Magento – vTiger Bridge User's Guide

This manual is intended to help you use this bridge to synchronize data between vTiger and Magento. You can refer to this manual for any question that you have about this product.

Introduction:

This bridge has been designed to synchronize the information between Magento Shopping Cart and vTiger CRM. Both Platforms have different modules and working principle. This Bridge will help you transfer the information between these two. For now this bridge can synchronize the **Products,** and its related information from Magento to vTiger and for **Customers** you can synchronize the information to and from both the platforms.

Home:

This is the default welcome page for the user. You will land up here when you successfully log in to the bridge. Here you can chose available action to perform.

Product Sync:

This button will bring you the page were you will find and option for syncing. After clicking the link you will be navigated to the "Product Synchronization" page, where you can map the fields that you want to transfer or synchronize. When you choose the sync option as Magento to vTiger, you will find the left hand side labels are vTiger attributes, that have to be mapped to the Magento fields contained in the drop-down.

Some fields are assumed to be basic are already mapped by the bridge for your convenience and you cannot change these. Other fields have options and can be mapped as required.

After appropriate mapping, when you click on the submit button, the data mapping is saved by the bridge. Once you hit the Sync link that appears just after the mapping is saved successfully, the information is synchronized accordingly based on the mapping rules.

Customer Sync:

The Customer Sync option also works in similar way. When you click on the Customer sync button you will find two links asking for the option where you want to synchronize the information from Magento to vTiger or vTiger to Magento.

1. **Magento – vTiger:** As soon as you choose the option as syncing from Magento to vTiger, you are redirected to the map page where you need to map the fields that have to be synchronized. You will find the left hand side labels are vTiger attributes, that have to be mapped to the Magento attributes contained in the drop- down. In the same way as we did for the products. Some basic fields are pre- mapped and cannot be changed. Other fields are to be mapped by you. Do keep in mind that mapping should be done logically otherwise this can cause a problem with the synchronization process. After defining the proper map and submitting the data, the map is saved and the synchronization is done accordingly.

2. **Vtiger to Magento :** This option also works in the same way as the Magento to vTiger synchronization, during this time you will find the Magento attributes on the left hand side and vTiger attributes on the right hand side drop-downs. After mapping the fields accordingly you can sync the data across the platforms.

Sales and Orders Sync:

Coming to third and last section of the Bridge, this option enables you to synchronize the Orders placed in Magento shopping cart to vTiger CRM. Clicking on the option will let users to map the fields that he wants to synchronize.

In the same way as we did for the Products and Customers, some fields that are assumed to be basic are mapped already and you need not worry about it. Other basic fields have options and you can map them according to your wish.

Line Items for the Orders are also synced in the background accordingly.

Once you are done with the mapping of the fields, when you click on the Submit button, the mapping is saved accordingly and as you hit the sync link, the orders' information are synchronized to the vTiger CRM.

NOTE: User need not map every time if he wants to synchronize the data. Once you save the map the rules can be used at a later time without having to redefine the field mapping. This is applicable to all Product , Customer and Sales-Orders Synchronization Processes.

Change Password :

This option will help you change your password for the Bridge.