



vtiger CRM 5.0 Release Notes

Document History

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Welcome to vtiger CRM!

vtiger CRM is an enterprise-ready open source CRM solution. vtiger CRM has passed through more than 10 development cycles to ensure that the product is enterprise-ready and usable. Usability, L&F and Security have been the prime focus of this release.

Version 5 Development Cycle - Fact Sheet

v4.5. dev 1 (Nov 9, 2005) → v4.5 dev 2 → v4.5 dev 3

→ v5.0 alpha 1 → v5.0 alpha 2 → v5.0 alpha 3 → v5.0 alpha 4 → v5.0 alpha 5

→ v5.0 beta 1 → v5.0 beta 2 → v5.0 RC (Aug 14, 2006)

→ **v 5.0 (Sep 14, 2006)**

Download vtiger CRM 5 & Add-ons

- [Windows](#) | [Installation Manual](#)
- [Linux](#) | [Installation Manual](#)
- [LAMP/WAMP](#) | [Installation Manual](#) (Linux) / [Installation Manual](#) (Windows)
- [Outlook Plugin](#) | [User Manual](#)
- [Office Plugin](#) | [User Manual](#)
- [Thunderbird Extension](#) | [User Manual](#)
- [Customer Portal](#) | [User Manual](#)
- [Web Forms](#) | [User Manual](#)
- [Firefox Toolbar](#) | [User Manual](#)

What is New?

Ajax-based User Interface

vtiger CRM 5 is completely redesigned from ground up by implementing the best of breed Web 2.0 technologies, such as AJAX, Tag clouds and mash ups with other Web services etc.

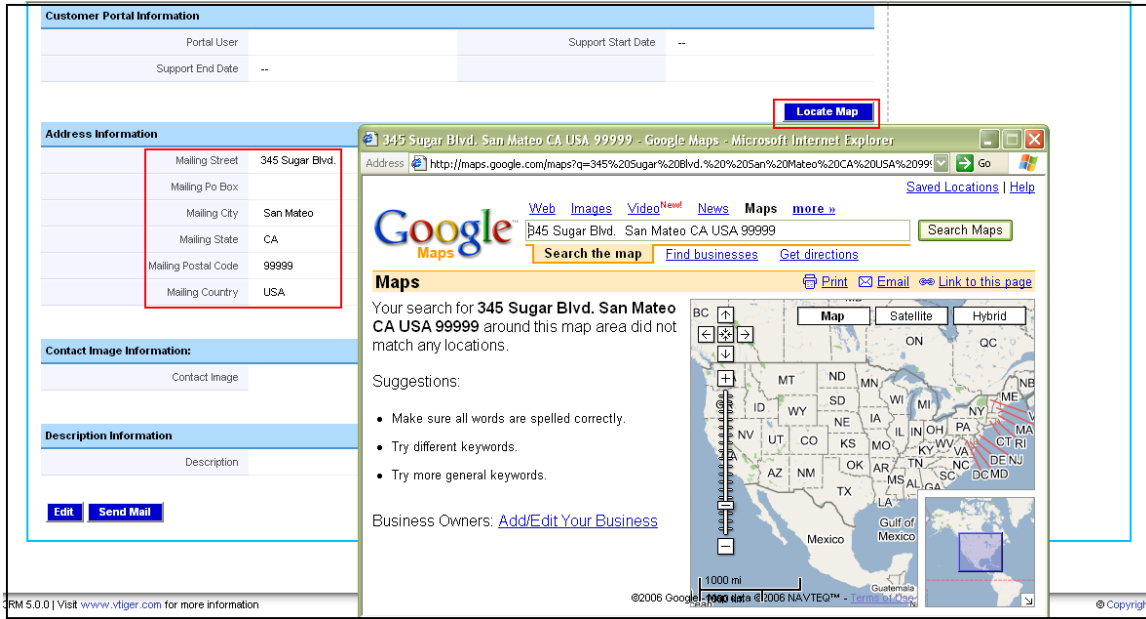


Figure 1: Locate Customer Address on Google Map

Color Schemes

Users have the ability to choose the color scheme of their choice. Three different color schemes namely -Alpha Gray, Blue Lagoon and Wood Spice are bundled with vtiger CRM 5. We encourage the community to participate in new scheme creations. Whichever user-contributed theme is found good by the community, will be bundled along with vtiger CRM 5 in the future.

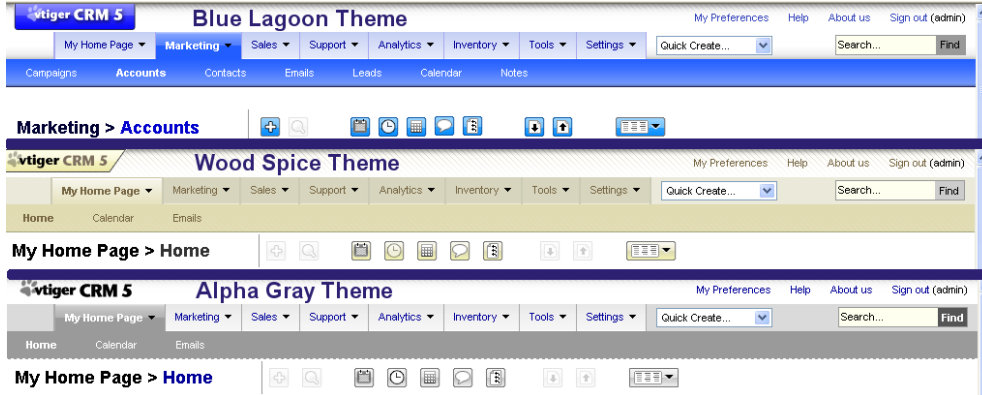


Figure 2: Blue Lagoon, Wood Spice, Alpha Gray themes

Enterprise-grade Security Management

Customers can enable access control to the users according to their organization hierarchy in real time. New security management functions are granular and flexible for implementation across organization of any size.

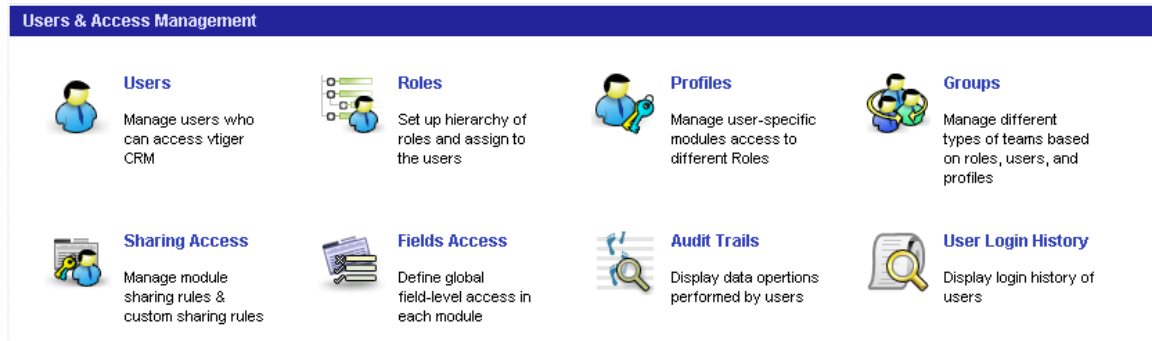


Figure 3: Users & Access Management

Calendar

Users can use the Calendar along with CRM core functions or as a standalone Personal Organizer. Users can also share personal calendar with other users & groups, set reminders, and plan recurring calls, meetings & to dos.

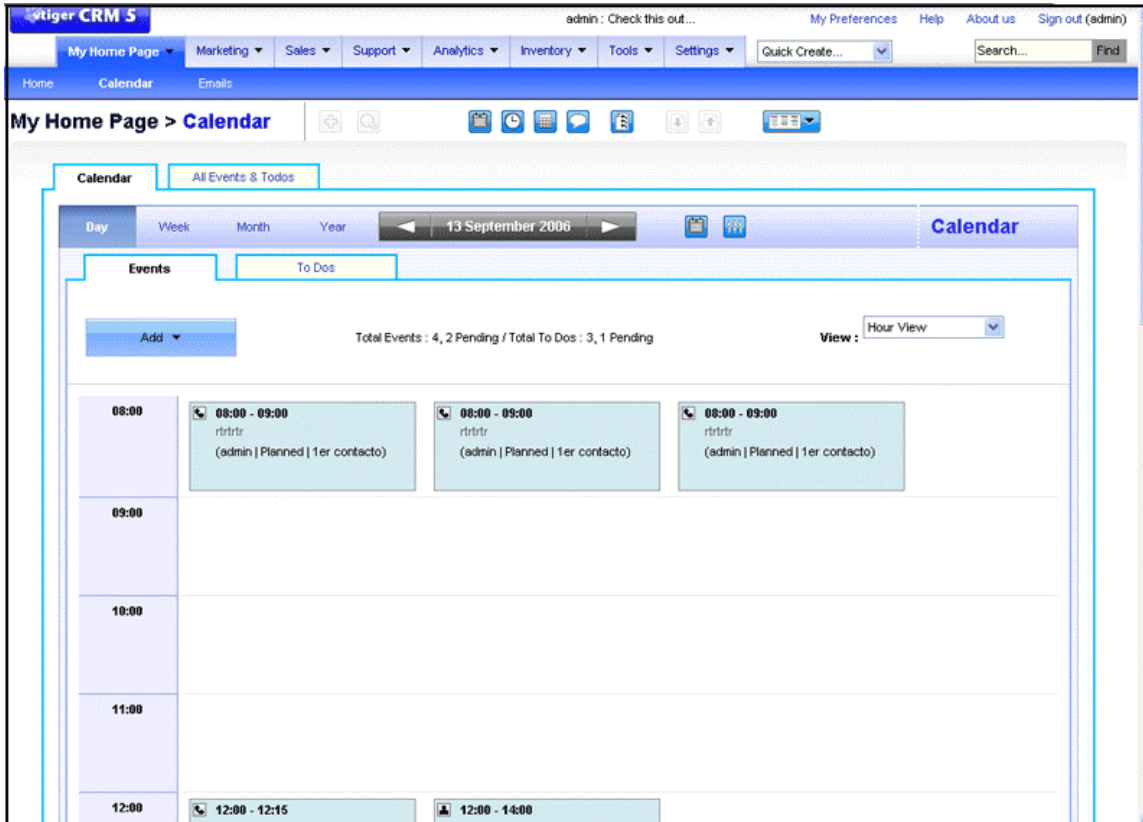


Figure 4: Calendar Day View

Email Client

Inbuilt Email Client for handling both Outbound and Inbound mails. Customers can also use the mass mailing for executing Marketing campaigns.

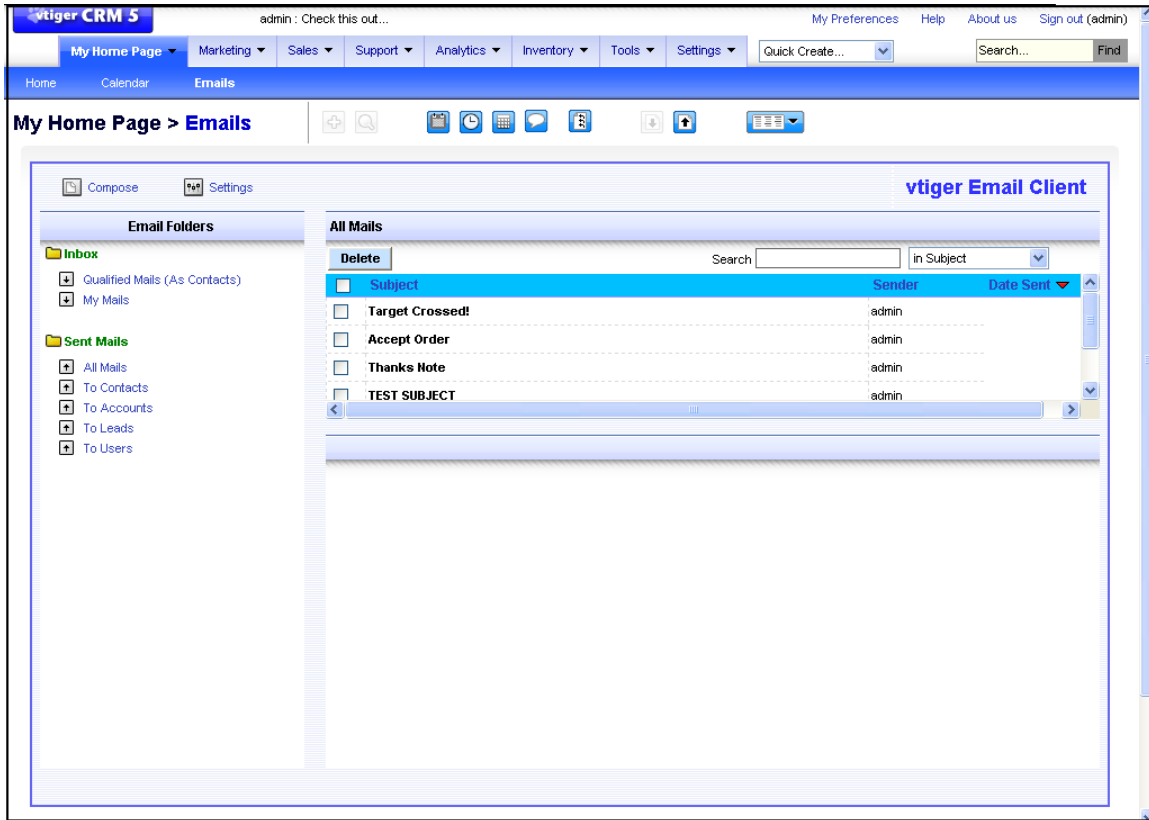
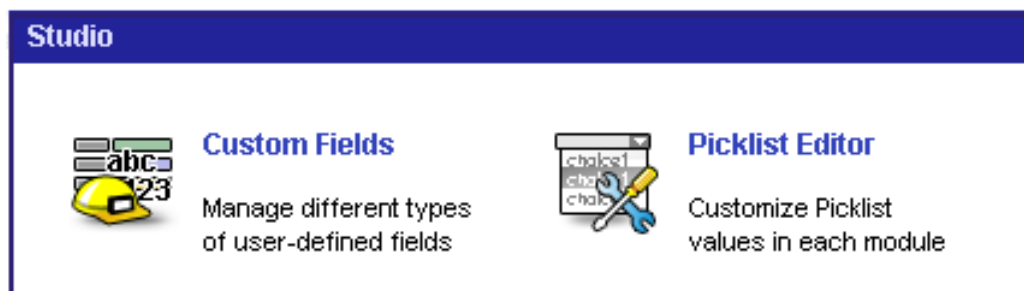


Figure 5: Email Client

Customization

Full-scale customization utilities including multiple custom objects, pick-list editor, multi-select value drop down lists, drag & drop Home page layout, global-level Page view customization, date & time formats, currency conversions etc.,



Reports & Dashboard

Fully customizable reports with 20+ pre-built-dashboards are available.

The screenshot displays the vtiger CRM 5 Reports interface. The top navigation bar includes 'My Home Page', 'Marketing', 'Sales', 'Support', 'Analytics', 'Inventory', 'Tools', and 'Settings'. The main content area is titled 'Analytics > Reports' and is divided into three sections:

- Account and Contact Reports:** A table with 12 rows, each containing a report name, description, and tools. The reports include 'Contacts by Accounts', 'Contacts without Accounts', 'Contacts by Potentials', 'Products', 'les contacts', 'like Contacts', 'razter', 'reporte detallado de ventas', 'adfsfaasdfsda', 'Customer list', 'AM Report', and 'Activity by accounts'.
- Lead Reports:** A table with 6 rows, each containing a report name, description, and tools. The reports include 'Lead by Source', 'Lead Status Report', 'Prueba', 'Leads by product by Territory', 'pinrept', and 'pinrept'.
- TestDir:** A folder view showing a list of reports with columns for 'Report Name', 'Description', and 'Tools'. The reports include 'rdv fred', 'Hello', 'PA Test Report', 'asdf', 'test', 'Azam', 'Techno Deneme', 'a', 'rpt1', 'My Report', 'p1', 'testje', '.', 'testing', 'test123labersüz "â&ö', 'Wood', 'vlgjer', and 'Contactos por empresa'.

Figure 6: vtiger Reports

Order Management

Streamlined sales and inventory management functions with products, price books, quotes, orders, and invoices. Additionally customers can manage multiple tax classes and rates.

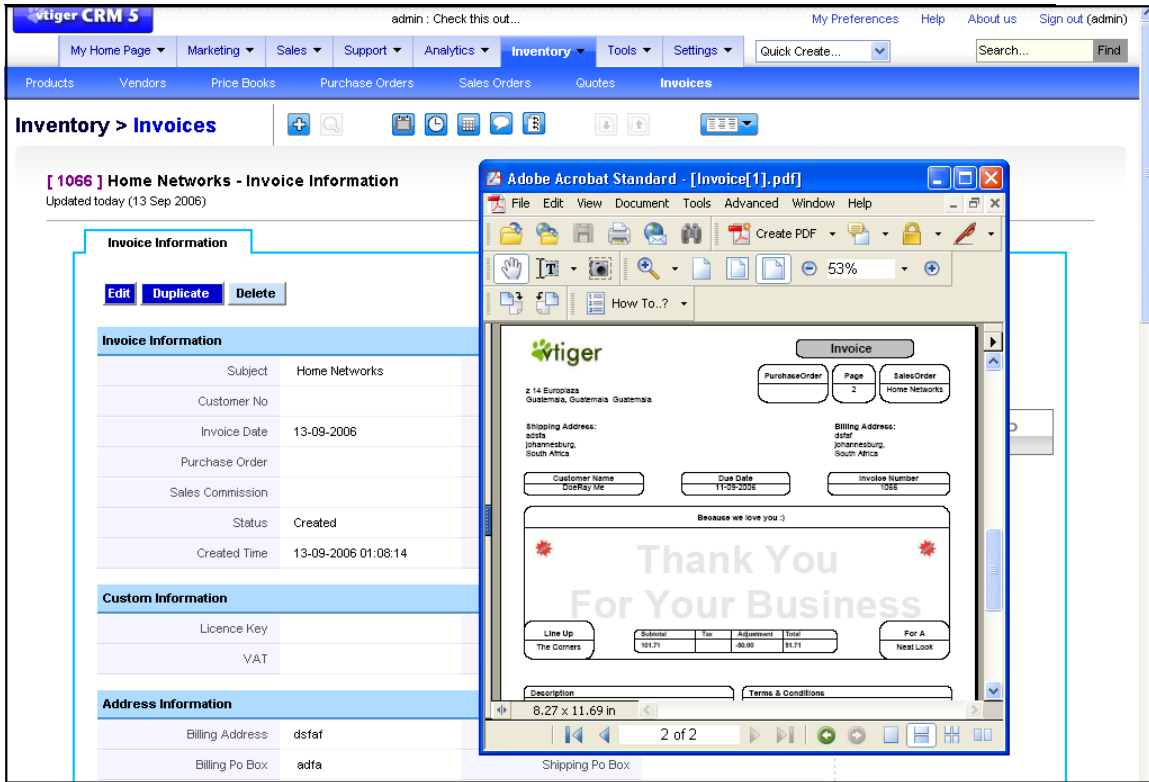


Figure 7: Generate Invoice

Marketing Automation

Create and manage campaigns, execute personal email marketing, and track success rate of the campaigns.

For a complete feature list refer to <vtiger CRM Home>/ Release_Notes.html

Limitations:

- Events more than one day will be displayed only at start time of the event.
- Week view UI will be changed post v5 release, so all the events are displayed at start time of the event.

- If events start time is lesser than the Calendar start time, it will not be displayed in the calendar view.
- Currency symbol will not be displayed for amount type fields except for potential amount.
- Field-level access control is not implemented for Import and Export utilities
- Field-level access control is not implemented for Firefox Toolbar
- After mail merge template is uploaded to vtiger CRM, even if you change the field level security, it will be reflected in template
- You cannot rename the reports
- Users at high-level hierarchy cannot view the data shared among their subordinates.
- Users at high-level hierarchy cannot view the data shared among their subordinates' groups
- Users in various sub groups can access data of their parent groups but cannot access the data of their own sub groups.

For example, A is a parent group, B is a sub group of A, and C is a sub group of B, then B can access data pertaining to A group, but cannot access the C sub-group data.

Known Issues

Please refer to vtiger Trac for more details about the issues: [Click Here](#)

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