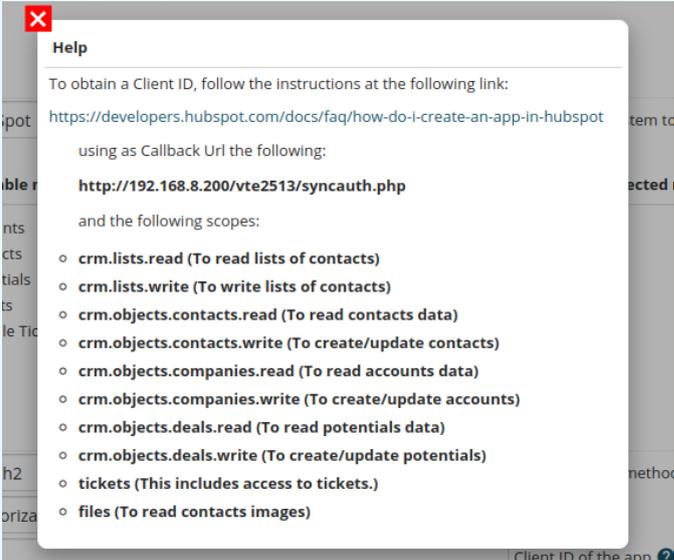


15.4 Synchronizations

From vtenext settings the crm synchronization function can be accessed with other applications. The synchronizable platforms available are as follows:

- Hubspot
- Salesforce
- SuiteCRM
- Jira
- vtiger
- Magento
- Prestashop
- Shopify
- WooCommerce

The synchronizable modules are different and based on the chosen platform. The following diagram summarizes which modules can be synchronized.

<p>Hubspot (only cloud version)</p>	<ul style="list-style-type: none">• Trouble Ticket• Accounts• Contacts• Potentials• Targets• Users <p>*record deletions from Hubspot to vtenext are not covered</p> <p>N.B. The "scopes". The crm indicates to insert the following "scopes":</p>  <p>ATTENTION: it is essential to select exactly those indicated, otherwise the synchronization will not work!</p>
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Salesforce	<ul style="list-style-type: none"> • Trouble Ticket • Ticket Comments • Ticket Attachments • Emails • Accounts • Campaigns • Contacts • Installations • Leads • Potentials • Products* • Users
SuiteCRM (only on-premise version)	<ul style="list-style-type: none"> • Trouble Ticket • Accounts • Campaigns • Contacts • Installations • Leads • Potentials • Products* • Users <p>*images are not imported</p>
Jira (only cloud version)	<ul style="list-style-type: none"> • Trouble Ticket • Project Tasks • Projects • Ticket Comments • Users
vtiger (only cloud version)	<ul style="list-style-type: none"> • Trouble Ticket • Accounts • Contacts • Vendors • Installations • Leads • Potentials • Products* • Services • Users <p>*images are not imported</p>
Magento (only on-premise version 2.4.0)	<ul style="list-style-type: none"> • Accounts • Currencies • Sales Orders • Products* • Configurable products • Taxes <p>*images are not imported</p>

Prestashop (only on-premise version 1.7.6.7)	<ul style="list-style-type: none"> • Accounts • Currencies • Sales Orders • Products* • Configurable products • Taxes <p>*images are not imported</p>
Shopify (only cloud version 2019-20)	<ul style="list-style-type: none"> • Accounts • Currencies • Sales Orders • Products* • Configurable products <p>*images are not imported</p>
WooCommerce (only on-premise version 4.4.0)	<ul style="list-style-type: none"> • Accounts • Currencies • Sales Orders • Products* • Configurable products • Taxes <p>*images are not imported</p>
Zendesk	<ul style="list-style-type: none"> • Trouble Ticket • Accounts • Ticket Comments • Ticket Attachments • Users

When accessing the configuration page from **SETTINGS > BUSINESS PROCESS MANAGER > SYNCHRONIZATIONS** the synchronization to be set and towards which system can be configured with a few simple steps. The page is identical to the page shown in the image below.


Settings > Synchronizations
Configure external systems for data synchronization

Create synchronization

General settings

External system The external system to connect to

Instance URL

Modules to synchronize	Available modules	Selected modules
	Accounts	
	Assets	
	Contacts	
	Leads	
	Potentials	
	Products	
	Services	
	Trouble Tickets	
	Users	
	Vendors	

Authentication

Type Authentication method to use

Username It should be an administrative user

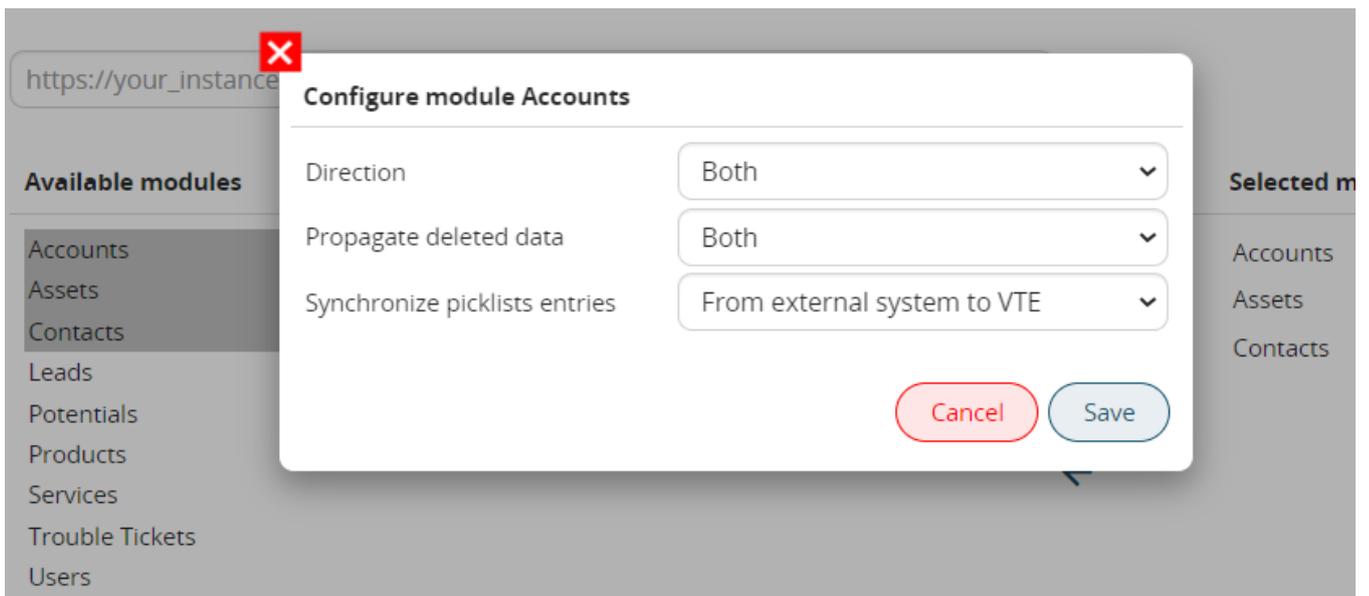
Password

VTENEXT 22.05

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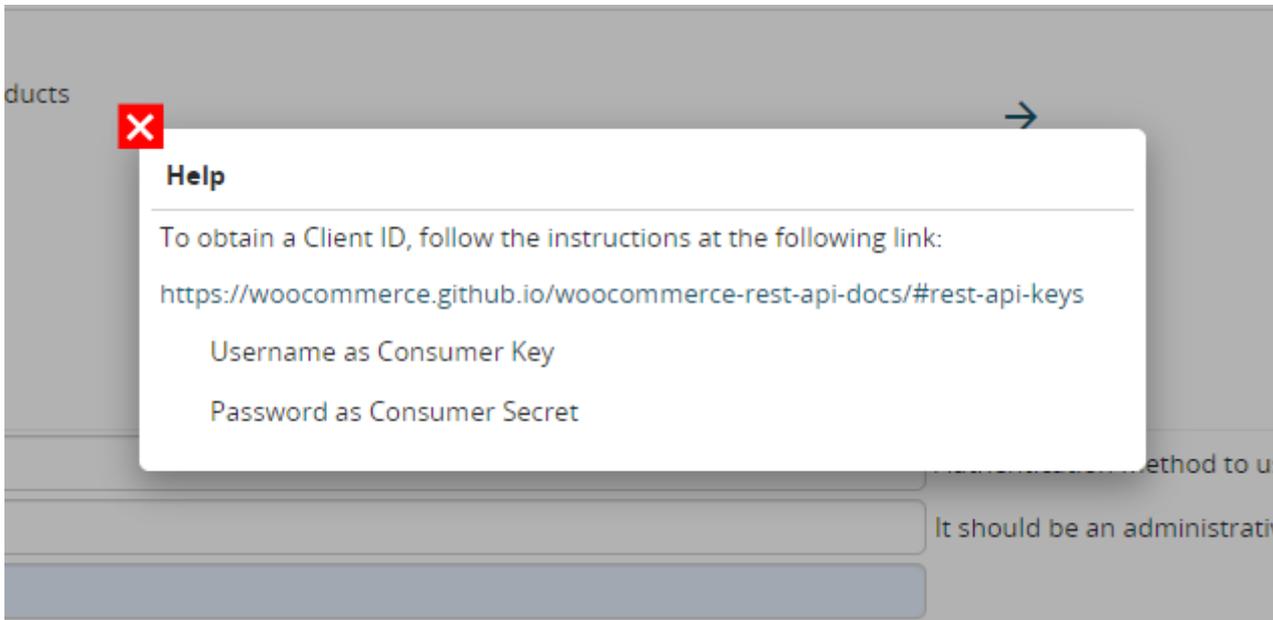
Configuration

1. The first required action is to choose the **External system** in the available drop-down menu
2. Specify the **Instance address** to which you wish to connect (where required)
3. Now choose the required synchronization modules from those available and take them to the **Selected modules** column by means of the right-pointing arrow
4. Once the operation in step 3 has been completed, a popup will open in which you can select the synchronization method for each of the selected modules (see example in the image below)



View of the synchronization configuration of the Trouble Ticket module selected in point 3

5. Enter the authentication data, stating the authentication mechanism **Type**, **Username** and **Password** for login. By clicking on the  icon it is possible to have further information to retrieve the data to be entered in the username and password that differ for each synchronizable platform.



N.B.: synchronization occurs in accordance with the interval set for the crons, which is every minute by default, but which can be subject to variation depending on the number of synchronizations set, other cron processes, and the machine workload.

Revision #7

Created 25 May 2022 17:25:40 by Alberto

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