# Moffice CRM Data Sync

## Introduction

Moffice CRM provides data sync: a feature that enables you to sync the data received from Web forms and link it directly to the CRM system. This differs from the concept of importing data because importing data requires a local file in your computer (.csv or .xls/.xlsx) that will batch add data to the CRM while data sync will real-time add data from others over the Internet to the CRM. You can currently link Web forms to automate data entry into the following categories:

- Customers
- Potentials
- Leads
- Help Desk Tickets
- Products
- Product Groups

An example of data sync in action would be a landing Web page. If the landing page has a form for interested Potentials to enter their information to get alerts about your product, data sync will allow the information entered by the Potential to be automatically sent to Moffice CRM and create a new Potential with the desired information input. It automates normally more tedious processes.

Data sync offers a lot of conveniences and can be completed with just a little technical knowledge. The data sync process involves mapping the values for the source in Moffice CRM and inserting the corresponding code bits to the backend portion of your Website's PHP file. The steps are as below. We'll show you how to create a form that turns submitted data into instant Help Desk Tickets in Moffice CRM.

**Part I:**
**Moffice CRM**
Setup Fields

1. Add sync source
2. Choose details
3. Map values

**Part II:**
**Your Website**
Insert Code

4. Post fields
5. Add API
6. Create data arrays
7. Input send function

**Part III:**
**Trial Runs**
Check Sync

8. Test Web form
9. Confirm results

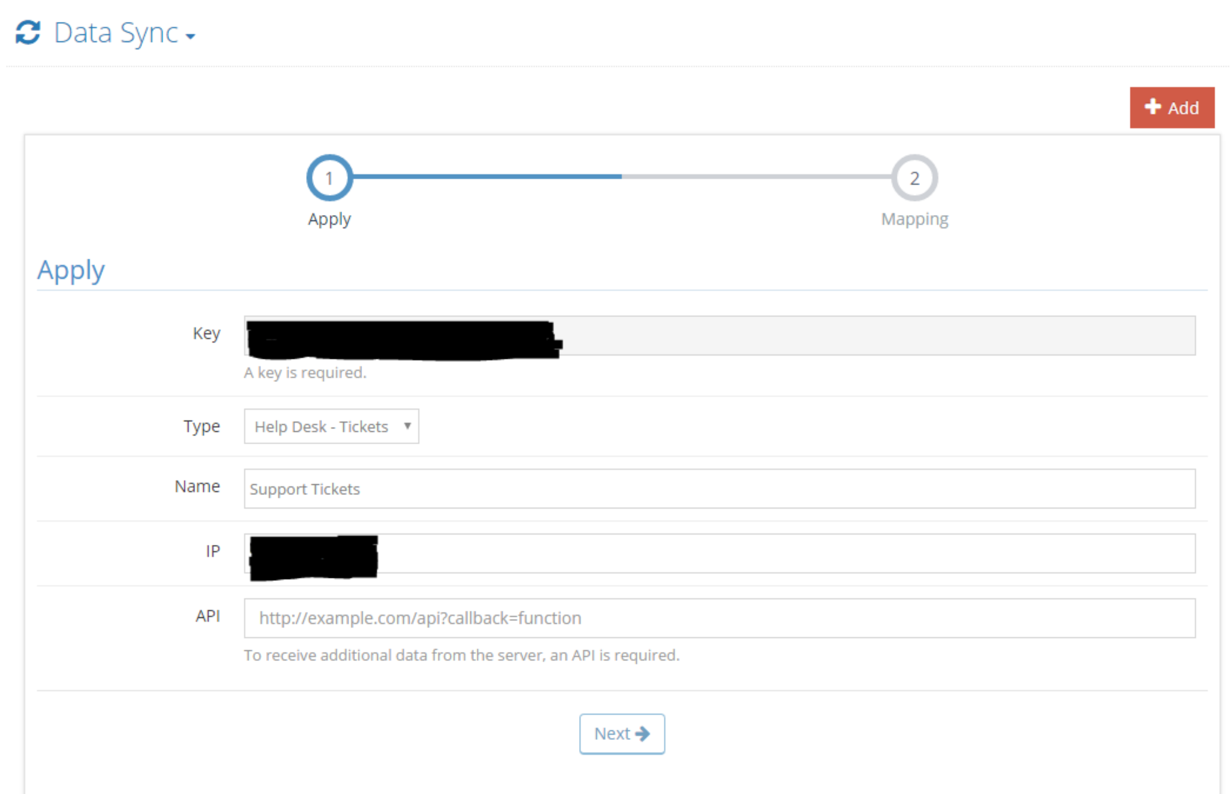
## Step 1: Setup Fields

To setup everything from Moffice CRM, you will need to start by creating a new sync source. From there, you will generate a key for the sync, then map fields for the items you need. Head to Customization > Data Sync and click the + Add button to get started.

## Step 2: Choose Details

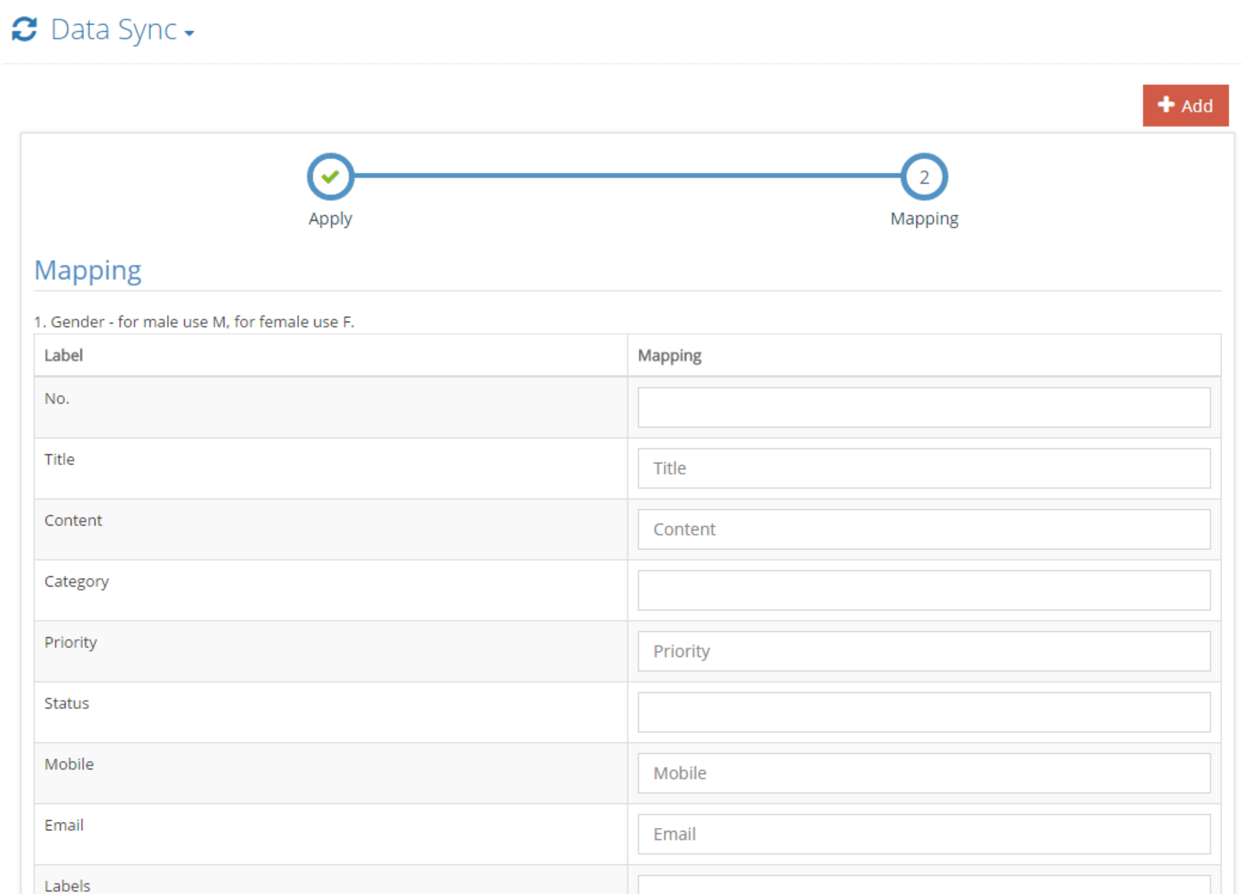
Start adding details for the data sync source. A key (used later in step 5) will be automatically generated. Then, you need to select the type of data sync source. Afterward, input a name for the source and the IP address of the Web form you'll be linking. Click "Next" to continue with the next step.

Remember, the only types of data sync sources currently available are to create new: Customers, Potentials, Leads, Help Desk Tickets, Products, and Product Groups.



## Step 3: Map Values

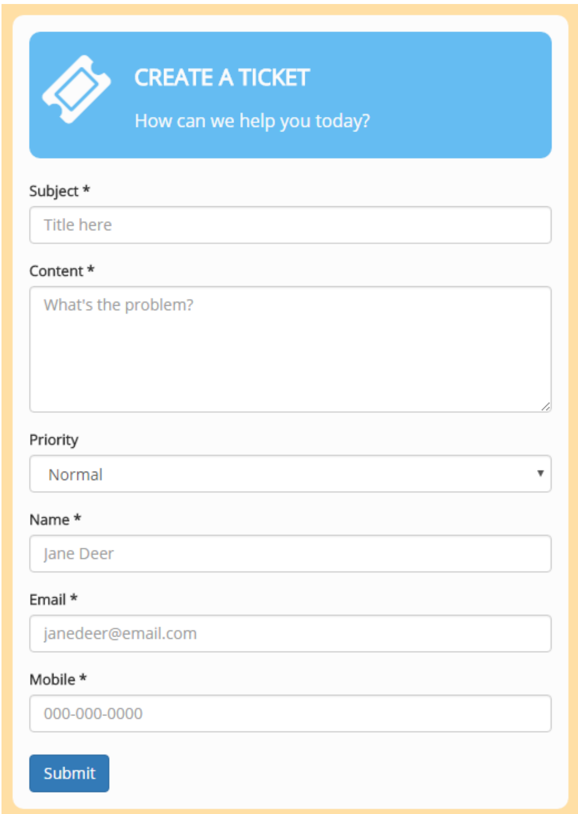
There are various fields available that you can add to the Ticket. To set up the fields, just pick and name the ones you'll be using. For example, to add Ticket Content, create a variable name for the mapping value of "Content". To utilize Ticket Category and Status, please contact MofficeSoft for assistance. Because their values differ from system to system (being customizable), MofficeSoft needs to help with their mapping / code values.



## Step 4: Post fields

For the second part of the data sync, we're going to set up a PHP file to send data from the Web form to Moffice CRM. First, create variables for each of the names of the form elements you're using in your Web form. In the form below, there is room for a Ticket title, Ticket content, Ticket priority, as well as the name, email, mobile, and IP address of the inquirer.

*Sample Web form:*




*Variables from the form:*

```
//==> Post Fields
$Title = $_POST['Title'];
$Content = $_POST['Content'];
$Priority = $_POST['Priority'];
$Name = $_POST['Name'];
$Email = $_POST['Email'];
$Mobile = $_POST['Mobile'];
$AccessIP = $_SERVER["REMOTE_ADDR"];
```

## Step 5: Add API

Next you'll add a code to link the data sync source with your PHP file. Remember the key you generated when creating the data sync source in Moffice CRM (step 2)? You'll be needing it here!

The API value you'll be entering will be "http://yourMofficeSuiteURL.com/ngw/customization/interwork/new/key/thekeyyougenerated"

```
//==> Enter API
$api = "http://[redacted].com/ngw/customization/interwork/new/key/[redacted]";
```

## Step 6: Create Data Arrays

Now, you'll be equating the mapping value names from Moffice CRM to the variables you posted previously in step 4 in a data array. Create an array and have the left side equal the names for the mapping values in Moffice CRM with the right being the names of the variables from your form. Everything here has the same name for added ease.

The only irregularity in our array is the Title. We don't want just the title; we would like to add the name of the inquirer in the Ticket. Linking Tickets to Customers is usually done through a pop-up chart in Moffice CRM, so there is no other field for "name" on a Ticket's details page.

Note also that the need to know the inquirer's IP address is very helpful, albeit unseen. By knowing the IP address, Moffice CRM can recognize a Customer who previously had their IP address recorded and automatically link the Ticket to the related Customer. This simplifies the Ticket creation further. If the IP address is not recognized, a new Ticket is created with the data entered as per usual.

```
//==> Enter Potential Information
$data = array(
        "Title"=>sprintf("[%s] %s", $Name, $Title),
        "Content"=>$Content,
        "Priority"=>$Priority,
        "AccessIP"=>$AccessIP,
            "Name"=>$Name,
            "Mobile"=>$Mobile,
            "Email"=>$Email
);
```

### Step 7: Input send function

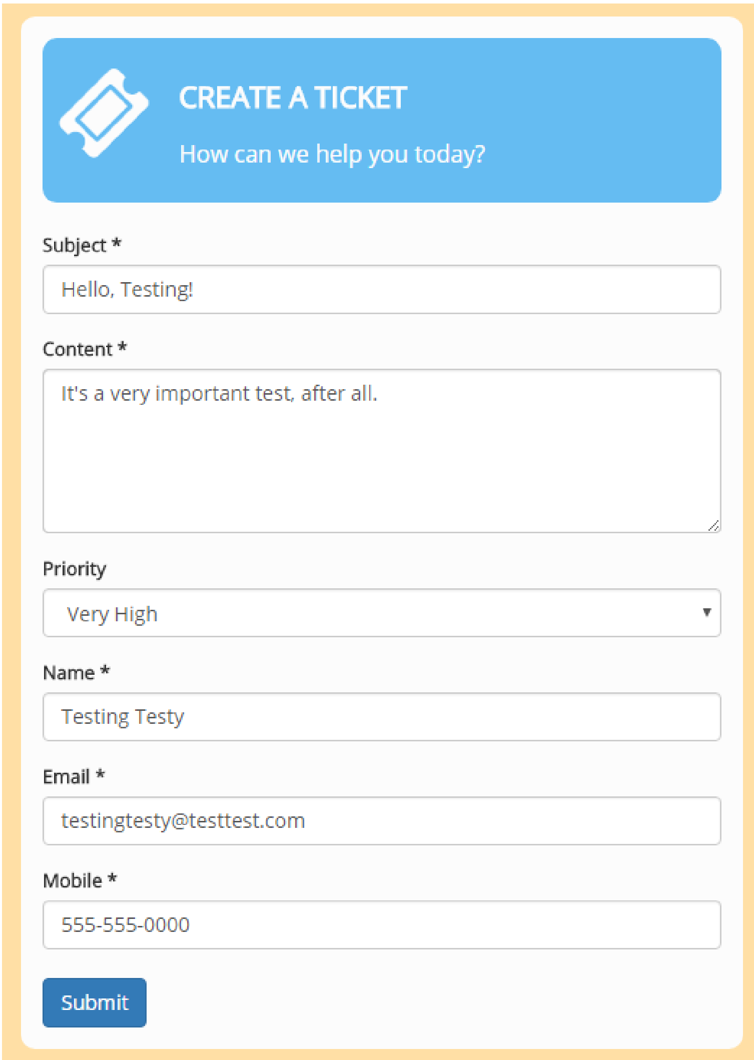
Finally, you'll send the data from your Web form to Moffice CRM through the function below.

```
//==> Send Data
function send_data_client($api,$data){
  $post['data'] = json_encode($data);
  $ch = curl_init($api);
  curl_setopt($ch, CURLOPT_POSTFIELDS, $post);
  curl_setopt($ch, CURLOPT_RETURNTRANSFER, 1);
  $postResult = curl_exec($ch);
  curl_close($ch);

  return $postResult;
}

$R  = send_data_client($api,$data);
```

## Step 8: Test Web form

Now, let's check to make sure everything works!

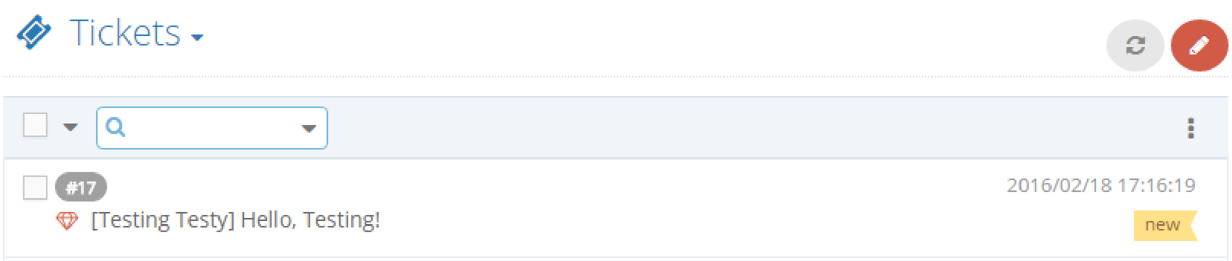
Submit the form after making some test data.



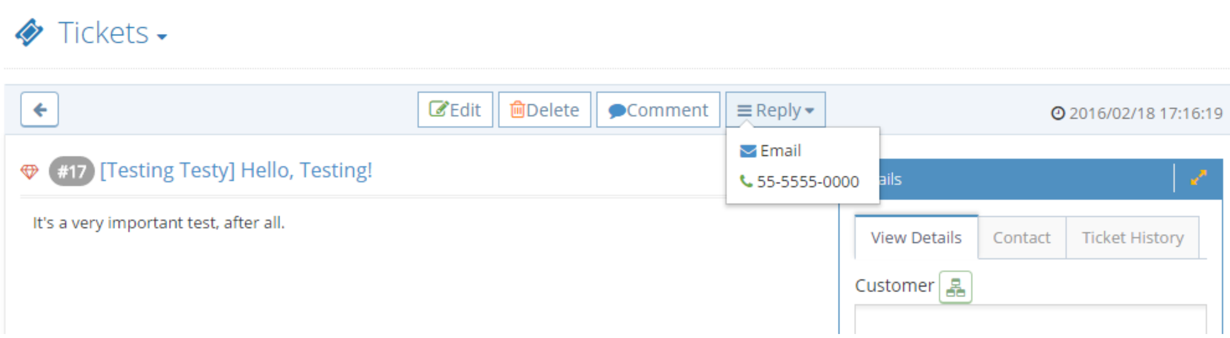
### Step 9: Confirm results

Finally, let's check how it looks from Moffice CRM.

Looking good so far. The Ticket is added with the name and priority intact.




Clicking the ticket, we can confirm that the inquirer's email and phone number were properly synced, as well as their Ticket content.




Through these steps, automating data addition to Moffice CRM is a simple convenience for everyone.