

2. Vtiger CRM Integration User Guides

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/25>

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 - When a new account is registered in Magento 2, Vtiger will automatically add a new record of this account in Leads, Organizations, Contacts.
 - When a customer adds items to the cart then checks out, Sales Orders in Vtiger will be auto-synced.
 - When an invoice is made by admin in Magento 2, the Invoice in Vtiger will be synced.
 - When the admin adds a new product in Magento 2, Vtiger will auto-sync data about that product.
 - When the admin edits a customer account/product in Magento 2, that customer/product will also be changed from Leads, Organizations and Contacts, products in Vtiger.
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Introduction

Magento 2 Vtiger CRM Integration synchronizes data automatically between your Magento 2 site and Vtiger CRM.

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 to define the mapping fields in the backend with ease.
- Mapping manually between Magento 2 attributes and Vtiger CRM custom fields.

System Requirements

Compatible with Vtiger CRM: 5.1*, 5.2.*, 5.3.*, 5.4.*, 6.0.*, 6.1.*, 6.2.*, 6.3.*, 6.4.*

Your store should be running on Magento Community Edition version **2.0.x, 2.1.x. and 2.2.x**

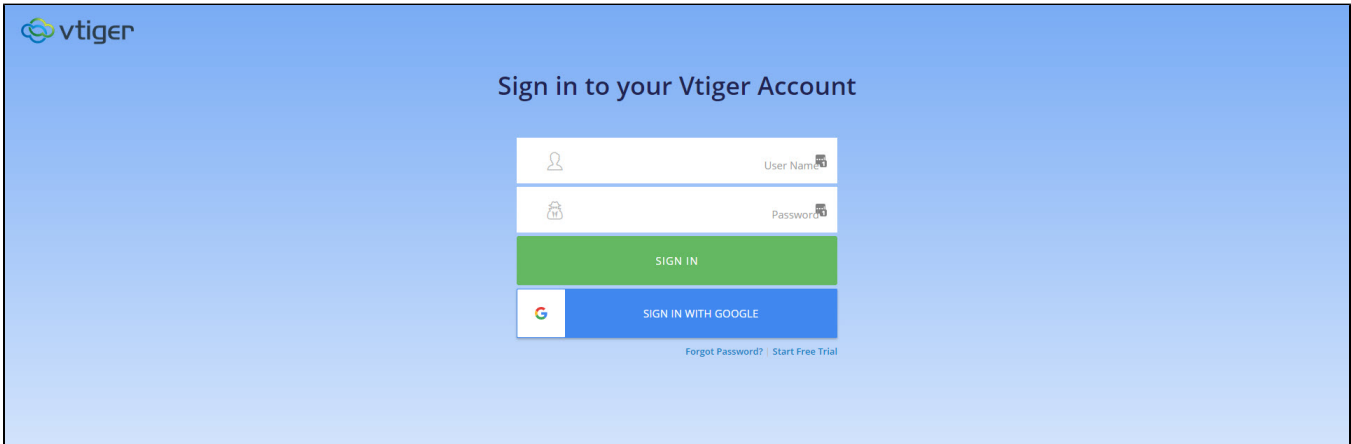


Configuration

Video Tutorial

Set up Vtiger account

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



Getting Vtiger Access Key

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

In the User Information, you can see the **Access Key**. Note that you will use this key for the configuration.

 The image is a screenshot of the Vtiger "My Preferences" page. On the left is a dark sidebar with a menu. The "My Preferences" option is highlighted with a red box. The main content area shows the user's profile information. A red rectangle highlights the "User Information" section, which contains the following data:

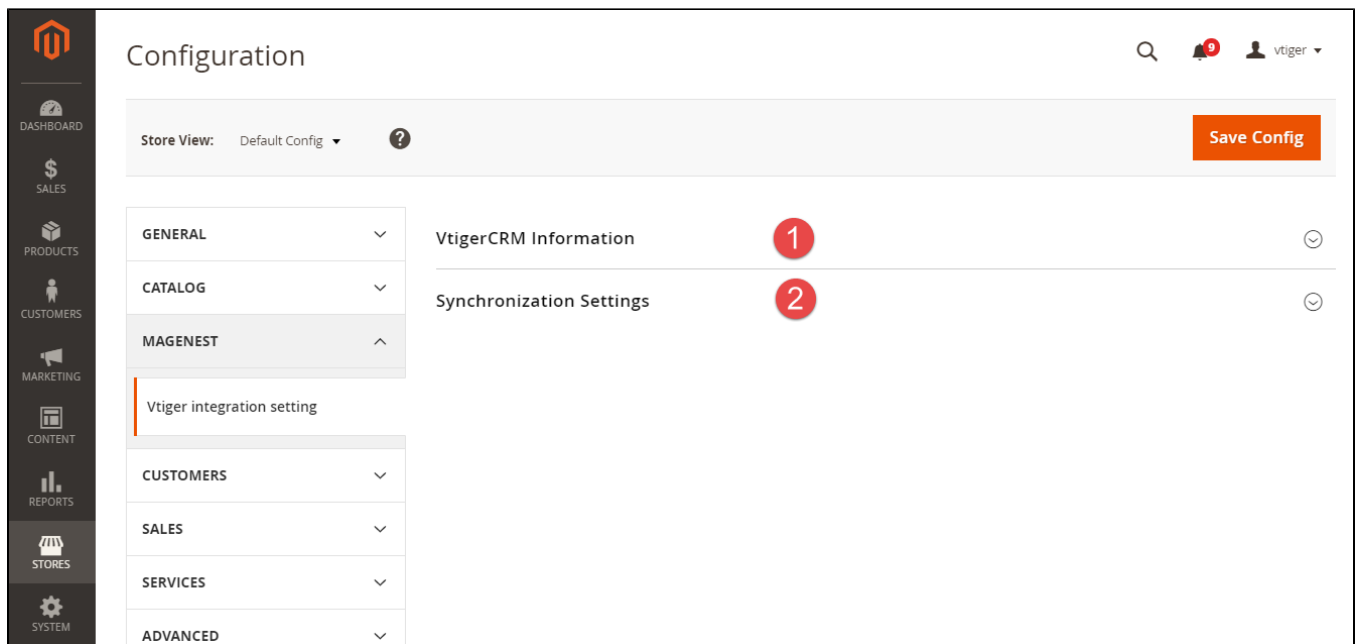
Username	Access Key
nadamas216@gmail.com	Wst9ZnOqNs0LrQ

 The "Access Key" value is highlighted with a red box. To the right of the main content area is a user profile card for "Hien Le" with the email "nadamas216@gmail.com". A red arrow points from the "My Preferences" link in the sidebar to the user profile card.

Magento Back End

Configuration

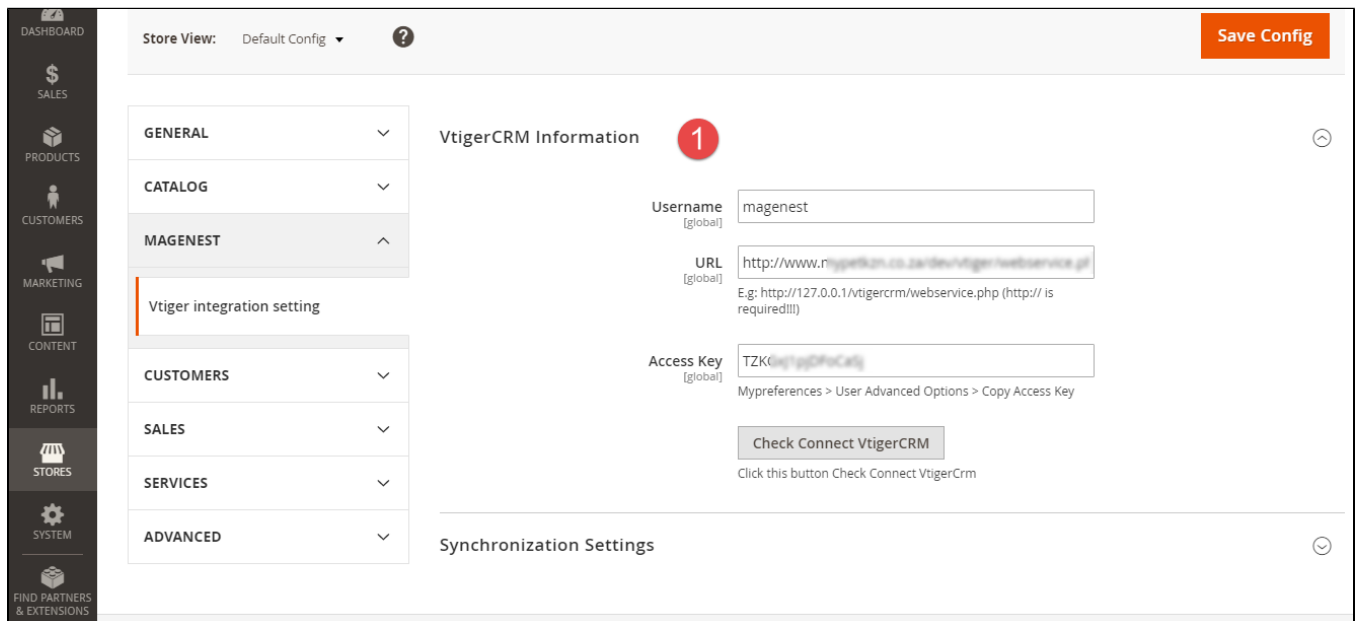
On the left menu bar, go to **Vtiger CRM Integration > Configuration > Magenest > Vtiger Integration Setting**



+ In the **VtigerCRM Information** section, there are three fields that will be shown.

- **Username:** Your Vtiger username.
- **URL:** Please follow the format of your _vtiger_site/webservice.php
- **Access Key:** Used the access key in your preferences in Vtiger (see the "Get Vtiger access key" guide above)

Click on the **Save Config** and **Check Connect VtigerCRM** button.



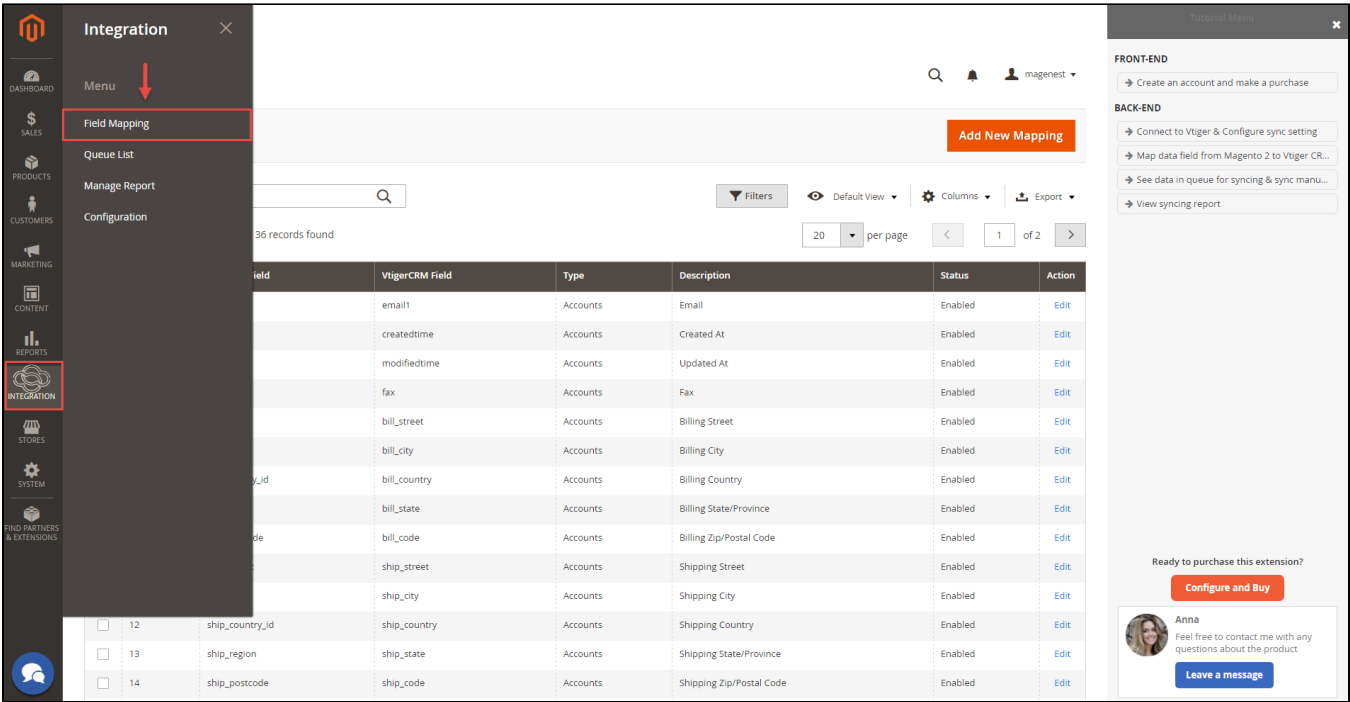
Set Up Field Mapping

In order to synchronize data fields from the Magento 2 store to your Vtiger CRM account correctly, you need to create the mapping for these fields first.

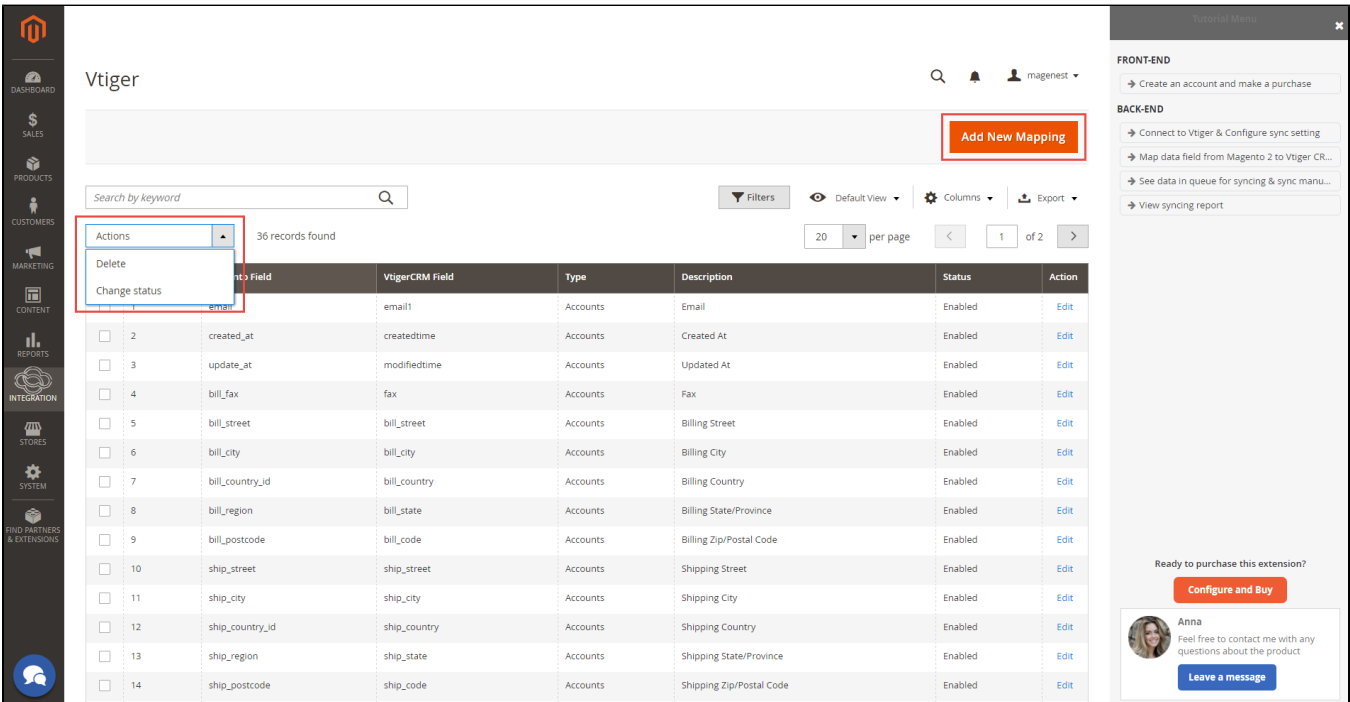
Go to **Vtiger Integration > Field Mapping**

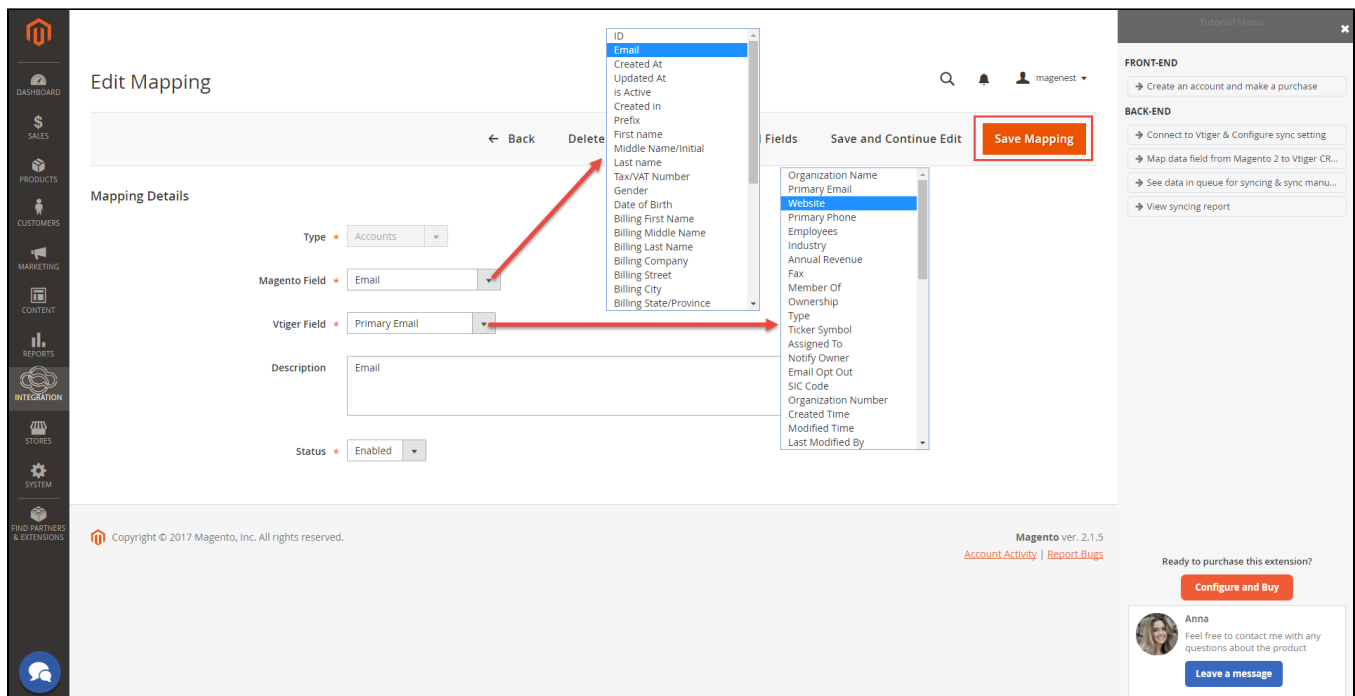
The module enables a grid table to manage mapping fields between Magento 2 and Vtiger CRM. You can choose which data fields you want to sync from Magento 2 to Vtiger CRM account.

From the manage mapping, you can export, change the status with enable and disable options, edit or delete a mapping.



In order to create a new mapping, click on the **Add New Mapping** button





- **Type:** select data type: Leads, Contacts, Accounts, SalesOrders, Invoices, Products.
- **Description:** describe the data information
- **Magento field:** select the Magento data field you want to synchronize from Magento
- **Vtiger field:** select the Vtiger field you want to synchronize into Vtiger.
- **Status:** select Enabled/Disabled.

Click **Save Mapping** to save the field mapping setting.

You can **Save and Continue Edit** while setting the mapping to ensure that you won't lose the settings due to unwanted reasons like losing your Internet connection.

You can **Update All Fields** to update the fields in Vtiger to Magento 2.

+ In the **Synchronization Settings** section, there are synchronization settings: Sync **Accounts (Organization)**, Sync **Contact**, Sync **Lead**, Sync **Products (items in Vtiger CRM)**, Sync **Orders**, and Sync **Invoices**.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

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FIND PARTNERS & EXTENSIONS

Configuration

Store View: Default Config

Save Config

GENERAL

CATALOG

MAGENEST

Vtiger integration setting

CUSTOMERS

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SERVICES

ADVANCED

VtigerCRM Information

Synchronization Settings

Sync Accounts(Organization)

Sync Contact

Sync Lead

Sync Products(Items in VtigerCrm)

Sync Orders

Sync Invoices

In each section, you can

- **Enable:** Choose Yes to enable the synchronization mode. The Sync Mode will show up
- **Sync Mode:** You can set the sync mode to be **Immediately** or **Cron Job**
Immediately: The extension will sync all of accounts from the Magento 2 site to the Vtiger CRM account immediately.

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ADVANCED

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Synchronization Settings

Sync Account

Enable

Yes

Sync Mode

Immediately

Add All Customers To Queue

Warning: Please save the configuration before syncing data

Sync Contact

Sync Subscriber

Sync Lead

- **Cron Job:** The data will be sync manually according to the time setting. You have 7 options: 5 minutes, 10 minutes, 15 minutes, 30 minutes, 45 minutes, 1 hour, 2 hours. By this time, the data will be added to the **Queue List** before processing.

Example: When the admin sets 5 minutes at the **Time** field, that means the data of the account will be synced from the Magento 2 site to the Vtiger CRM account after 5 minutes automatically.

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ADVANCED

Synchronization Settings

Sync Account

Enable

Yes

Sync Mode

Cron Job

Time

5 minutes

Add All Customers To Queue

Warning: Please save the configuration before syncing data

Sync Contact

Sync Subscriber

Save Config

Queue List

In Queue List, you can modify the data before synchronizing, select the data, and choose Actions > Delete.

You can press the **Sync Now** button to sync all the data in Queue to Vtiger CRM immediately.

You can also **View Request Daily** to see the synchronization report.

⚠ Note that synchronizing will take some time, the length of time depends on the size of data.

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Queue

Search by keyword

Filters

Columns

Export

Actions

0 records found

20 per page

1 of 1

	Magento Entity Id	Enqueue Time	Type	Priority
We couldn't find any records.				

View Request Daily

Sync Now

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Magento ver. 2.1.5

Account Activity | Report Bugs

FRONT-END

Create an account and make a purchase

BACK-END

Connect to Vtiger & Configure sync setting

Map data field from Magento 2 to Vtiger CR...

See data in queue for syncing & sync manu...

View syncing report

Ready to purchase this extension?

Configure and Buy

Anna

Feel free to contact me with any questions about the product

Leave a message

View Report

When the process is done, go to **Vtiger Integration > Manage Report** to check what is synced in the grid.

- If the data is synced right, the Status will be **success** and the Message will be "OK"

- If there's a problem during the syncing process, the Status will be **error** and the Message tab will show the error message like the record below.

You can easily check the synchronization with the **View Request Daily** button and **View On Vtiger** button.

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View Report

Filters

Default View

Columns

Export

Actions

48 records found

20 per page

1 of 3

ID	Record ID in VtigerCrm	VtigerCrm Table	Action	Username	Datetime	Email
1	ACC12	Accounts	Create		2017-05-25 06:26:48	
2	ACC12	Accounts	Update		2017-05-25 06:27:10	
3	PRO12	Products	Create	magenest magenest	2017-05-25 06:34:03	magenest@gmail.com
4	PRO13	Products	Create	magenest magenest	2017-05-25 06:35:41	magenest@gmail.com
5	PRO14	Products	Create	magenest magenest	2017-05-25 06:35:56	magenest@gmail.com
6	PRO15	Products	Create	magenest magenest	2017-05-25 06:36:03	magenest@gmail.com
7	PRO16	Products	Create	magenest magenest	2017-05-25 06:36:11	magenest@gmail.com
8	PRO17	Products	Create	magenest magenest	2017-05-25 06:36:18	magenest@gmail.com
9	PRO18	Products	Create	magenest magenest	2017-05-25 06:36:25	magenest@gmail.com
10	PRO19	Products	Create	magenest magenest	2017-05-25 06:36:33	magenest@gmail.com
11	PRO20	Products	Create	magenest magenest	2017-05-25 06:36:40	magenest@gmail.com
12	PRO21	Products	Create	magenest magenest	2017-05-25 06:36:47	magenest@gmail.com
13	PRO22	Products	Create	magenest magenest	2017-05-25 06:36:55	magenest@gmail.com
14	PRO23	Products	Create	magenest magenest	2017-05-25 06:37:02	magenest@gmail.com
15	PRO24	Products	Create	magenest magenest	2017-05-25 06:37:09	magenest@gmail.com
16	PRO25	Products	Create	magenest magenest	2017-05-25 06:37:16	magenest@gmail.com
17	PRO26	Products	Create	magenest magenest	2017-05-25 06:37:23	magenest@gmail.com

Tutorial Menu

FRONT-END

Create an account and make a purchase

BACK-END

Connect to Vtiger & Configure sync setting

Map data field from Magento 2 to Vtiger CR...

See data in queue for syncing & sync manu...

View syncing report

Ready to purchase this extension?

Configure and Buy

Anna

Feel free to contact me with any questions about the product

Leave a message

Main Functions

When a new account is registered in Magento 2, Vtiger will automatically add a new record of this account in Leads, Organizations, Contacts.

Create New Customer Account

Personal Information

First Name *

Test Create Customer

Last Name *

and Sync with VtigerCRM

Email *

vtigercrmandmagento@gmail.com

☐ Sign Up for Newsletter

Sign-in Information

Password *

.....

Confirm Password *

.....

Create an Account

vtiger

Calendar Leads Organizations Contacts Opportunities Products Documents Tickets All

All Records Type keyword and press enter Advanced

Leads List

Actions + Add Lead All Leads 1 to 1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
<input type="checkbox"/>	First Name	Last Name	Company	Primary Phone	Website	Primary Email	Assigned To																			
<input type="checkbox"/>								Search																		
<input type="checkbox"/>	Test Create Customer and Sync with VtigerCRM				vtigercrmamagento@gmail.com		Administrator																			

Dashboard

Recently Modified

vtiger

Calendar Leads Organizations Contacts Opportunities Products Documents Tickets All

All Records Type keyword and press enter Advanced

Organization List

Actions + Add Organization All Organizations 1 to 1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
<input type="checkbox"/>	Organization Name	Billing City	Website	Primary Phone	Assigned To																					
<input type="checkbox"/>						Search																				
<input type="checkbox"/>	Test Create Customer				Administrator																					

Dashboard

Recently Modified

vtiger

Calendar Leads Organizations Contacts Opportunities Products Documents Tickets All

All Records Type keyword and press enter Advanced

Contacts List

Actions + Add Contact All Contacts 1 to 1


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
<input type="checkbox"/>	First Name	Last Name	Title	Organization Name	Primary Email	Office Phone	Assigned To																			
<input type="checkbox"/>								Search																		
<input type="checkbox"/>	Test Create Customer and Sync with VtigerCRM		--	vtigercrmamagento@gmail.com		Administrator																				


Dashboard


Recently Modified

Google Contacts

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



Search entire store here... 



Sync VtigerCRM

Account Dashboard

Account Information

Address Book

My Downloadable Products

My Orders

Newsletter Subscriptions

Billing Agreements

My Product Reviews

My Wish List

My Orders

Order #	Date	Ship To	Order Total	Status
000000001	2/20/16	Test Create Customer and Sync with Vtiger	\$237.00	Pending View Reorder

1 Item


Compare Products

You have no items to compare.

My Orders

☐ Test Create Product and Sync with VtigerCRM

CalendarLeadsOrganizationsContactsOpportunitiesProductsDocumentsTicketsSales OrderAll

All RecordsType keyword and press enterAdvanced

Sales Order List

Recently Modified

ActionsAdd Sales Order

All Sales Order

1 to 1

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Subject	Organization Name	Quote Name	Total	Assigned To
<input type="checkbox"/>					
<input type="checkbox"/>	000000001	Test Create Customer	--	\$238.35	Administrator

Search

When an invoice is made by admin in Magento 2, the Invoice in Vtiger will be synced.

Invoices

Search by keyword

Q

Filters

Default View

Columns

Export

Select Items

1 records found

20

per page

1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	000000001	Feb 20, 2016 3:59:27 AM	000000001	Feb 20, 2016 3:56:50 AM	Test Create Customer and Sync with Vtiger	Paid	\$237.00	View

Calendar

Leads

Organizations

Contacts

Opportunities

Products

Documents

Tickets

Invoice

All

Administrator

vtiger

All Records

Type keyword and press enter

Q

Advanced

Invoice List

Actions

+ Add Invoice

All Invoice

1 to 1

Recently Modified

	Subject	Sales Order	Status	Total	Assigned To
<input type="checkbox"/>					
<input type="checkbox"/>	000000001	--	Paid	\$238.35	Administrator

When the admin adds a new product in Magento 2, Vtiger will auto-sync data about that product.

New Product

← Back

Save

▼

Product Details

Images and Videos

Search Engine Optimization

Websites

ADVANCED SETTINGS

Product Details

Name *

Test Create Product and Sync with VtigerCRM

[STORE VIEW]

SKU *

Test Create Product and Sync with VtigerCRM

[GLOBAL]

Price *

\$ 12

[WEBSITE]

Tax Class

None

[WEBSITE]

Images and Videos

Add video

[STORE VIEW]

Click here or drag and drop to add images.

Images and Videos

Quantity

12121

In Stock

[GLOBAL]

Weight

Does this have a weight?

[GLOBAL]

Yes

No

12 lbs

Calendar

Leads

Organizations

Contacts

Opportunities

Products

Documents

Tickets

All

Administrator

vtiger

All Records

Type keyword and press enter

Advanced

+

Products List

Actions

+ Add Product

▼ All Products

1 to 1

◀

▶

✎

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

	Product Name	Part Number	Commission Rate	Qty. In Stock	Qty/Unit	Unit Price	
<input type="checkbox"/>							Search
<input type="checkbox"/>	Test Create Product and Sync with Vtiger...	Test Create Product and Sync with Vtiger	0.000	232	0	\$232	

When the admin edits a customer account/product in Magento 2, that customer/product will also be changed from Leads, Organizations and Contacts, products in Vtiger.

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 within **2 business days**.
 - We will offer **lifetime free updates and 6 months of 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.

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