



vtiger Outlook Plug-in 4.2 User Manual

(Revision 4.2)

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1. Installation Procedure

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

System Requirements

- **Hardware:** x486 with 256MB RAM or higher with a minimum of 10 MB disk space
- **Operating Systems:** Windows 2000/XP
- **Software:** Microsoft Outlook 2000/2003 and Internet Explorer 6

Installation Prerequisites

- You must have administrator privileges on the system.
- Microsoft Outlook user details are registered with vtiger CRM server, i.e., you must have valid login details to connect vtiger CRM server.
- Microsoft Outlook must be stopped before installing the vtiger Outlook Plug-in.

Installing vtiger Outlook Plug-in

1. Download the vtiger Outlook Plug-in from http://prdownloads.sourceforge.net/vtigercrm/vtiger_Outlook_Plugin_4_2.exe?download
2. Double-click the **vtiger_Outlook_Plugin_4_2.exe** from the directory where you have downloaded the file.
3. In the *License Agreement* dialog, read the license agreement and click the **Yes** button if you accept the license agreement.

4. In the *Directory Choose Destination Location* dialog, browse the directory in which you want to install vtiger Outlook Plug-in and click the **Next** button.
5. In the *Start Copying Files* dialog, review the installation details and click the **Next** button. vtiger Outlook Plug-in installation will take a few minutes.
6. In the *InstallShield Wizard Complete* dialog, select one of the following options and click the **Finish** button to complete the installation:
 - **Yes I want to restart my computer now** - To restart the computer immediately.
 - **No, I will restart my computer** - To restart the computer later.

Uninstalling vtiger Outlook Plug-in

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

Note: Ignore the error messages displayed (if any) during un-installation.

2. Working with vtiger Outlook Plug-in

The vtiger Outlook Plug-in is productivity-enhancement software that can be used with vtiger CRM. Using the vtiger Outlook plug-in, you can perform the following operations in Microsoft^(R) Outlook^(R):

- Edit the E-mail message before adding to vtiger CRM (if required)
- Add customers-related E-mails from Microsoft^(R) Outlook^(R) to vtiger CRM
- Synchronize the Microsoft^(R) Outlook^(R) contacts with vtiger CRM
- Synchronize the Microsoft^(R) Outlook^(R) tasks with vtiger CRM
- Synchronize the Microsoft^(R) Outlook^(R) calendar with vtiger CRM
- Resolve the conflicts (if any) while synchronizing the contacts, tasks, and calendar

Note: Currently vtiger Outlook Plug-in supports **Microsoft^(R) Outlook^(R) 2000, 2002, and 2003** only.

Configuring vtiger CRM Server

Before adding or synchronizing Microsoft^(R) Outlook^(R) E-mails and contacts to vtiger CRM, provide the vtiger CRM login details in Microsoft Outlook.

To configure vtiger CRM login details in Microsoft^(R) Outlook^(R)

1. Start the Microsoft^(R) Outlook^(R).
2. Select the **Tools → Options** menu.
3. In the *Options* dialog, select the **vtiger CRM** tab and enter the following user settings under *vtiger CRM Configuration* section:
 - **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.
 - **Remember Password:** Select the check box if you want to remember the login details.

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

Configuring Proxies to Access vtiger CRM via Internet

Many organizations block access from the Internet to their networks to prevent outside parties from gaining access to sensitive information. If your organization has a firewall, you may need to go through a proxy server before connecting to vtiger CRM server via Internet.

Before you start, ask your system administrator for the names and port numbers of the servers running proxy software for each network service.

To configure proxies to access vtiger CRM via Internet

1. Start the Microsoft^(R) Outlook^(R).
2. Select the **Tools → Options** menu.
3. In the *Options* dialog, select the **vtiger CRM** tab and enter the following proxy settings under *Configuring Proxies to Access vtiger CRM via Internet* section:
 - **Direct connection to the Internet:** Choose this if you don't want to use a proxy.
 - **Manual proxy configuration:** Choose this to configure the following proxy settings:
 - **Address:** Type the name or numeric IP address of the proxy server. Type the port in the Ports field.
 - **Port:** Type the port number.
 - **Proxy User Name:** Enter the user name to access the Internet.
 - **Password:** Enter the password for the user name.
4. Click the **OK** button to apply the changes.

How to Connect to the vtiger CRM Demo?

Before adding or synchronizing Microsoft^(R) Outlook^(R) E-mails and contacts to **vtiger CRM Demo** running at <http://www.vtigercrm.com/demo/> provide the vtiger CRM demo login details in Microsoft^(R) Outlook^(R) as follows.

1. Start the Microsoft^(R) Outlook^(R).
2. Select the **Tools -->Options** menu.
3. In *Options* dialog, select the **vtiger CRM** tab and enter the following user settings:
 - I. **User Name:** Enter the user name as "admin" to log in to the vtiger CRM.
 - II. **Password:** Enter the password as "admin" for the user name.
 - III. **Host Name:** Enter the vtiger CRM server name as "www.vtigercrm.com/demo/".
 - IV. **Remember Password:** Select the check box if you want to remember the login details.
4. Click the **OK** button to apply the changes.

Note:

- Kindly do not expose your valuable real-time data in vtiger CRM demo. Because, the data exposed in the demo can be accessed by anyone and may be misused.
- Please refer to *Configuring Proxies to Access vtiger CRM via Internet* section if you are trying to access the vtiger CRM demo behind firewall.

Configuring Proxies to Access vtiger CRM via Internet

Many organizations block access from the Internet to their networks to prevent outside parties from gaining access to sensitive information. If your organization has a firewall, you may need to go through a proxy server before connecting to vtiger CRM server via Internet.

Before you start, ask your system administrator for the names and port numbers of the servers running proxy software for each network service.

To configure proxies to access vtiger CRM via Internet

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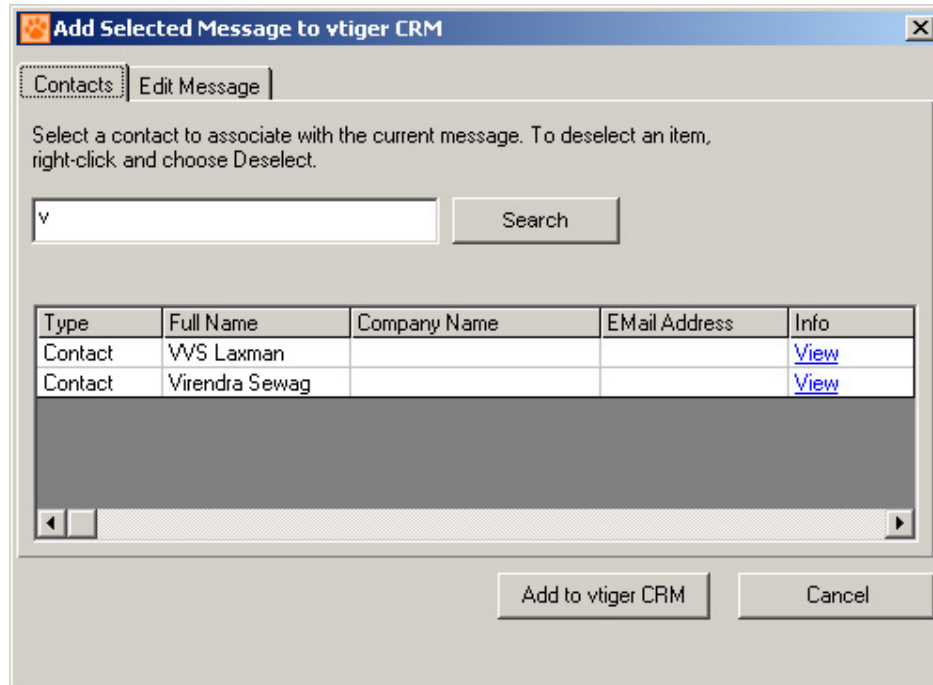
1. Start the Microsoft^(R) Outlook^(R).
 2. Select the **Tools → Options** menu.
 3. In the *Options* dialog, select the **vtiger CRM** tab and enter the following proxy settings under *Configuring Proxies to Access vtiger CRM via Internet* section:
 - **Direct connection to the Internet:** Choose this if you don't want to use a proxy.
 - **Manual proxy configuration:** Choose this to configure the following proxy settings:
 - **Address:** Type the name or numeric IP address of the proxy server. Type the port in the Ports field.
 - **Port:** Type the port number.
 - **Proxy User Name:** Enter the user name to access the Internet.
 - **Password:** Enter the password for the user name.
2. Click the **OK** button to apply the changes.

Adding E-mail Messages to vtiger CRM

You can add customer-specific E-mail messages from Microsoft^(R) Outlook^(R) to vtiger CRM as an activity history. Before adding the E-mail messages make sure the corresponding contact to the E-mail exists in vtiger CRM.

To add E-mail messages from Outlook to vtiger CRM

1. Select the **Inbox** shortcut from sidebar.
2. Select the required E-mail from the Inbox.
3. Click the **Add to vtiger CRM** toolbar icon.
Note: If the corresponding contact's E-mail address is not available in vtiger CRM, an error message "*No matching contacts for <Email Address>*" is displayed. When this error message is displayed, first add the contact in vtiger CRM and then add the E-mail to vtiger CRM.
4. In the *Add Selected Message to vtiger CRM* dialog, the **Contacts** tab is displayed where the selected E-mail details are displayed.



5. In the *Contacts* table, click the **View** link to view the contact details in vtiger CRM.

Note: When you click the View link, a default browser is displayed. Here, enter the vtiger CRM login details. First time, it will not display the appropriate contact details. You have to click the **View** link again to view the selected contact details.

6. Some times you may not require archiving the complete E-mail in vtiger CRM. In this case, you can modify the E-mail message before adding it to the vtiger CRM. Follow the steps given below to modify the E-mail message:
 - I. Select the E-mail message to be modified from the *Contacts* table.
 - II. Click the **Edit Message** tab.
 - III. Modify the content in the *Edit Message* text area.
7. Click the **Add to vtiger CRM** button to add the E-mail message to the selected contact in vtiger CRM.
8. Once the E-mail message is added to vtiger CRM, the "*Successfully Added*" message is displayed. Click the **OK** button to complete the operation.

Note: The E-mail message will be added to the following sections in vtiger CRM:

- **History** section of the respective contact.
- **E-mail List** under **E-mail** tab.

Synchronizing the Microsoft^(R) Outlook^(R) Contacts with vtiger CRM

Synchronization allows you to enter the customer-specific contacts from Microsoft^(R) Outlook^(R) to vtiger CRM and vice-a-versa and update the information in both vtiger CRM and Microsoft^(R) Outlook^(R). It also eliminates duplication of contacts and resolves conflicts if the data is not in sync.

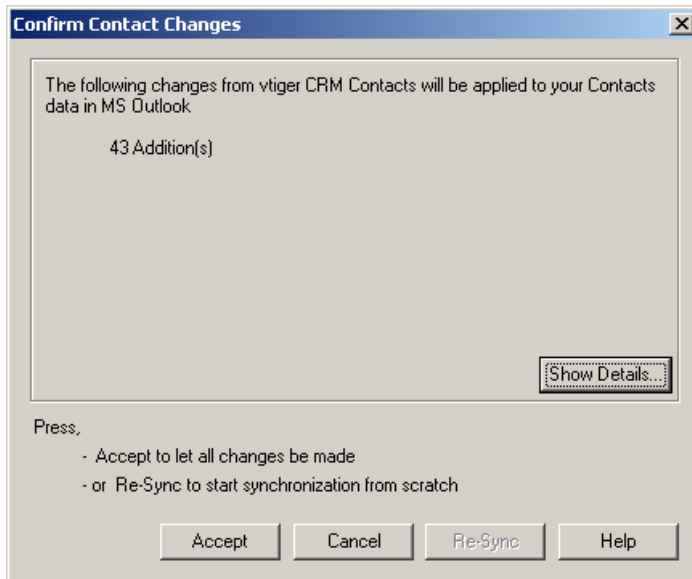
To synchronize contacts between Microsoft^(R) Outlook^(R) and vtiger CRM

1. Select the **Contacts** shortcut from the Microsoft^(R) Outlook^(R) sidebar.
2. Select the required contacts from the Inbox.
3. Click the **Sync to vtiger CRM** toolbar icon.
4. In the *vtiger CRM* dialog, click the **Yes** button to start synchronization.
5. It takes a few minutes to completely read the contacts in vtiger CRM and Microsoft^(R) Outlook^(R). Once reading is completed, you have to complete one of the following operations:
 - a. Add Contacts
 - b. Resolve Conflicts

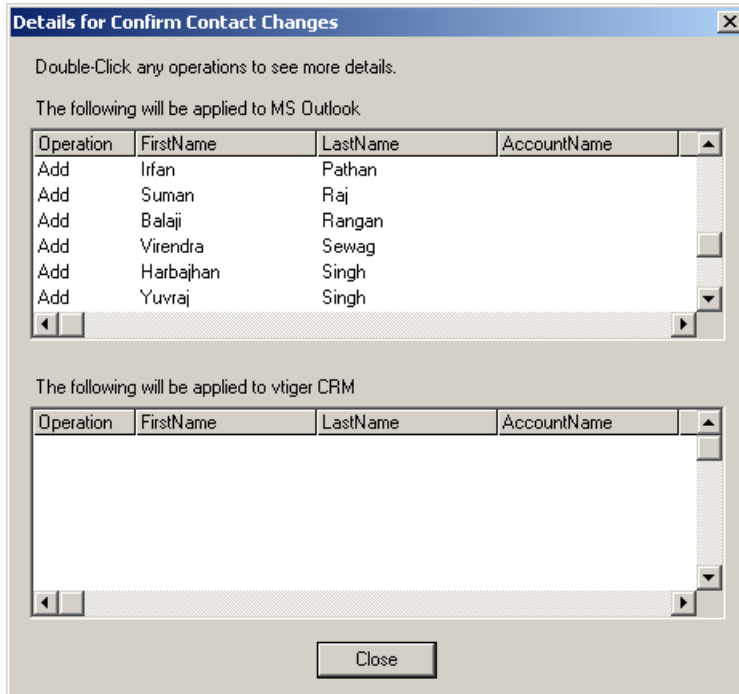
Adding contacts

If you are synchronizing contacts first time, then follow these steps:

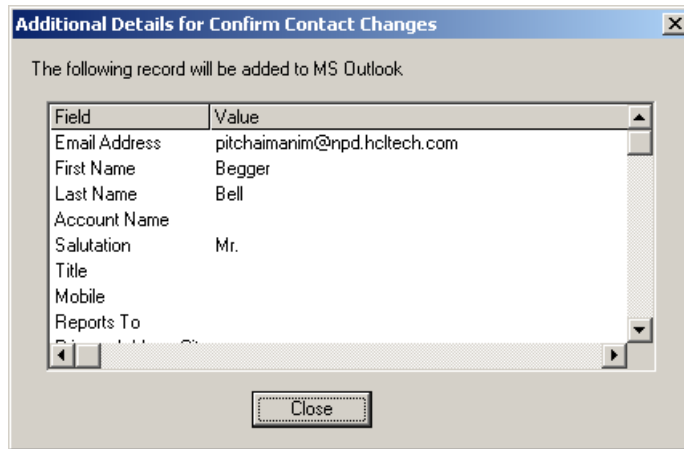
1. In the *Confirm Contact Changes* dialog, contacts added, updated, and deleted are displayed. Click the **Show Details** button to view the list of contacts.



2. In the *Details for Confirm Contact* dialog, double-click on the **Add** link to check the contact details. In the *Additional Details for Confirm Contact Changes* dialog, the selected contact details are displayed. Click the **Close** button to close the dialog. Follow the same procedure to check other contacts. Once you are ensured that all the contact details are correct, click the **Close** button in the *Details for Confirm Contact* dialog.



3. In the *Confirm Contact Changes* dialog, click the **Accept** or the **Cancel** button to complete or abort the synchronization respectively.

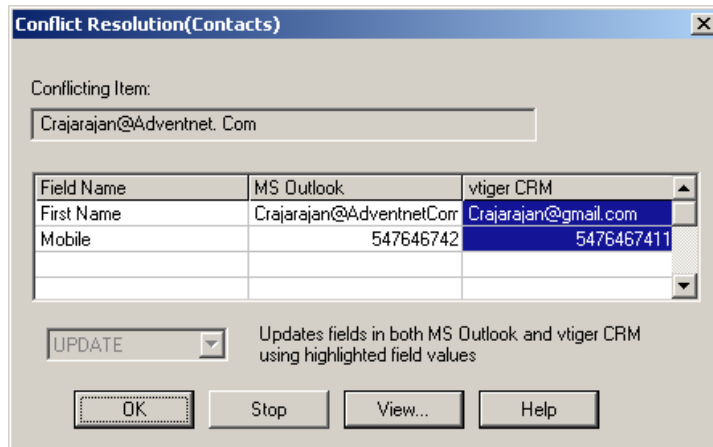


Resolving Conflicts

Say, after the first time synchronization, you update the contact details in vtiger CRM or in Microsoft^(R) Outlook^(R). Then there will be differences in contact details present in vtiger CRM and Microsoft^(R) Outlook^(R). To make the contact details similar both in vtiger CRM and in Microsoft^(R) Outlook^(R) you have to override the data in other-side.

To resolve conflict in between Microsoft^(R) Outlook^(R) and vtiger CRM

1. In the *Conflict Resolution (Contacts)* dialog, conflicting contact name and the corresponding fields are displayed in a table.



2. Select the value to be synchronized (either from MS Outlook column or from vtiger CRM)

3. Click the **OK** or the **Stop** button to update or abort the synchronization respectively.
4. Once contacts details are updated Confirm Contact Changes dialog is displayed. Follow the steps given in [Add Contacts](#) section to resolve the conflicts.

Note: Say, the contact you add from Microsoft^(R) Outlook^(R) to vtiger CRM already exists with similar details in vtiger CRM, or vice versa. A vtiger CRM dialog is displayed stating <write the message>. Click OK to complete

Synchronizing the Microsoft^(R) Outlook^(R) Tasks with vtiger CRM

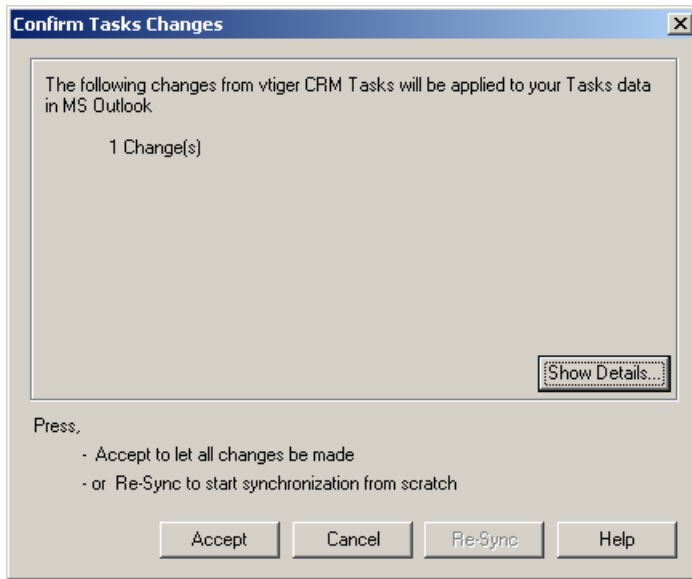
Synchronization allows you to enter the customer-specific tasks from Microsoft^(R) Outlook^(R) to vtiger CRM and vice-a-versa and update the information in both vtiger CRM and Microsoft^(R) Outlook^(R). It also eliminates duplication of tasks and resolves conflicts if the data is not in sync.

To synchronize tasks between Microsoft^(R) Outlook^(R) and vtiger CRM

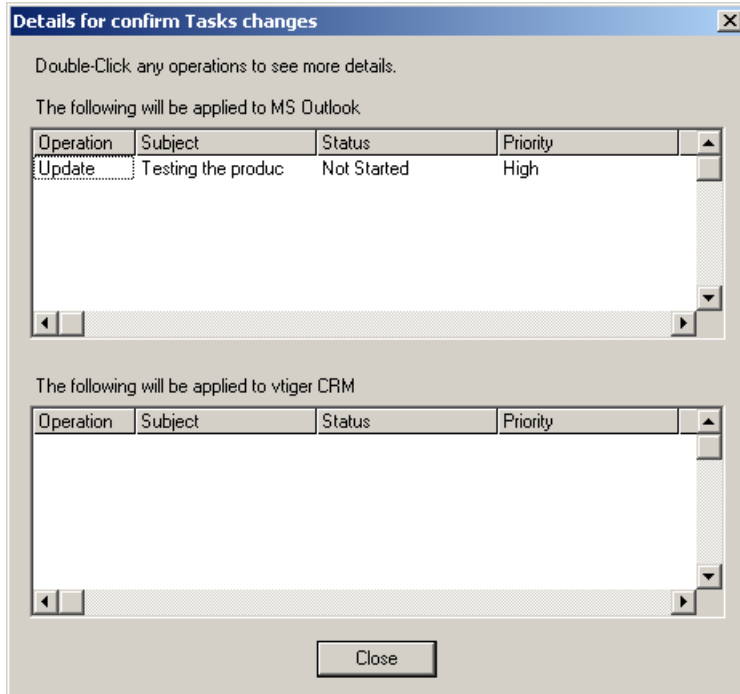
1. Select the **Tasks** shortcut from the Microsoft^(R) Outlook^(R) sidebar.
2. Select the required tasks from the Inbox.
3. Click the **Sync to vtiger CRM** toolbar icon.
4. In the *vtiger CRM* dialog, click the **Yes** button to start synchronization.
5. It takes a few minutes to completely read the tasks in vtiger CRM and Microsoft^(R) Outlook^(R). Once reading is completed, you have to complete one of the following operations:
 - Add Tasks
 - Resolve Conflicts

To add new tasks

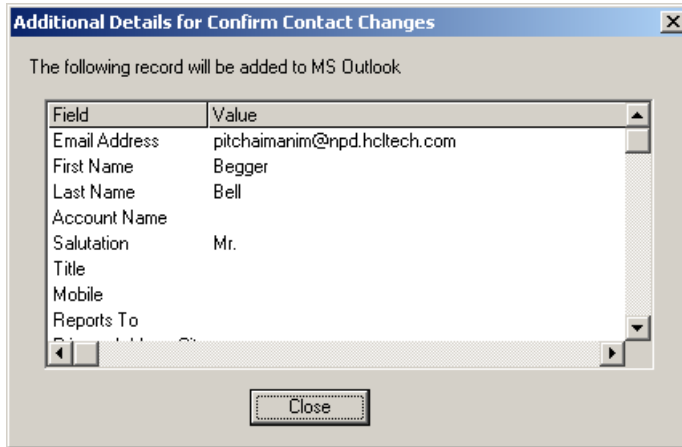
1. In the *Confirm Task Changes* dialog the number of contacts added, updated, and deleted are displayed. Click the **Show Details** button to view the list of tasks.



2. In the *Details for Confirm Task* dialog, double-click on the **Add** link to check the task details. In the *Additional Details for Confirm Task Changes* dialog, the selected task details are displayed. Click the **Close** button to close the dialog. Follow the same procedure to check other tasks. Once you are ensured that all the task details are correct, click the **Close** button in the *Details for Confirm Task* dialog.



3. In the *Confirm Task Changes* dialog, click the **Accept** or the **Cancel** button to complete or abort the synchronization respectively.

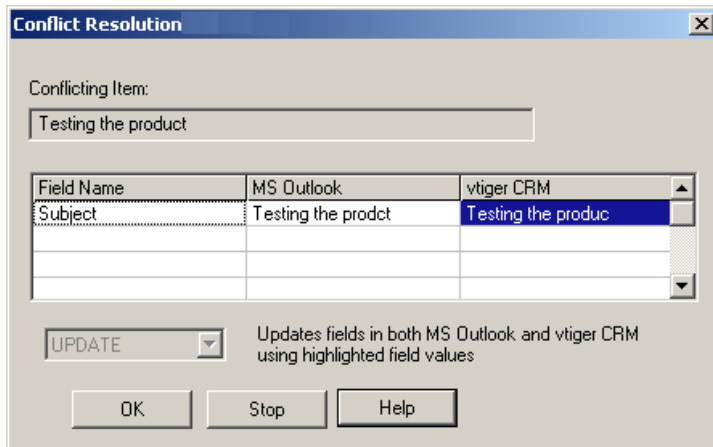


Resolving Conflicts

Say, after the first time synchronization, you update the task details in vtiger CRM or in Microsoft^(R) Outlook^(R). Then there will be differences in task details present in vtiger CRM and Microsoft^(R) Outlook^(R). To make the task details similar both in vtiger CRM and in Microsoft^(R) Outlook^(R) you have to override the data in other-side.

To resolve conflict in between Microsoft^(R) Outlook^(R) and vtiger CRM

1. In the *Conflict Resolution (Tasks)* dialog, conflicting task name and the corresponding fields are displayed in a table.



2. Select the value to be synchronized (either from MS Outlook column or from vtiger CRM).

3. Click the **OK** or the **Stop** button to update or abort the synchronization respectively.
4. Once tasks details are updated the *Confirm Task Changes* dialog is displayed. Follow the steps given in [Add Tasks](#) section to resolve the conflicts.

Note: Say, the contact you add from Microsoft^(R) Outlook^(R) to vtiger CRM already exists with similar details in vtiger CRM, or vice versa. A vtiger CRM dialog is displayed stating <write the message>. Click **OK** to complete

Synchronizing the Microsoft^(R) Outlook^(R) Calendar with vtiger CRM

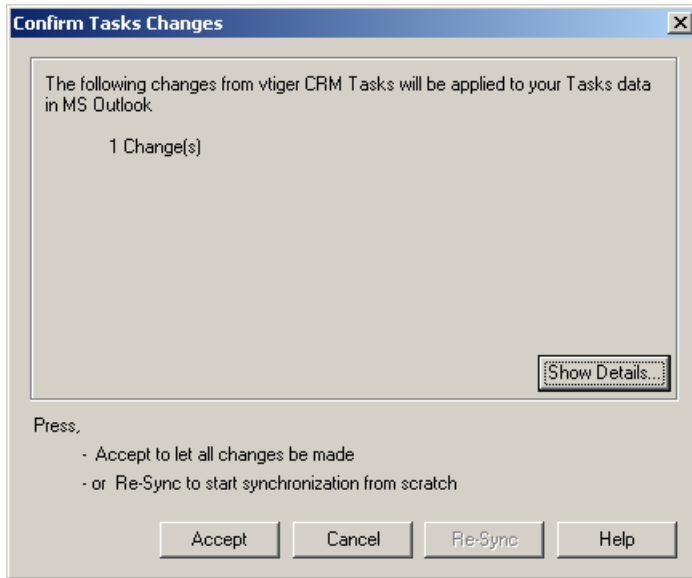
Synchronization allows you to enter the customer-specific events from Microsoft^(R) Outlook^(R) to vtiger CRM and vice-a-versa and update the information in both vtiger CRM and Microsoft^(R) Outlook^(R). It also eliminates duplication of events and resolves conflicts if the data is not in sync.

To synchronize the events between Microsoft^(R) Outlook^(R) and vtiger CRM

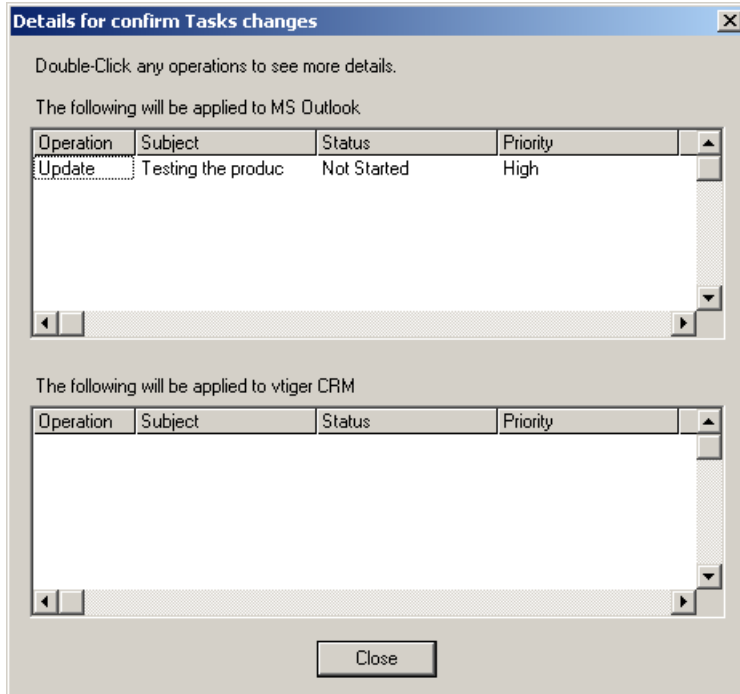
1. Select the **Calendar** shortcut from the Microsoft^(R) Outlook^(R) sidebar.
2. Select the required events from the Inbox.
3. Click the **Sync to vtiger CRM** toolbar icon.
4. In the *vtiger CRM* dialog, click the **Yes** button to start synchronization.
5. It takes a few minutes to completely read the events in vtiger CRM and Microsoft^(R) Outlook^(R). Once reading is completed, you have to complete one of the following operations:
 - Add Events
 - Resolve Conflicts

To add new events

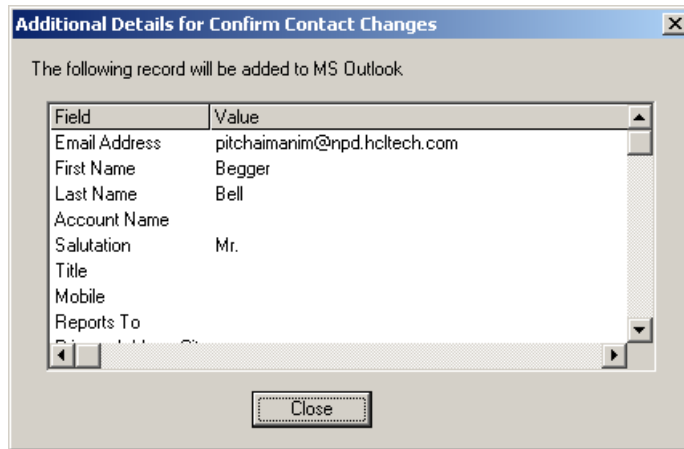
1. In the *Confirm Events Changes* dialog, events added, updated, and deleted list are displayed. Click the **Show Details** button to view the list of events.



2. In the *Details for Confirm Events* dialog, double-click on the **Add** link to check the task details. In the *Additional Details for Confirm Event Changes* dialog, the selected event details are displayed. Click the **Close** button to close the dialog. Follow the same procedure to check other events. Once you are ensured that all the event details are correct, click the **Close** button in the *Details for Confirm Event* dialog.



3. In the *Confirm Event Changes* dialog, click the **Accept** or the **Cancel** button to complete or abort the synchronization respectively.

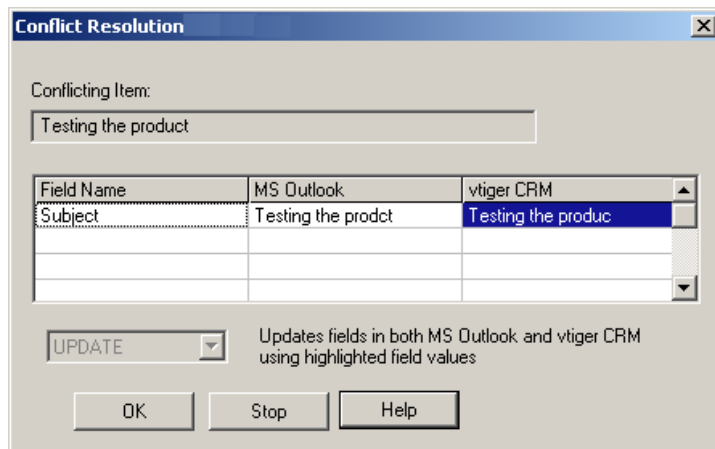


Resolving Conflicts

Say, after the first time synchronization, you update the events details in vtiger CRM or in Microsoft^(R) Outlook^(R). Then there will be differences in event details present in vtiger CRM and Microsoft^(R) Outlook^(R). To make the event details similar both in vtiger CRM and in Microsoft^(R) Outlook^(R) you have to override the data in other-side.

To resolve conflict in between Microsoft^(R) Outlook^(R) and vtiger CRM

1. In the *Conflict Resolution (Events)* dialog, conflicting event name and the corresponding fields are displayed in a table.



2. Select the value to be synchronized (either from MS Outlook column or from vtiger CRM).

3. Click the **OK** or the **Stop** button to update or abort the synchronization respectively.
4. Once event details are updated *Confirm Event Changes* dialog is displayed. Follow the steps given in [Add Tasks](#) section to resolve the conflicts.

Note: Say, the contact you add from Microsoft^(R) Outlook^(R) to vtiger CRM already exists with similar details in vtiger CRM, or vice versa. A vtiger CRM dialog is displayed stating.

5. Click **OK** to complete the synchronization.

3. Troubleshooting Tips

1. An error message, "A program is trying to access E-mail addresses you have stored in Outlook. Do you want to allow this? If this is unexpected, it may be a virus and you should choose "No". ." is displayed if you installed the Microsoft^(R) Outlook^(R) E-mail Security Update. Please refer to the following URL for complete details:

<http://support.microsoft.com/default.aspx?scid=kb%3BEN-US%3B263074>

Solution: If you want to continue working with vtiger Outlook Plug-in, select the "Allow access for" check box and select the time from drop-down box.

2. An error message, "*Component 'TABCTL32.OCX' or one of its dependencies not correctly registered: a file is missing or invalid*", is displayed when trying to add E-mails or synchronize contacts from Microsoft^(R) Outlook^(R) to vtiger CRM.

Solution: The above error message is displayed when the following files are not installed properly during vtiger Outlook Plug-in installation:

- TABCTL32.OCX
- MSFLXGRD.OCX

Follow the steps given below to fix the problem:

1. Download the above files from the following locations to your vtiger Outlook installation directory:
 - <http://www.ascentive.com/support/new/images/lib/TABCTL32.OCX>
 - <http://freeware.it-mate.co.uk/downloads/controls/msflxgrd.zip>
2. Stop the Microsoft^(R) Outlook^(R) if it is running.
3. Register the above ActiveX control files from vtiger Outlook Plug-in home directory in command prompt as given below:
`regsvr32 TABCTL32.OCX`
`regsvr32 MSFLXGRD.OCX`
4. Again start the Microsoft^(R) Outlook^(R).

Note: You should have administrative privileges to register the ActiveX controls.

3. An error message: "*Could not send soap request to vtiger CRM*" is displayed when trying to synchronize contacts and tasks from Microsoft^(R) Outlook^(R) to vtiger CRM

Solution: The above error message is displayed when the vtiger CRM server details are given wrongly under **Tools → Options → vtiger CRM** tab. Please provide the valid login details and try again.

4. An error message: "*Cannot parse the output response*" is displayed when trying to synchronize contacts and tasks from Microsoft^(R) Outlook^(R) to vtiger CRM

The above error message is displayed if you are using incompatible vtiger CRM, MySQL database is not running, or error in PHP.

4. Known Issues

- When you click the **View** link in the *Add Selected Message to vtiger CRM* dialog, for the first time, it will not display the appropriate contact details. You have to click the View link again.
- After uninstalling the vtiger Outlook, **Sync Contacts to vtiger CRM** or **Sync Tasks to vtiger CRM** buttons are not removed from toolbar.
- While synchronizing contacts from vtiger CRM to Microsoft^(R) Outlook^(R) it automatically converts the first letter of First Name to upper case letter.

5. 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.