



# vtiger CRM Toolbar 4.2 User Manual

(Revision 1.0)

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## 1. Installation Procedure

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- System Requirements
- Installation Prerequisites
- Installing vtiger Toolbar
- Uninstalling vtiger Toolbar

### System Requirements

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- **Hardware:** x486 with 256MB RAM or higher with a minimum of 4 MB disk space.
- **Operating Systems:** Linux or Windows version 2000/NT/XP/2003.
- **Software:** Firefox Web Browser version 1.0 and higher.

### Installation Prerequisites

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- You can use vtiger Toolbar only with **vtiger CRM 4.2**. It is incompatible with earlier versions of vtiger CRM.
- You must have administrator privileges on the system.
- You must have valid login details to connect the vtiger CRM server from Firefox.

### Installing vtiger Toolbar

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Before installing vtiger Toolbar in Firefox Web browser, first update your vtiger CRM 4.2 server with the following file:

[http://www.vtiger.com/products/crm/48432975/vtiger\\_FxToolbar\\_server.zip](http://www.vtiger.com/products/crm/48432975/vtiger_FxToolbar_server.zip)

Download the **vtiger\_FxToolbar\_server.zip** file into *<vtiger CRM Home>* directory. Please also take a backup of the **contactserialize.php** file present under *<vtiger CRM Home>* directory if you made any changes.

#### To install vtiger Toolbar in Firefox

1. Download the vtiger Toolbar from:  
[http://www.vtiger.com/products/crm/48432975/vtiger\\_FxToolbar\\_1\\_0.xpi](http://www.vtiger.com/products/crm/48432975/vtiger_FxToolbar_1_0.xpi)
2. In the *Firefox*, select the **Tools → Extensions** menu.
3. In the *Extensions* dialog, click the **Install** button.
4. In the *Select an extension to install* dialog, browse the **vtiger\_Toolbar\_4\_2.xpi** file and click the **Open** button.
5. In *Software Installation* dialog, click the **Install Now** button.

**Note:** Ignore the message "*vtiger Toolbar ... **Unsigned***" displayed in the *Software Installation* dialog.

6. Close the Firefox and open it again to work with vtiger CRM-specific functions.

## Uninstalling vtiger Toolbar

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You can uninstall the vtiger Toolbar in Firefox using the Extension Manager.

### To uninstall vtiger Toolbar in Firefox

1. In the *Firefox*, select the **Tools → Extensions** menu.
2. In the *Extensions* dialog select the vtiger Toolbar and click the **Uninstall** button.
3. Close the Firefox and open again so that all the vtiger Firefox-specific functions are removed.

## 2. Working with vtiger Toolbar

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The vtiger Toolbar is an easy to use toolbar that can be used to create leads, contacts, accounts, and tickets from Firefox Web browser without logging into vtiger CRM user interface. Using the vtiger Toolbar, you can perform the following operations in Firefox Web Browser:

- Create Leads
- Create Accounts
- Create Contacts
- Create Tickets


### Configuring vtiger CRM Login Details

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Before adding leads, contacts, accounts, or tickets from Firefox to vtiger CRM, provide the vtiger CRM login details in Firefox.

#### To configure vtiger CRM login details

1. Start the Firefox Web Browser.
2. Select the **vtiger CRM → Login to vtiger CRM** menu.
3. In the *vtiger CRM Configuration* dialog, enter the following user settings:
  - **User Name:** Enter the user name to log in to the vtiger CRM.
  - **Password:** Enter the password for the user name.
  - **Host Name:** Enter the vtiger CRM server name, where it is running.



The image shows a screenshot of the 'vtigerCRM UserLogin' dialog box. The dialog has a blue title bar with the text 'vtigerCRM UserLogin' and a close button. The main area is light beige and contains three input fields: 'Username' with 'admin', 'Password' with '\*\*\*\*\*', and 'vtiger URL' with 'http://localhost'. Below the URL field is a smaller text box containing '(e.g., http://www.vtiger.com/products/crm/demo)'. At the bottom right are 'Save' and 'Cancel' buttons.

4. Click the **Save** button to apply the changes.

### How to connect to the vtiger CRM Demo?

Before adding leads, accounts, contacts, or tickets to **vtiger CRM Demo** running at <http://www.vtigercrm.com/demo/> , provide the vtiger CRM demo login details in Firefox Web Browser.

### To add the vtiger CRM Demo login details in Firefox Web Browser

1. Start the Firefox Web Browser.
2. Select the **Tools** → **vtiger CRM Configuration** menu.
3. In the *vtiger CRM Configuration* dialog, enter the following user settings:
  - **User Name:** Enter the user name as "admin".
  - **Password:** Enter the password for the user name as "admin".
  - **Host Name:** Enter the vtiger CRM server as "[www.vtigercrm.com/demo/](http://www.vtigercrm.com/demo/)".
4. Click the **Save** button to apply the changes.

## Creating Leads, Contacts, Accounts, and Tickets

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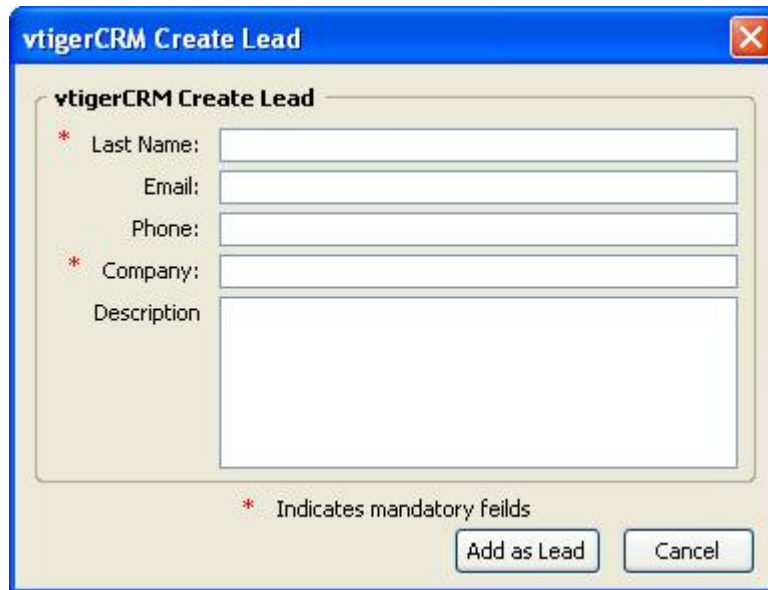
You can add Leads, Contacts, Accounts, and Tickets from Firefox Web browser to vtiger CRM instantly.



### To create lead from Firefox Web browser

1. In vtiger CRM toolbar click the **Create Lead** button.

2. In the *Create Lead* dialog specify the lead details.



The image shows a screenshot of the 'vtigerCRM Create Lead' dialog box. The dialog has a blue title bar with the text 'vtigerCRM Create Lead' and a close button (X) in the top right corner. The main content area is light beige and contains the following fields:

- \* Last Name: [Text Input Field]
- Email: [Text Input Field]
- Phone: [Text Input Field]
- \* Company: [Text Input Field]
- Description: [Large Text Area]

At the bottom of the dialog, there is a legend: '\* Indicates mandatory feilds' (note the typo 'feilds'). Below the legend are two buttons: 'Add as Lead' and 'Cancel'.

3. After specifying the lead details click the **Save** button to save the lead details in vtiger CRM server.

### 3. Customer Support

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Please post your comments, feature requests, and issues in **vtiger CRM Discussions** (<http://forums.vtiger.com/>) so that we can provide support for you.