

Vtiger CRM - Prestashop Connector

For PRESTASHOP version 1.4.x

For vtiger CRM version 5.1 , 5.2.0 & 5.2.1

Introduction

As an e-shop manager, you are always looking for better ways to improve your customer relationship management, the most efficient guarantee to improve your business.

Customer loyalty and permanent new opportunities being an absolute necessity, we developed a software to link your e-shop Prestashop with vtigerCRM, the first 100% open source CRM software.

Ultra easy to use and setup, this interface offers the possibility to record automatically your customers, products, orders and invoices in your CRM and then have the possibility to process these data with your favorite CRM software abilities.



Presentation

This interface allows to synchronize easily your e-shop data towards vtiger CRM. Here is a list of actions which launch an action into the CRM.

E-shop side action

Customer registration



CRM consequences

- If e-mail address is already used in an Account, Lead or Contact, the entity is updated.
- If e-mail address isn't already used, a lead is created.
- An account could be created from company name, if it exists, or formed with customer's « last name first name ».

Customer login



- If a customer logs in, its presence in vtiger is tested
- A lead is created if the test is negative.

A customer places an order



- The order is registered in CRM, in terms of currency used by the customer.
- If products don't exist in CRM (product code), they are created using order data.
- The customer is registered if he wasn't yet.

Product creation (admin)	➔ <ul style="list-style-type: none">- When a product is added in the e-shop, this one is automatically recorded into the CRM, if it doesn't exist yet (product code).- If a product hasn't a code, this last one is built with the product's ID number after the prefix « #presta_ ».
Products export (admin)	➔ <ul style="list-style-type: none">- E-shop products (basic information, without combinations) are recorded into the CRM.- If a product hasn't a code, this last one is built with the product's ID number after the prefix « #presta_ ».
Customers export (admin)	➔ <ul style="list-style-type: none">- E-shop's customers are registered into the CRM.- If he has not already made an order, he is registered as a Lead.- If he already made at least one order, he's registered as a Contact and if there's a company name, an Account is created too, related to the Contact.- If a customer is already present in the CRM (e-mail address), he is NOT updated.
Currencies setup (admin)	➔ <ul style="list-style-type: none">- Currencies which already exist in the CRM are retrieved and linked with the e-shop ones using ISO 4217's codes. During module installation or currencies' links update, those which aren't active or created, are created during this process.
Orders updates (admin)	➔ <ul style="list-style-type: none">- When an order status changes, this one is changed in the CRM (only if the order is registered in the CRM's Prestashop module).- If this status allowed an invoice creation, one invoice is created in the CRM.- If the order generates an invoice, this last one's status is updated too.- When a product is deleted in an order, it's deleted too in the CRM, and possibly in the invoice if it exists (if the order is registered in CRM's Prestashop module).

Installation

Read this BEFORE any installation



It's strongly recommended to do a saving (a dump) of your databases before continue.

Prestashop 1.0 module (or higher version) has to be installed on vtiger CRM **BEFORE** linking the e-shop to the CRM. It's recommended to install this module before installing vtigercrmconnector module in the shop to prevent any damage.

After CRM's module Prestashop installation, you have to check if it's active, as well as Leads, Accounts, Contacts, Products, SalesOrder and Invoices modules.

Check user's rights of the one we'll use to connect the shop to the CRM to make sure they are adequate.

There's big difference between 1.3 and 1.4 Prestashop's versions . Then vtigercrmconnector module works **ONLY** on the 1.4 version. Make sure your shop version is right and make the necessaries updates.

Installation Prestashop module and CRM's setup.

Log in the CRM with an admin profile.

In « Settings / Module Manager », choose « Custom Modules » and then click on « Import New ».

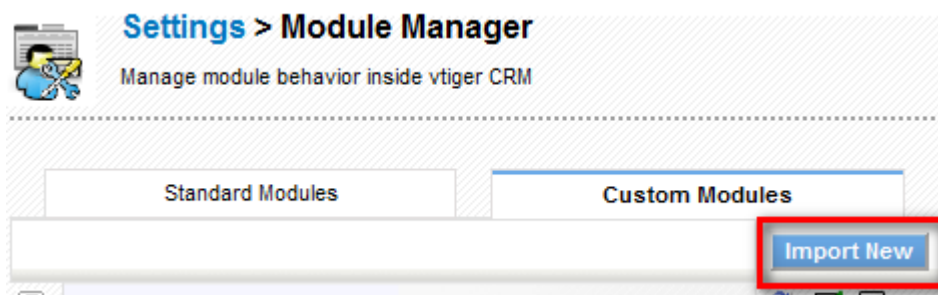


Illustration 1: Module manager overview

Select file Prestashop_1.x.zip on your computer by clicking on « File... » and then click on « Import ».

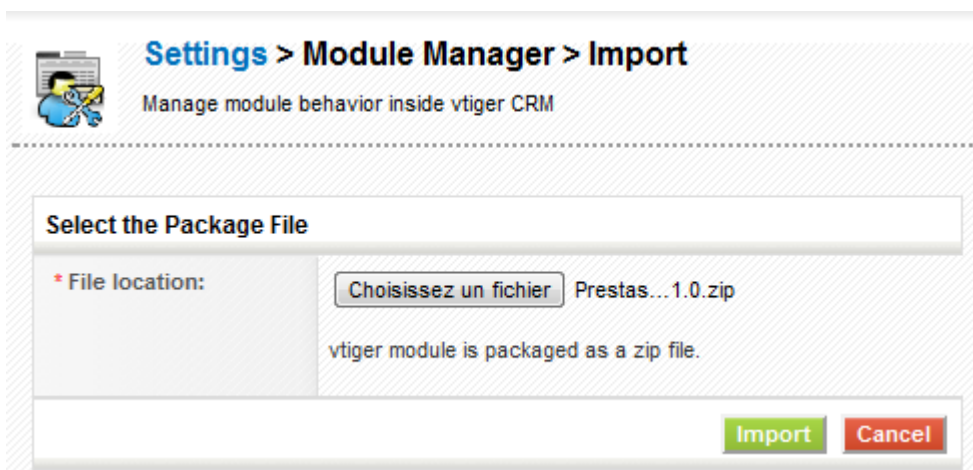


Illustration 2: Importation overview in module manager

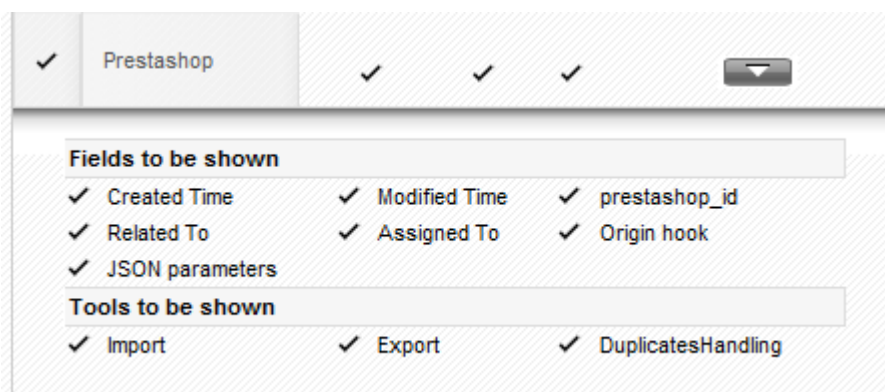
If there's no error, wait for the installation to be finished.

A new value « Prestashop » should be available in Potentials, Leads and Contacts « Origin » field. If it's not the case, add it from list editor respecting case (« P » upper case, « restashop » lower case).

Make sure that Prestashop, Accounts, Contacts, Leads, Products, Potentials, Invoices and SalesOrder modules are active in the « Module Manager », and check that global privileges (« Settings / Sharing Access ») are at *Public: Read, Create/Edit, Delete*.



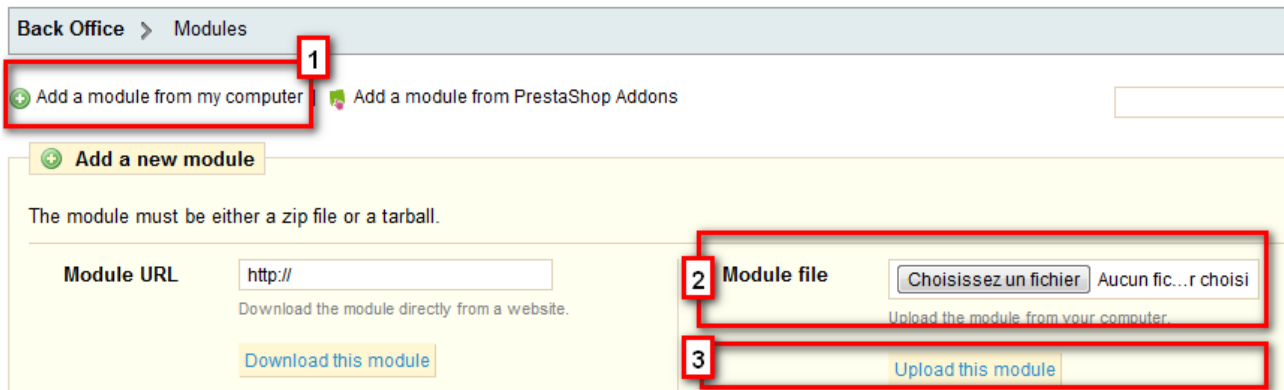
Finally, check that the user you'll use to connect the shop to the CRM has the same rights on these modules.



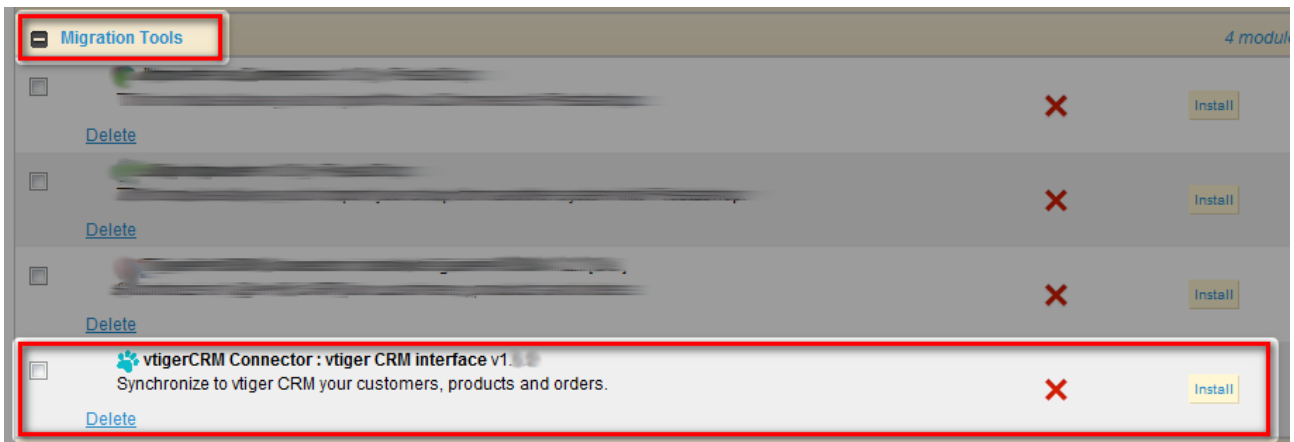
Installation of vtigerCRM Connector module

Log in your shop as admin.

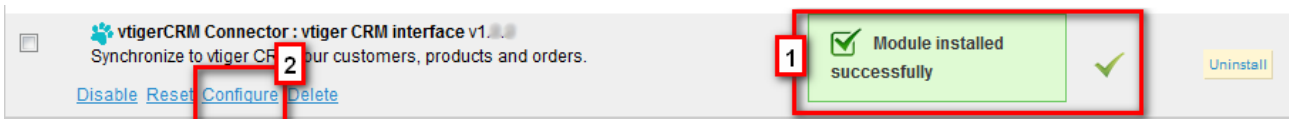
In « Module » tag, click on « Add a module from my computer » (1) and then select the file « vtigercrmconnector.zip » using file manager (2) before validate by clicking on « Upload this module » (3).



Go in sub-part « Migration Tools » and then click on « Install » button for « vtigercrmconnector » module.



If installation succeeds (1), click on “Configure” (2).



Enter CRM's URL, ending by a slash (« / »).



Enter User name.

Copy user key from « My Preferences » (into CRM) of the chosen user (category « User Advanced Options ») and then paste it in the corresponding field (in vtigercrmconnector setup).

5. User Advanced Options

Reminder Interval	1 Minute	Access Key	0
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Click on « Validate and test ».

vtigerCRM Connector : configure the bridge to vtiger CRM

Configure the bridge to vtiger CRM

Specify connection parameters

URL vtiger CRM : http://

User name : admin

Access key :

Validate and test

If login succeeds, you'll see that page.

vtigerCRM Connector : configure the bridge to vtiger CRM

Connection to http:// (Profile admin) Details 1

2 3 4

Connection to vtiger CRM

To access the CRM connection interface, click on Edit

Mandatory fields

Beware, the following fields are tagged as mandatory in the CRM. If these ones haven't value, records won't be done in vtiger CRM. Please configure the CRM or put a default value.


SalesOrder :

- Billing Address (bill_street) Default value
- Shipping Address (ship_street) Default value

Note that if the point besides « Details » (1) is red, login has failed.

Setup vtigerCRM Connector module

On the previous screenshot, four areas had been highlighted.
The first (1) permits to access to the connection details state.

Connection to [http://\[redacted\]](#) (Profile [admin](#)). Details 

Setup - current state	OK
Connection - current state	OK
Module Prestashop CRM - state	Creation authorized Update authorized Deletion authorized Retrieving authorized

The second (2) permits to manage connection parameters (A) and the mandatory fields in order to give them default values.

Connection Configuration

Connection to vtiger CRM 2

To access the CRM connection interface, click on Edit. A Edit

Mandatory fields

Connection Configuration

Connection to vtiger CRM 2

To access the CRM connection interface, click on Edit.

Configure the bridge to vtiger CRM

Specify connection parameters

URL vtiger CRM :

User name :

Access key :

A Validate and test

Mandatory fields setup

Vtiger CRM sets originally some mandatory fields in Potentials, Accounts, Contacts, Sales Orders and Invoices modules. It is so **necessary** to fill these fields with a default value on the Connection part of the Connector. The default value is "--None--" but you still can modify it.

default val

Mandatory fields

Sales

Beware, the following fields are tagged as mandatory in the default value.

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•

Default value - salesorder - bill_street X

--None-- Save

C

SalesOrder :

- Billing Address (bill_street) Default value

Configuration

The third (3) permits configuration of others parameters, like creating an account and/or a potential when an order is created (A), defining created Sales Order's and created Potentials' subjects prefixes (B) and defining links between CRM's currencies and e-shop's currencies (C), with automatic linking process using ISO 4217's codes (D).



It's strongly recommended to activate into CRM the same currencies than those available in the shop in order to avoid any problem.

Note that only alphanumeric characters (without accentuation) and # [] _ - are authorized. Spaces are allowed too but not at the beginning.

The screenshot shows the Vtiger CRM configuration interface. The 'Configuration' tab is selected. The 'Sales order configuration' section includes:

- 3** (tab indicator)
- A** (checkboxes):
 - Create Account: Create account in CRM when an order in created in the shop.
 - Create Potential: Create potential in CRM when an order in created in the shop.
- B** (text boxes):
 - Sales order prefix**: Text before shop order number (Currently : Bon de commande no1). Input: Bon de commande no
 - Potentials prefix**: Text before the number of the order that created the potential. (Currently : Commande boutique no1). Input: Commande boutique no
- D** (checkbox): Link currencies automatically
- C** (table):

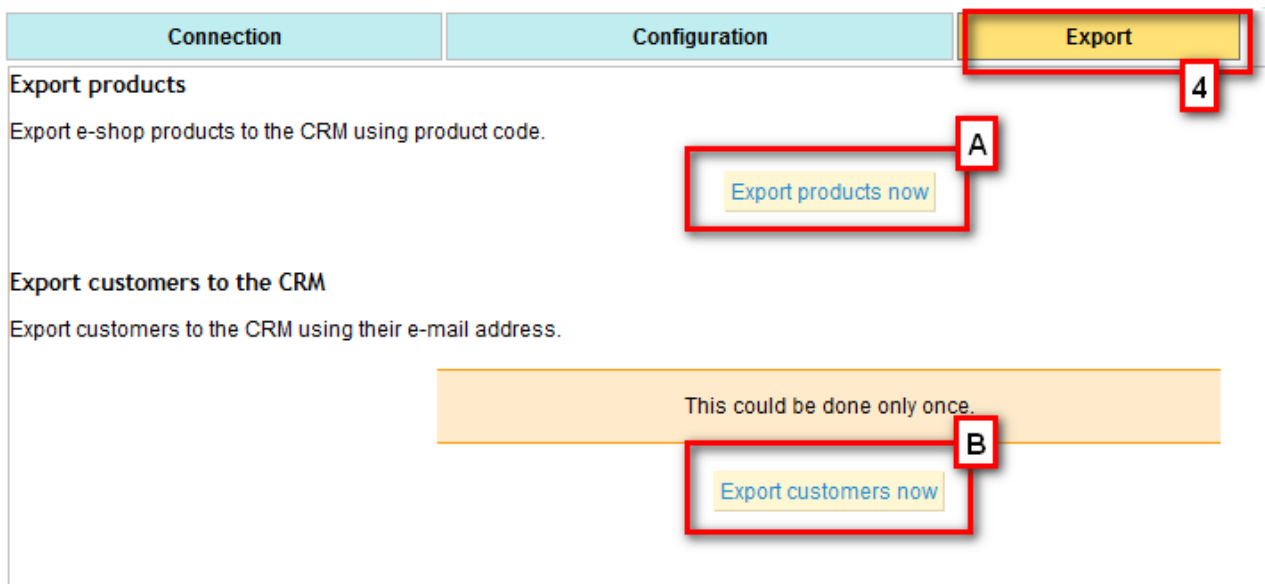
Currencies from CRM		Currencies from shop
Euro - EUR	=>	Euro - EUR
USA, Dollars - USD	=>	Dollar - USD
Great Britain Pounds - GBP	=>	Pound - GBP

Additional text in the 'Sales order prefix' section: *Authorized characters (Without accents !) : from a to z (upper and lower case), numbers, spaces, # [] _ -*

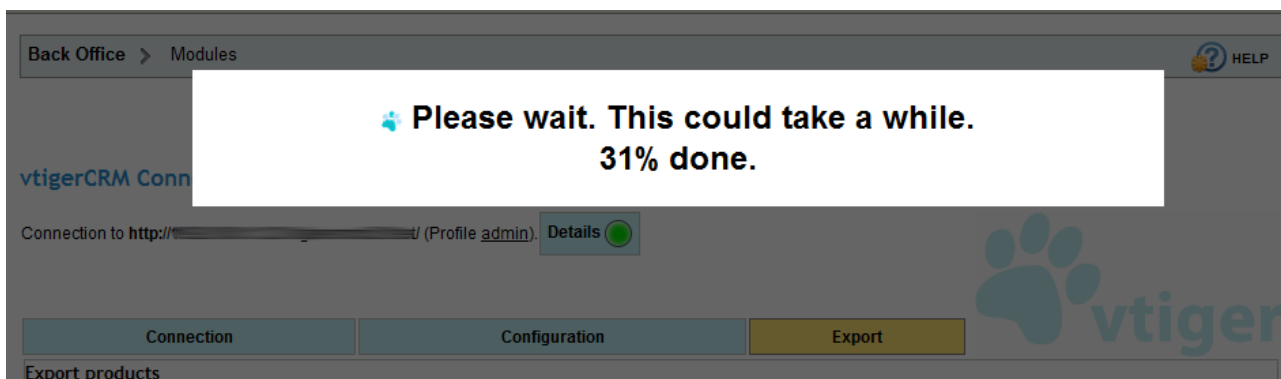


If checkboxes « Create Account » and « Create Potential » are both checked, the system will, in priority, links the Potential to the Account instead of the Contact.

The fourth (4) permits to manage data exports from shop to vtiger CRM. So you have the possibility to export all products (A) and customers (B) in one click . You can export the customers **only once**.



A lightbox with a view of the export progress is displayed for each module which had this functionality. It disappears when process ends or when the page is on its maximum execution time and it's going to reload. In that case, a message says that the previous export isn't finished yet.



If a problem occurred and the page is « cut », this means that the export hadn't enough time to finish. This could occur if you have many elements and/or a low server configuration. Restart this until return page is normal. Make sure shop's default currency (the one which is used for products) is the same that CRM one, so that values between the two platforms are coherent.

Module Vtiger CRM - Prestashop Connector

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