



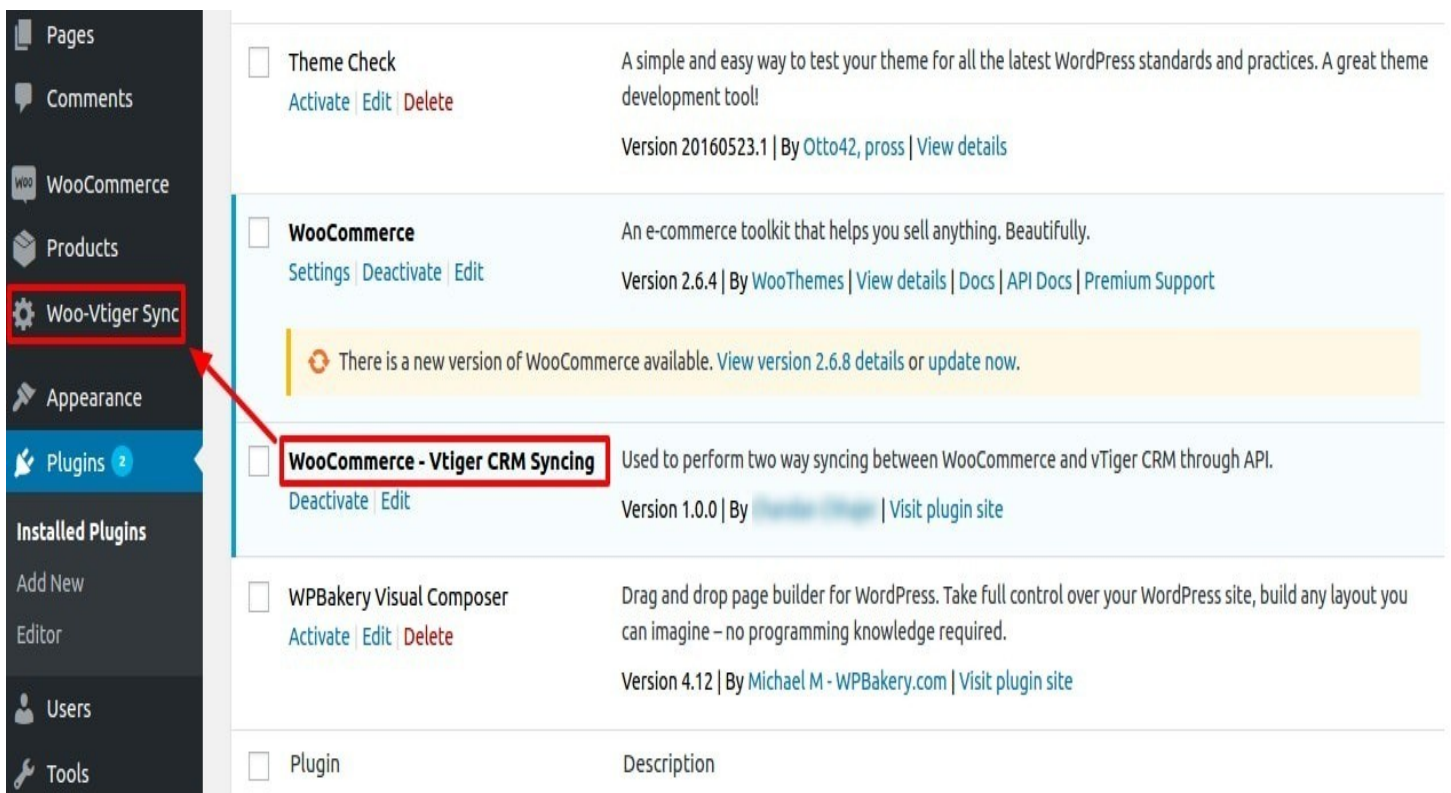
*technology mindz*

**Woo-Vtiger Sync Plugin - User Guide**

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## 2-Way Woo-Vtiger Syncing Plugin

1. In WordPress Dashboard, choose Plugins, and then click Add New.
2. On the Install Plugins page, click Upload Plugin Button.
3. After click on Upload Plugin Button a uploading File section Appear.
4. Browse our Plugin Here and open it.
5. And Click on Installed Now Button, Plugin Installation Begain Now.
6. After Plugin Installed Activate It.



The screenshot shows the WordPress dashboard's 'Plugins' page. The left sidebar menu is visible, with 'Plugins' highlighted in blue and a notification icon. The main content area displays a list of installed plugins. The 'WooCommerce - Vtiger CRM Syncing' plugin is highlighted with a red box, and a red arrow points to it from the sidebar menu. The plugin's name is also highlighted with a red box. The plugin's description, version, and author information are visible.

Plugin	Description
<input type="checkbox"/> Theme Check	A simple and easy way to test your theme for all the latest WordPress standards and practices. A great theme development tool! Version 20160523.1   By Otto42, pross   <a href="#">View details</a>
<input type="checkbox"/> WooCommerce	An e-commerce toolkit that helps you sell anything. Beautifully. Version 2.6.4   By WooThemes   <a href="#">View details</a>   <a href="#">Docs</a>   <a href="#">API Docs</a>   <a href="#">Premium Support</a>
There is a new version of WooCommerce available. <a href="#">View version 2.6.8 details</a> or <a href="#">update now</a> .	
<input type="checkbox"/> <b>WooCommerce - Vtiger CRM Syncing</b>	Used to perform two way syncing between WooCommerce and vTiger CRM through API. Version 1.0.0   By <a href="#">[Author]</a>   <a href="#">Visit plugin site</a>
<input type="checkbox"/> WPBakery Visual Composer	Drag and drop page builder for WordPress. Take full control over your WordPress site, build any layout you can imagine – no programming knowledge required. Version 4.12   By Michael M - WPBakery.com   <a href="#">Visit plugin site</a>
<input type="checkbox"/> Plugin	Description

**Note: After Plugin Installation Process Plugin Will be shows Before Appearance Option.**

**Note: Vtiger CRM Server and WordPress Server Should be same for Syncing.**

7. This is Two Way Synchronized Plugin For Better Connectivity For Wordpress Woo-Commerce Plugin and Vtiger CRM.
8. Woo-Vtiger Sync Plugin Provided 3/18 Vtiger and 3/3 Woo Commerce Common Component Syncing. They are Products, Orders and Customers.

## Choose Woo-Vtiger Sync Plugin → Vtiger Connectivity Option

1. On Vtiger Connectivity Section Some Several Options Available.
2. On EndPoint Url User Insert the Webservice.php Path for connectivity with 3<sup>rd</sup> Party Apps like: Woo Commerce. The Path Shows as **http://vtiger\_url/webservice.php** their Vtiger\_url is the Folder path of Vtiger CRM.
3. Vtiger CRM 3<sup>rd</sup> Party Connectivity did not happen without **Vtiger Username** and **User Access Key**. That **User Access Key** is accessible From **My Preference Tab** in Vtiger CRM. We Fetched All 3 Modules Via Makeing Webservice.
4. We need to Estishblished **Database connectivity** with vtiger server via **Database Hostname, Database Name, Database Username and Database Password** for geeting **Pick list** from vtiger database eg: **Products Categories**.
5. For the **Prodcnts Images** accessibilty we need the **Root Path of Vtige CRM** on server.

The screenshot shows the 'Vtiger CRM Conncetivity' form with the following fields and annotations:

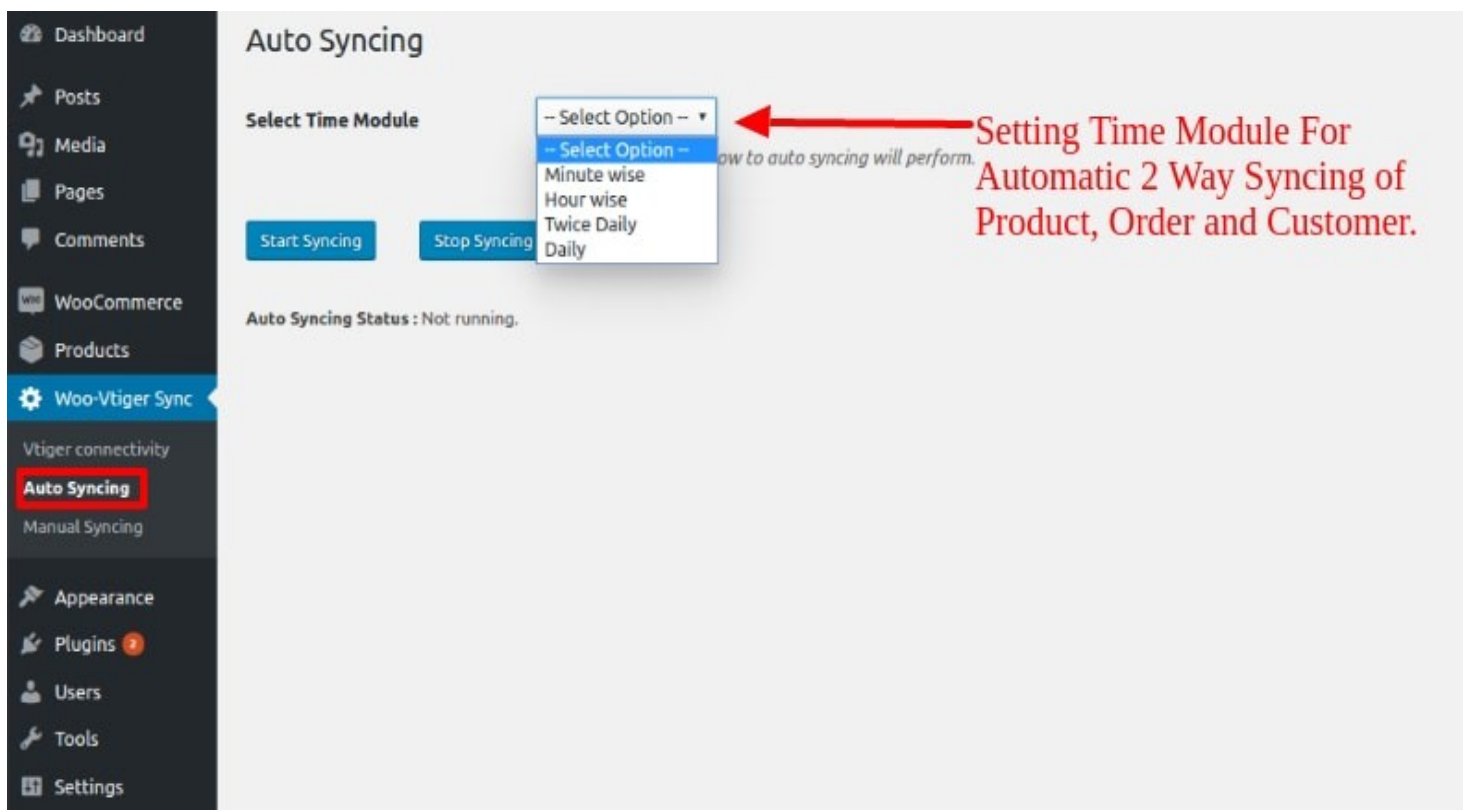
- Endpoint Url**: Annotated with 'Webservice.php File path in CRM Folder For Connect with Third Party Apps'. The help text is 'Url path to vtiger/webservice.php like http://vtiger\_url/webservice.php'.
- Username**: Annotated with 'CRM Username and User access key that accessible in CRM Folder at My Preference Tab for CRM Connectivity.'. The help text is 'Username of the user who is to logged in.'.
- User Access Key**: Annotated with 'CRM Username and User access key that accessible in CRM Folder at My Preference Tab for CRM Connectivity.'. The help text is 'Access key of the user admin, found on my preferences page.'.
- Database Hostname**: Annotated with 'For CRM Database Connectivity Set the Host-name, Database Name, DB\_Username and DB\_password'. The help text is 'Vtiger crm database hostname like : 'localhost'.'.
- Database Username**: Annotated with 'For CRM Database Connectivity Set the Host-name, Database Name, DB\_Username and DB\_password'. The help text is 'Vtiger crm database username like : 'root'.'.
- Database Password**: Annotated with 'For CRM Database Connectivity Set the Host-name, Database Name, DB\_Username and DB\_password'. The help text is 'Vtiger crm database password like '12345'.'.
- Database Name**: Annotated with 'For CRM Database Connectivity Set the Host-name, Database Name, DB\_Username and DB\_password'. The help text is 'Vtiger crm database name like 'vtigercrm'.'.
- Root Path**: Annotated with 'Root Folder Path of Vtige CRM on Server'. The help text is 'Vtiger crm root path like '/home/./././crm folder name/'.'.

A red-bordered box contains the note: 'Note : All the fields are mandatory. Before submit, please check all the fields are filled up and field value is correct.'

**Note:** All the Fields **All Mandatory before Form Submission** without it not a single data is submitted.

## Choose Woo-Vtiger Sync Plugin → Auto Syncing Option

1. User are able to do **Auto Syncing** from **Vtiger CRM to Wordpress Woo-Commerce Plugin** for his convenience.
2. User Setting the time module **According to his convineance** from 4 options.
  - **Minute Wise**
  - **Hour Wise**
  - **Twice Daily**
  - **Daily Basis**



3. After Choosing **Time Module** another sub section apper. Eg: If Our site is Too Busy and we collect lots of information in several minutes so we select **Minute Wise** and a sub option appear Choose **Minutes Section**. At this section some options available.
4. After selecting **Time Module** we click on **Start Syncing Button** for starting automatic sync between **Vtiger CRM and Woo Commerce Plugin**.
5. If user want to stop syncing in future or stop syncing for some time so user are able for stop syncing **According to his convineance** via clicking on **Stop Syncing Button**.

**Auto Syncing**

Select Time Module: Minute wise

Choose Minutes: -- Choose Option --

Start Syncing Stop Syncing

Auto Syncing Status : Not running.

After Time Module Set Set Time Duration for Performing Auto Syncing between CRM and Woo Commerce Plugin.

Stop Auto Syncing Button If You want Set Manual Syncing or want to Stop All Process For Some Fixed Duration.

One Time Auto Syncing Start Button.

### Choose Woo-Vtiger Sync Plugin → Manual Syncing Option

**Manual Syncing**

Select Module: -- Select Option --

Start Syncing View Synchronizations

Select Module For Manual 2 Way Syncing between Products, Customers and Orders.



1. On **Manual Syncing Option** user are able for custom Syncing between **Vtiger CRM or Woo Commerce Plugin**.
2. User are selection **One Module** at a Time From the 6 **Options List**.
  - **Import Products**
  - **Export Products**
  - **Import Customers**
  - **Export Customers**
  - **Import Orders**
  - **Export Orders**
3. After Selecting Module User want to Click on **Start Syncing Button** for Performing Syncing between **Vtiger CRM or Woo Commerce Plugin**.
4. User are able to check his last **Manual Syncing** time of all fields via clicking on **Hide Synchronization Summary Button**.

**Manual Syncing**

Select Module

*Choose an option that you want to synchronize.*

[Start Syncing](#) [Hide Synchronization Summary](#)

To Show / Hide 2 way Manual Synchronised Summary between Vtiger CRM and WordPress Woo-Commerce Plugin

Synchronization Summary	Last Sync Time
The last synchronize time when products import from vtiger crm.	Not Scheduled
The last synchronize time when products export to vtiger crm.	Not Scheduled
The last synchronize time when customers import from vtiger crm.	Not Scheduled
The last synchronize time when customers export to vtiger crm.	Not Scheduled
The last synchronize time when sales orders import from vtiger crm.	Not Scheduled
The last synchronize time when sales orders export to vtiger crm.	Not Scheduled