

Administrative Guide

VtigerCRM Microsoft Exchange Connector
(Exchange Server 2010)

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Introduction

Vtiger CRM has been one of the market leader in the open source CRM sector and with free plug-ins for Microsoft Office and Outlook it has helped its users to enhance their productivity and maintain higher customer satisfaction. Microsoft Outlook is one of the most widely used Email & Contact management tool. The vtiger Outlook plug-in lets you synchronize Contacts, Emails and Calendar events. The only draw back is that the plug-in has to be installed on each of the client machine.

This is where the advantage of Exchange Connector lies where in you need to install it on the Exchange Server only once and it will do an automatic synchronization of Contacts, Tasks, Appointments and Emails. It also gives you the ability to create Accounts/Contacts/Leads/Potentials from Emails directly.

Requirements

1. Exchange Server 2010
2. Power Shell 2.0
3. Microsoft .Net Framework 3.5 or greater
4. vtigerCRM 5.3.0

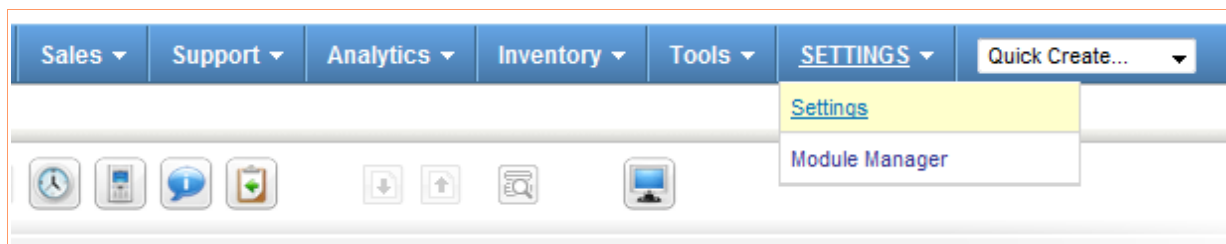
Installation

There are two components that needs to be installed, one on the vtiger Server and the other on the Exchange Server.

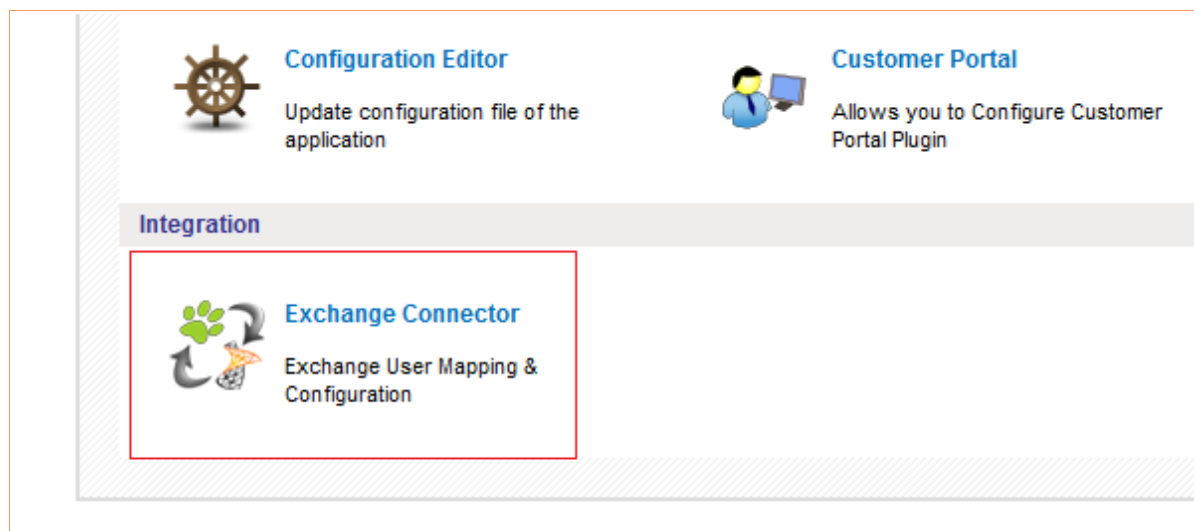
Vtiger Server Component

Unzip the vtigerCRM-Exchange-Connector-vtigercomponent.1.0.zip into the root folder of vtiger source and then run Customization/apply.php from your browser. For example if you open vtiger on the browser with URL <http://demo.vtiger.com> then you need to run <http://demo.vtiger.com/Customization/apply.php>. This will install a vtiger module named “Exchange Connector” which appears under Settings section.

This module will be accessible only by the admin users.



At the bottom of the screen you will see Exchange Connector



Exchange Server Component

We will be installing an Application on IIS which will act as a middle ware between vtigerCRM and Exchange Server. For installing this application you will have to provide :

1. Administrator credentials which has the permissions to Read/Write/Access on the IIS server.
2. The Administrator should be assigned impersonation role, this can be done by running the following command on Powershell.

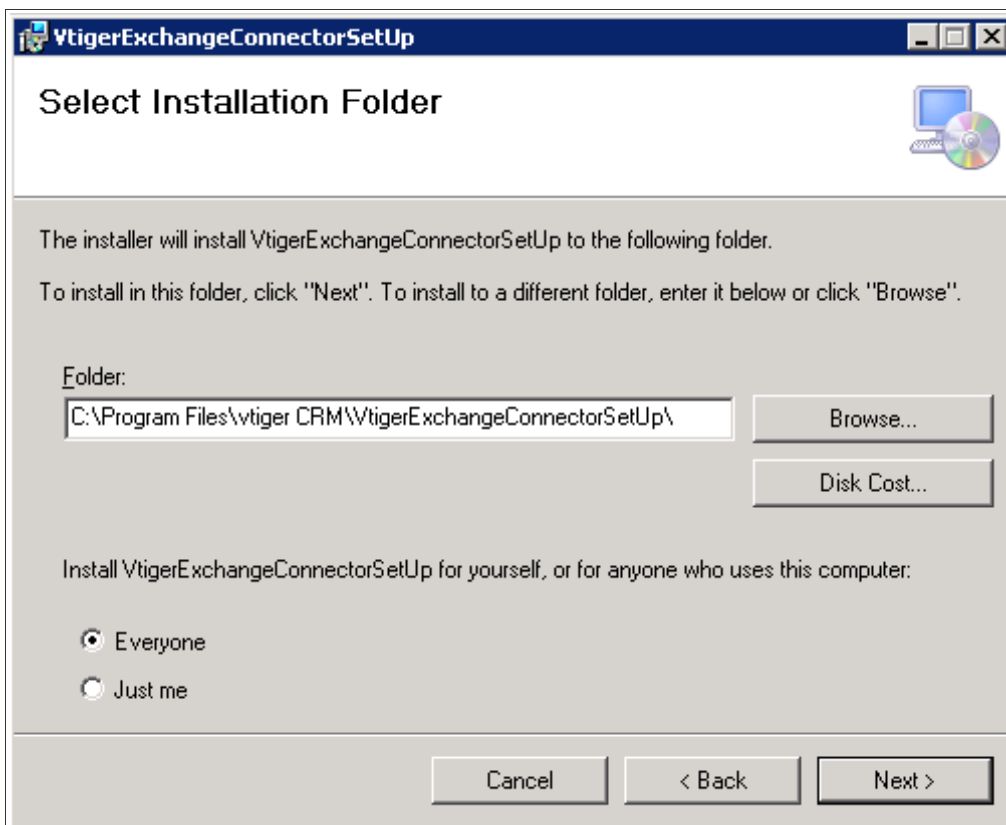
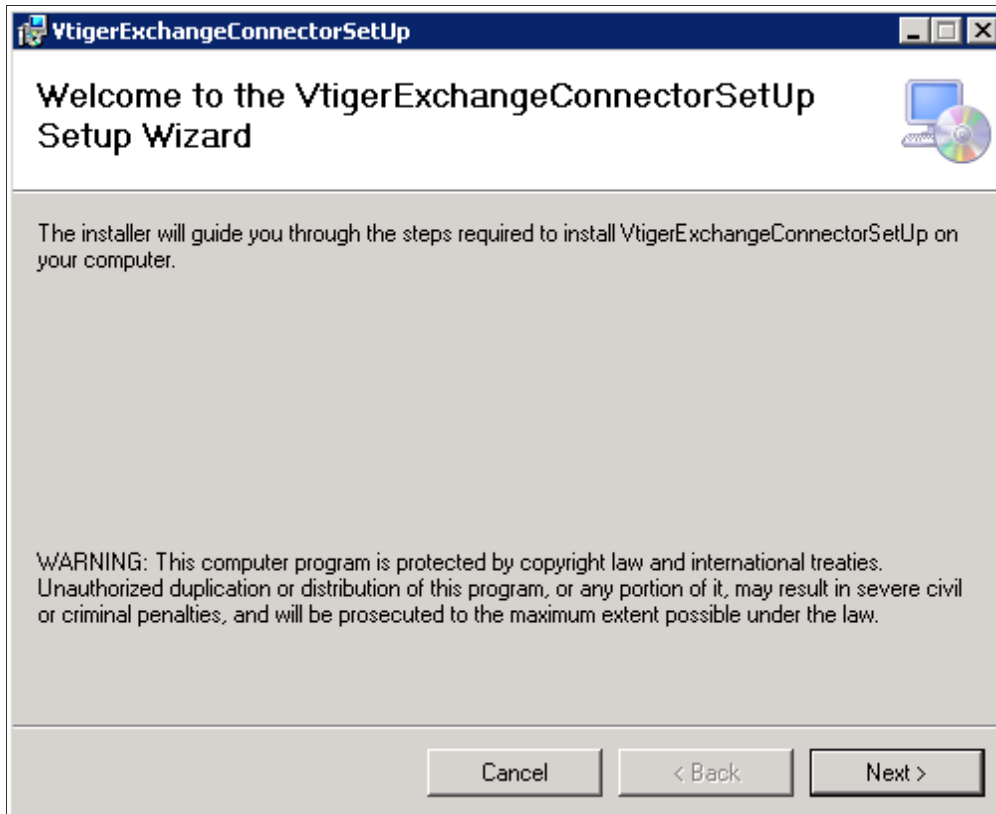
```
New-ManagementRoleAssignment -Name:"ROLENAME" -Role:ApplicationImpersonation  
-User:"USER_NAME"
```

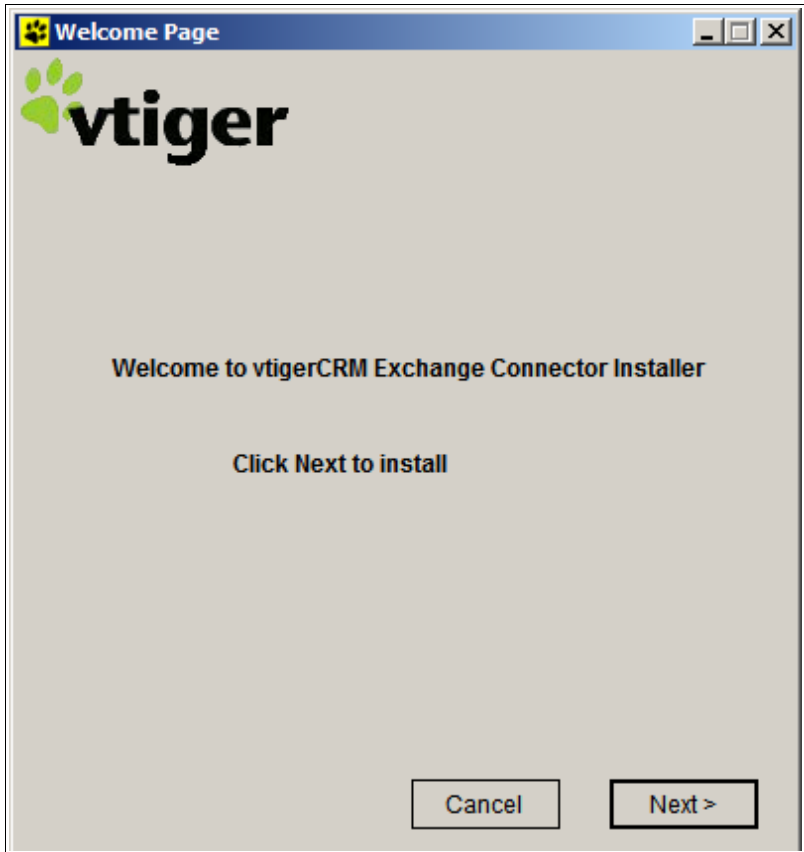
Example:

```
New-ManagementRoleAssignment -Name:exchange_connector -Role:ApplicationImpersonation  
-User:Administrator
```

Note : This version of connector assumes that the default iis http port is 80 and https port is 443.

Unzip the vtigerCRM-ExchangeConnector-Exchangecomponent.1.1.zip Click on the setup.exe

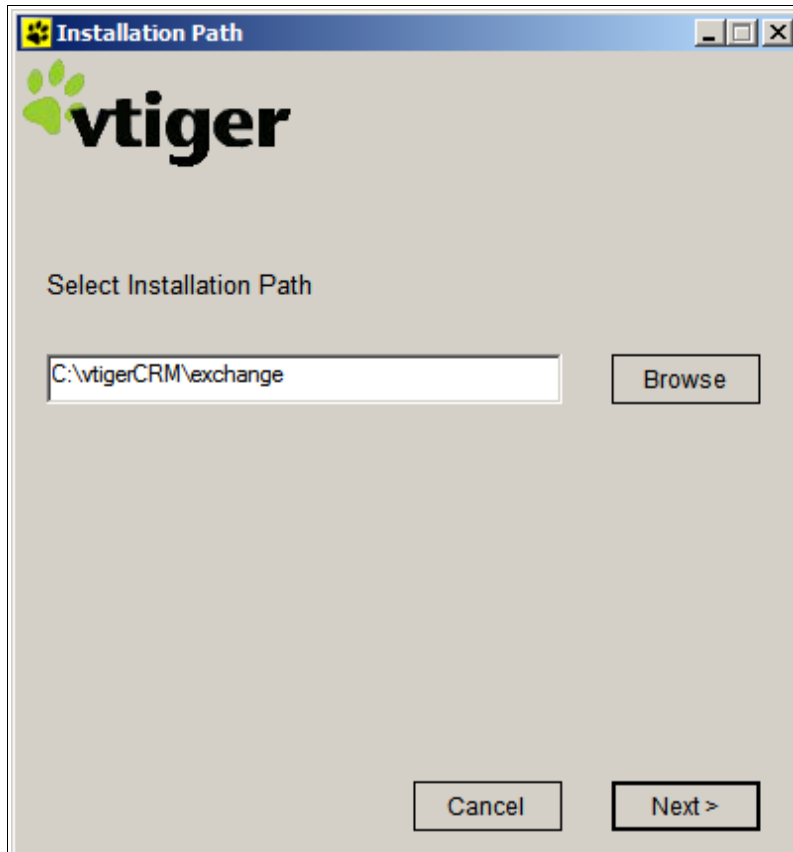




Accepting the License will enable the Next button.



Select a folder where the connector will be installed.



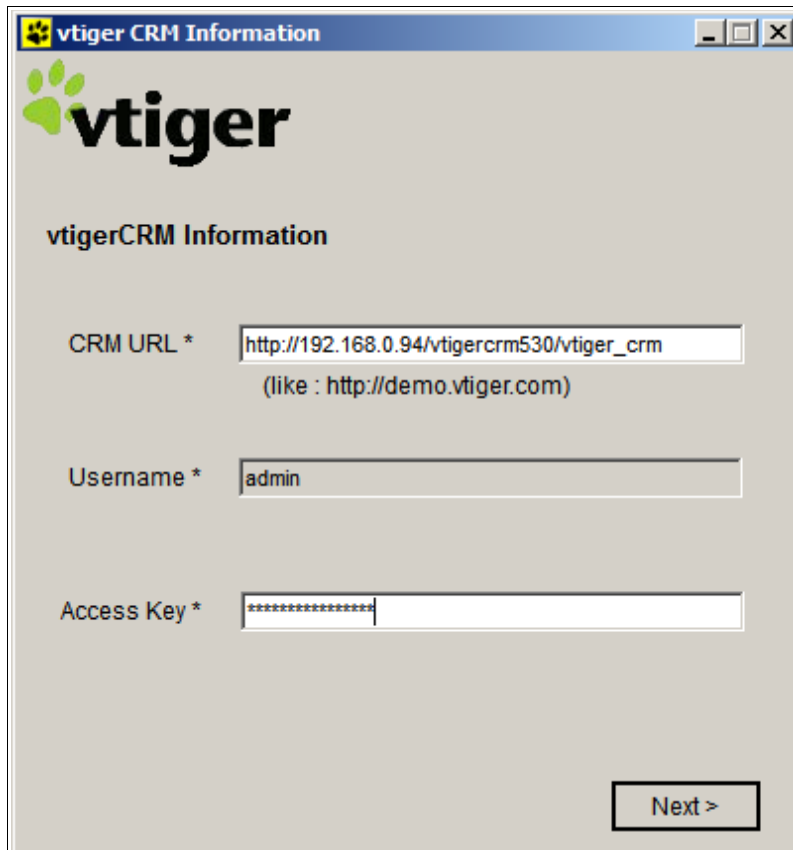
Here you have to enter License Key.



On this screen you will need to provide vtiger admin credentials and the vtiger server path.
For example, if you access your vtiger from the browser <http://demo.vtiger.com> , then give this in the vtiger CRM URL.

You can find “Access Key” inside vtigerCRM, for this after logging in go to “My Preferences” in the vtiger screen which is located at the top right side after the login page.

Note : Here you need to provide “admin” credentials from the vtigerCRM, as this is the user that cannot be deleted from the CRM.



The image shows a screenshot of a web browser window titled "vtiger CRM Information". The window contains the vtiger logo (a green paw print next to the word "vtiger") and the text "vtigerCRM Information". Below this, there are three input fields:

- CRM URL ***: The input field contains the text "http://192.168.0.94/vtigercrm530/vtiger_crm". Below the field, there is a hint text "(like : http://demo.vtiger.com)".
- Username ***: The input field contains the text "admin".
- Access Key ***: The input field contains a series of asterisks "*****" followed by a cursor.

At the bottom right of the form, there is a button labeled "Next >".

Here provide the Active Directory's administrator user credentials which has permission to add an application on IIS server as well as impersonation permission to other mail boxes.



The image shows a Windows-style dialog box titled "Active Directory Information" with the vtiger logo. It contains two input fields: "Admin Username *" with the text "Administrator" and "Password *" with a masked password of seven dots. At the bottom right, there are two buttons: "Cancel" and "Next >".

Active Directory Information

Admin Username * Administrator

Password *

Cancel Next >

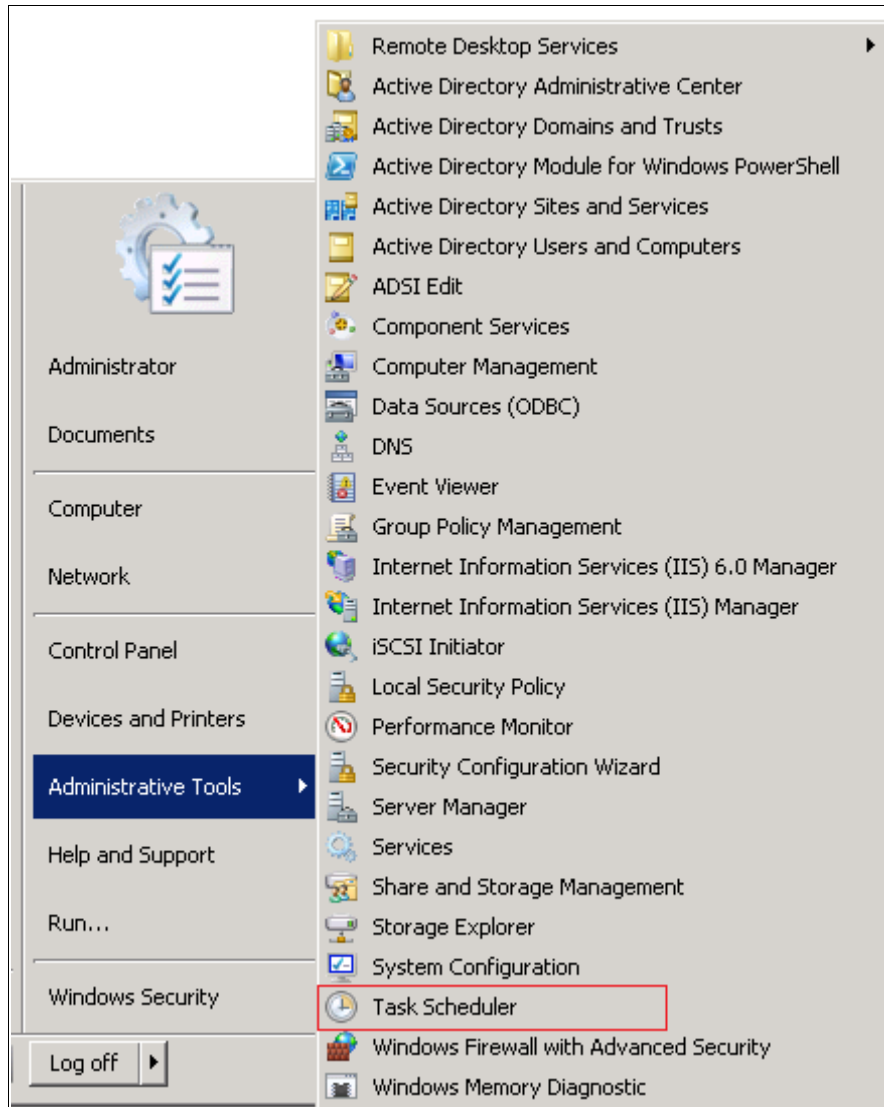


This indicates the plug-in has been installed with out any issues.

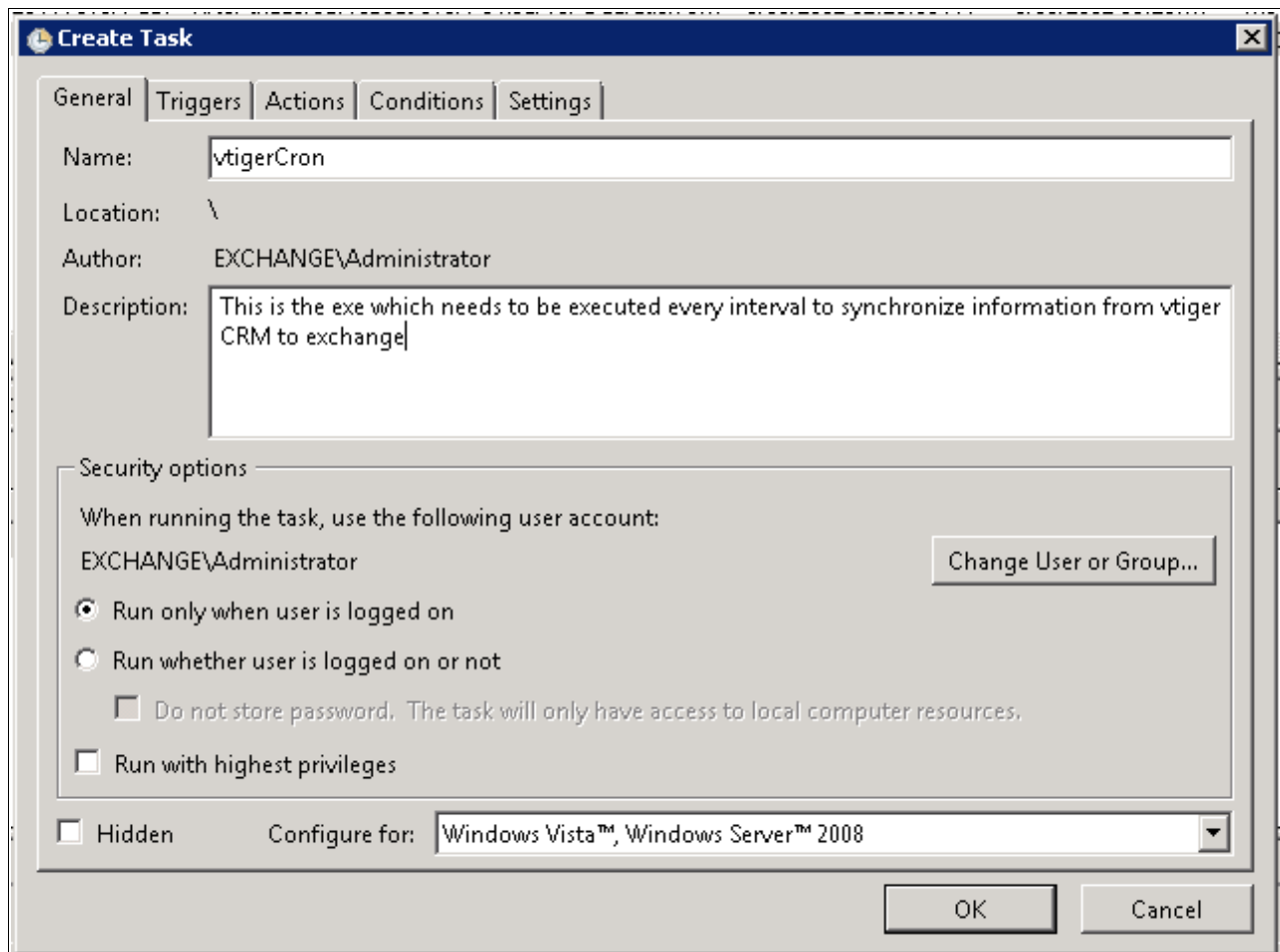
Scheduling vtigerCron

To fetch the information from vtigerCRM to exchange we have provided an exe called vtigerCron.exe. This exe should be executed very often to synchronize from vtiger to exchange and for this it is ideal that a Task is created in Windows Task Scheduler. Below are the steps given to set up the cron :

Step 1 : Click Start > Administrative Tools > Task Scheduler



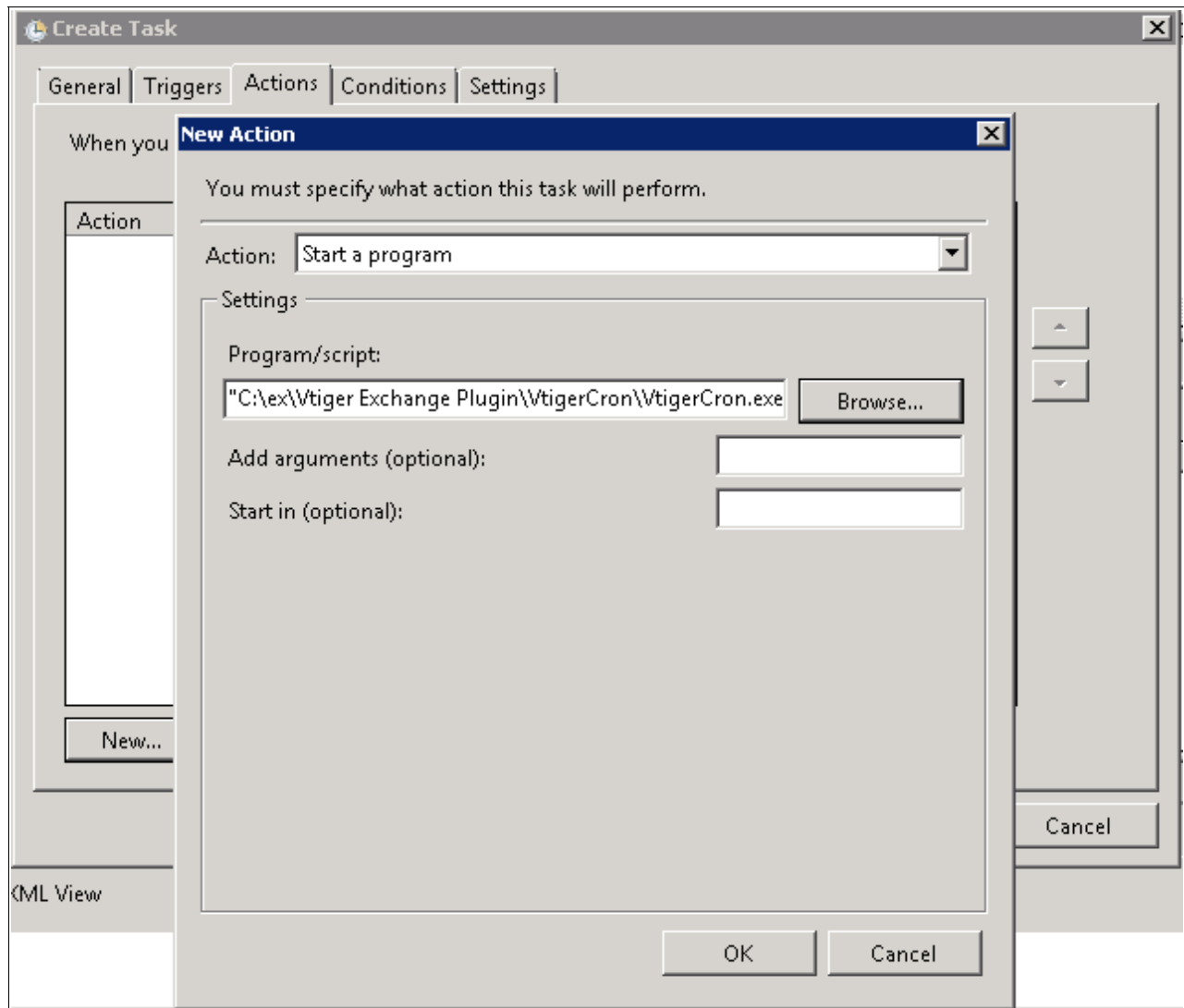
Step 2: Create a Task and provide it with name and description in the General tab.



Step 3 : Click on Triggers tab and schedule a new trigger, the recommended values for this is :
Daily and Repeat task every 10-15 minutes indefinitely.

The image shows a screenshot of the 'Edit Trigger' dialog box. The 'Begin the task:' dropdown is set to 'On a schedule'. Under the 'Settings' section, the 'Daily' radio button is selected and highlighted with a red box. The 'Start:' field is set to '1/10/2012' and '1:26:52 PM', with a 'Synchronize across time zones' checkbox that is unchecked. The 'Recur every:' field is set to '1' days. Under the 'Advanced settings' section, the 'Repeat task every:' dropdown is set to '1 hour' and the 'for a duration of:' dropdown is set to 'Indefinitely', both highlighted with a red box. Other options include 'Delay task for up to (random delay): 1 hour', 'Stop all running tasks at end of repetition duration' (unchecked), 'Stop task if it runs longer than: 3 days', 'Expire: 1/10/2013 1:50:04 PM' (unchecked), and 'Enabled' (checked). 'OK' and 'Cancel' buttons are at the bottom right.

Step 4 : Click on Actions tab and create a new action, browse to the path where connector is installed. You will find VtigerCron folder which has VtigerCron.exe and select it.



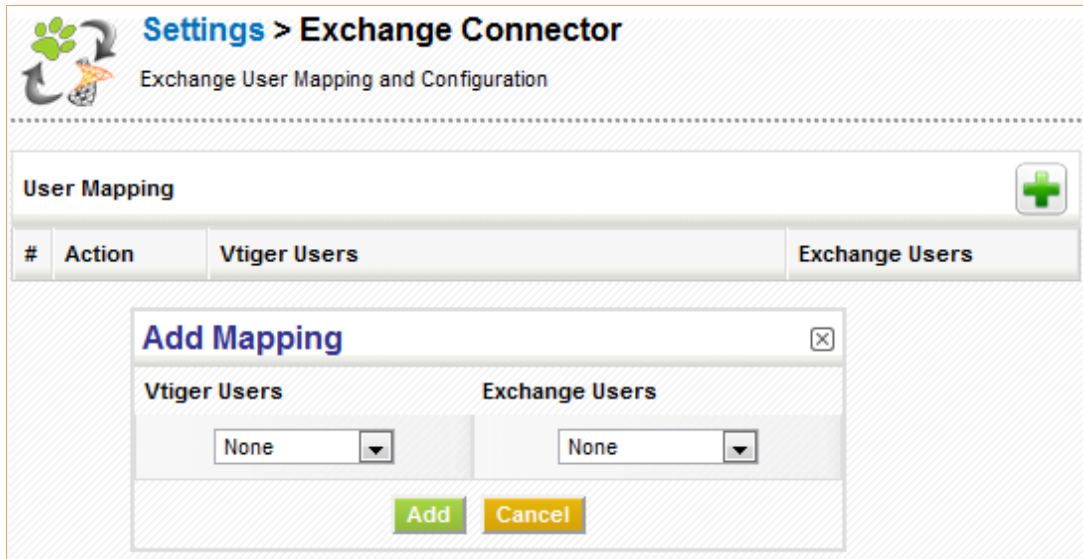
Once done the task will appear in the list as shown below.

Name	Status	Triggers
GoogleUpdat...	Ready	At 2:23 PM every day
GoogleUpdat...	Ready	At 2:23 PM every day - After triggered, repeat every 1 hour for a duration of 1 day.
MyNewService	Run...	At 3:28 PM every day - After triggered, repeat every 5 minutes indefinitely.
vtigerCron	Ready	At 1:26 PM every day - After triggered, repeat every 1 hour indefinitely.

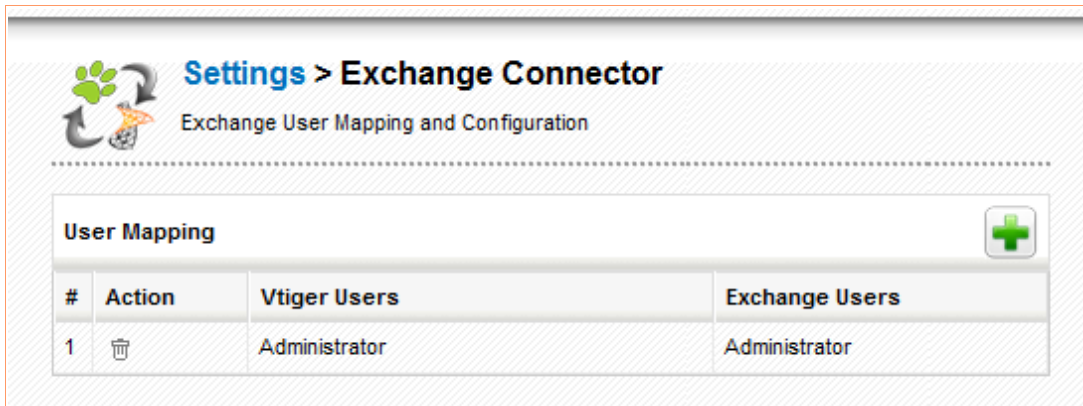
Add Mapping

Click on the plus button to get a popup which will let you add a mapping between vtiger and exchange user.

Under Vtiger Users you will see all the unmapped vtiger users and under Exchange Users you will see all the unmapped Exchange Users, the Exchange Users will only be shown once the Exchange Connector is installed on the Exchange Server.



The screenshot shows the 'Settings > Exchange Connector' interface. The main heading is 'Exchange User Mapping and Configuration'. Below this is a 'User Mapping' section with a green plus icon. A table with columns '#', 'Action', 'Vtiger Users', and 'Exchange Users' is visible. An 'Add Mapping' dialog box is open, featuring two dropdown menus labeled 'Vtiger Users' and 'Exchange Users', both currently set to 'None'. At the bottom of the dialog are 'Add' and 'Cancel' buttons.

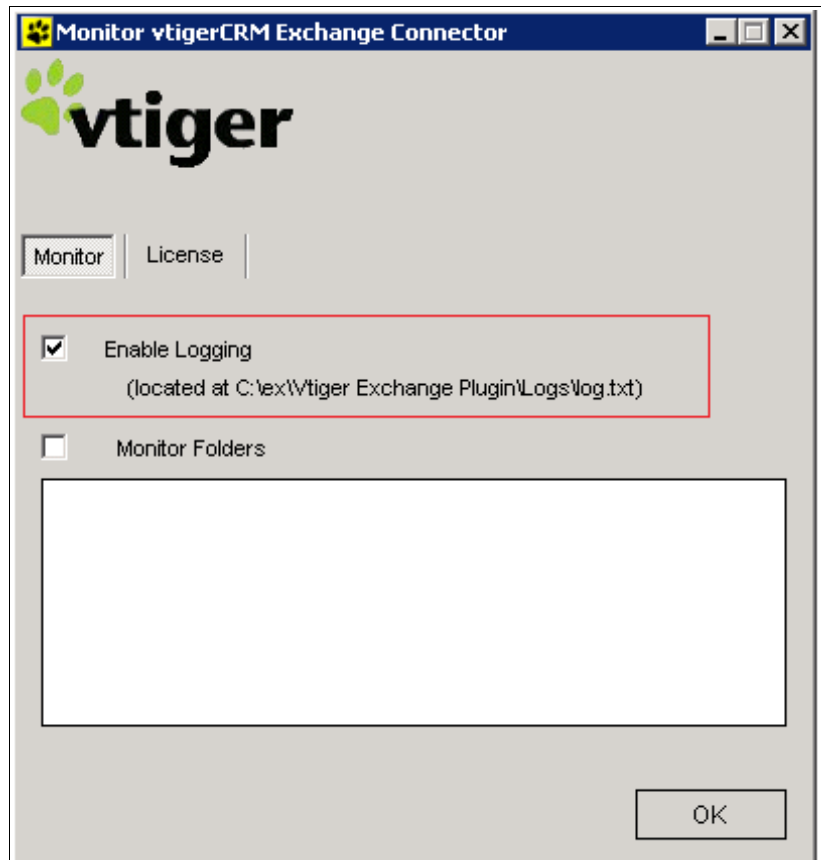


The screenshot shows the 'Settings > Exchange Connector' interface. The main heading is 'Exchange User Mapping and Configuration'. Below this is a 'User Mapping' section with a green plus icon. A table with columns '#', 'Action', 'Vtiger Users', and 'Exchange Users' is displayed. The table contains one row with the number '1' in the '#', a trash icon in the 'Action', 'Administrator' in the 'Vtiger Users', and 'Administrator' in the 'Exchange Users'.

#	Action	Vtiger Users	Exchange Users
1		Administrator	Administrator

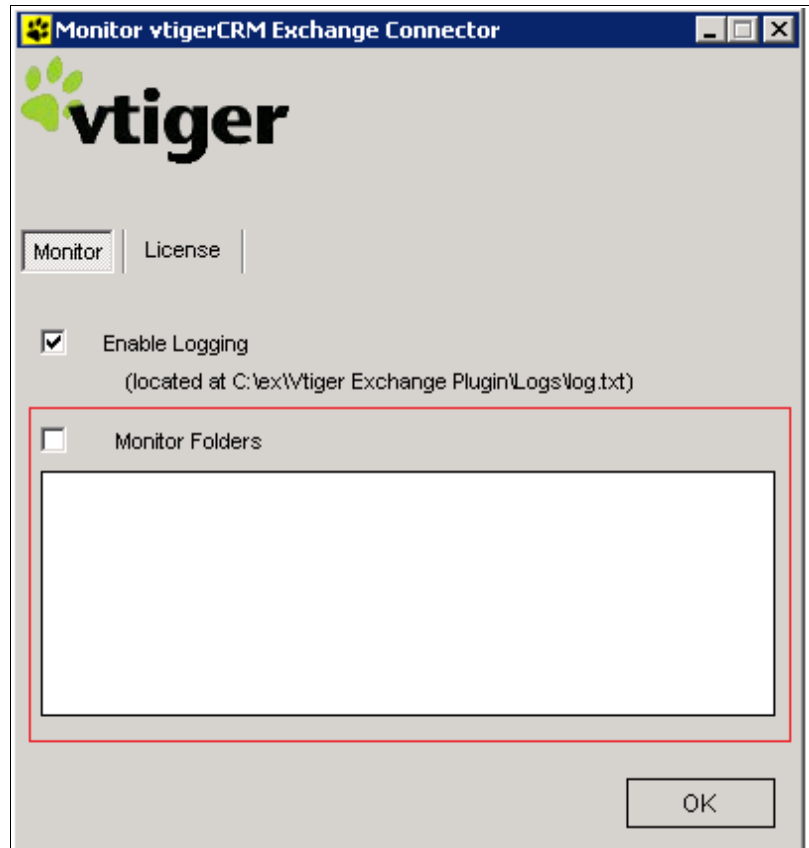
Enable Debugging

If the connector is not working then you can enable debugging using Monitor.exe which is shipped with the connector and you will find it in under Monitor folder where the connector is installed.



Monitor Folders

Once the mapping is added for a user folder will be created by the connector(explained in User Manual). These folder will listen to any changes and will notify vtiger CRM by creating/updating/deleting records, if a folder(s) does not respond to any action then Exchange server has lost the track of it. We will need to subscribe the folder again to start tracking changes for this we have Monitor Folder feature which you can see in when running Monitor.exe



When you select the Monitor Folder check box, it will start tracking the folders that exchange has lost tracking and it will re-subscribe them.

