

Vtiger CRM

Thank you for purchasing my extension. If you have any questions that are beyond the scope of this help file, please feel free to email via my user page contact form here. Thanks so much!

Created: 16/01/2017 | By: Magenest | Support Portal:<http://servicedesk.izysync.com/servicedesk/customer/portal/105>

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Introduction

Woocommerce Vtiger CRM Integration synchronizes data automatically between your Woocommerce site and Vtiger CRM.

Extension's page: [Vtiger CRM Integration](#)

Features

- Allows synchronizing and updating Customers from Magento 2 store to Vtiger CRM Leads, Organizations, Contacts.
- Allows synchronizing Orders from Magento 2 store to Vtiger CRM Sales Orders.
- Allows synchronizing Invoices from Magento 2 store to Vtiger CRM Invoices.
- Allows synchronizing and updating Products from Magento 2 store to Vtiger CRM Products.
- Allows admins define the mapping fields in backend with ease.
- Mapping manually between Magento 2 attributes and Vtiger CRM custom fields.
- 2 synchronize modes: Auto or Manual.
- Report Sync data between Woocommerce and Salesforce.A

Configuration

Set up Vtiger account

Go to <https://www.vtiger.com/log-in/> to log in (if you had an existing Vtiger account) or register new one.



Sign in to your Vtiger account

?

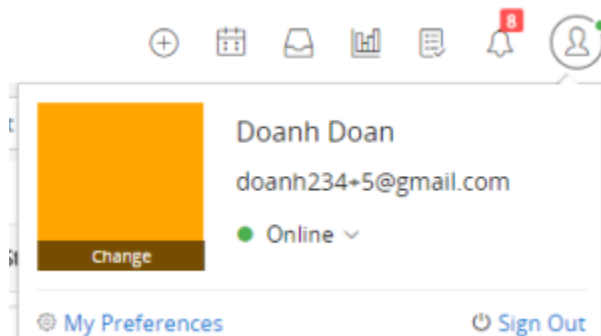
Sign in



Sign in with Google

Getting Vtiger Access Key

Access your Vtiger account and click on your profile name on the top right corner, then go to **My Preferences**



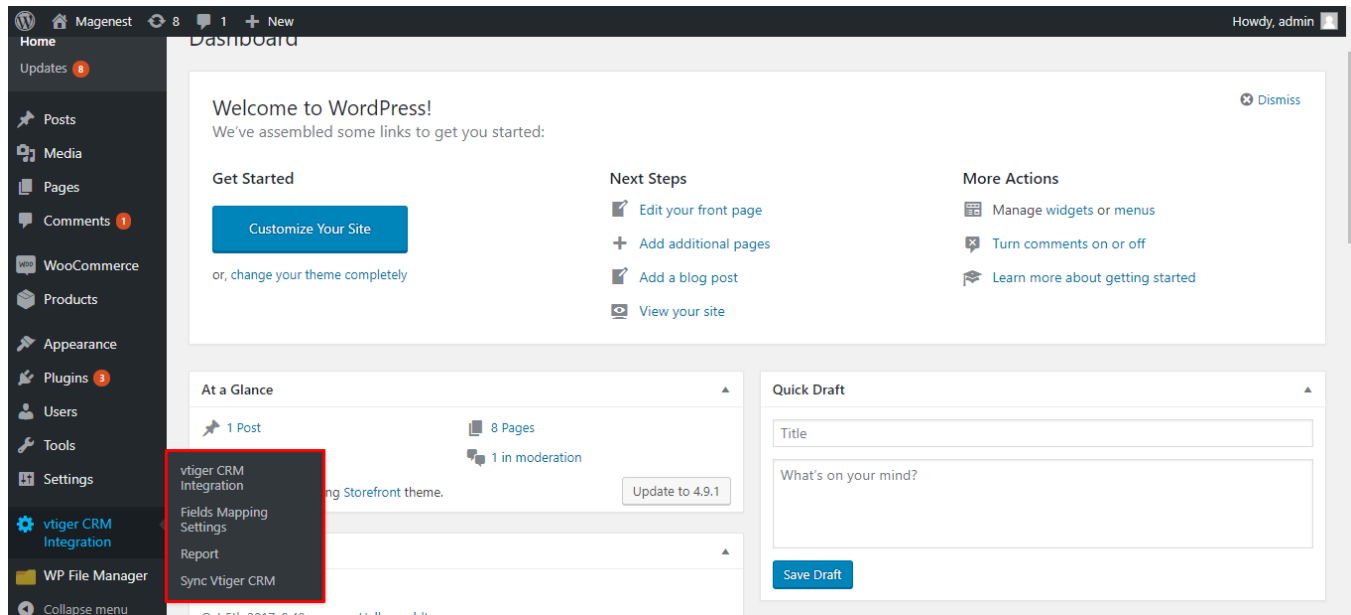
Scroll to bottom of the page, you can see the Access Key in **User information**

User information

Username	doanh234+5@gmail.com	Access Key
Language	US English	Reports To
Role	CEO	Primary Group
Is Admin	Yes	

2mBxluY1EAONfc

Go to the Vtiger CRM tab, then the Vtiger CRM menu will be shown.

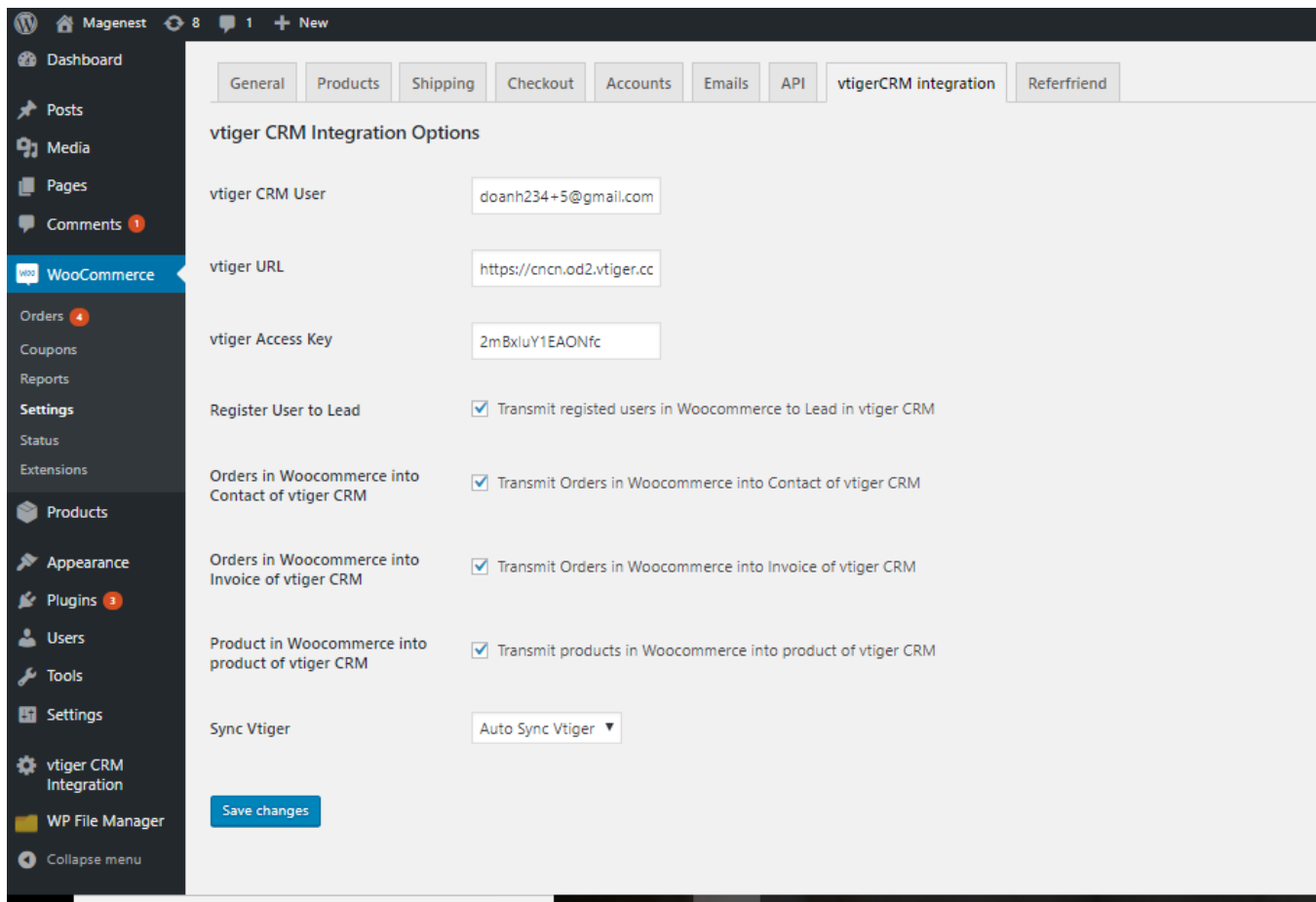


+ Configuration in Woocommerce

To start using the extension, admins need to set some configurations by navigating to **WooCommerce > Settings > VtigerCMR integration**

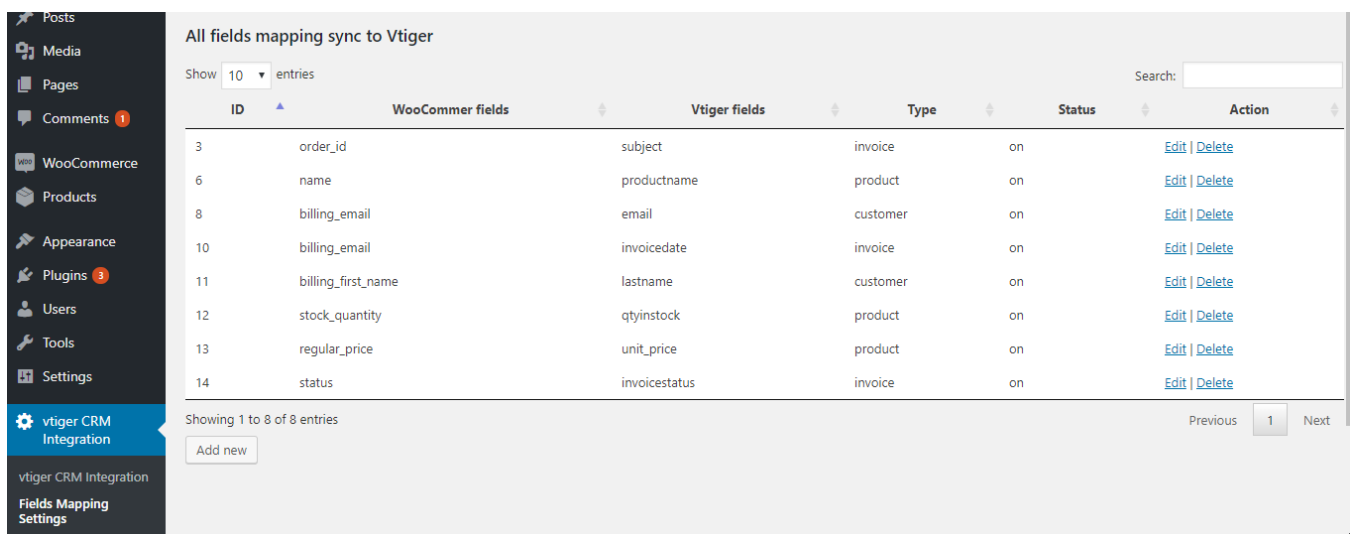
Expand the **VtigerCRM Information** section, there are three fields will be shown.

- ➖ **Username:** Your Vtiger username.
- ➖ **URL:** Please follow the format of your_vtiger_site/webservice.php
- ➖ **Access Key:** Used the access key which saved in the previous step to enter this field.
- ℹ After that, you need select option Module sync (Orders in Woocommerce into Contact of vtiger CRM, to Vtiger and Sync mode: Auto (Auto Sync Vtiger) or Manual (Add to Queue)



+ Config field mapping

Go to **Vtiger CRM Integration > Fields Mapping**



You can add new field by click button **Add new**

All fields mapping sync to Vtiger

Show entries Search:

ID	WooCommer fields	Vtiger fields	Type	Status	Action
3	order_id	subject	invoice	on	Edit Delete
6	name	productname	product	on	Edit Delete
8	billing_email	email	customer	on	Edit Delete
10	billing_email	invoicedate	invoice	on	Edit Delete
11	billing_first_name	lastname	customer	on	Edit Delete
12	stock_quantity	qtyinstock	product	on	Edit Delete
13	regular_price	unit_price	product	on	Edit Delete
14	status	invoicestatus	invoice	on	Edit Delete

Showing 1 to 8 of 8 entries Previous **1** Next

[Add new](#)

Edit Fields Mapping

Type

Woocommerce field

Vtiger field

Status ☒

[Add new](#)

- **Type** : Customer, Leads, Products, invoices, sales order
- **Woocommerce field**: select Magento data field fromdropdown list which you want to synchronize.
- **Vtiger field**: select Vtiger field fromdropdown list which you want to store data in.
- **Status**: select Enabled/Disabled.

Remember to click **Add new** to store information

Notice: Please attention many mandatory field in Vtiger you must add

+ Sync to Vtiger

1. If you config Sync mode is Automatically

- Register User to Lead: When a new customer register account, it will sync into Module lead.
- Orders in Woocommerce into Contact of vtiger CRM: When have new order, billing information or shipping information will sync into Vtiger.

- Orders in Woocommerce into Invoice of vtiger CRM: When have new order, cart information will sync into Vtiger.

- Product in Woocommerce into product of vtiger CRM: When createnew product, many field will sync into Vtiger.

2. If you config Sync mode is Manually

Your task will be added to the queue:

Equeue customer sync Vtiger				
User id	User	Email	Order date	Sync
368	frank nguyen	vuongdung2611@gmail.com	2018-01-08 13:32:13	SYNC

Equeue lead sync Vtiger				
User id	User	Email	Order date	Sync

Equeue Product sync Vtiger			
Product id	Name	Create date	Sync

Equeue Order sync to Invoice Vtiger					
Order id	Billing name	Billing mail	Order detail	Create date	Sync

+ Report

You can see all synchronized records.

- Click **Vtiger CRM Integration > Report**

All Item was sync to Vtiger				
Show	10	entries	Search:	
ID	Woocommerce ID	vtigerCRM ID	Type	Created time
1	358	4x262	Customers	04 Jan, 2018 03:36 PM
2	358	16x263	Invoices	04 Jan, 2018 03:36 PM
3	359	6x266	Products	04 Jan, 2018 03:40 PM
4	360	6x265	Products	05 Jan, 2018 12:46 PM
5	362	6x264	Products	05 Jan, 2018 12:58 PM
6	363	4x267	Customers	05 Jan, 2018 02:54 PM
7	363	16x268	Invoices	05 Jan, 2018 02:54 PM
8	364	4x269	Customers	05 Jan, 2018 03:38 PM
9	364	16x270	Invoices	05 Jan, 2018 03:38 PM
10	365	6x273	Products	08 Jan, 2018 12:32 PM

Showing 1 to 10 of 15 entries

Previous 1 2 Next

+ Main Functions

When a customer adds items to cart then check out, Sales Orders in Vtiger will be auto synced.

Orders

- Dashboard
- Orders
- Downloads
- Addresses
- Account details
- Logout
- My Coupon

ORDER	DATE	STATUS	TOTAL	ACTIONS
#369	January 8, 2018	On hold	\$4.00 for 1 item	View
#368	January 8, 2018	On hold	\$12.00 for 1 item	View
#364	January 5, 2018	On hold	\$12.00 for 1 item	View
#363	January 5, 2018	On hold	\$4.00 for 1 item	View
#358	January 4, 2018	On hold	\$0.50 for 1 item	View
#357	January 4, 2018	Pending payment	\$0.50 for 1 item	Pay View Cancel

Type to search 4 days left in free trial - Click to subscribe

INVENTORY

Products

Services

Price Books

Invoices

Sales Orders

Purchase Orders

Vendors

Contacts

Organizations

Email Templates

My Invoices

+ Add Invoice

Import

Customize

Help

1 to 14

	Subject	Organization Name	Contact Name	Assigned To	Status	Sales Order
☐	Woocommerce ID #369			Doanh Doan	pending	
☐	Woocommerce ID #368			Doanh Doan	Woocommerce ID #368	
☐	Woocommerce ID #364			Doanh Doan	Woocommerce ID #364	
☐	Woocommerce ID #363			Doanh Doan		
☐	Magenest			Doanh Doan		
☐	Woocommerce ID #292			Doanh Doan	pending	
☐	Woocommerce ID #289			Doanh Doan	on-hold	
☐	Woocommerce ID #290			Doanh Doan	on-hold	

When admin add a new product , Vtiger will auto sync data about that product.

POSTS

Media

Pages

Comments

WooCommerce

Products

All Products

Add New

Categories

Tags

Attributes

Appearance

Plugins

Users

Tools

Settings

Products

Add New

Import

Export

All (44) | Published (42) | Drafts (2) | Trash (11) | Sorting

Bulk Actions

Apply

Filter by category

Filter by product type

Filter

44 items

1 of 3

	Name	SKU	Stock	Price	Categories	Tags		Date
☐	product1	-	In stock	\$123.00	Posters	-	☐	Published 2018/01/08 12:46:17 pm
☐	test13	-	In stock	\$12.00	-	-	☐	Published 2018/01/08 12:35:41 pm
☐	ốc	oc	In stock	\$12.00	Clothing	-	☐	Published 2018/01/08 12:32:49 pm
☐	test12	SKU	In stock	\$120.00	Music	-	☐	Published 2018/01/05 12:58:42 pm
☐	é — Draft	-	In stock	-	-	-	☐	Last Modified 2018/01/05 12:52:43 pm
☐	testhvac	-	In stock	\$100.00	Music	-	☐	Published

Products

Services

Price Books

Invoices

Sales Orders

Purchase Orders

Vendors

Contacts

Organizations

Email Templates

Print Templates

Approvals

1 to 19 < ...

	Product Name	Part Number	Commission Rate	Qty. in Stock	Qty/Unit	Unit Price
	Search					
	New product					\$99
	product1					\$123
	test13					\$0
	óc					\$0
	test Vt					\$0
	testbyoc					\$0
	test12					\$0
	test 1					\$0
	Test 1					\$99
	HTC Desire SV	876872622	9	1,000	1	\$600

6

Update

- When a bug fix or new feature is released, we will provide you with the module's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests after **2 business days**.
- We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.

Magenest