

Administrative Guide

*VtigerCRM Microsoft Exchange Connector
(Exchange Server 2010)*

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Introduction

Vtiger CRM has been one of the market leader in the open source CRM sector and with free plug-ins for Microsoft Office and Outlook it has helped its users to enhance their productivity and maintain higher customer satisfaction. Microsoft Outlook is one of the most widely used Email & Contact management tool. The vtiger Outlook plug-in lets you synchronize Contacts, Emails and Calendar events. The only draw back is that the plug-in has to be installed on each of the client machine.

This is where the advantage of Exchange Connector lies where in you need to install it on the Exchange Server only once and it will do an automatic synchronization of Contacts, Tasks, Appointments and Emails. It also gives you the ability to create Accounts/Contacts/Leads/Potentials from Emails directly.

Requirements

1. Exchange Server 2010
2. Power Shell 2.0
3. Microsoft .Net Framework 3.5 or greater
4. vtigerCRM 5.3.0

Installation

There are two components that needs to be installed, one on the vtiger Server and the other on the Exchange Server.

Exchange Server Component

We will be installing an Application on IIS which will act as a middle ware between vtigerCRM and Exchange Server. For installing this application you will have to provide :

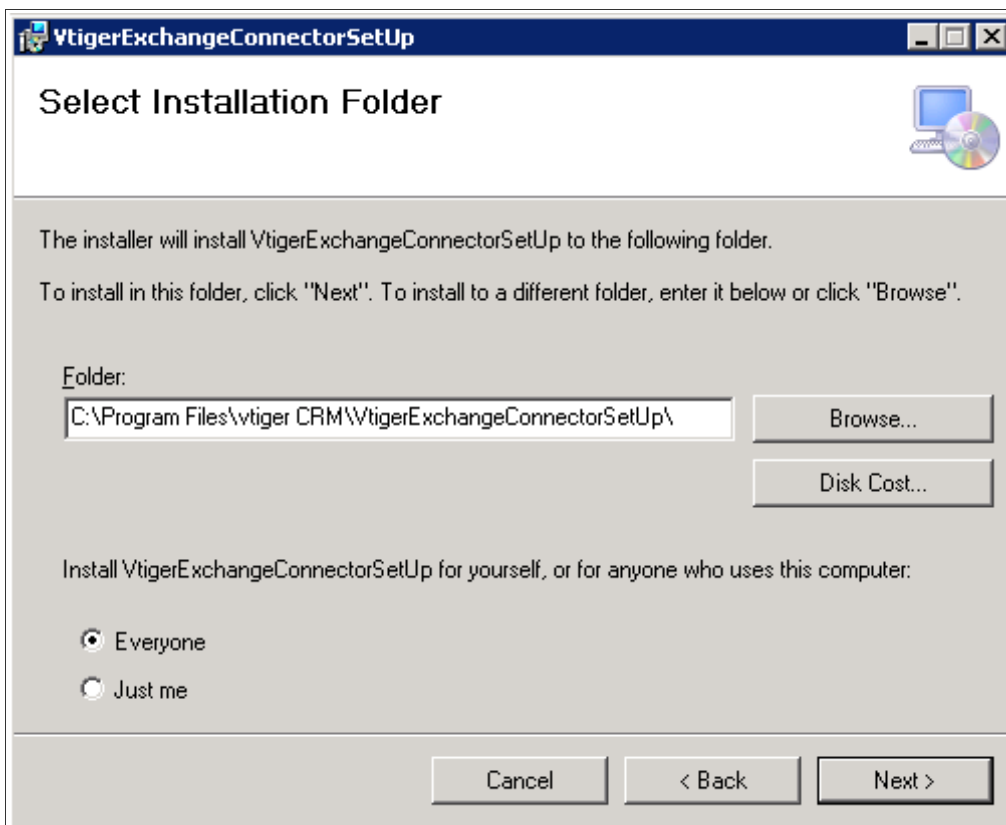
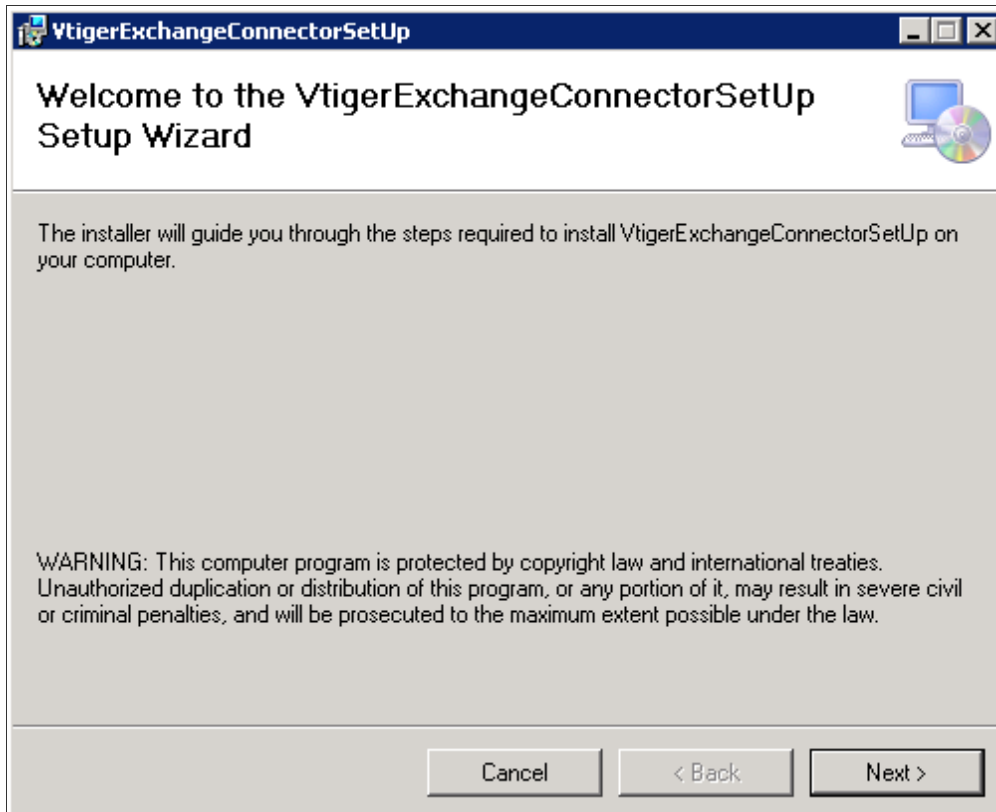
1. Administrator credentials which has the permissions to Read/Write/Access on the IIS server.
2. The Administrator should be assigned impersonation role, this can be done by running the following command on Powershell.

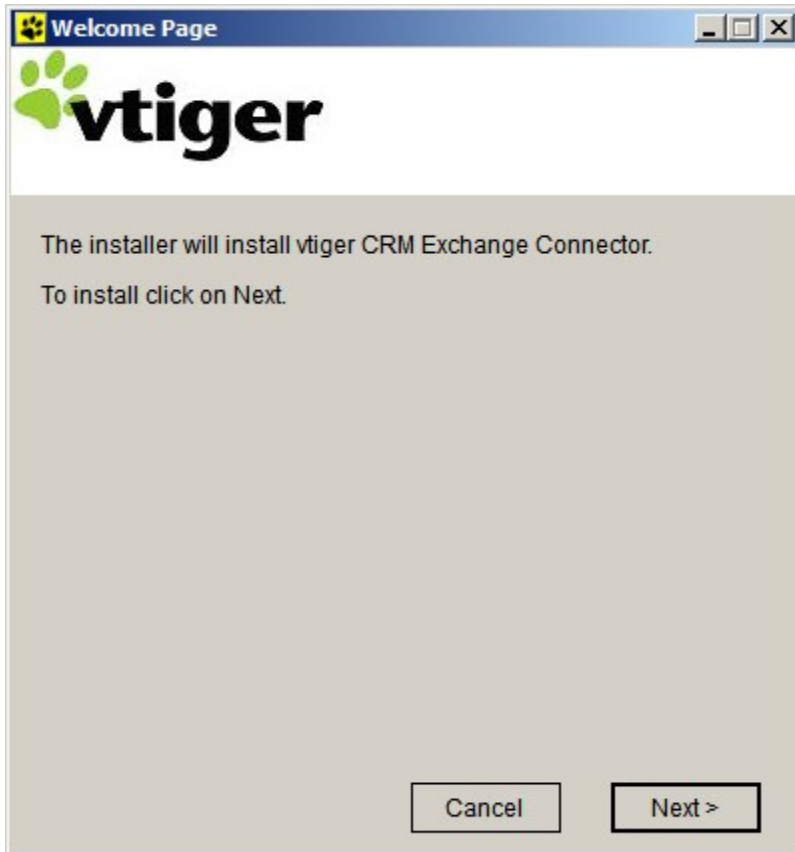
```
New-ManagementRoleAssignment -Name:"ROLENAME" -Role:ApplicationImpersonation  
-User:"USER_NAME"
```

Example:

```
New-ManagementRoleAssignment -Name:exchange_connector -Role:ApplicationImpersonation  
-User:Administrator
```

Click on the setup.exe





Accepting the License will enable the Next button.



Select a folder where the connector will be installed.




On this screen you will need to provide vtiger admin credentials and the vtiger server path.
For example, if you access your vtiger from the browser <http://demo.vtiger.com> , then give this in the vtiger CRM URL.

You can find “Access Key” inside vtigerCRM, for this after logging in go to “My Preferences” in the vtiger screen which is located at the top right side after the login page.

Note : Here you need to provide “admin” credentials from the vtigerCRM, as this is the user that cannot be deleted from the CRM.

vtiger CRM Details



* vtiger CRM URL
(example : <http://demo.vtiger.com>)

* Username
(vtiger CRM Admin Username)

* Access Key
(user's Access Key)

Next >

Here provide the Active Directory's administrator user credentials which has permission to add an application on IIS server as well as impersonation permission to other mail boxes. Also make sure the password is not changed as the connector will be depending on this to connection and other tasks.

Active Directory Admin Details



* Username
(Active Directory Admin Username)

* Password

Cancel Next >

This indicates the plugin has been installed with out any issues.



Vtiger Server Component

Unzip the vtigerCRM-exchange-connector.1.0.zip into the root folder of vtiger source and then run Customization/apply.php from your browser. For example if you open vtiger on the browser with URL <http://demo.vtiger.com> then you need to run <http://demo.vtiger.com/Customization/apply.php>. This will install a vtiger module named “Exchange Connector” which appears under Settings section.

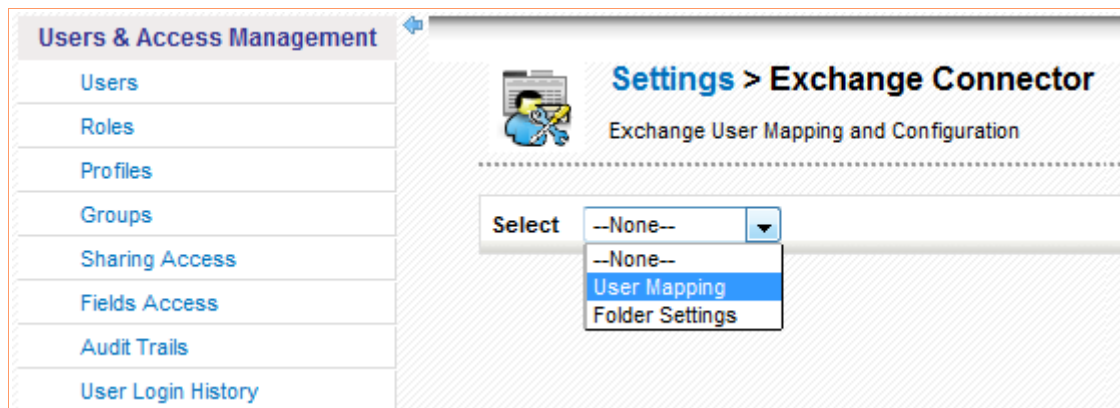
This module will be accessible only by the admin users.

The screenshot displays the Vtiger CRM interface. At the top, there is a navigation bar with tabs for Sales, Support, Analytics, Inventory, Tools, and SETTINGS. The SETTINGS tab is active, and a dropdown menu is open, showing 'Settings' and 'Module Manager'. Below the navigation bar, there is a toolbar with various icons. The main content area is titled 'Other Settings' and contains several configuration options, each with an icon and a brief description:

- Assign Module Owners**: Assign Customer Support owners to CRM module
- Currencies**: Manage international currencies and exchange rates
- Proxy Server**: Configure proxies to access RSS feeds through Internet
- Backup Server**: Specify database backup server details
- Inventory : Terms & Conditions**: Specify Terms and Conditions for quotes, orders, and invoices
- Customize Record Numbering**: Module Entity Number customization
- Configuration Editor**: Update configuration file of the application
- Customer Portal**: Allows you to Configure Customer Portal Plugin

Below the 'Other Settings' section, there is an 'Integration' section. A red box highlights the 'Exchange Connector' module, which is described as 'Exchange User Mapping & Configuration'.

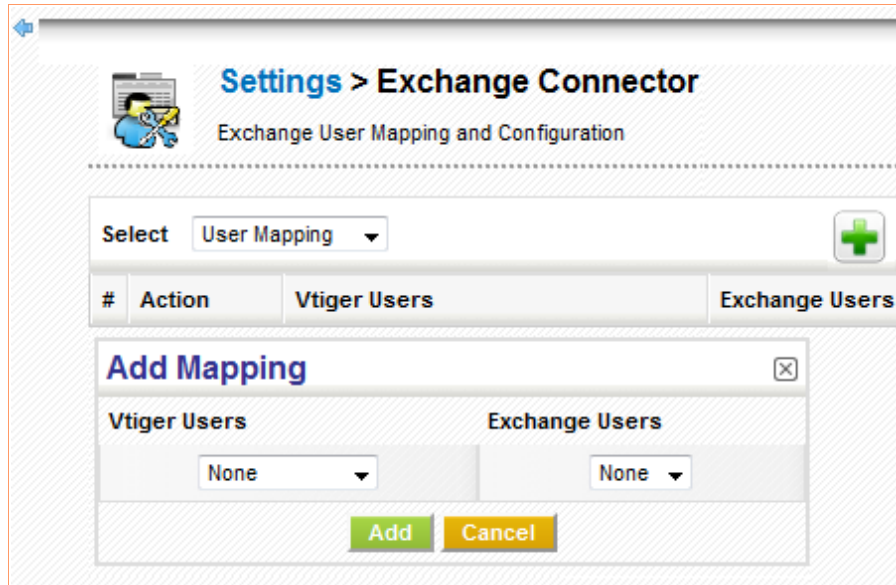
Select the Exchange Connector to view/configure the list of users.



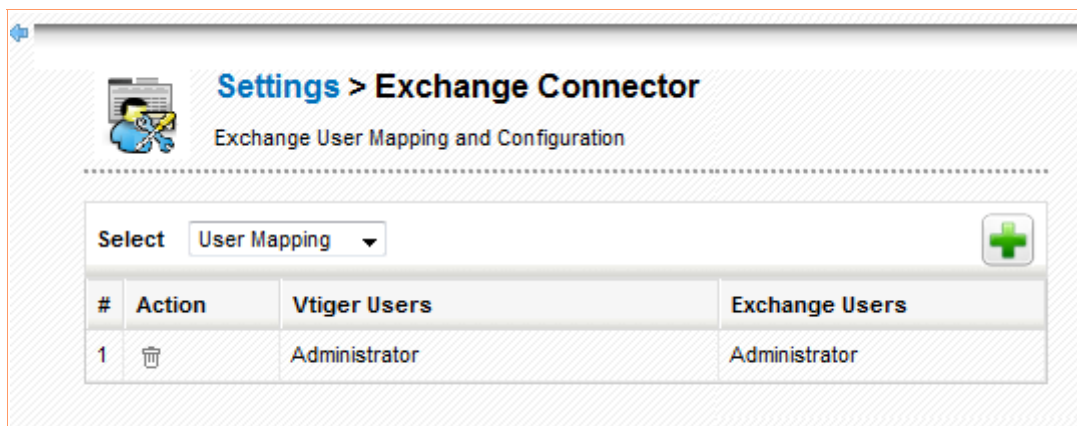
Add Mapping

Click on the plus button to get a popup which will let you add a mapping between vtiger and exchange user.


Under Vtiger Users you will see all the unmapped vtiger users and under Exchange Users you will see all the unmapped Exchange Users, the Exchange Users will only be shown once the Exchange Connector is installed on the Exchange Server.



The screenshot shows the 'Settings > Exchange Connector' page with the 'Exchange User Mapping and Configuration' section. A 'User Mapping' dropdown menu is visible, and a green plus button is located to its right. Below this, a table with columns '#', 'Action', 'Vtiger Users', and 'Exchange Users' is partially visible. An 'Add Mapping' popup window is open, featuring two dropdown menus labeled 'Vtiger Users' and 'Exchange Users', both currently set to 'None'. At the bottom of the popup are 'Add' and 'Cancel' buttons.



The screenshot shows the 'Settings > Exchange Connector' page with the 'Exchange User Mapping and Configuration' section. A 'User Mapping' dropdown menu is visible, and a green plus button is located to its right. Below this, a table with columns '#', 'Action', 'Vtiger Users', and 'Exchange Users' is shown. The table contains one entry with the number '1' in the first column, a trash icon in the second column, and 'Administrator' in both the 'Vtiger Users' and 'Exchange Users' columns.

#	Action	Vtiger Users	Exchange Users
1		Administrator	Administrator

Known Issues

- Don't let the user rename/delete or change the permission of the folder that were created by vtiger CRM Exchange connector as this may stop the synchronization.