



CRM Integration Manual

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Contents of this Manual are applicable to the WPL Complex Add-On. Details of this Manual may be different based on the customizations you have or your software.

What's CRM integration add-on?

The CRM Integration add-on is developed with the purpose of facilitating the integration of WPL CRM with third party CRM systems such as Zoho CRM, Infusion Soft, etc. The system is developed in a flexible manner, so it can be configured to synchronize with one or more CRMs at the same time.

Who can use this user manual?

The configuration of this add-on requires a level of technical knowledge which is explained in this user manual.

The following image shows the first page of CRM Integration dashboard. There are 3 sections in CRM Integration dashboard:

Section 1: CRM Basic Info

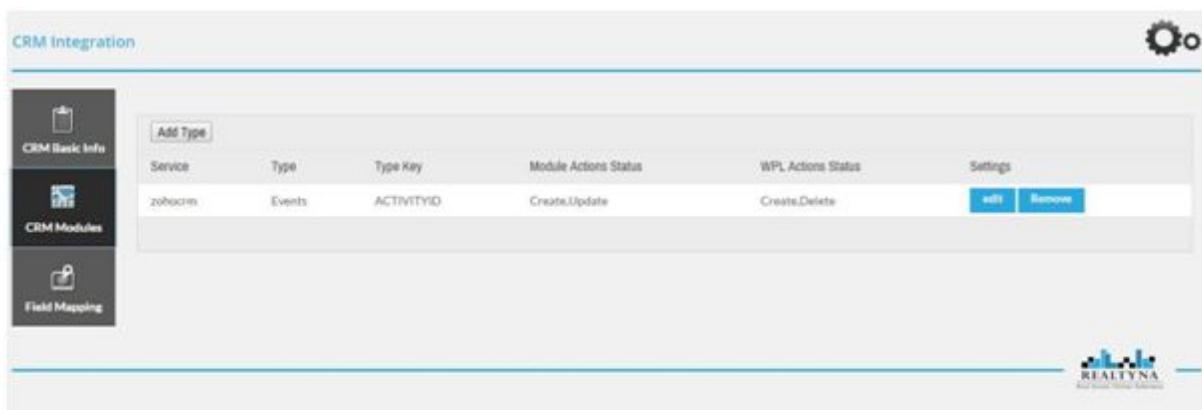
Using this section we can start adding a new CRM service.



Section 2: CRM Modules

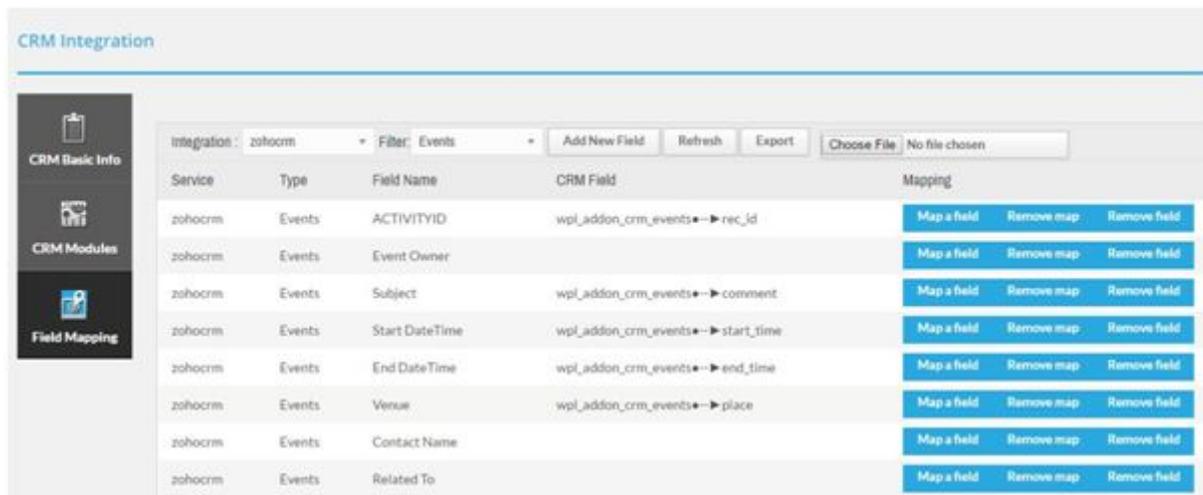
As you know, each CRM comes with different modules for example, contacts, events, accounting, etc. In this section we can add different modules of the 3rd party CRM that we want to map (synchronize) with WPL CRM.

The following image shows adding Events module of the Zoho CRM.



Section 3: Field Mapping

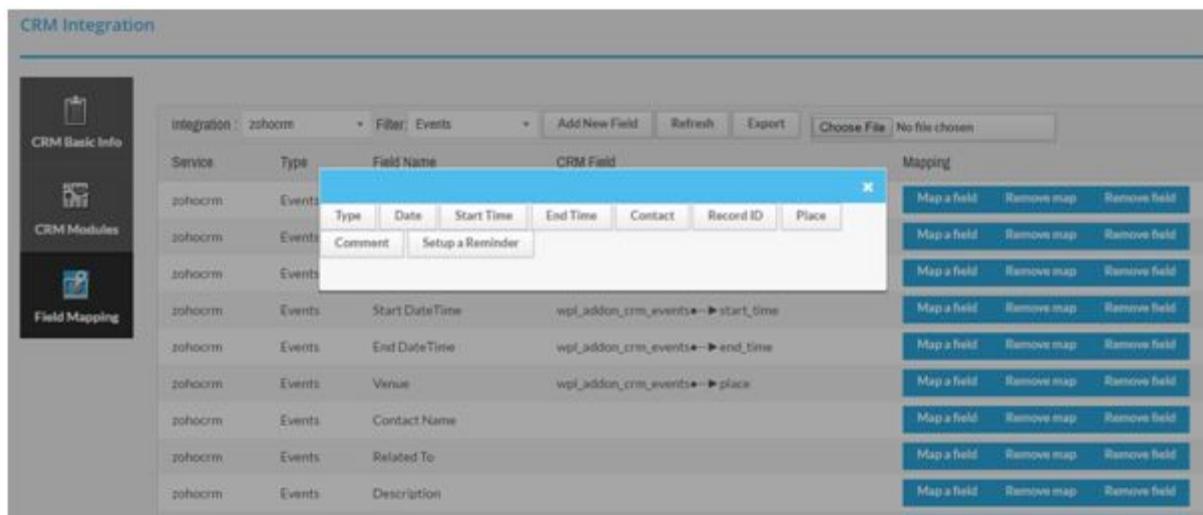
In this section we can map the fields of each of the 3rd party's CRM module with the related fields of WPL CRM.



The screenshot shows the 'CRM Integration' interface. On the left, there is a sidebar with 'Field Mapping' selected. The main area displays a table with columns: Service, Type, Field Name, CRM Field, and Mapping. The table lists various fields from Zoho CRM Events mapped to WPL CRM fields. Each row has three buttons: 'Map a field', 'Remove map', and 'Remove field'.

Service	Type	Field Name	CRM Field	Mapping
zohocrm	Events	ACTIVITYID	wpl_addon_crm_events→rec_id	Map a field Remove map Remove field
zohocrm	Events	Event Owner		Map a field Remove map Remove field
zohocrm	Events	Subject	wpl_addon_crm_events→comment	Map a field Remove map Remove field
zohocrm	Events	Start DateTime	wpl_addon_crm_events→start_time	Map a field Remove map Remove field
zohocrm	Events	End DateTime	wpl_addon_crm_events→end_time	Map a field Remove map Remove field
zohocrm	Events	Venue	wpl_addon_crm_events→place	Map a field Remove map Remove field
zohocrm	Events	Contact Name		Map a field Remove map Remove field
zohocrm	Events	Related To		Map a field Remove map Remove field

As you can see in the above image, all the fields related to the Events module of the Zoho CRM is pulled and listed here. Now by clicking on the Map a field button, we can select the related field in the WPL's CRM. This action will map the two fields.



The screenshot shows the same 'CRM Integration' interface, but with a modal window open over the table. The modal window has a title bar and a close button. It contains a list of fields to choose from: Type, Date, Start Time, End Time, Contact, Record ID, Place, Comment, and Setup a Reminder. The 'Map a field' button for the 'ACTIVITYID' row is highlighted.

Service	Type	Field Name	CRM Field	Mapping
zohocrm	Events	ACTIVITYID	wpl_addon_crm_events→rec_id	Map a field Remove map Remove field
zohocrm	Events	Event Owner		Map a field Remove map Remove field
zohocrm	Events	Subject	wpl_addon_crm_events→comment	Map a field Remove map Remove field
zohocrm	Events	Start DateTime	wpl_addon_crm_events→start_time	Map a field Remove map Remove field
zohocrm	Events	End DateTime	wpl_addon_crm_events→end_time	Map a field Remove map Remove field
zohocrm	Events	Venue	wpl_addon_crm_events→place	Map a field Remove map Remove field
zohocrm	Events	Contact Name		Map a field Remove map Remove field
zohocrm	Events	Related To		Map a field Remove map Remove field
zohocrm	Events	Description		Map a field Remove map Remove field

After mapping all the fields of the different modules of the CRM, we can run a cronjob for getting the data from the 3rd party CRM or vice versa.

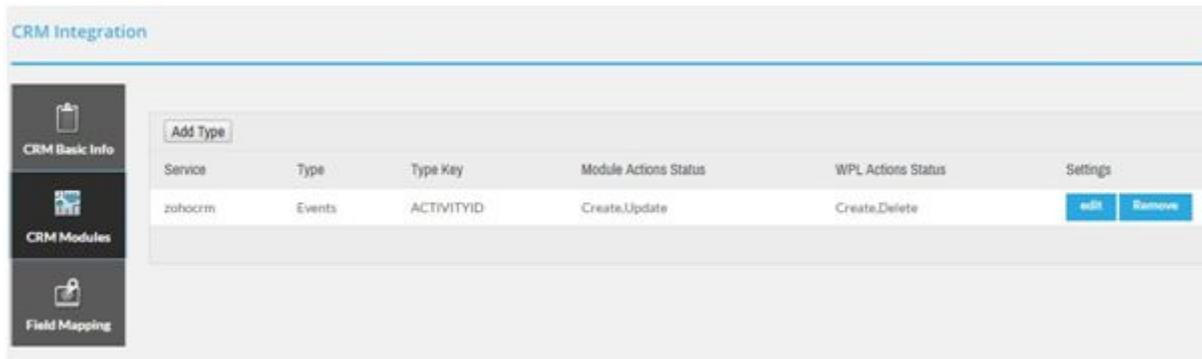
http://example.com/?wpl_crm_integration_cron=1&module=type number

You can create different cronjobs for different modules. After the configuration, the information will be updated automatically.

Notice : You don't need configure it, this will be configured by our team.

Settings for modules or types

Please refer to the picture below:



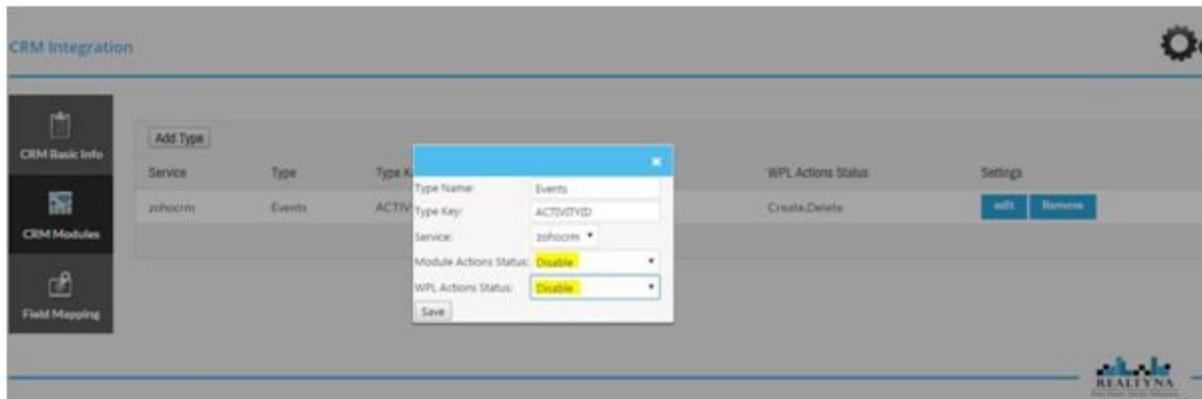
In this table, we can configure syncing operation for each module.

There are two columns that are important (module actions status and wpl actions status).

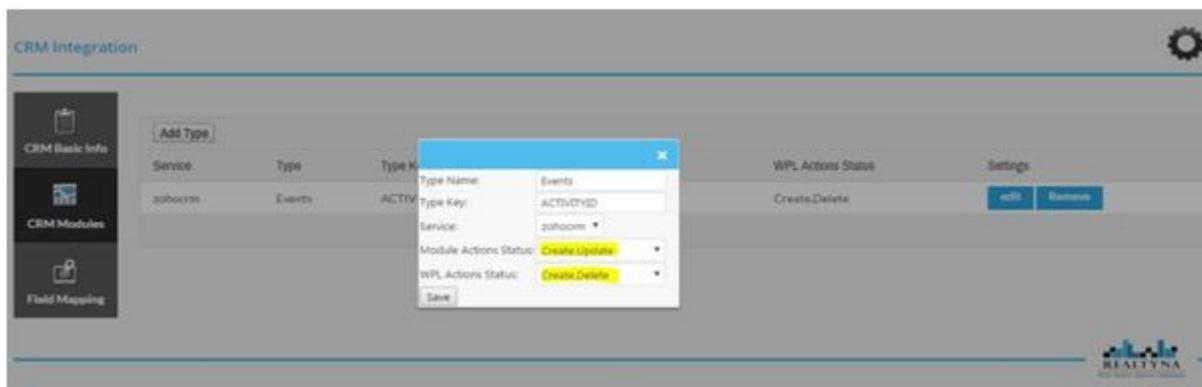
By using these settings we can choose way of syncing for each module or type.

To update these settings you can click on the edit button.

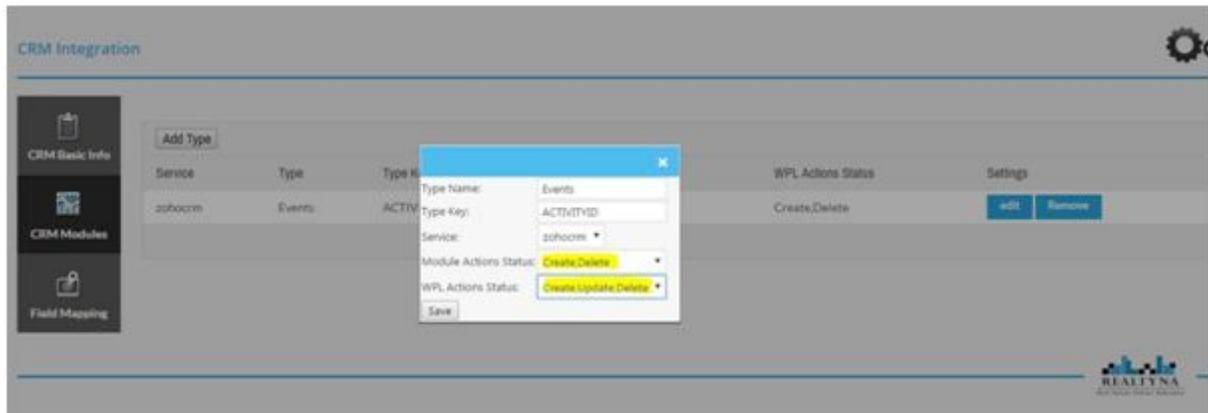
Note : When you want update 3rd party CRM must be selected disable item in the drop down element for both of them (module actions status and wpl actions status).



If you want to update our CRM is in the 3rd party CRM do the below settings .



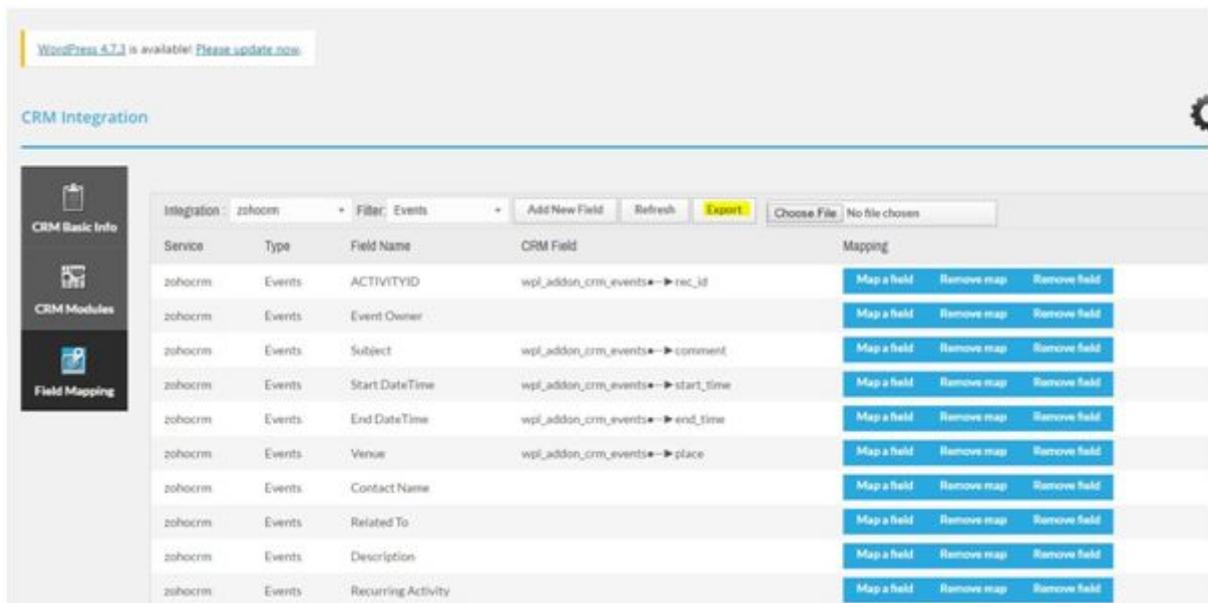
To update,create and delete in our CRM :



How we can export/import map data:

To download map you can open the CRM Mapping menu and click on the service combobox afterwards, you can choose one of all services that loaded.

Please consider the below picture:

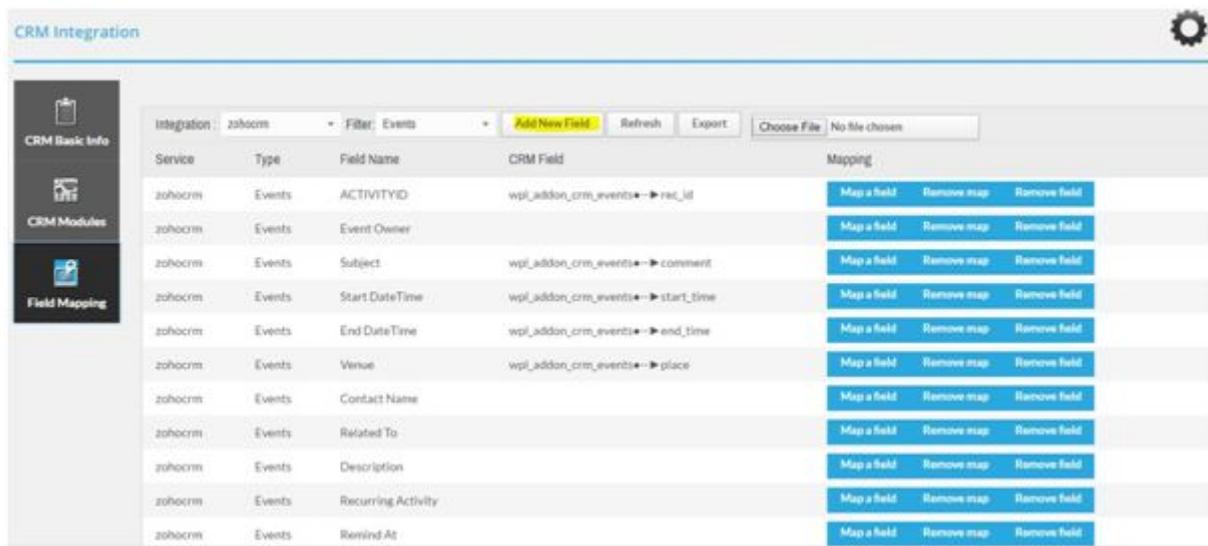


When you click on the export button the map file will be downloaded

Afterwards you can import your map file downloaded via file element you can see the file element next to the export button.

How we can add new fields to field mapping section ?

Please consider the following picture :

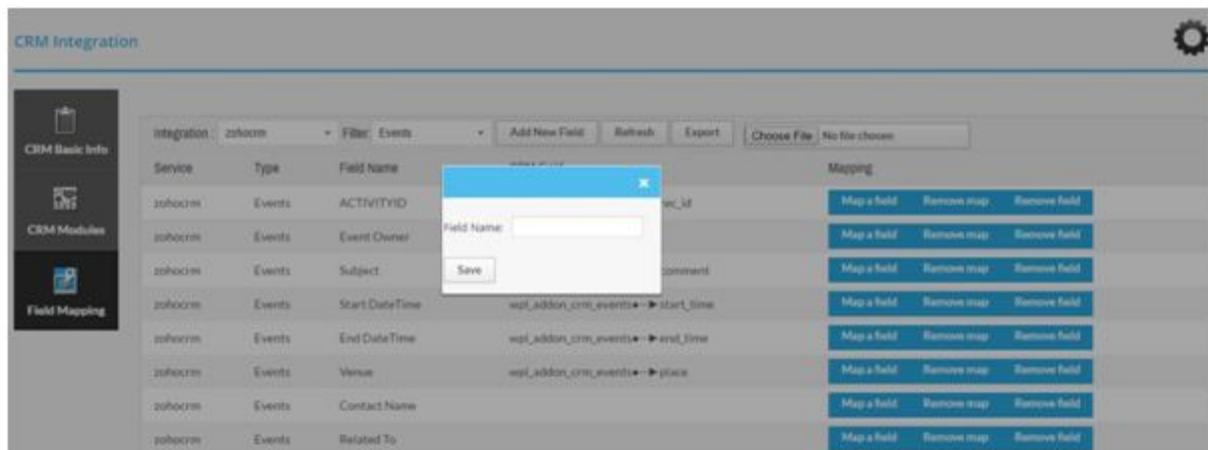


The screenshot shows the 'CRM Integration' interface. On the left, there is a sidebar with 'Field Mapping' selected. The main area displays a table with columns: Integration, Service, Type, Field Name, CRM Field, and Mapping. The 'Add New Field' button is highlighted in yellow. Below the table, there are buttons for 'Map a field', 'Remove map', and 'Remove field' for each row.

Integration	Service	Type	Field Name	CRM Field	Mapping
zohocrm	zohocrm	Events	ACTIVITYID	wpl_addon_crm_events-->rec_id	Map a field Remove map Remove field
zohocrm	zohocrm	Events	Event Owner		Map a field Remove map Remove field
zohocrm	zohocrm	Events	Subject	wpl_addon_crm_events-->comment	Map a field Remove map Remove field
zohocrm	zohocrm	Events	Start DateTime	wpl_addon_crm_events-->start_time	Map a field Remove map Remove field
zohocrm	zohocrm	Events	End DateTime	wpl_addon_crm_events-->end_time	Map a field Remove map Remove field
zohocrm	zohocrm	Events	Venue	wpl_addon_crm_events-->place	Map a field Remove map Remove field
zohocrm	zohocrm	Events	Contact Name		Map a field Remove map Remove field
zohocrm	zohocrm	Events	Related To		Map a field Remove map Remove field
zohocrm	zohocrm	Events	Description		Map a field Remove map Remove field
zohocrm	zohocrm	Events	Recurring Activity		Map a field Remove map Remove field
zohocrm	zohocrm	Events	Remind At		Map a field Remove map Remove field

As you see in this picture this is a button called 'Add new field' that placed next to the refresh button. Once , you can see this button that choice, service and module name afterwards you can see this button.

After clicking on this button. You can see the wizard below.



The screenshot shows the same 'CRM Integration' interface as above, but with a dialog box open. The dialog box has a title bar with a close button and a text input field labeled 'Field Name'. Below the input field is a 'Save' button. The background table is dimmed.

Note: Might you have some fields in your different modules of the foreign CRM, but there are not on the field mapping section (after synchronizing). In this cases, after logging in, your foreign CRM you can copy field name from different module and paste into the field name text box (Before paste the name you must to choice, service and module till the field be created to relate module) after this you click on the save button it will be added last of the table so you don't need to refresh page . Now you have a field that gets ready to map with WPL CRM fields.