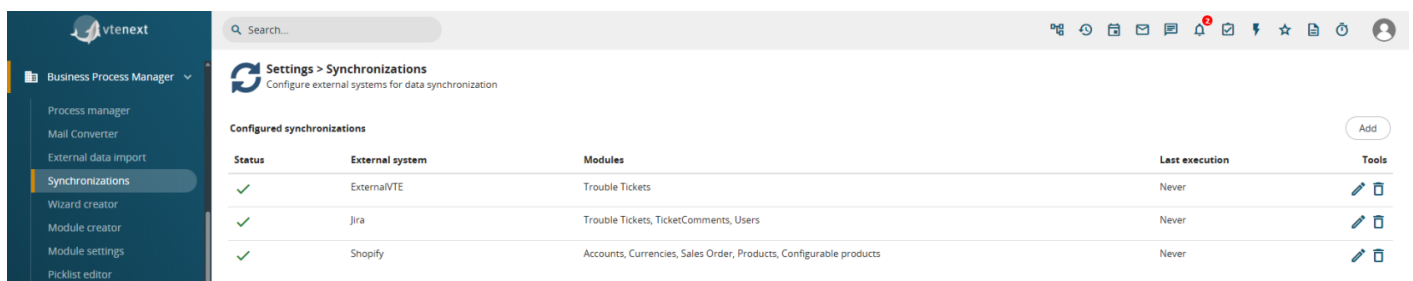


15.4 Synchronizations

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

- VTENEXT
- Hubspot
- Jira
- Magento
- PrestaShop
- Salesforce
- Shopify
- SuiteCRM
- vtiger
- WooCommerce
- Zapier
- ZenDesk

It is possible to **create multiple synchronizations for multiple systems at the same time**. By clicking the **ADD** button at the top right, you can choose which external system to configure and add all the ones you need.



The screenshot shows the vtenext interface with the 'Settings > Synchronizations' page. The page title is 'Settings > Synchronizations' with a subtitle 'Configure external systems for data synchronization'. There is an 'Add' button at the top right. Below the title is a table titled 'Configured synchronizations'.

Status	External system	Modules	Last execution	Tools
✓	ExternalVTE	Trouble Tickets	Never	Edit Delete
✓	Jira	Trouble Tickets, TicketComments, Users	Never	Edit Delete
✓	Shopify	Accounts, Currencies, Sales Order, Products, Configurable products	Never	Edit Delete

The modules that can be synchronized, for each individual synchronization, differ depending on the platform selected. Below is a diagram that summarizes which modules can be synchronized. The supported versions are specified in parentheses.

VTENEXT

- HelpDesk
- Accounts
- Contacts
- FAQ
- Providers
- Assets
- Leads
- ProjectTask
- Potentials
- ProjectPlan
- Products
- Services
- TicketComments
- Users

Note: This function is essential when linking two vtenext installations, for instance, **to synchronize the TEST environment with the PRODUCTION environment.**

Warning: The vte authentication password for synchronization with another vte must be defined using its access key and NOT the user's login password

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":

Help

To obtain a Client ID, follow the instructions at the following link:
<https://developers.hubspot.com/docs/faq/how-do-i-create-an-app-in-hubspot>
using as Callback Url the following:
<http://192.168.8.200/vte2513/syncauth.php>
and the following scopes:

- **crm.lists.read** (To read lists of contacts)
- **crm.lists.write** (To write lists of contacts)
- **crm.objects.contacts.read** (To read contacts data)
- **crm.objects.contacts.write** (To create/update contacts)
- **crm.objects.companies.read** (To read accounts data)
- **crm.objects.companies.write** (To create/update accounts)
- **crm.objects.deals.read** (To read potentials data)
- **crm.objects.deals.write** (To create/update potentials)
- **tickets** (This includes access to tickets.)
- **files** (To read contacts images)

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

Salesforce	• Trouble Ticket • Ticket Comments • Ticket Attachments • Emails • Accounts • Campaigns • Contacts • Installations • Leads • Potentials • Products* • Users
SuiteCRM (only on-premise version)	• Trouble Ticket • Accounts • Campaigns • Contacts • Installations • Leads • Potentials • Products* • Users *images are not imported
Jira (only cloud version)	• Trouble Ticket • Project Tasks • Projects • Ticket Comments • Users
vtiger (only cloud version)	• Trouble Ticket • Accounts • Contacts • Vendors • Installations • Leads • Potentials • Products* • Services • Users *images are not imported
Magento (only on-premise version 2.4.0)	• Accounts • Currencies • Sales Orders • Products* • Configurable products • Taxes *images are not imported

Prestashop (only on-premise version 1.7.6.7)	• Accounts • Currencies • Sales Orders • Products* • Configurable products • Taxes *images are not imported
Shopify (only cloud version 2019-20)	• Accounts • Currencies • Sales Orders • Products* • Configurable products *images are not imported ATTENTION: To synchronize Shopify products, it is necessary to also set up the Configurable Products module in the configuration.
WooCommerce (only on-premise version 4.4.0)	• Accounts • Currencies • Sales Orders • Products* • Configurable products • Taxes *images are not imported
Zapier	PAY ATTENTION: To properly set up the Zapier connector, it's essential to carefully read the ZAPIER MANUAL provided in Chapter 15.7. FOTO
Zendesk	• 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.

Create synchronization

Save Cancel

General settings

External system Vtiger The external system to connect to

Instance URL https://your_instance.odx.vtiger.com

Available modules

Selected modules

Modules to synchronize

Accounts
Assets
Contacts
Leads
Potentials
Products
Services
Trouble Tickets
Users
Vendors



Authentication

Type Basic HTTP Authentication method to use

Username username It should be an administrative user

Password

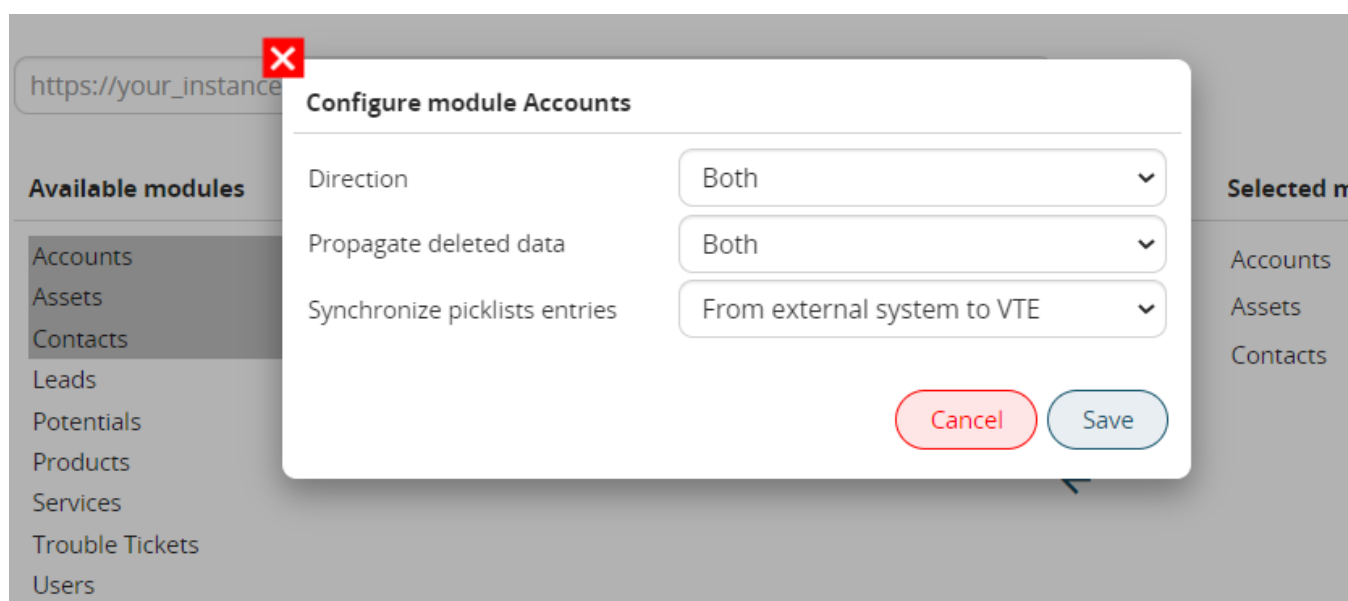
VTENEXT 22.05

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View of the synchronizations configuration page

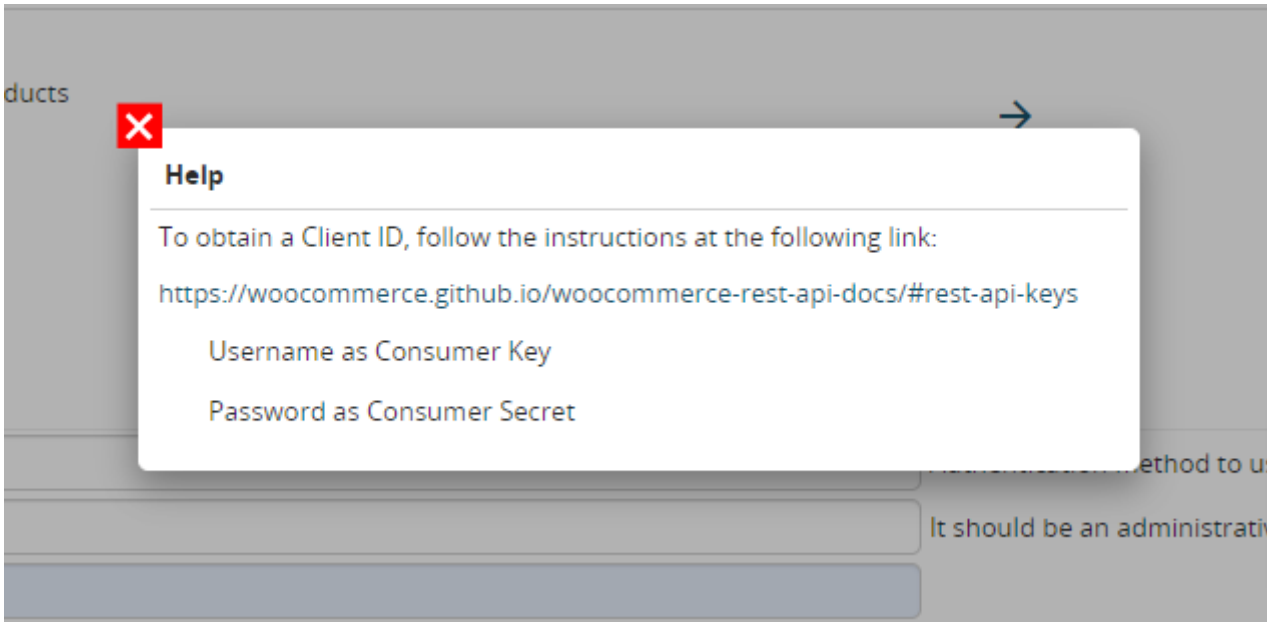
Configuration

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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