

# User Manual

*Vtiger CRM Microsoft Exchange Connector  
(Exchange Server 2010)*

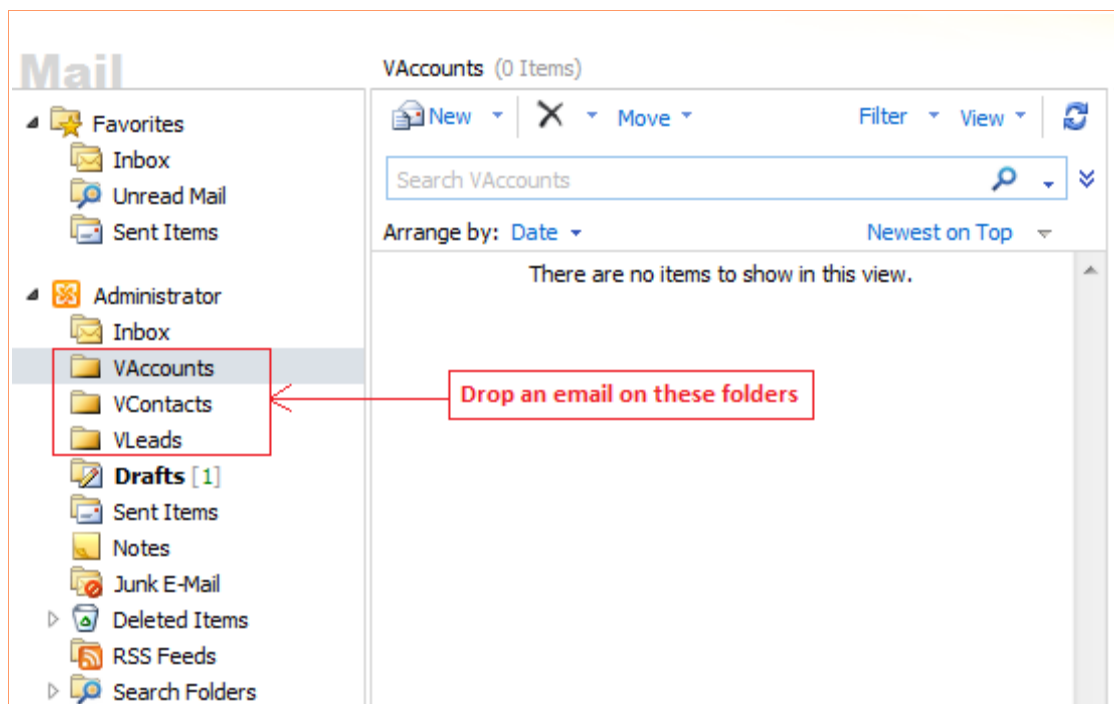
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## Email Operations

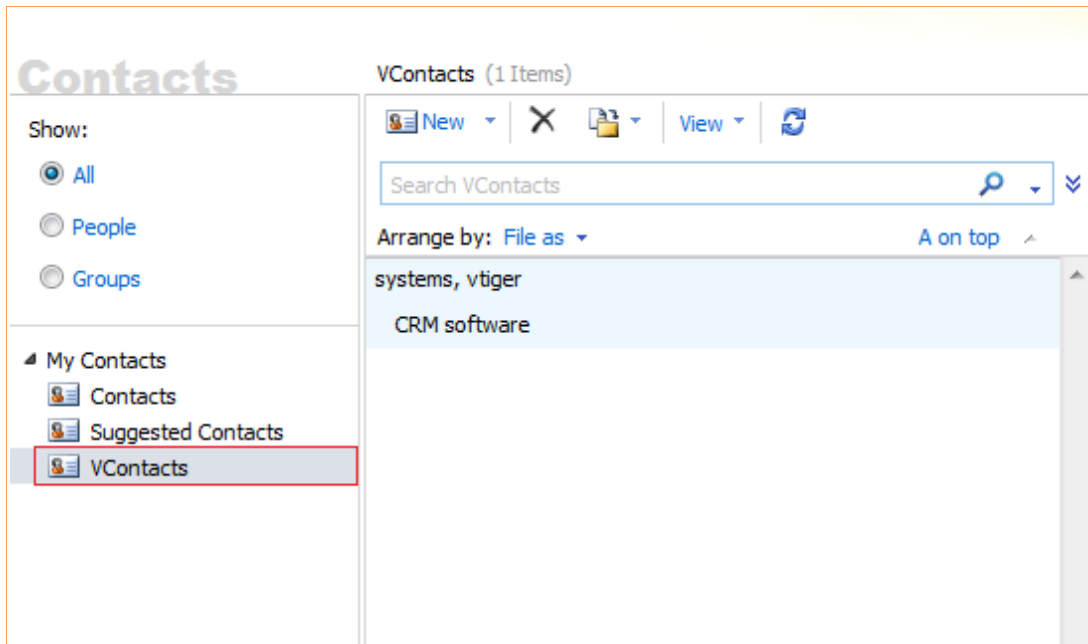
The connector creates three Mail folders with the names as VAccounts, VContacts and VLeads names. These folders are responsible for attaching the emails to the CRM. When an email is dropped onto any of these folders the CRM tries to identify the sender and if found it will attach the mail to it, otherwise it will create a record and then relate the mail to it.

Consider an example where an email is dropped on the “VLeads” folder. The sender of the mail will be searched in the CRM and if not found it will create a *Lead* and associate the email to it. Likewise the mails that are dropped on “VAccounts” and “VContacts” will create *Account* and *Contact* CRM record respectively.



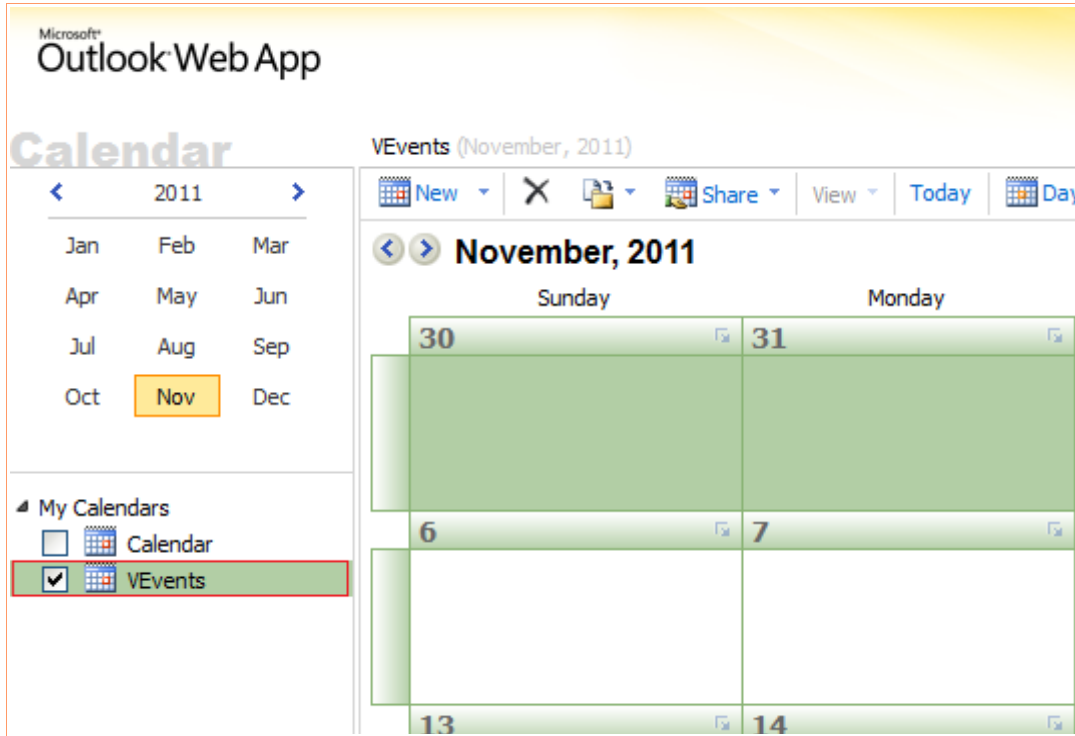
## Contact Operations

Any *Contact* that is created, edited, deleted in “VContacts” folder will be pushed to vtiger CRM. This folder is created by the connector and will be used for synchronizing *Contacts* from the CRM. All the *Contacts* that are assigned to the user in the CRM will be available in this folder so that one can update his *Contacts* details which will be immediately changed in the CRM. This folder supports two-way synchronization.



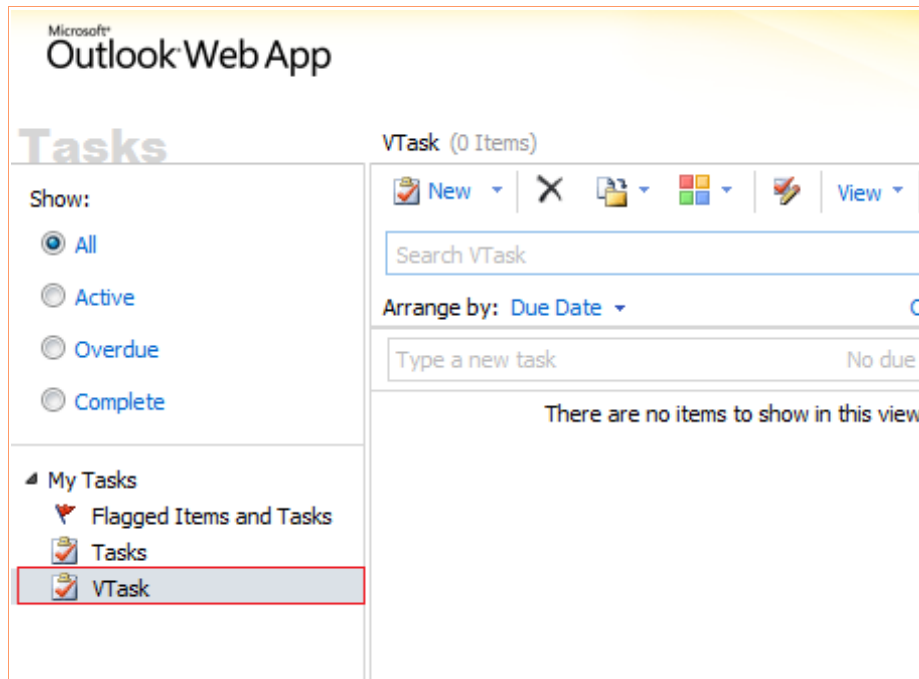
# Calendar Operations

All the events with type “Call”, “Meeting” or any other custom event type other than “Todo” in CRM will be created under “VEvents” folder. Whenever any changes are made to them from Outlook it will immediately be changed in the CRM. This folder supports two-way synchronization.



## Task Operations

Like *Contacts* and *Calendar* events even the *Task* will be synchronized with “VTask“ folder. All the *Tasks*(called *Todo* in CRM) related to the user will be shown here and the *Task* created in this folder will be reflected in the CRM. This folder supports two-way synchronization.



**Note :** Any changes made in Outlook will be immediately transferred to the CRM, but the changes made in the CRM will need a minimum of 10 minutes before it can be shown in Outlook.

## Limitation

1. If you change the 'Assigned To' of a existing synced Contact/Event/Task in CRM, then it will not be removed from the exchange.
2. ModTracker module should be installed and enabled for two-way synchronization. With this you also need to enable Contacts, Calendar and Events module in the settings page of ModTracker.
3. Importing bulk Contacts from CSV will not be recorded in ModTracker thereby not tracked by Exchange Connector and those records will not be sent for synchronization. These records will only be sent to exchange when they are updated in vtiger. ical importing of Events also will not tracked
4. Reference field like Account Name and Manager will not be created when a Contact is created nor it will link if they already exist.
5. If existing fields or custom fields are made manadatory for Contacts, Calendar Task and Events then their values will have ????.
6. Custom Event Type in the CRM will be sent from vtigerCRM and when updated in Exchange will change the Type to Meeting.
7. Emails with Attachments that are dropped on VAccounts/VContacts/VLeads folder will not respect Attachments, they will not be added in CRM.