Synchronizing Customer details from ClickPOS to, and from SugarCRM

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Location	ClickPOS help http://www.clickpos.com/Support/Training/AdministratorTraining.aspx
File name	SugarCRM and ClickPOS Customer Sync

Usage

ClickPOS has the ability to sync selected **CUSTOMER fields** into SugarCRM **and** SugarCRM back to ClickPOS.

There are two ways you may collect customer details,

1. If you are using SugarCRM, while converting an opportunity to a sale and

2. From ClickPOS Point of sale

ClickPOS CUSTOMER ⟷ Sugarcrm CONTACTS ⟷ Sugarcrm ACCOUNTS
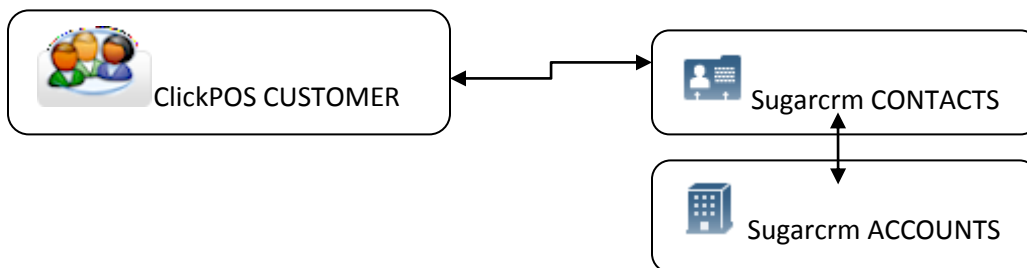
If you are using SugarCRM for tracking new lead details, then SugarCRM is the first location were a new contact is created, then when customer is ready to be invoiced the Contact details can be added to ClickPOS automatically from SugarCRM's Contacts tab. This avoids duplication of data entry, and provides consistency.

Prerequisites

In order to synchronize you are required to add the following fields into SugarCRM
- Add following fields listed under the heading "New Fields" to appropriate module in SugarCRM.
To add new fields, login to SugarCRM, then
**Admin | Studio | Contacts or Accounts | Fields | Add Fields**
Note : field names must be spelled exactly as below.

| New Fields - Add to Sugar CRM	Module	Sugar Data Type
cp_synch	Contacts	Check box
Cp_cust_code	Contacts	Integer
Cp_cust_tradingas	Accounts	Text field
Cp_cust_customerclass	Accounts	Text field

Then Display the fields in the SugarCRM screens. Go to
Admin | Studio | Contacts or Accounts | Layouts| Edit View

Then drag and drop the two new fields added.
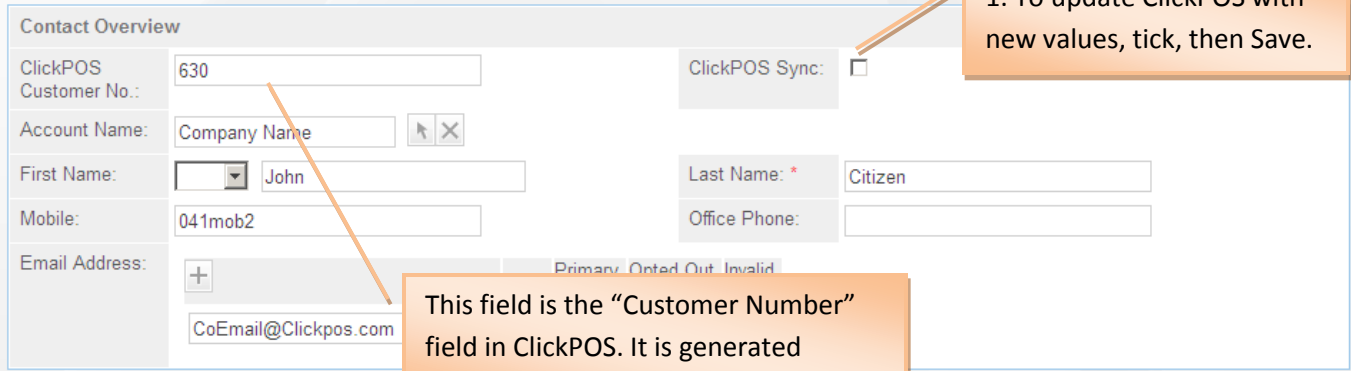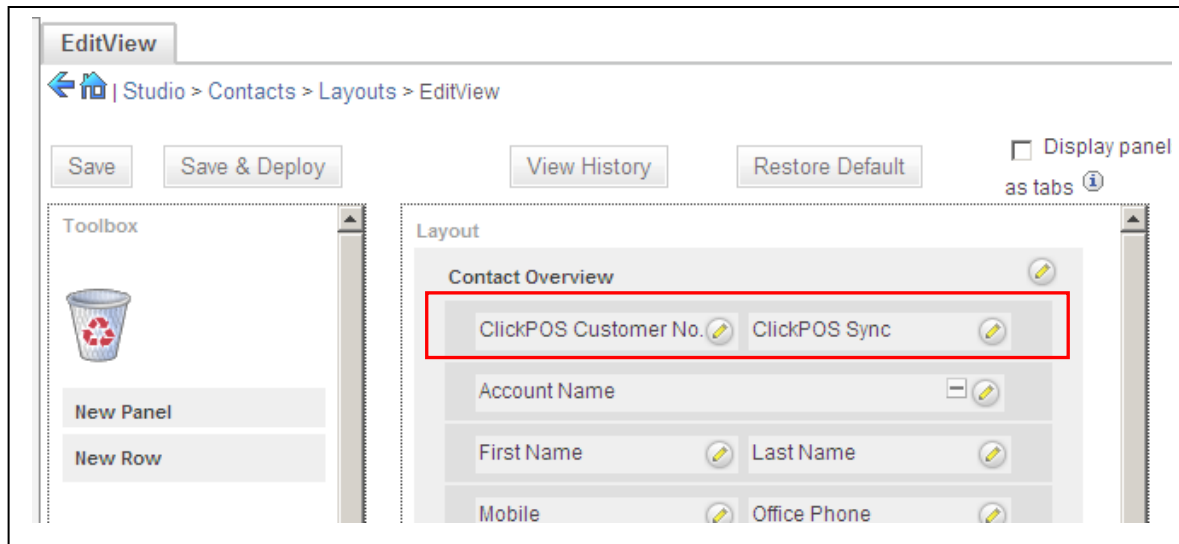
1. How to synchronize SugarCRM to ClickPOS

SugarCRM CONTACTS → ClickPOS CUSTOMER
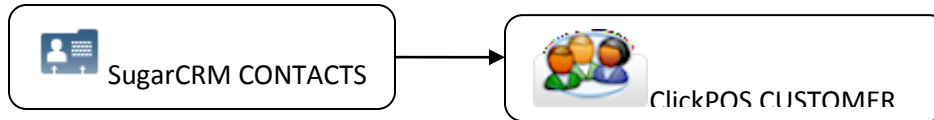
Sync SugarCRM Contact to ClickPOS Customer.

Login to SugarCRM, then go to Contacts Tab.
If the contact Does Not exist in ClickPOS, then the ClickPOS Customer number field will be empty.
To copy details into ClickPOS, simply tick the "ClickPOS Sync ", then, Save

1. To update ClickPOS with new values, tick, then Save.

This field is the "Customer Number" field in ClickPOS. It is generated automatically from ClickPOS.
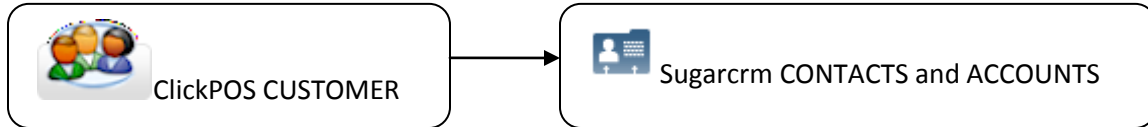
The system will now add the details into ClickPOS, then, will add the ClickPOS customer number back into SugarCRM. Once you see a number in "ClickPOS Customer No" field, then the system has been synchronized.
Please note that , the Sync module updates every 5 minutes. Simply refresh the page to see if the Customer number field has a value.

Editing an existing record.
Any time in the future, if you make a change, for example the mobile number, simply Tick the "ClickPOS Sync", then Save. The system will update ClickPOS with the new number.

2. How to synchronize ClickPOS to SugarCRM

ClickPOS CUSTOMER → Sugarcrm CONTACTS and ACCOUNTS

Login to ClickPOS, then go to
Card File | Customer
Add the Customer details, then, to save the details into SugarCRM, simply
1. tick the "SugarCRM Sync"
2. Click OK to save.

If the contact Does Not exist in SugarCRM, the system will Add a new Contact and update any Account details . If the customer already exists, it will overwrite all relevant fields with the ones in ClickPOS.

1. To update SugarCRM with new values, tick "Sync to CRM", then OK to save.

Field mapping

The following fields are updated between both systems.

Sugar Module	Sugar Label	Sync to	ClickPOS-Customer	Example Screenshot Text
Contacts	title	← →	Title	Mr.
Contacts	First name	← →	Name	John
Contacts	Last name	← →	Last	Citizen
Contacts	email1	← →	Email	CoEmail@clickpos.com
Contacts	ClickPOS Customer No.	← →	Cust No.	630
Contacts	Phone mobile	← →	Mob	0411111111221
Accounts	NAME	← →	CONAME	Company Name
Accounts	Cp cust TradingAs	← →	Trading As	T/A CONAME
Accounts	Cp cust CustomerClass	← →	Customer Class	Not Active
Accounts	Email1	← →	Email	AccContactEmail@clickpos.com
Accounts	Billing address street	← →	Address 1	215 Rouse St.
Accounts	Billing address city	← →	Suburb	Port Melbourne
Accounts	Billing address state	← →	State	Vic
Accounts	Billing address postal code	← →	Post/ZIP	3207
Accounts	Phone office	← →	Tel Home	0939393933939
Accounts	Website	← →	Website	www.clickpos.com
Accounts	Billing address country	← →	Country	Australia

Additional notes

If you have customer details in ClickPOS, and want to mass upload customers to SugarCRM, we suggest you Export the Customer list from ClickPOS using the Report Generator.
 To keep consistency in both systems the ClickPOS's CUSTOMER NUMBER must be exported as well.

If you require assistance we are happy to import the details for you. Please email help@clickpos.com