AntERP.com Solutions Data Sync between FrontAccounting And VtigerCRM
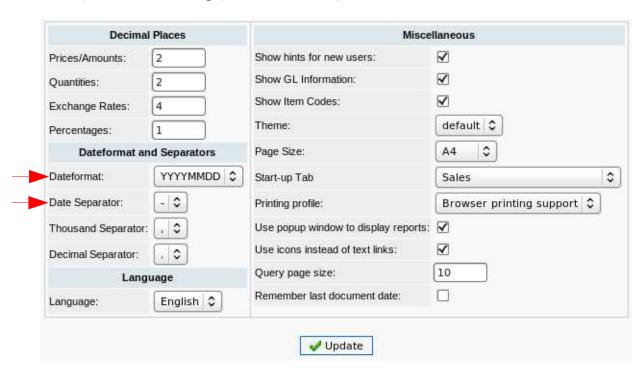
Data Synchronization Test

Pre-requisite:

Before we perform data synchronization, we need to configure the Date Format and MUST be the same format. For example, the date format for YYYY-MM-DD as below:

1) Vtigercrm (Go to My Preferences)

2) Front Accounting (Go to Preferences)

Module Name	1Way	2Way	Status	Reason
Accounts	Ok	Ok	Work	
Account Contacts	Ok	Ok	Work	
Vendors	Ok	Ok	Work	If not working, please adjust the VtigerCRM Timezone setting. It shold work fine.
Vendors Contacts	Not Supported	Not Supported	Not Work	Future development
Currency	Ok (Fa to Vtiger Only)	Not Supported	Work	
Product Category Manufacturer Category	Ok	Ok	Work	VtigerCRM does not support Category Synchronization. Hence, we DO NOT support for Product, Manufacturer and Service Category Deletion. It need to replace the existing Product, Manufacturer and Service Category and

Service Category				then delete the old category. (Deletion ONLY support 1 way Sync from FA to Vtiger for Product, Manufacturer and Service Category) NOTE: (Changing of Product Category to Manufacturer Category may cause some issue. Please run twice in FA to eliminate this issue. Your data will get sync)
Products	OK	OK	Work	To sync the products from FrontAccounting to Vtiger, you need to filled in all the **IMPORTANT** information like <mark>Product Category, Product Item, Sales Pricing, Vendors and also Purchase Order from FrontAccounting</mark>. The purchase order for specific products are important for Re-order level, quantity in stock, on demand etc. We need to make sure that this product have those information before we sync to Vtiger to avoid any unnecessary issue arising in both system. (in-consistancy) If the new product just enter into the system, we will only sync the products to Vtiger with all the fields (Re-order level, quantity in stock, on demand etc) = 0. Image file not supported
Services	OK	OK	Work	To sync the products from FrontAccounting to Vtiger, you need to filled in all the **IMPORTANT** information like <mark>Service Category, Service Item, Sales Pricing from FrontAccounting</mark>. Issue Found: Vtiger doesn't support sync currency using web services. Hence, the default currency will be used (USD) Image file not supported
Prices	OK	OK	Work	Multi currency supported. Although the Pricing are supported. It have some variant between the 2 system. The conversion rate might be different. Our Exchange Rate is based on **Yahoo Finance**.
PurchaseOrder	Ok	Ok	Work	"Group" tax mode are supported. It depend on the setting in FA Supplier Tax Group Setting There are at least 2 type: 1) GST Tax (5%) 2) Tax Excempt (Free Tax) Issue Found: 1) FA doesn't have Supplier Discount. We do not deduct the Purchase Order cost. 2) FA doesn't have Supplier Shipping Cost. We do not add into Purchase Order cost. 3) Vtiger for Purchase Order MUST use Tax Mode = 'group' to add the Taxation to Purchase Order. Summary: <mark>Vtiger for Purchase Order cannot apply the Adjustment, Discount, Shipping cost and must used tax mode = group for taxation.</mark>
Quotes	Ok	Ok	Work	Does Not support "Group" tax mode. Applicable to "Individual" mode only.
SalesOrder	Ok	Ok	Work	Does Not support "Group" tax mode. Applicable to "Individual" mode only.
Invoice	Ok	Ok	Work	Does Not support "Group" tax mode. Applicable to "Individual" mode only. NOTE: VtigerCRM Only can Sync to FA and virse-versa when the invoice is created. After that, the invoice item cannot be change. In Accounting, we do not change the invoice

				once we printed and delivered the goods to our customer.

Online and Offline Synchronization are supported.

General Practice:

No	Module	Description
1.	Address	FrontAccounting only have 1 address fields. Our standard ways to enter the address information as below: | Field Name	Sample Address
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Street	1600 Amphitheatre Parkway
City	Mountain View
State	CA
Zip/PostalCode	94043
Country	United States	

NOTE and Issue Found:

No	Module	Description
2.	Manufacturer	Vtiger does not support Manufacturer yet. If your products category is under manufacturer, the synchronization process will have some issue. It doesn't sync to Vtiger.
3.	SalesOrder	Does Not Support recurring Invoice Information
4.	Tax Setting	Tax Setting must be configure accordingly in Vtiger and also FA.
5.	Tax Mode	Does Not Support "Group" tax mode. By default, use "Individual" only. | Tax Mode	Supported	Not Supported
Individual	Individual Discount	Individual Tax
Group	Not Support	Not Supported
		| NOTE: Individual tax mode include the item below: (Supported) - Individual Discount are sync with FA NOTE: Individual tax mode include the item below: (Not Supported) - Individual Tax are sync with FA NOTE: Group tax mode include the item below: (Not Supported) - Group Discount - Taxes For Shipping and Handling - Adjustment