



vtiger Thunderbird Extension 4.2 User Manual

(Revision 2.0)

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1. Installation Procedure

- System Requirements
- Installation Prerequisites
- Installing vtiger Thunderbird Extension
- Uninstalling vtiger Thunderbird Extension

System Requirements

- **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:** Thunderbird version 1.0 or Mozilla version 1.6 and higher E-mail client.

Installation Prerequisites

- You must have administrator privileges on the system.
- You must have valid login details to connect the vtiger CRM server from Thunderbird.

Installing vtiger Thunderbird Extension

You can install the vtiger Thunderbird Extension in both Thunderbird and Mozilla E-mail clients. In Thunderbird, you can install it using Extension Manager where as in Mozilla you have to install directly from vtiger Web site.

To install vtiger Thunderbird Extension in Thunderbird

1. Download the vtiger Thunderbird Extension from <http://sourceforge.net/projects/vtigercrm/>
2. In the *Thunderbird*, 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_Thunderbird_Extension_4_2.xpi** file and click the **Open** button.

5. In *Software Installation* dialog, click the **Install Now** button.

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

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

To install vtiger Thunderbird Extension in Mozilla E-mail Client

1. In Mozilla Web browser open the [vtiger CRM - Downloads](http://www.vtiger.com/products/crm/download.html) page (<http://www.vtiger.com/products/crm/download.html>).
2. In *vtiger CRM Download* page, under *vtiger CRM Add-Ons* section, click the Mozilla link.
3. Now vtiger Thunderbird Extension will be installed in your Mozilla E-mail client.
4. Restart Mozilla E-mail client to work with vtiger CRM-specific functions.

Uninstalling vtiger Thunderbird Extension

You can uninstall the vtiger Thunderbird Extension in Thunderbird. In Mozilla you have to install a third-party Extension Uninstaller before uninstalling the vtiger Thunderbird Extension.

To uninstall vtiger Thunderbird Extension in Thunderbird

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

To uninstall vtiger Thunderbird Extension in Mozilla E-mail Client

1. In the *Mozilla* Web browser, select the **Tools → Extension Uninstaller** menu.
2. In the *Extension Uninstaller* dialog, select the vtigerCRM and click the **UnInstall** button.
3. Close the Mozilla E-mail client and open again so that all the vtiger Thunderbird-specific functions are removed.

Note: You must install the **Extension Uninstaller** as it is not bundled with Mozilla Web browser. Please refer to the following URL for more details.

<https://addons.update.mozilla.org/extensions/moreinfo.php?application=mozilla&version=1.7&category=Miscellaneous&id=203>

2. Working with vtiger Thunderbird Extension

The vtiger Thunderbird Extension is productivity-enhancement software that can be used with vtiger CRM. Using the vtiger Thunderbird Extension, you can perform the following operations in Thunderbird/Mozilla E-mail clients:

- Add customers-related E-mails to contact's history section in vtiger CRM.
- Edit E-mail message before adding to vtiger CRM.
- Import contacts from vtiger CRM to Thunderbird/Mozilla E-mail client.
- Export contacts from Thunderbird/Mozilla E-mail client to vtiger CRM.

Displaying vtiger Thunderbird-specific Toolbar Icons

By default, vtiger Thunderbird Extension-related toolbar icons are not displayed in toolbar area. You have to customize first time.

- Thunderbird - Add to vtiger CRM
- Thunderbird Address Book
 - Import vtiger CRM
 - Export vtiger CRM

To display the toolbar icons in Thunderbird

1. Open the Thunderbird Email Client or Thunderbird Address Book.
2. Select **View → Toolbar → Customize** menu.
3. In the *Customize Toolbar* dialog, drag the vtiger CRM-specific icons and drop in the toolbar area.

Note: You cannot use the vtiger Thunderbird-specific toolbar icons in Mozilla E-mail client, as it does not support toolbar customization.

Configuring vtiger CRM Login Details

Before adding E-mails and contacts from Thunderbird to vtiger CRM, provide the vtiger CRM login details in Thunderbird.

To configure vtiger CRM login details

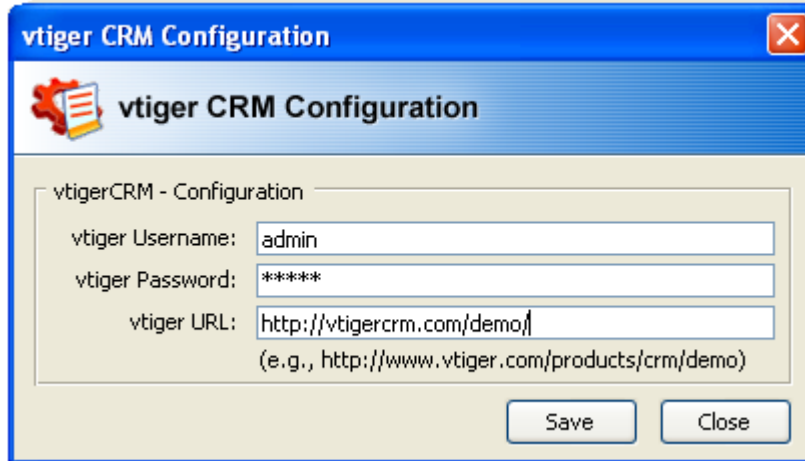
1. Start the Thunderbird.
2. Select the **Tools → vtiger CRM Configuration** menu.
3. In the *vtiger CRM Configuration* dialog, enter the following user settings:
 - **User Name:** Enter the user name to log in to the vtiger CRM.
 - **Password:** Enter the password for the user name.
 - **Host Name:** Enter the vtiger CRM server name, where it is running.
4. Click the **Save** button to apply the changes.

How to connect to the vtiger CRM Demo?

Before adding or synchronizing Thunderbird/Mozilla E-mail client E-mails to **vtiger CRM Demo** running at <http://www.vtigercrm.com/demo/>, provide the vtiger CRM demo login details in Thunderbird/Mozilla E-mail client.

To add the vtiger CRM Demo login details in Thunderbird/Mozilla E-mail client

1. Start the Thunderbird/Mozilla E-mail client.
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/".
4. Click the **Save** button to apply the changes.

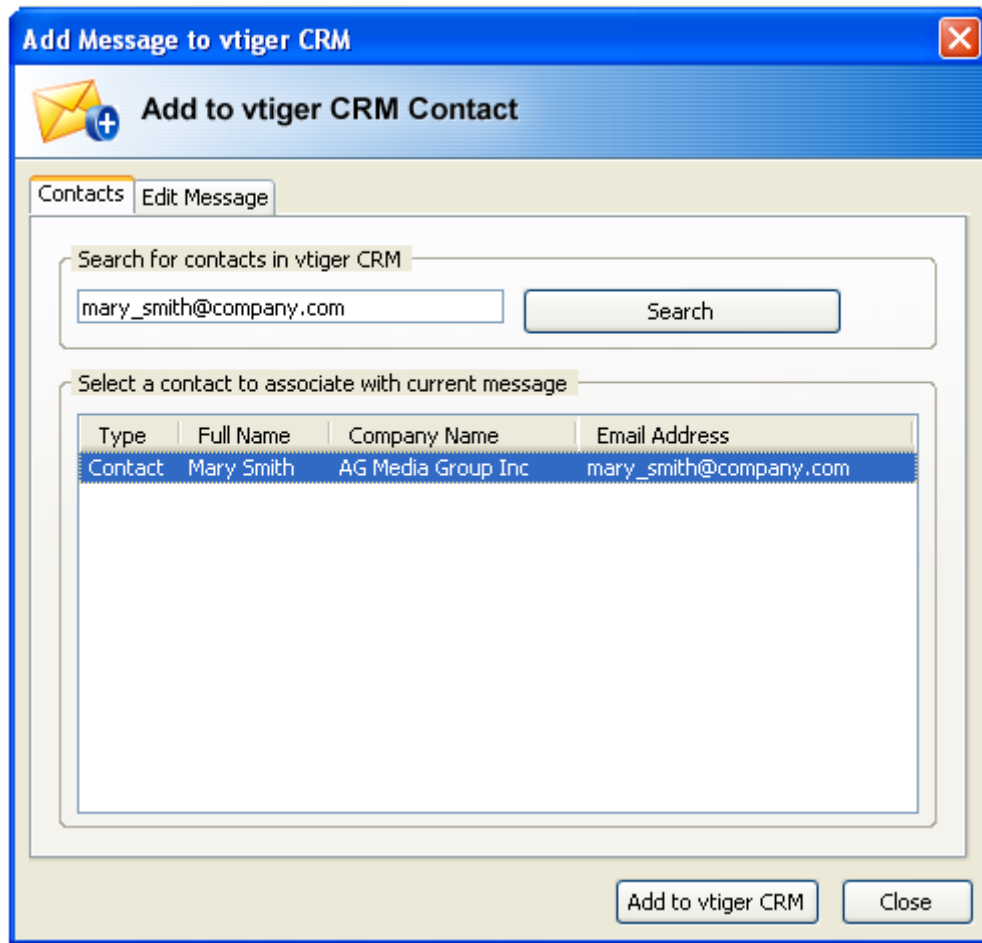


Adding E-mail Messages to vtiger CRM

You can add customer-specific E-mails from Thunderbird to vtiger CRM as an activity history under contact. Before adding E-mails make sure the corresponding contact exists in vtiger CRM.

To add E-mail message from Thunderbird to vtiger CRM

1. Select the specific **E-mail** folder from left hand-side **Folders** tree.
2. Select the customer-specific E-mail from right hand-side E-mails list and perform one of the following operations:
 - o Select the **Tools → Add Message to vtiger CRM** menu
 - o Click the **Add to vtiger CRM** toolbar icon.
 - o Select the pop-up menu Add Message to vtiger CRM.
3. In *Add Message to vtiger CRM* dialog, the **Contacts** tab is displayed where the selected E-mail details are displayed.

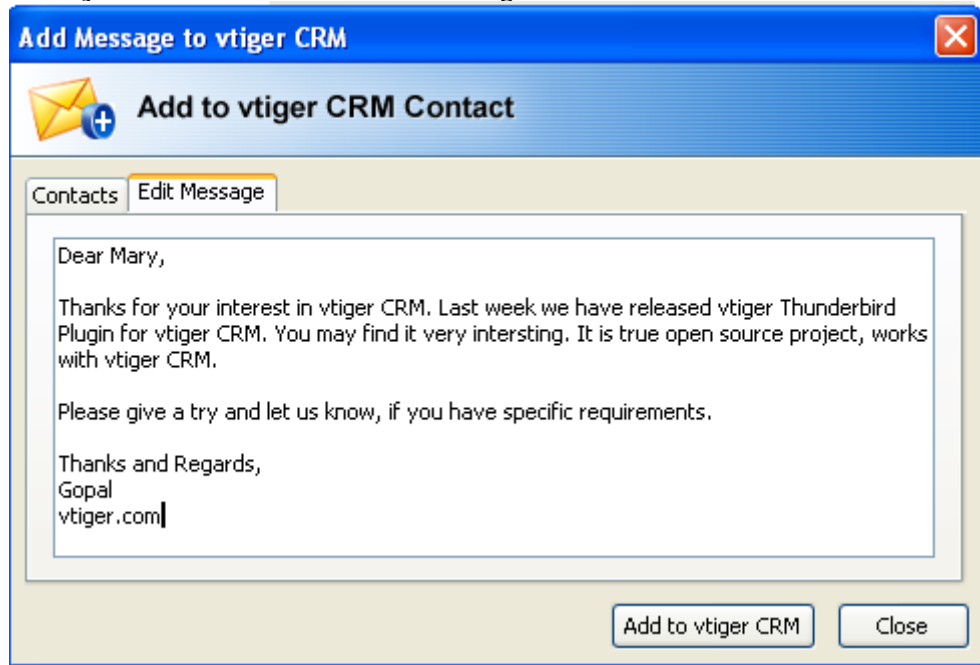


4. In the *Contacts* table, click the **contact** name to view the contact details in vtiger CRM.

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

5. 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 to be modified from the *Contacts* table.
 - II. Click the **Edit Message** tab.

- III. Modify the content in the *Edit Message* text area.



6. Now click the **Add to vtiger CRM** button to add the E-mail to the selected contact in vtiger CRM.
7. Once the E-mail is added to vtiger CRM, the "*Successfully Added Message to vtiger CRM*" message is displayed. Click **OK** to complete the operation.

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

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

Importing Contacts from vtiger CRM Thunderbird

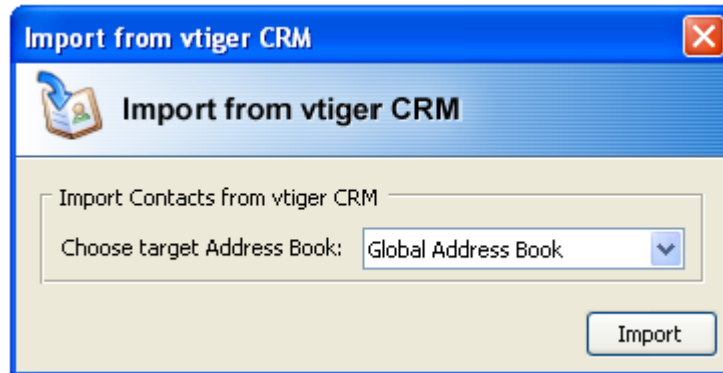
Importing allows you to enter the customer-specific contacts from vtiger CRM to Thunderbird or Mozilla E-mail clients.

Note: Please wait while the vtiger Thunderbird Extension imports contacts from vtiger CRM to Thunderbird. It may take few minutes to complete the importation and the application may turn to background.

To import contacts from vtiger CRM to Thunderbird

1. In Thunderbird, select the **Tools** → **Address Book** menu.
2. Select the specific **Address Book** folder from left hand-side **Address Books** tree and perform one of the following operations:

- I. Select the **Tools → Import** from vtiger CRM menu
 - II. Click the **Import Contacts** toolbar icon.
 - III. Select the pop-up menu **Import to vtiger CRM**.
3. In the *Import from vtiger CRM* dialog, click the **Import** button to start the importation.



4. It takes a few minutes to completely import the contacts from vtiger CRM to Thunderbird.

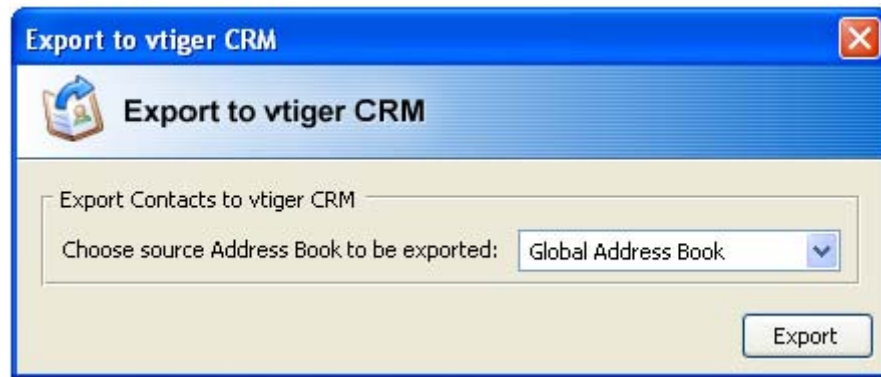
Exporting Contacts from Thunderbird to vtiger CRM

Exporting allows you to enter the customer-specific contacts from Thunderbird or Mozilla E-mail client to vtiger CRM.

Note: Please wait while the vtiger Thunderbird Extension exports contacts from Thunderbird to vtiger CRM. It may take few minutes to complete the exportation and the application may turn to background.

To export contacts from Thunderbird to vtiger CRM

1. In Thunderbird, select the **Tools → Address Book** menu
2. Select the specific **Address Book** folder from left hand-side **Address Books** tree and perform one of the following operations:
 - I. Select the **Tools → Export** to vtiger CRM menu.
 - II. Click the **Export Contacts** toolbar icon.
 - III. Select the pop-up menu **Export to vtiger CRM**.
3. In the *Export to vtiger CRM* dialog, click the **Export** button to start the exportation.



4. It takes a few minutes to completely export the contacts from Thunderbird to vtiger CRM.

3. Troubleshooting Tips

Error message *Error while parsing response from vtiger CRM server* is displayed while clicking the **Search** button in the *Add Message to vtiger CRM* dialog.

Solution: Please check, whether you have specified the correct login details while configuring the vtiger CRM login details.

4. Known Issues

- User with any login details can gain access from the Thunderbird and Mozilla Email clients to the vtiger CRM. Authentication feature is not implemented in vtiger Thunderbird Extension 4.2. Hence vtiger CRM users are advised not to expose their vtiger CRM system to Internet.
- E-mail message is not displayed under contact's history. It is added only under E-mails module of vtiger CRM.
- Upon clicking the contact details link in the *Add Message to vtiger CRM* dialog, the exact contact details are not displayed. Instead, vtiger CRM Home page is displayed.
- During importation/exportation the Thunderbird will be in hanging mode till the operation is completed.

5. Customer Support

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