

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

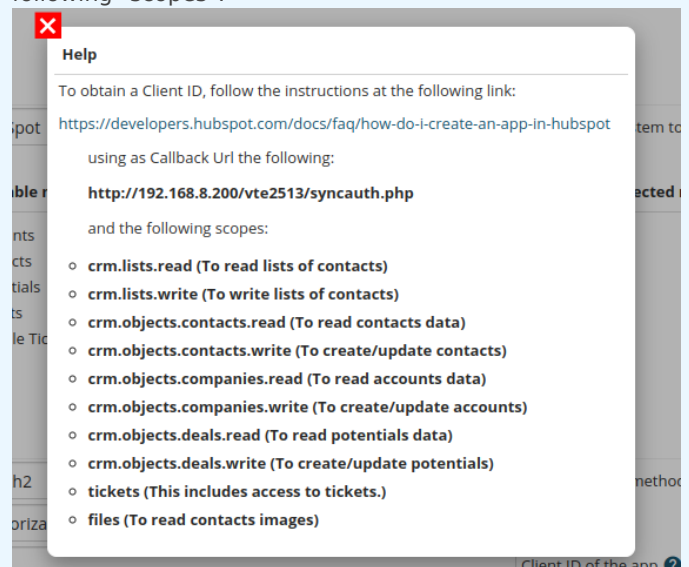
The synchronizable modules are different and based on the chosen platform. The following diagram summarizes which modules can be synchronized.

Hubspot (only cloud version)

- Trouble Ticket
- Accounts
- Contacts
- Potentials
- Targets
- Users

*record deletions from Hubspot to vtenext are not covered

N.B. The "scopes". The crm indicates to insert the following "scopes":




ATTENTION: it is essential to select exactly those indicated, otherwise the synchronization will not work!

| | |
|--|--|
| 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
 Save
Cancel

General settings

External system

Vtiger

The external system to connect to

Instance URL

https://your_instance.odx.vtiger.com

Modules to synchronize

Available modules

Accounts
 Assets
 Contacts
 Leads
 Potentials
 Products
 Services
 Trouble Tickets
 Users
 Vendors

→
 ←

Selected modules

Authentication

Type

Basic HTTP

Authentication method to use

Username

username

It should be an administrative user

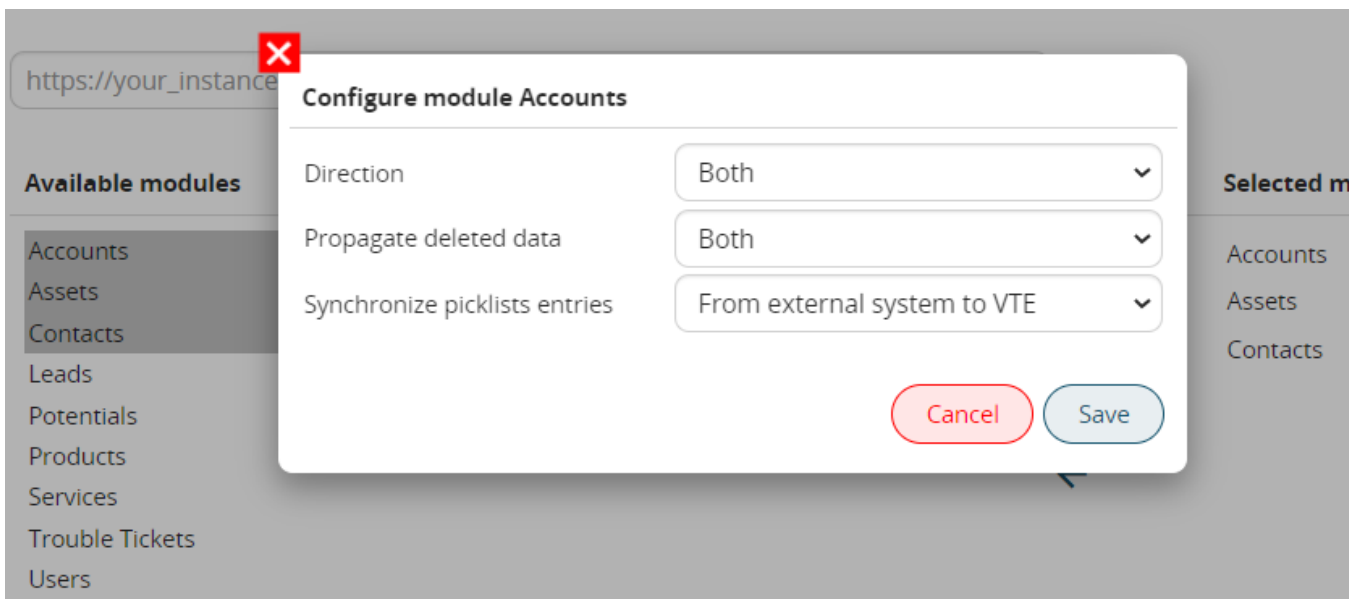
Password

.....


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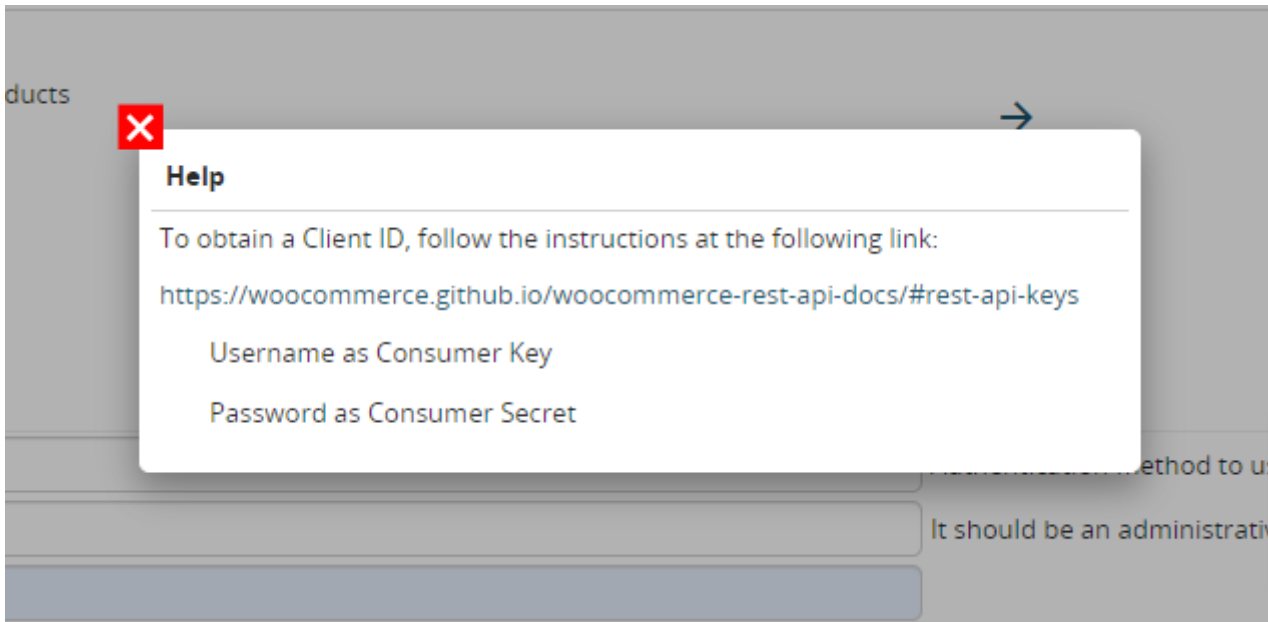
Configuration

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.

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