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# MAGENTO CRM VTIGER

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## USER GUIDE

*Version 0.1.0*

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## 1. INTRODUCTION

All web-store owners always look for the best way to manage information of their customers. Because a good management system will help them gain insight into the behavior of customers and make reasonable ideas for their web-shops. Understanding that, we released miraculous extension Magento Vtiger that allows you you to synchronize data between Magento web-shop and Vtiger CRM system by transferring data of customers, products, orders to Vtiger system automatically. It must be the perfect choice for admin to get the best control customers-related information. Easy to install and configure, Magento Vtiger will give you valued benefits.

### **Outstanding features**

- ✓ Each Magento Vtiger includes two modules: Magentor Vtiger for Magento and Magestore Vtiger for Vtiger. Therefore, this extension ensures the best integration and combination between Magento and Vtiger.
- ✓ Data to be transferred automatically: All information of products, customers, orders.
- ✓ Prompt data transfer: There are two options for admin to transfer data. Data is transferred step by step or all data are transferred at once (customers, products and orders respectively)
- ✓ The process of all-data transfer is shown on a pop-up. In addition, Log management allows admin to view result of each transfer.
- ✓ Enable admin to transfer an enormous quantity of data up to hundreds of thousands of recorders.
- ✓ Smart data transfer: Site owners can configure to transfer data group by group. For example, they can transfer each 100 products.
- ✓ Allow admin to keep the transfer from losing data.
- ✓ Transfer data using Ajax: This function supports for movement of existing-information on Magento site. It also makes sure that your transfer process will not be interrupted but smoothly until finishing.

- ✓ Simple installation and configuration.
- ✓ Compatible with Magento:
  - Community edition 1.3.x.x, 1.4.x.x, 1.5.x.x, 1.6.x.x
  - Enterprise edition 1.9.x.x, 1.10.x.x, 1.11.x.x

## 2. HOW TO INSTALL

### 2.1 *Install extension for Magento site*

- After purchasing, you can download the file at once, license key will be sent to your email. The file that you download normally is a zip file. Unzip it to a folder.
- Use FTP client (like Filezilla, WinSCP, cuteFtp) to upload (copy) all folders in the zip package to your Magento site root folder. This will not overwrite any existing files, it only add new files to the folder structure.
- After uploading is done, Log in your Magento administration panel to refresh cache. Go to System > Cache Management. Select all caches and take action “Refresh” then submit.
- Navigate to System > Configuration, if you can see the extension tab, it is installed properly. Remember to put your license key to the License key management so that the module could be activated.
- Now if you get Access denied error when click on the extension tab, you need to log out admin panel and log in again.
- Go to front-end and try to process, make sure that everything is OK.

### 2.2 *Install module for Vtiger CRM system*

- To install this module, after logging in Vtiger system, go to **Setting -> Module Manager**. Go to tab **Custom Modules** and then **Import New**. Choose path to file **vtiger-MagestoreVtiger-1.1.0.7rc2.zip** and begin to set up.



## Settings > Module Manager > Import

Manage module behavior inside vtiger CRM

### Verify Import Details

<b>Module Name</b>	MagestoreVtiger
<b>Module Directory</b>	modules/MagestoreVtiger
<b>Req. vtiger version</b>	5.1.0
<b>License</b>	Author Nguyen Minh Dung. Copyright @ belong in <a href="http://www.oss.com.vn">http://www.oss.com.vn</a>

I accept the license agreement.

Do you want to proceed with the import? **Yes** **No**

## After clicking import module

### Importing Module ...

```

Creating Module MagestoreVtiger ... STARTED
Initializing module permissions ... DONE
Updating tabdata file ... DONE
Setting up sharing access options ... DONE
Creating Module MagestoreVtiger ... DONE
Added to menu Tools ... DONE
Updating parent_Tabdata file ... STARTED
Updating parent_Tabdata file ... DONE
SQL ALTER TABLE vtiger_account ADD date_of_birth DATE NULL ... DONE
SQL ALTER TABLE vtiger_accountbills ADD bill_name VARCHAR(100) NULL, ADD bill_company VARCHAR(100) NULL, ADD bill_phone VARCHAR(30) NULL, ADD bill_fax VARCHAR(30) NULL ... DONE
SQL ALTER TABLE vtiger_accountshipbills ADD ship_name VARCHAR(100) NULL, ADD ship_company VARCHAR(100) NULL, ADD ship_phone VARCHAR(30) NULL, ADD ship_fax VARCHAR(30) NULL ... DONE
SQL ALTER TABLE vtiger_soshipbills ADD ship_name VARCHAR(100) NULL, ADD ship_company VARCHAR(100) NULL, ADD ship_phone VARCHAR(30) NULL, ADD ship_fax VARCHAR(30) NULL ... DONE
SQL ALTER TABLE vtiger_products ADD products_new_from_date date NULL, ADD products_new_to_date date NULL, ADD weight decimal(10,2) NULL, ADD short_description text NULL, ADD special_price decimal(25,2) NULL, ADD special_price_from_date date NULL, ADD special_price_to_date date NULL, ADD cost decimal(9,2) NULL, ADD magento_taxclass VARCHAR(50) NULL, ADD more_general_attributes text NULL, ADD more_price_attributes text NULL ... DONE
SQL INSERT INTO `vtiger_field`
(`tabid`, `columnname`, `tablename`, `generatetype`, `utype`, `fieldname`, `fieldlabel`, `readonly`, `presence`, `selected`, `maxlength`, `sequence`, `block`, `displaytype`, `typeofdata`, `quickcreate`, `quickcreatesequence`, `info_type`, `massedittable`, `helpinfo`)
VALUES (14, 'products_new_from_date', 'vtiger_products', 1, 'S', 'products_new_from_date', 'Set Product as New from Date', 1, 2, 0, 100, 9, 31, 1, 'D-O', 1, NULL, 'BAS', 1, NULL), (14, 'products_new_to_date', 'vtiger_products', 1, 'S', 'products_new_to_date', 'Set Product as New to Date', 1, 2, 0, 100, 10, 31, 1, 'D-O', 1, NULL, 'BAS', 1, NULL), (14, 'weight', 'vtiger_products', 1, '1', 'weight', 'Weight', 1, 2, 0, 100, 25, 31, 1, 'N-O', 1, NULL, 'BAS', 1, NULL), (14, 'short_description', 'vtiger_products', 1, '1', 'short_description', 'Short Description', 1, 2, 0, 100, 2, 36, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (14, 'special_price', 'vtiger_products', 1, '71', 'special_price', 'Special Price', 1, 2, 0, 100, 5, 32, 1, 'N-O', 1, NULL, 'BAS', 1, NULL), (14, 'special_price_from_date', 'vtiger_products', 1, 'S', 'special_price_from_date', 'Special Price From Date', 1, 2, 0, 100, 6, 32, 1, 'D-O', 1, NULL, 'BAS', 1, NULL), (14, 'special_price_to_date', 'vtiger_products', 1, 'S', 'special_price_to_date', 'Special Price To Date', 1, 2, 0, 100, 7, 32, 1, 'D-O', 1, NULL, 'BAS', 1, NULL), (14, 'cost', 'vtiger_products', 1, '71', 'cost', 'Cost', 1, 2, 0, 100, 8, 32, 1, 'N-O', 1, NULL, 'BAS', 1, NULL), (14, 'magento_taxclass', 'vtiger_products', 1, '1', 'magento_taxclass', 'Magento Tax Class', 1, 2, 0, 100, 9, 32, 1, 'V-O', 1, NULL, 'BAS', 0, NULL), (14, 'more_general_attributes', 'vtiger_products', 1, '1', 'more_general_attributes', 'More General Attributes', 1, 2, 0, 100, 27, 31, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (14, 'more_price_attributes', 'vtiger_products', 1, '1', 'more_price_attributes', 'More Price Attributes', 1, 2, 0, 100, 10, 32, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'bill_name', 'vtiger_accountbills', 1, '1', 'bill_name', 'Billing Name', 1, 2, 0, 100, 0, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'ship_name', 'vtiger_accountshipbills', 1, '1', 'ship_name', 'Shipping Name', 1, 2, 0, 100, 0, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'bill_company', 'vtiger_accountbills', 1, '1', 'bill_company', 'Billing Company', 1, 2, 0, 100, 0, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'ship_company', 'vtiger_accountshipbills', 1, '1', 'ship_company', 'Shipping Company', 1, 2, 0, 100, 0, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'bill_phone', 'vtiger_accountbills', 1, '1', 'bill_phone', 'Billing Phone', 1, 2, 0, 100, 13, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'ship_phone', 'vtiger_accountshipbills', 1, '1', 'ship_phone', 'Shipping Phone', 1, 2, 0, 100, 14, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'bill_fax', 'vtiger_accountbills', 1, '1', 'bill_fax', 'Billing Fax', 1, 2, 0, 100, 15, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'ship_fax', 'vtiger_accountshipbills', 1, '1', 'ship_fax', 'Shipping Fax', 1, 2, 0, 100, 16, 11, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (6, 'date_of_birth', 'vtiger_account', 1, 'S', 'date_of_birth', 'Date Of Birth', 1, 2, 0, 100, 9, 9, 1, 'D-O', 1, NULL, 'BAS', 1, NULL), (22, 'bill_name', 'vtiger_soshipbills', 1, '1', 'bill_name', 'Billing Name', 1, 2, 0, 100, 0, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (22, 'ship_name', 'vtiger_soshipbills', 1, '1', 'ship_name', 'Shipping Name', 1, 2, 0, 100, 0, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (22, 'bill_company', 'vtiger_soshipbills', 1, '1', 'bill_company', 'Billing Company', 1, 2, 0, 100, 0, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (22, 'ship_company', 'vtiger_soshipbills', 1, '1', 'ship_company', 'Shipping Company', 1, 2, 0, 100, 0, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (22, 'bill_phone', 'vtiger_soshipbills', 1, '1', 'bill_phone', 'Billing Phone', 1, 2, 0, 100, 13, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (22, 'ship_phone', 'vtiger_soshipbills', 1, '1', 'ship_phone', 'Shipping Phone', 1, 2, 0, 100, 14, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (22, 'bill_fax', 'vtiger_soshipbills', 1, '1', 'bill_fax', 'Billing Fax', 1, 2, 0, 100, 15, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL), (22, 'ship_fax', 'vtiger_soshipbills', 1, '1', 'ship_fax', 'Shipping Fax', 1, 2, 0, 100, 16, 63, 1, 'V-O', 1, NULL, 'BAS', 1, NULL) ... DONE
SQL ALTER TABLE vtiger_inventoryproductrel MODIFY discount_amount DECIMAL (16, 3) NULL ... DONE
Recalculating sharing rules ... DONE
Initializing webservice support ... DONE

```

Finish

## Install successfully

➤ After successfully installing, enter URL to browser:

`{{Vtiger-address}}/index.php?module=MagestoreVtiger&action=webservice`

`{{Vtiger-address}}` is url of Vtiger page.

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- ✓ If browser displays announcement “Vtiger-MagestoreVtiger 1.1.0.7. Module webservice was Activate!” module is set up successfully and can be used.
- ✓ If browser displays announcement “Vtiger-MagestoreVtiger 1.1.0.7. Module webservice was not Activated” you have to open ftp, log in Vtiger system and download file: {{Vtiger-address}}/webservice.php, enter this code at the top of the file:

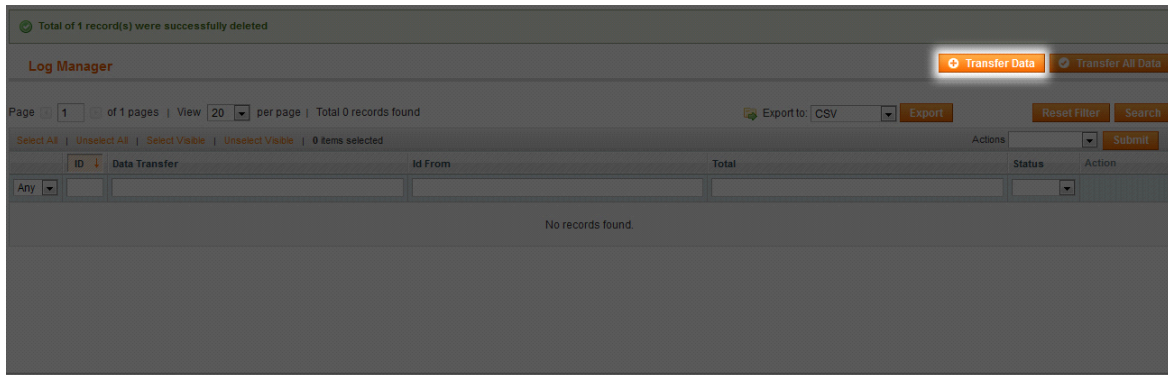
```
<?php
if ($_GET['MagestoreVtiger']) {
    include_once('modules/MagestoreVtiger/webservice.php');exit (0);
}
?>
```

- ✓ Re-check the previous step  
{{Vtiger-address}}/index.php?module=MagestoreVtiger&action=webservice,  
we will receive the announcement “Vtiger-MagestoreVtiger 1.1.0.7. Module webservice was Activated!”

### 3. HOW TO USE

When admin logs in back-end and clicks on menu **Magento Crm/ Transfer Data**, system will show three main functions as followed:

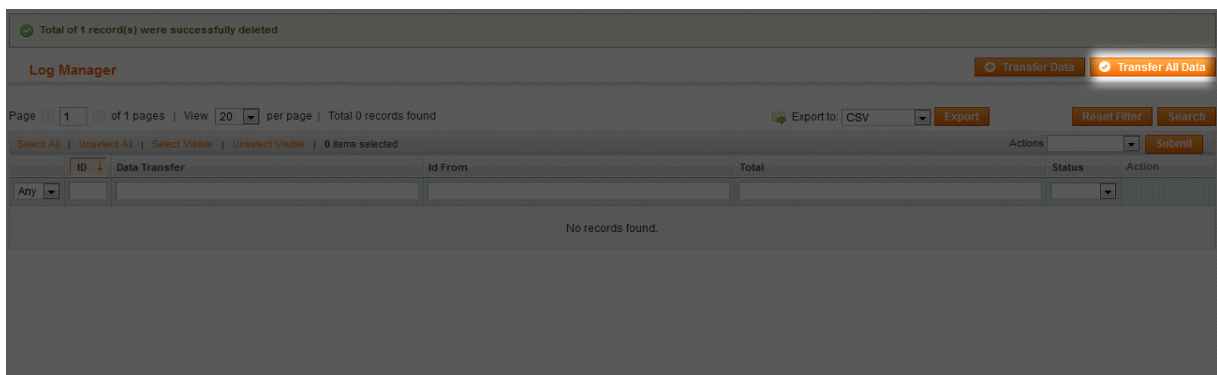
#### 3.1. Transfer data



#### Transfer Data

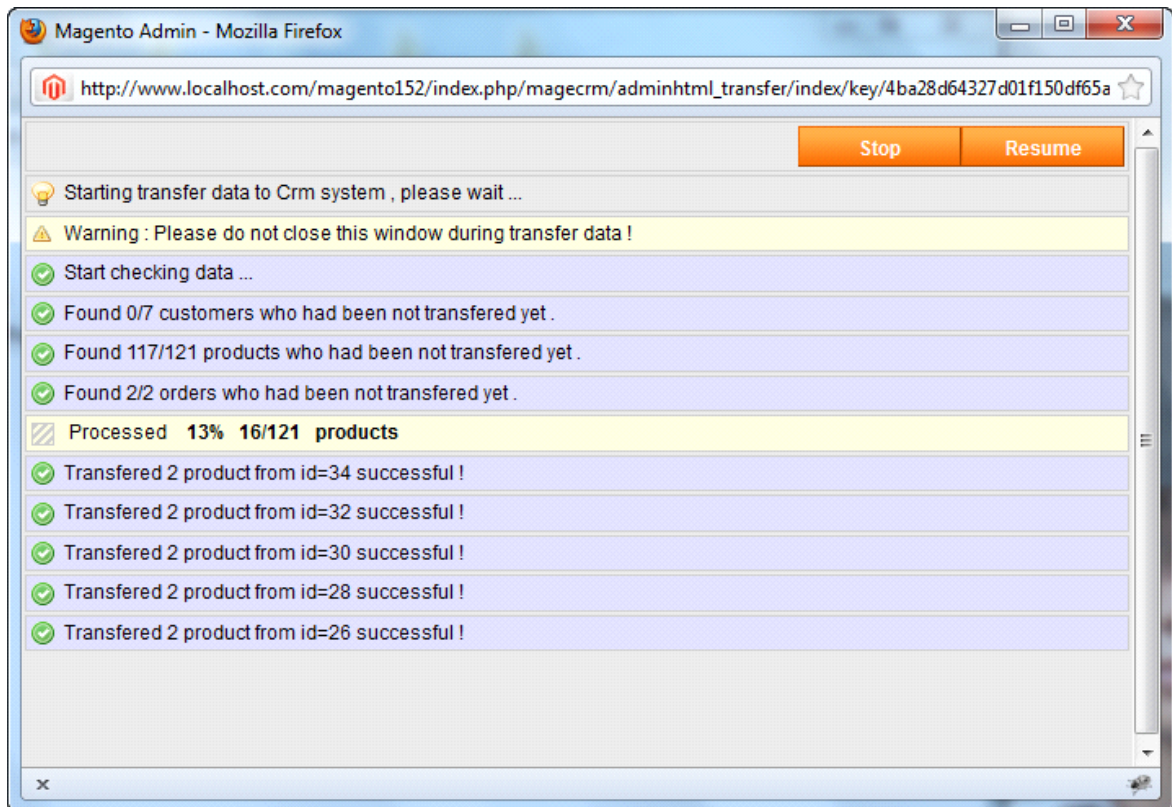
System will transfer data when users click on this button and transferred data will depend on the config section. If we config for customers: 1-2 product: 3-5 and order: 5-1, system will transfer 2 customers, starting at the customer id=1 and check whether customers have been completely transferred, afterwards move to product and order.

#### 3.2. Transfer All Data



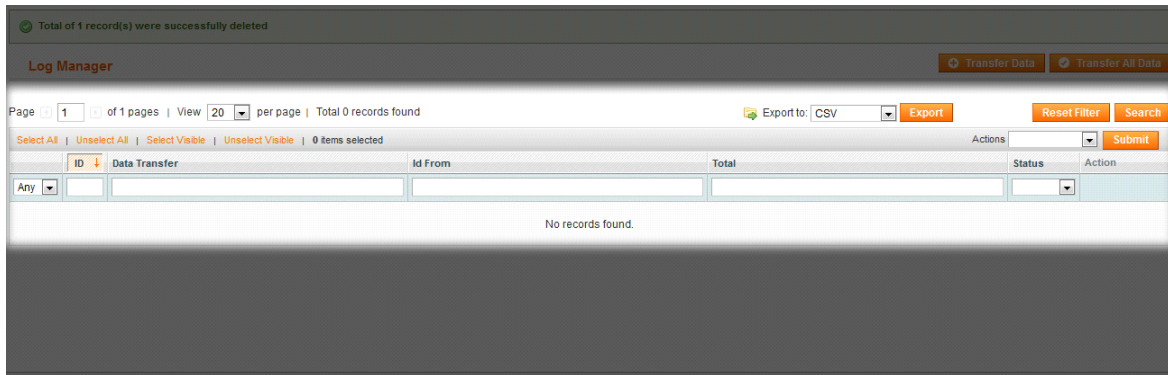
#### Transfer All Data

When users click on button Transfer All Data, system will automatically transfer all data to selected CRM system. Each transfer gets data from config section. For example, if we config as mentioned above, system will transfer 2 customers, after finishing customers, it will transfer product, each time 5 items, after finishing product, it will transfer order, each time 1 item. After clicking on button Transfer All Data, system will display a pop-up.



### Automatically transfer all data

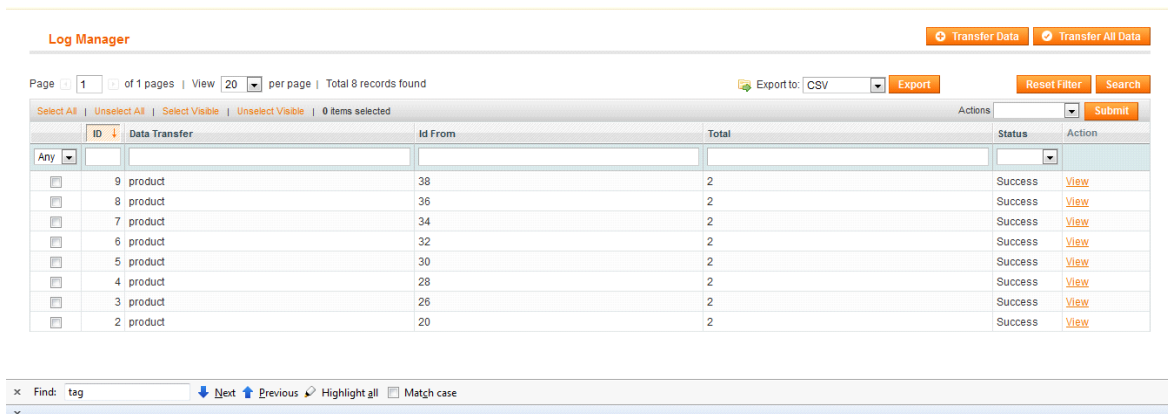
### 3.3. Log Information



#### Log information

After each transfer, system will re-log status and basic info like:

- What data has just been transferred: customer, product or order?
- Id from, number of data is transferred
- Status of each transfer: success or failed
- Message left by system.



#### Log information after each transfer

## 4. HOW TO CONFIGURE

Admin can configure by clicking on menu **Magento Crm / Settings** in back-end. Config is divided into 3 main parts as below:

### 4.1. Module settings



The screenshot shows the 'Module Settings' configuration page. It contains two dropdown menus. The first is labeled 'Enabled Module' and is set to 'Yes'. Below it is a small triangle icon and the text 'Enable or disable module'. To the right of the dropdown is a '[STORE VIEW]' link. The second dropdown is labeled 'Select CRM' and is set to 'Vtiger'. Below it is a small triangle icon and the text 'Select a CRM system.'. To the right of this dropdown is also a '[STORE VIEW]' link.

#### Module settings

- Enabled Module: system won't work if choosing No
- Select CRM: set as Vtiger

### 4.2. Connection settings

- Vtiger CRM Address: the url of Vtiger CRM system. For example:  
<http://yourvtigercrm.com>
- Vtiger User Id : the user name that's used in Vtiger system
- Vtiger Access key: You can see the Access Key by logging in Vtiger system and going to section "My Preference".

Connection Settings		
Vtiger CRM Url	<input type="text" value="http://www.yourvtigercrm.com"/>	[STORE VIEW]
	▲ Url of VTiger CRM System. For example: http://www.yourvtigercrm.com	
Vtiger User Id	<input type="text" value="admin"/>	[STORE VIEW]
	▲ User Id that's used in VTiger CRM System	
Vtiger Access Key	<input type="text" value="HAYTU323IMXJA"/>	[STORE VIEW]
	▲ User Access Key that's used in VTiger CRM System (it is not the password)	
Sugar CRM Url	<input type="text" value="http://www.yoursugarcrm.com"/>	[STORE VIEW]
	▲ Url of Sugar CRM System (exclude index.php). For example: http://www.yoursugarcrm.com	
Sugar User	<input type="text" value="admin"/>	[STORE VIEW]
	▲ Username that's used in Sugar CRM System	
Sugar Password	<input type="text" value="pass123456"/>	[STORE VIEW]
	▲ Password that's used in Sugar CRM System	

### Connection settings

## 4.3. Transfer Settings

Transfer data into CRM System		
Transfer Customers From Id	<input type="text" value="8-0"/>	[STORE VIEW]
Transfer Products From Id	<input type="text" value="20-2"/>	[STORE VIEW]
Transfer Orders From Id	<input type="text" value="1-1"/>	[STORE VIEW]

### Transfer settings

- Customers: consists of 2 parts id-from and number of customers of each transfer. If customers have been transferred, system will re-update information of those customers.
- Products: similarly, it consists of 2 parts: id-from and number of products of each transfer.
- Orders: similarly to customers and products, after transferring each order, system will automatically transfer all invoices of those orders.

-----**END**-----

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