

# User Manual

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

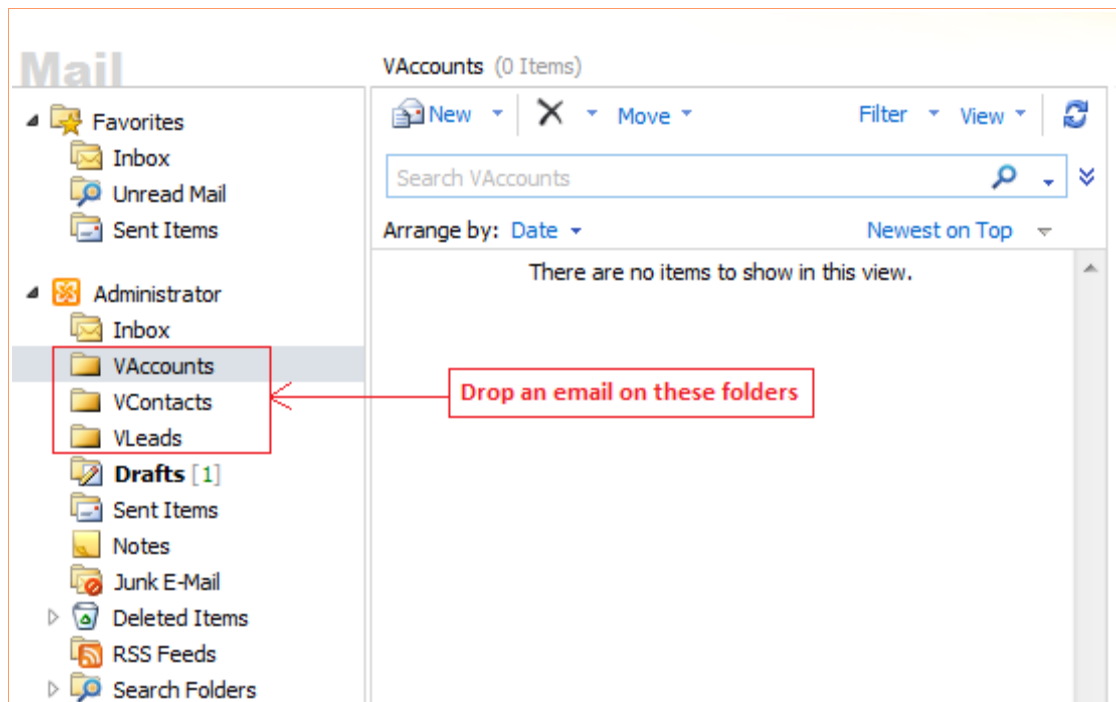
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# Email Operations

The connector creates 3 Mail folders with VAccounts, VContacts and VLeads names. These folders are responsible for attaching mails to CRM. When an email is dropped onto 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 will relate the mail to it.

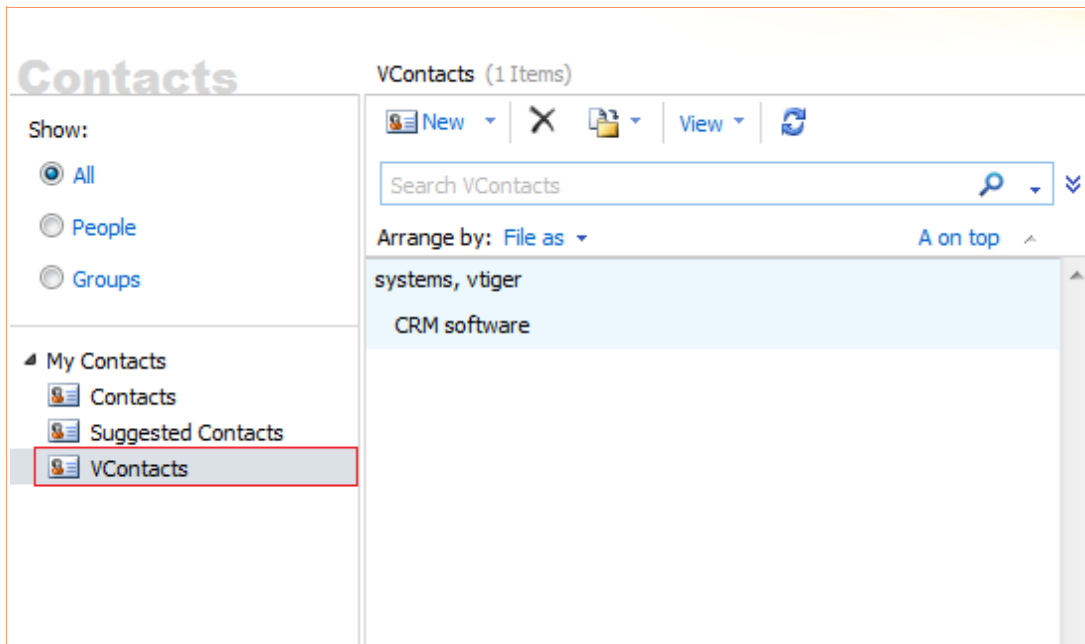
Consider an example where an email is dropped on “VLeads” folders, the sender of the mail will be searched in the CRM and if not found it will create an Lead and associate the mail to it. Likewise the mails that are dropped on “VAccounts” and “VContacts” will create Account and Contact CRM records respectively.



# Contact Operations

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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

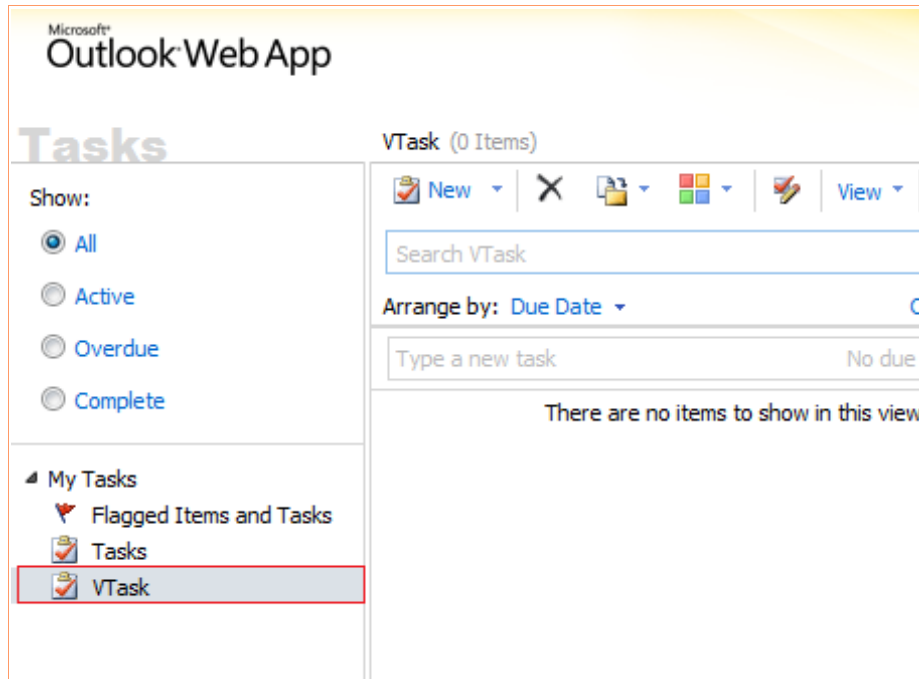
All the events with type “Call”, “Meeting” or any other custom event type other than “Todo” in CRM will be created under “VEvents” folder, whenever any changes are made on them from Outlook it will be immediately changed in the CRM. This folder supports two-way synchronization.

The screenshot displays the Microsoft Outlook Web App interface. At the top, it says "Microsoft Outlook Web App". Below that, the word "Calendar" is prominently displayed. On the left side, there is a navigation pane with a "My Calendars" section. Under this section, two calendar options are listed: "Calendar" (with an unchecked checkbox) and "VEvents" (with a checked checkbox and a red border around the row). Above the "VEvents" list, there is a month navigation grid for 2011, with "Nov" highlighted in orange. To the right of the "My Calendars" list, the main calendar area is titled "VEvents (November, 2011)". This area includes a toolbar with icons for "New", "Delete", "Share", "View", "Today", and "Day". Below the toolbar, the calendar is shown in a grid view for November 2011, with "Sunday" and "Monday" as column headers. The dates 30, 31, 6, 7, 13, and 14 are visible in the grid cells.

# Task Operations

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Like Contacts and Calendar events even the Task will be synchronized with “Vtask“ folder. All the Task(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 at the Outlook side will be immediately transferred to the CRM, but transferring the changes from CRM to Outlook will depend on the frequency set by your administrator.