vTiger^{TM} Integration Installation

The vTiger integration module allows you to transfer accounts, invoices and products into NolaPro.

Installing vTiger

If vTiger is not already installed, download it at http://www.vtiger.com/get-started/download and select the download file for Windows or Linux.

An installation and user manual are also available for download. Please see the vTiger installation manual for installation instructions.

Note: By default the Windows installation of vTiger does not enable the php_mbstring.dll extension. This is required to send your data into NolaPro. Please enable the extension by doing the following:

1. Go to Start -> Computer
2. Navigate to C:\Program Files\vtigercrm-x.x.x\php and open the php.ini file. Note: Your vtiger installation directory may differ.
3. Search for ";extension=php_mbstring.dll"
4. Remove the semicolon from the beginning and save the file.
5. Stop and Start your CRM Server by going to Start -> All Programs -> vtigercrm-x.x.x.

Activate vTiger in NolaPro

In NolaPro, purchase and activate the vTiger Integration if you haven't already. This can be done by going to Tools -> Add-Ons and selecting vTiger Integration from the list. Complete the purchasing process and it will be activated automatically. Alternately, it can be purchased on our store by clicking here and an activation code will be emailed to you.

Install the NolaPro module in vTiger

1. Download the NolaPro vTiger module here.
2. In vTiger you will need to go to Settings -> Module Manager.
3. Click on the Custom Modules tab.
4. Click the Import New button.
5. Select the NolaPro add-on zip file you downloaded in the first step.
6. Click Import.
7. Accept the agreement that appears and click "Yes" when asked "Do you want to proceed with import?".
8. Click Finish when the import module procedure is complete. This will add a new menu entry under Tools called NolaPro.

In vTiger, go to Tools -> NolaPro and your screen should look similar to the following:

There are 4 fields in the NolaPro API Info section where data from NolaPro needs filled in.

- **NolaPro API Key** and **NolaPro API User ID** can be found by going to Admin -> Admin Setup -> User New/Edit. Select your user name and scroll down until you find the **API Key** and **API User ID** fields. Copy this information to the corresponding fields in vTiger.
- **NolaPro API URL** will be the address you use to access NolaPro with "/api" replaced at the end. For example, if your web browser address bar is displaying http://localhost:50080/index.php you would use http://localhost:50080/api in this field.
- **NolaPro API Company ID** can be found by going to Admin -> Admin Setup -> Company New/Edit. Select the company you will be using when importing data from vTiger and click Edit. The Company ID will be the first field listed.

Click Save when all 4 fields are filled in.

Things to note before importing accounts, products and invoices

- In vTiger, the Qty/Unit field must be filled in for all items.
- In NolaPro, a default location and price level must be set in Admin -> Setup Inventory -> General Setup.
- Tax Names in vTiger must have matching tax names in NolaPro.
- In NolaPro, Default Customer Terms must be set. This is located in Admin -> Setup Receivables -> Company Options, Default Terms tab.