



vtiger Office Plug-in 4.2

User Manual

(Revision: 2.0)

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1. Installation Procedure

- System Requirements
- Installation Prerequisites
- Installing vtiger Office Plug-in
- Uninstalling vtiger Office Plug-in

System Requirements

- **Hardware:** x486 with 256 MB RAM or higher with a minimum of 100 MB disk space.
- **Operating System:** Windows 2000/XP/2003.
- **Software:** Microsoft Word 2000/2003 (English or German) and Internet Explorer 5.5 and above.

Installation Prerequisites

- You must have administrator or power user privileges on the system.
- You must have valid login details to connect vtiger CRM as you have to connect from Microsoft Word to vtiger CRM.
- You must stop Microsoft Word before installing the vtiger Office Plug-in.

Installing vtiger Office Plug-in

1. Download the vtiger Office Plug-in from http://prdownloads.sourceforge.net/vtigercrm/vtiger_Office_Plugin_4_2.exe
2. Double-click the **vtiger_Office_Plugin_4_2.exe** from the directory where you have downloaded the file.
3. In the *vtiger CRM Office Plug-in Setup* dialog, click the **Next** button to start the installation process.
4. In the *License Agreement* dialog box, read the license agreement and click the **I Agree** button if you accept the license agreement.

5. In the *Language Selection* dialog box, select the language and click the **Next** button.
Note: You can select English, Dutch, or German language.
6. In the *Choose Destination Location* dialog, browse the directory in which you want to install vtiger Office Plug-in and click the **Next** button.
7. In the *Start Copying Files* dialog, click the **Next** button to start installation. The vtiger Office Plug-in installation will take a few seconds.
8. In the *vtiger Office Plug-in Setup* dialog box, click the **Finish** button to complete the installation.

Uninstalling vtiger Office Plug-in

1. Stop the Microsoft Word if it is running.
2. Select **Start →Settings →Control Panel**.
3. In the *Control Panel*, click the **Add or Remove Programs** icon.
4. In the *Add/Remove Programs* dialog, select the **vtiger Office Plug-in** and click the **Remove** link. It will take a few seconds to remove the vtiger Office Plug-in.

2. Working with vtiger Office Plug-in

You can use vtiger Office Plug-in to create mail merge templates for creating on-the-fly Microsoft Word templates, such as form letters/emails, envelops, catalogs, mailing labels, and others using leads, accounts, and contacts database fields in vtiger CRM. After creating a mail merge template based on customer specific data fields in vtiger CRM, you have to upload the same into vtiger CRM through vtiger CRM Browser interface.

You can perform the following operations in Microsoft Word using vtiger Office Plug-in:

- Configure vtiger CRM Server
- Log in and out vtiger CRM
- Insert vtiger CRM-specific database fields into mail merge document

Configuring vtiger CRM Server

First you have to establish a connection in between Microsoft Word and vtiger CRM to display the database fields related to Leads, Contacts, and Accounts in Microsoft Word.

To configure vtiger CRM server

1. Start the Microsoft Word.
2. In the *Microsoft Word*, click the **vtiger CRM → Configuration** menu.
3. In the *vtiger CRM - Configuration* dialog under *vtiger CRM Configuration* section, enter the following vtiger CRM server details:
 - **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.
4. In the *vtiger CRM - Configuration* dialog under *vtiger Configure Proxy to access vtiger via Internet* section, enter one of the following details:
 - Select the **Direct connection to the Internet** option if you are connecting the vtiger CRM directly

- Select the Manual proxy configuration option if you connect the vtiger CRM through proxy. Enter the following details:
 - **Address:** Type the name or numeric IP address of the proxy server.
 - **Port:** Type the port number.
 - **Proxy User Name:** Enter the user name to access the Internet.
 - **Password:** Enter the password for the user name.

vtiger CRM - Configuration

Please enter the following details to access your secure vtiger CRM

vtiger CRM Configuration

vtiger User Name: admin

vtiger Password: *****

vtiger URL: http://vtigercrm.com/demo/
(E.g.,http://localhost/)

Configure Proxy to access vtiger CRM via Internet

Direct connection to the Internet
 Manual Proxy Configuration

Address: Port:

Proxy User Name:

Proxy Password:

OK Cancel

Logging in and out vtiger CRM

You must have authenticated login details to log in from Microsoft Word to vtiger CRM.

To log in and out vtiger CRM

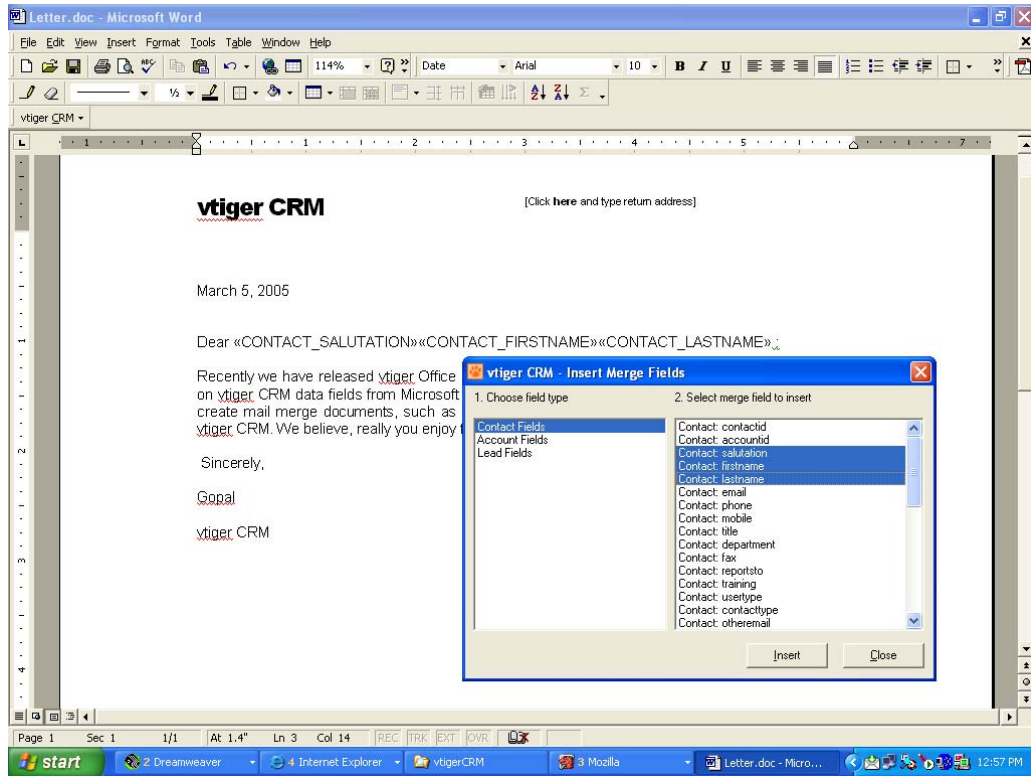
- Click the **vtiger CRM → Sign In** menu to log in to the vtiger CRM.
- Click the **vtiger CRM → Sign Out** to log out from the vtiger CRM.

Inserting Data Fields in Document

You can create mail merge templates using the vtiger CRM database fields for leads, contacts, and accounts, so that you can create on-the-fly documents from vtiger CRM. Once documents are created, you can store the documents either locally or remotely. You can create printer friendly documents in bulk from vtiger online.

To insert database fields in document

1. Start the *Microsoft Word* from **Start → Program Files → Microsoft Word**.
2. In the *Microsoft Word* window, create a New Document from **File → New** menu.
3. In the *New* dialog box, select either a **Blank Document** or one of the templates from other tabs.
4. In the *New* dialog box, select the **Document** option and click **OK**.
5. In the MS Office main window, click the **vtiger CRM → Insert Merge Field** menu.
6. In the *vtiger CRM - Insert Merge Fields* dialog, follow the procedure given below:
 - i. Point the cursor at the required place in document.
 - ii. In the *Chose Field Type* section, select one of the field types (Contacts, Accounts, Leads, or Tickets).
 - iii. Choose the field to be inserted from the **Select merge field to insert** section. You can select multiple fields by clicking the fields to be inserted.
 - iv. Once you have selected the fields, click the **Insert** button. Your selected fields are inserted at the cursor point. Follow the same procedure till you have completed the mail merge template.
7. Once you have completed typing Mail Merge document, save the file with *.doc extension, i.e., Microsoft Word document format.



3. Managing Mail Merge Documents

After creating mail merge templates in Microsoft® Word® by inserting the vtiger CRM specific database fields, and then store the mail merge template in vtiger CRM server. After that, users can start using these templates and create Microsoft® Word® documents merging the customer-related data, such as leads, accounts, and contacts. Once the documents are created, you can either store it locally in your machine or make it available in vtiger CRM documents storage system for public use. Also you can send these documents to your customers.

You have to complete the following operations to create mail merge Microsoft® Word® documents:

- Store mail merge templates in vtiger CRM.
- Create Mail merge documents from vtiger CRM.

Storing Mail Merge Templates

After creating mail merge template in Microsoft® Word®, store it in vtiger CRM for users to merge their customer data with the template and create documents.

To store mail merge templates

1. Log in to vtiger CRM with valid administrator login details. Please skip this section if you are not vtiger CRM System Administrator. Refer to [Creating Mail Merge Documents](#) section.
2. Click the [Settings](#) hyperlink.
3. In the *Settings: Home* page, under **Word Templates** section, click the [Mail Merge Templates](#) hyperlink.
4. In the *Mail Merge Templates* page, click the **New Template** button.
5. In the *Attach Mail Merge Template* page, add the mail merge template as given below:
 - Module: Select the Leads, Accounts, or Contacts from drop-down list.
 - File Name: Browse the mail merge template created using vtiger Office Plug-in.
 - Description: Specify any additional comments.
6. Click the **Upload File** button.

Creating Mail Merge Documents

You can create Word documents merging the vtiger CRM data with the required Leads, Accounts, and Contacts.

You must have Microsoft Internet Explorer version 5.5 or higher and Microsoft® Word® 2000/2003 in your machine to view the mail merge documents. Other wise you cannot be able to view the generated documents.

While creating mail merge document, first time the Security Warning message is displayed in your Internet Explorer because **vtigerCRM.cab** file will be downloaded from your vtiger CRM server.



Click the **Yes** button to download the **vtigerCRM.cab** file. Otherwise you will not be able to create mail merge documents.

To create mail merge documents

1. Log in to vtiger CRM with valid login details.
2. Select the required lead, contact, or account from the corresponding **Leads**, **Accounts**, or **Contacts**, module respectively.
3. In the *Lead*, *Account*, or *Contact* page, select the mail merge template from the **Select Template to Mail Merge** drop-down list.
4. Click the **Merge** button to display the mail merge document in Microsoft Word.

5. Now you can save locally or print the document.

4. Troubleshooting Tips

Error message while creating mail merge document: *This feature requires IE 5.5 or higher for Windows on Microsoft Windows 2000, Windows NT4 SP6, Windows XP.*
Click here to return to the previous page

The above error message will be displayed, if you are using vtiger CRM in Web browser other than Microsoft IE 5.5 or above.

5. Known Issues

- User with any login details can gain access from the Microsoft Word to the vtiger CRM. Authentication feature is not implemented in vtiger Office Plug-in 4.2. Hence vtiger CRM users are advised not to expose their vtiger CRM system to Internet.
- Error message during installation: *First call to RegDBCreateKeyEX Failed.* Kindly ignore this error message.
- You cannot use vtiger Office Plug-in with Web browsers other than Microsoft Internet Explorer.
- Error message while creating mail merge document: *vtiger CRM cannot download template document.*

The above error message will be displayed, if the value for "\$site_URL" in the **config.php** file present under <vtiger CRM Home> is not configured properly. Provide the exact Web server port number at which vtiger CRM is running.

6. Customer Support

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