Vtiger User Manual 5.2.1

User Manual

From vtiger.com

`This documentation applies to vtigerCRM 5.2.1 and vtigerCRM 5.2.0`

User Manual CRM Basics

From vtiger.com

Contents

CRM BASICS

This chapter explains what CRM is, and introduces the main concepts and terminology. This chapter is intended for users and business managers unfamiliar with CRM and CRM concepts.

Customer Relationship Management (CRM) refers to the strategy, processes, and systems, used to manage a company's interaction with customers, users, and sales prospects. CRM is an integral part of every business, and CRM systems enable businesses to streamline and better manage their customer interactions. CRM systems help increase sales, enhance marketing, and improve customer service and support.

CRM software products, such as vtiger CRM, enable you to deploy CRM systems for your business. These products support useful CRM functions that help a business automate and manage a wide range of business activities, particularly those that deal with customers and sales prospects. With a CRM product, businesses can quickly setup a CRM system for their customer related activities, and use this system to manage and drive productivity in sales, marketing, andcustomer service and support functions.

CRM systems cover many different functional areas, including many aspects of sales, marketing, and customer support and service. However, a business may use a given CRM system for only part of their business activities. Not all businesses use all CRM system capabilities, and certainly many small businesses do not use a CRM system at all. Moreover, businesses that use CRM systems often use them in many different ways. For example, a business may use CRM only for sales management while not using any CRM systems for customer service or marketing, while another may use a CRM system only for customer support. CRM systems therefore need to support a wide range of usage scenarios as required by diverse businesses. vtiger CRM allows you to use the system just for specific business activities, or any combination of the business functions supported by the software.

In order to get the most out of the CRM implementation, business processes for the selected business functions must use and align with the CRM systems employed. This often requires changes in employee activities, e.g. entering sales data into the CRM system instead of paper records or spreadsheets. Without such changes to ensure their proper use, CRM systems will have limited value. This use is typically focused in functional areas, i.e. the entire business does not need to use the system, but only staff in the chosen functional areas such as sales, and the business managers that need to monitor that activity.

To deploy a CRM system for your business, you will first want to understand the functions and features provided by the CRM software, so you can determine which of these capabilities will be useful and can be deployed for your business. You may choose to start with a simple subset of what is possible, to enable you to try out the system and gradually increase the use of the system for more of your business activities. You will also decide whether to start with a subset of users as a pilot or trial use of the CRM system. Once you have determined the functions to use in your initial implementation, you will install and setup your CRM system to support those business functions and setup user accounts for your CRM users with the requisite roles and permissions for each user. Your CRM users will need guidance on how they will use the system in the course of their business activities, to ensure that the system is used as planned. After a successful initial implementation, you may choose to use new functions in the CRM system to cover additional business activities.

Let's first look at the important CRM functions provided by CRM software.

CRM Functions

CRM may include a diverse set of critical business functions, and CRM software products support automation and management for most of these business functions. Three of the most important CRM functions are Sales Management (known as Sales Force Automation), Marketing Management (also known as marketing automation, and Customer Service and Support.

A **Sales Force Automation** system provides a set of tools to streamline various phases of the sales process, and automate and manage many of the tasks performed by the sales staff. Sales Force Automation includes a management system for tracking and recording every stage in the sales process for each prospective customer, from initial contact to final disposition. Many Sales Force Automation applications also include features for opportunity management, quote generation, sales forecasting and pipeline, workflow automation, and product inventory.

Systems for **Marketing Automation** help the enterprise identify and target its best customers and generate qualified leads for the sales team.A key marketing capability is managing and measuring marketing campaigns, including email, and direct mail. Marketing automation also includes capabilities for managing prospect lists, collateral, and internal marketing resources.

A **Customer Service and Support** system enables tracking and management of customer service activities and support issues. Customer service is an important differentiator for many businesses, and CRM systems help them improve their customersâ experience while increasing efficiency and reducing costs. CRM systems provide tools to manage customer issues and service requests, e.g. track and resolve support requests. They provide tools such and knowledge bases to help customer self-service, and help service staff more quickly respond to customer requests.

CRM systems may also provide an array of related tools and functions such as **Inventory Management**, which helps businesses manage their inventory of products to ensure reliable and efficient procurement from suppliers and delivery to customers, Calendering, Email, Security Management, and many other useful business tools. Please see the vtiger CRM product overview section for more detailed information on vtiger CRM provides in each of these functional areas.

As with any business activity, there are a number of concepts and terminology used in CRM, many of which are simply common business terms and concepts. You will find it most helpful to be familiar with these terms and concepts when you use the CRM system.

Common CRM Terms and Concepts

The following are some of the common terms you will encounter as you use vtiger CRM and other CRM systems.

- **Lead :** A lead is a prospective customer. In a CRM system, prospective customers are first entered into the system as leads. You may collect leads from your marketing events such as conference, advertisement, trade show etc. The goal is to convert a lead into a customer. Not all leads will result in a sale and be converted into a customer. This lead will contain all the information about the contact or the account available at this sales stage.

- **Potential** (also known as **Opportunity**):A potential is an opportunity to make a sale, i.e. a potential sale. When you determine a lead could generate a potential sale, the Lead will be converted to a Potential. In addition, an Account and Contact entries for this lead will be automatically created in the CRM system. Each businesses will determine when a lead should be converted to a potential. For example, a business may decide a lead that requests a quote can be converted to a Potential. The Lead entry will be deleted to avoid confusion and duplicate entries. All the information collected for the Lead is still available in the CRM system, but will now be presented in records for Contact, Account or Potential.

- **Account:** An Account is a customer account record for a customer or prospective customer. When a Lead is converted to a Potential, an Account for the prospective customer is automatically created in the CRM system.
- **Contact:** A Contact is the contact information for a given customer or prospective customer. When a Lead is converted to a Potential, a Contact for the prospective customer is automatically created in the CRM system.
- **Quotes :** A Quote is a records information for a sales quotation, i.e. price, quantities, and other terms, for a potential sale to prospects. The CRM system supports you in the creation of quotes for potential customers. A quotation can be created for a Potential, for easy and automatic transfer of the customer data to the quote.
- **Purchase Order:** A purchase order (PO) is a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer. The Purchase Order is a formal notification and approval for a customer order, and kicks off the next stage in the sales process when the PO is received.
- **Sales Order:** A Sales Order is a document used internally by businesses to track and complete a customer order. A sales order may be for products and/or services. A CRM system allows you to record and manage Sales Orders and related information as part of your sales process. Once a quotation is approved, a Sales Order can be created directly from a Quote detail view. All the relevant data from existing records will be automatically populated in the Sales Order.
- **Invoice:** An invoice is a commercial document issued by a seller to the buyer, indicating the products, quantities, and agreed prices for products or services the seller has provided the buyer. Once a quotation is approved, an Invoice can be created directly from a Quote detail view. All the required data will be automatically added to the Invoice.
- **Campaign:** A Campaign (or Marketing Campaign) is a marketing effort to increase sales through a set of marketing activities. The goal of this effort is often to generate new leads and help convert them to new sales. A campaign can have other goals, e.g. improve the awareness or brand of the company. A CRM system can help manage, execute and monitor marketing campaigns.
- **Product:** A Product is a business offering from a business to it's customers. A CRM system allows a business to record it's Products and related information so that sales staff and other CRM users can use product information fully and correctly in their business activities.
- **Vendor:** A Vendor is a supplier of a product. The Inventory Management portion of a CRM system allows tracking of inventory being supplied by multiple Vendors.
- **Price Books:** A Price Book is a named collection of products and pricing created to serve a specific purpose, e.g. a segment of the market. For example, a business may have a Price Book for government sales, where prices are discounted, or include additional charges. Price Books in a CRM system allow sales staff to more easily quote prices when serving different types of customers that need differentiated pricing strategies.
- **Trouble Ticket** (sometimes called **Service Request**): A Trouble Ticket is a record of information related to a customer issue or service request. A CRM System, as well as many other Help Desk and Issue Tracking systems, use Trouble Tickets to capture, track, and manage, customer issues or service requests.
- **Security Administration :** The user security administration functions are the core of CRM security management, and are used to control the access to the CRM system for each user. vtiger CRM provides a privilege system that allows you to control who can view, edit, delete or create each type of CRM data. Roles, Profiles, and Groups, are used to make it easier to manage privileges for multiple users and managers, and eliminates the need to setup each privilege individually for each user. Instead, you can setup privileges for a Profile, and use the Profile for multiple users and Roles. Roles are organized hierarchically and a user can have multiple Roles, which provides an efficient way to assign privileges to users and managers performing multiple functions.
- **Profiles :** Profiles are a set of security privileges for executing CRM operations, and can be assigned to users. Profiles make it easier to control detailed security privileges without having to specify them individually for each user. Specific security privileges can be granted once in a Profile, and then assigned to users as needed.
- **Roles :** Role based security allows security setup using hierarchical roles that capture user and manager responsibilities in an organization. Each Role is primarily one or more Profiles, i.e. a set of security privileges. These Roles are then assigned to users. Security administration with role based security consists of determining the operations that must be executed by persons in particular jobs, and assigning Roles to users as needed.

- **Groups :** In addition to restricting security privileges for each type of data, vtiger CRM provides some security control to permit access to specific subsets of data. For example, you may need to setup access to data for a specific customer account so that specific people can see the data. For better manageability, the CRM allows to collect users and Roles in Groups. Specific data, e.g. a specific Account, can be assigned to the group so that everyone in the group has accesses to that data.

- **Sharing Access :** Sharing Access controls are used to determine what level of data sharing is enabled between users, e.g. can one salesperson see another's leads. By default the sharing access settings may allow all users to see all CRM records, even if the record is not assigned to them. Sharing Access allows you to restrict or allow such access for each type of CRM data.

- **Field Access :** Field Access is used to control visibility of specific fields in each module to users of the module. You can use this function to either show or hide particular fields to the entire organization. Default field access settings include custom fields you may have created before. By default it is configured to display all data provided in the CRM system.

- **Tag Cloud :** Tag Clouds are a convenience for CRM data access that has been tagged with labels. They are designed to improve the usability of the CRM by making it easier to access. They help to categorize the records based on a user's requirement from categories set by the CRM system. Tag Clouds are used to pool objects based on subjective or other values.

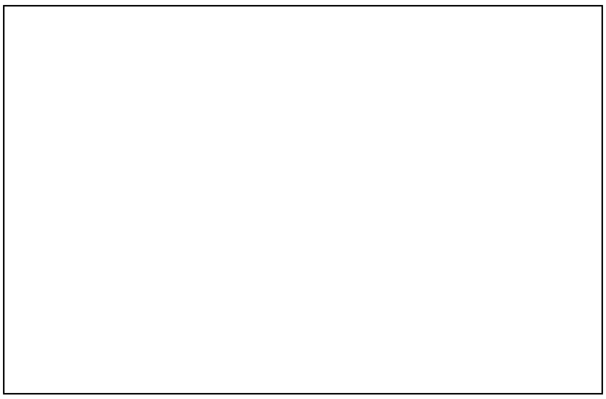
- **Calendar Reminder :** Each user can activate an activity reminder function by setting a reminder interval in My Preferences. If activated a popup browser window will be displayed every time an activity is due. The popup window displays the time, status, and subject of an activity. It offers you the options to postpone or to close a reminder message. If postponed the message will popup again after the next reminder interval until it is closed.

- **Chat Functionality :** The chat functions offered by the CRM provides instant messaging capabilities in a form of real-time communication between two or more CRM users. The CRM offers public as well as a private chat capabilities in so-called chat rooms. The public chat allows all CRM users to share a common chat room where each user can read all messages and can contribute if desired. The private chat room serves as a platform for the communications between two users.

vtigerCRM Product Overview

This chapter introduces the vtiger CRM Product and provides an overview of the many functional areas and features it provides. This chapter is primarily intended for business and IT managers to help them decide how to use the vtiger CRM product. We provide an in-depth listing of the many capabilities in the product. This information will be useful to you as you plan your CRM system.

vtiger CRM is an open source software product that enables you to quickly deploy a CRM system for your business. It implements many of the common CRM functions needed by small and medium sized businesses, to enable them to quickly and easily use CRM to enhance their business functions for sales, marketing and customer service and support. vtiger CRM is a widely used product with thousands of users in dozens of countries. It has a vibrant community of users driving the product forward, and contributing to it's development. Over a million copies of vtiger CRM have been downloaded by our users. vtiger CRM is designed to be used over the web by multiple users as illustrated below. It runs on a Linux, Windows or Macintosh system, and can be accessed by multiple authorized users over the Internet using a web browser. Each user has access to the data and functionality according to their roles and ownership of the CRM data, and the policies you set for such access.



vtiger CRM provides a complete set of CRM capabilities for the CRM business functions. It enables automation and management of the following CRM and related functions:

- Sales force automation
- Marketing automation
- Customer Support and Service
- Inventory management
- Security management

- Calendaring
- E-mail integration

In addition, vtiger CRM provides many additional tools and features that help CRM users in a variety of related business activities. Many of these tools are mentioned in the feature list below, in the functional areas in which they are most used. As discussed in the earlier chapter, each business will need to choose which of the capabilities provided by the CRM software will be used in their business. Some businesses may start with a limited subset of the functions, or even a subset of their teams, and grow as the users get more comfortable with using the system. Alternately, a business may do a full scale deployment and use a wide range of the capabilities right from the get-go, with proper planning and execution.

Let's look at the features provided in support of these business activities in more detail. Please refer to the CRM Basics chapter for an introduction to the functional areas and the terms used.

Sales Force Automation Features

Sales Force Automation is an important CRM function that streamlines and enhances the operations of your sales team. Sales Force Automation includes many activities needed by your sales team including Lead Management, Opportunity Management, Account %26 Contact Management, Sales Pipeline Management, Sales Forecasting, Sales Analytics, and others. vtiger CRM supports these different aspects of Sales Force Automation as outlined below.

Sales leads are a vital resource for sales and vtiger CRM offers sales teams a full range of lead management functions. vtiger CRM provides the following features to manage sales leads.

- Manage leads end-to-end (from creating leads to converting them into opportunities, i.e. Potentials)
- Capture leads directly from your Web site and transfer to vtiger CRM using vtiger CRM Forms
- Customize online lead form as per your organization requirements
- Import leads from external sources, such as Web downloads, trade shows, seminars, direct mail, and other types of campaigns
- Add multiple products to the leads
- Qualify leads to next stage based on information captured in lead details
- Convert leads into sales opportunities, accounts, and contacts with a single-click
- Lead conversion mapping for all the custom fields
- Create fully customizable lead reports
- Export leads to spreadsheet software, such as MicrosoftÂ® ExcelÂ®, OpenOfficeÂ®, and others for further analysis

Sales staff need to track and pursue every sales opportunity to maximize their success. Opportunity Management is another important sales function covered by vtiger CRM. Opportunities are called Potentials in vtiger CRM. vtiger includes the following features for Opportunity Management:

- Track all sales opportunities end-to-end in a sales cycle
- Associate opportunities with accounts, contacts, activities, and other modules to have a better visibility on the opportunities
- Generate quotes, sales orders, and invoices from the potentials
- Create fully customizable opportunity reports
- Export opportunities to spreadsheet software, such as MicrosoftÂ® ExcelÂ®, OpenOfficeÂ® and others to analyze the sales pipeline and quickly identify the bottlenecks if any

Customer Account Management is central to sales, and vtiger CRM provides a number of Account Management features:

- Track all accounts and related contacts, opportunities, cases, and other details from a common repository
- Specify parent-child relationships between accounts and their subsidiaries or other divisions
- Import accounts from external sources, such as ACT, GoldMine, and other applications
- Generate quotes, sales orders, and invoices for the accounts
- Track purchase history of the customers and analyze opportunities for up selling and cross selling
- Create fully customizable account reports
- Export accounts to spreadsheet software, such as MicrosoftÂ® ExcelÂ®, OpenOfficeÂ®, and others to analyze the buying patterns of a customers and set up loyalty programs
- Attach customer-specific documents to accounts for a quick reference in future

Contact Management is another key sales requirement, and vtiger CRM provides a number of Contact Management functions to ensure sales teams maximize the value of their contact lists.

- Track all contacts and related opportunities, cases, activities, and other details from a common repository
- Create the hierarchy of contacts within a company to have a better coordination while dealing with customers
- Import contacts from external sources, such as ACT, GoldMine, and other applications
- Export contacts to spreadsheet software, such as MicrosoftÂ® ExcelÂ®, OpenOfficeÂ®, and others for further analysis
- Synchronize contacts with MicrosoftÂ® OutlookÂ®

Sales Activity Management is used to ensure the sales team's work activities and tasks are managed for maximum productivity. vtiger CRM offers the following Activity Management features.

- Add all important customer-related e-mails to vtiger CRM for quick reference in future
- Store all the details of customer meetings and calls in a n intuitive calendar
- Manage daily tasks of the vtiger CRM users to have a streamlined sales process

Sales teams need good Reports & Dashboards to analyze and improve their sales efforts. vtiger CRM provides a number of tools in this area.

- Pre-build reports for sales force automation
- Sales pipeline analysis by stage
- Monthly Sales pipeline analysis
- Sales opportunities by lead source
- Drill-down the dashboards by time and opportunity stage

Marketing Management Features

vtiger CRM provides Campaign Management, E-mail Marketing, Online Lead Forms, Product Management specifically useful for your organization-wide marketing requirements. The following outlines many of the marketing management features offered by vtiger CRM.

Campaign Management is an integral part of marketing and vtiger CRM offers a number of features to manage and monitor your marketing campaigns.

- Manage organization-wide marketing campaigns
- Track campaign effectiveness based on customer data
- Execute personalized mass mailing campaigns for the campaigns

vtiger CRM supports E-mail Marketing functions as outlined below.

- Manage mailing lists based on existing data related to leads, accounts, and contacts
- Create HTML templates directly from the system
- Send mass E-mail campaigns from the selected mailing lists

A number of Lead Management functions are provided in vtiger CRM to help in marketing efforts to your leads.

- Capture leads directly from your Web site and transfer to vtiger CRM
- Customize online lead form as per your organization requirements
- Import leads from external sources, such as Web downloads, trade shows, seminars, direct mail, and other types of campaigns
- Qualify leads to next stage based on information captured in lead details

vtiger CRM provides other marketing-related modules, such as Calendaring, Contact Management, File Attachments, etc. to help streamline your marketing efforts.

Customer Service/Support Features

vtiger CRM provides enterprise quality Customer Support & Service features, such as Ticket Management, Knowledge Management, Customer Self Service Portal, Reports, and Support Statistics specifically useful for your organization's customer support force. You can also use other customer support-related modules, such as Products, Activity Management, Calendar, Contact Management, and so on.

Ticket Management is a set of functions related to handling customer support issues, queries, and other service requests. A trouble ticket is the term used for a support request from a customer. vtiger CRM provides the following Ticket Management features.

- Track all trouble tickets related to customers end-to-end as per organization's customer support process
- Associate trouble tickets with accounts, contacts, products, and other modules to have a better visibility on the trouble tickets
- Create fully customizable list views as per Support person's requirement
- Provide solutions to the trouble tickets submitted through Customer Portal
- Automatically update the status of tickets through E-mail
- Create fully customizable ticket reports
- Create customer support statistics to help the managers to plan for a better customer support process.
- Create custom fields as per your organization requirements

In order to help customers quickly find answers to their queries and support issues, as well as help support staff find answers more quickly, vtiger CRM provides a Knowledge Base with the following features.

- Manage product-wise Knowledge Base in a centralized location for a better resolution of trouble tickets within least possible time
- Associate Articles with trouble tickets and products
- Provide public access to the Knowledge Base only after approval
- Maintain up-to-date Articles in vtiger CRM based on customer suggestions & comments

vtiger CRM enables you to provide your customers with a Customer Self Service Portal, which is a web portal that your customers can log into and report and track issues, and get answers from the knowledge base. The vtiger CRM Customer Portal provides the following features.

- Customizable and can be deployed easily on your Web site
- Secured access to the Customer Self Service Portal
- Search Knowledge Base articles before submitting trouble tickets
- Constantly improve the quality of Knowledge Base by threaded discussions
- Notify trouble ticket update to the customers through E-mail
- Follow up the trouble tickets by threaded discussions
- Update customer profiles (limited functionality)

Inventory Management Features

vtiger CRM supports more complete sales cycle management by integrating Inventory Management functions, such as Products, Price Books, Vendors, Sales Quotes, Purchase Orders, Sales Orders, and Invoices with CRM modules, such as Leads, Accounts & Contacts, and Opportunities. Using vtiger CRM you can achieve the seamless integration between pre-sales and post-sales activities in a single application.

vtiger CRM provides a Products Management module to capture and use product information, including pricing, so that your sales team and other staff can apply this information in their sales, marketing, support and other customer related activities. the vtiger CRM Products Management module provides the following features.

- Manage organization-wide product information
- Associate products with other modules for a better 360 degrees view
- Import product details from other applications
- Create custom product fields as per your organization's requirements
- Attach product-specific documents, such as collateral, license agreements, and others
- Upload product images for easy identification
- Export product details to spreadsheet software, such as MicrosoftÂ® ExcelÂ®, OpenOfficeÂ®, and others for further analysis
- Create Price Books as per customer segment and associate products with Price Books
- Procure products from the selected vendors list

vtiger CRM provides functionality to anable sales teams to easily generate sales quotes for customers. The vtiger CRM Sales Quote module provides the following features.

- Track outstanding quotes from the quotes list view
- Add line items to the quotes and update subtotal, taxes, adjustments, and grand total amounts
- Select different prices for the same product as per customersegment
- Create printer-friendly Sales Quotes and deliver to the prospect customers through inbuilt E-mail service
- Create Sales Order or Invoice with a single click from the Sales Quote
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the prospect
- Display quotes related to accounts under the related list
- Customize Sales Quote fields as per your organization's requirements

Once a sale is made, Order Management kicks in, which is a set of functions to ensure the order is properly serviced and fulfilled for the customer. vtiger CRM provides a number of features in support of Order Management.

- Streamline organization-wide procurement and fulfillment processes with integrated approach of vtiger CRM
- Track outstanding orders from the orders list view
- Procure products from the best available Vendors/Manufacturers/Resellers list in vtiger CRM
- Manage up-to-date stock position by seamless integration between order fulfillment and available stock in your warehouse
- Customize Purchase Order (PO) and Sales Order (SO) fields as per your organization requirements
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the prospect while creating orders
- Add line items to the Orders and update subtotal, taxes, adjustments, and grand total amounts automatically
- Create printer-friendly Order (PO/SO) and deliver to the Vendors/Customers through inbuilt E-mail service
- Once the Sales Order is accepted, create Invoice from Sales Order with a single click
- Periodically notify the stock position to the parties concerned in your organization so that stock is always available to fulfill the outstanding orders

vtiger CRM also provides a set of functions to support generation of Invoices. Invoices for customer billing are a critical step once a customer order has been fulfilled.

- Track outstanding invoices from the Invoices list view
- Create printer-friendly Invoices and deliver to the customers through inbuilt E-mail service
- Customize Invoice fields as per your organization requirements
- Add line items to the Invoice and update subtotal, taxes, adjustments, and grand total amounts automatically
- Customize Invoice fields as per your organization requirements
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the customer while creating invoices
- Associate invoices with the General Ledger account for hassle-free Book Keeping

Getting Started with vtiger CRM

The following assumes vtiger CRM has been installed and setup for your business, and a user account created for you. Please refer to the installation manual for information on how to install vtiger CRM, and the Administrator Manual for information on vtiger CRM administration.

Before You Begin

To use vtiger CRM, you need to use a supported web browser that can connect to the vtiger CRM system via the web or private network. vtiger CRM supports the majority of web browsers, including IE 6 or higher, Firefox, Chrome and Safari.

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Your browser configuration must meet the following requirements:
1.Cookies:  You must allow cookies in your browser.
2.Javascript:  You must have Javascript enabled in the security settings of your browser.
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Before you can start working with the CRM system you must identify yourself to the CRM system as an authorized user. This is done by a login procedure which requires a Username and a Password. Both are provided to you by your CRM system administrator.

Logging Into vtiger CRM

Your CRM system administrator will provide you with a URL to be used as the access address to the CRM system at your browser. You will also need the Username and the Password of your CRM account.

The Login screen will appear as shown in the mage above. The user must type an Username and Password into the available edit fields in order to continue on the program. A user may also choose a different Theme or Language. Username, Password, Themes and Languages are provided by the system administrator. After entering the Username and Password, press <Enter>, or the Sign in Button.

Logging Out

To sign out of vtiger CRM, use the Sign Out link at the top right of your vtiger CRM screen.

Changing Password

After logging in first time, you may change the password for a better security. It is better to use a combination of letters, numbers, and symbols in your password.

To change password

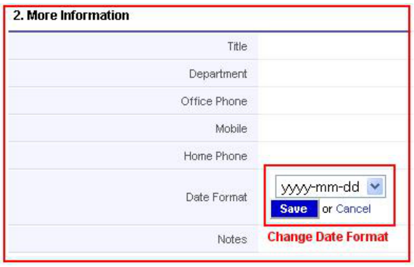
1.In *vtiger CRM* Home page, click the My Preferences hyperlink.
2.In *User: <User Name>* page, click the **Change Password** button.
3.In the Change Password pop-up page, enter the new password and click **Save**.
4.Sign out from the vtiger CRM and sign in again with the new password.

Changing Date Format

After logging in first time, you must change the date format as per your organization date format. You can select one of the following options,

- dd-mm-yyyy
- mm-dd-yyyy
- yyyy-mm-dd

To change date format 1.In the *vtiger CRM* Home page, click the My Preferences hyperlink.
2.In the *User: <User Name>* page, click the Edit button.
3.In the *User: <User Name>* page, select the date format from Date Format pick list.
4.Click Save. The date format will be changed for all the date fields in all the modules.



User Interface Overview

The vtiger CRM User Interface is organized into functional modules such as Leads, Accounts, Contacts, etc. All the modules include a common set of user interface components like pull-down menus and buttons. Some of the menu options and buttons vary with each module, so that only relevant operations are enabled for each module.

The following shows the top header that is common to the vtiger CRM user interface across all modules.

The top line has the vtiger CRM header logo, and the following set of links:

- Gmail Bookmarklet: A script provided by vtiger CRM which makes it easy to incorporate links to emails in your Gmail account into specific CRM records.
- My Preferences: A link to setup your preferences, e.g. the list of standard widgets on your Home Page.
- Help: Link to help information.
- About Us: Link to vtiger CRM information on the team and contributors.
- Sign Out(user): The link to sign out of this user session. The current user is listed so you know at all times which user you are logged in as.

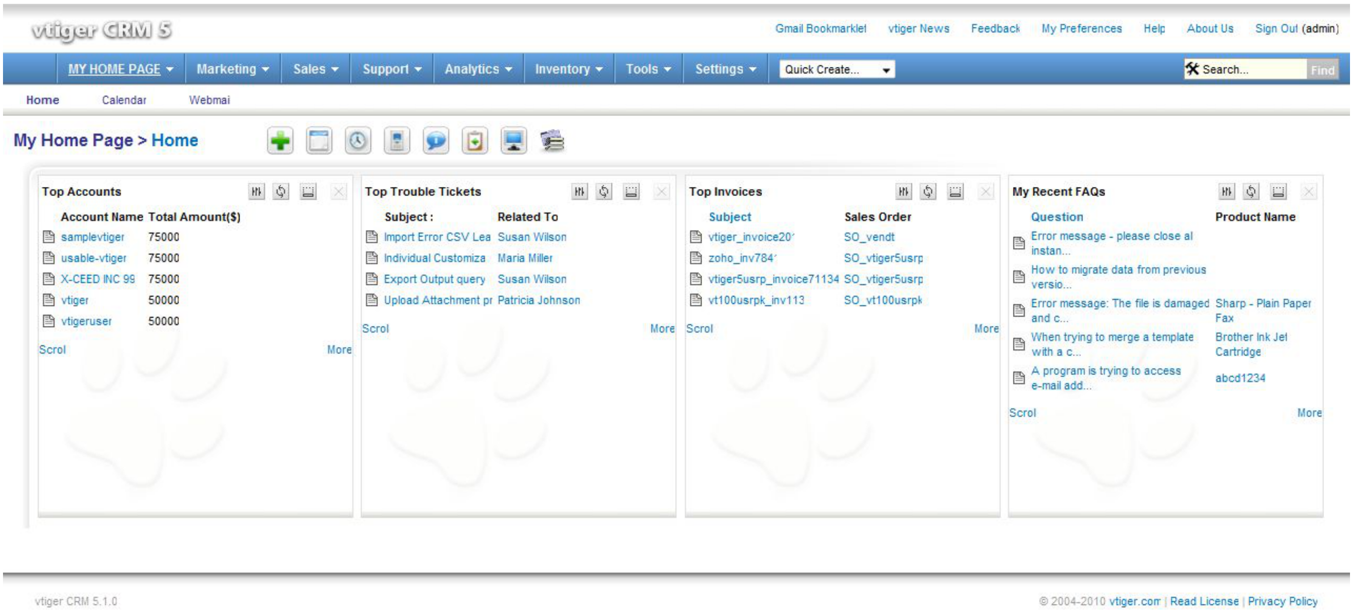
The second line in the common header is a set of pull-down menus organized in functional groups, including CRM functional areas such as Marketing, Sales, Customer Support, etc. Use these menus to access different modules as explained in the next section. At the end of the pull-down menus is a Quick Create drop-down list, to add new records quickly without needs to navigate to each module and then click create/add.

The third line in the common header is a set of links to related modules. The image shows three links in the Home Page module, but these links are different in each module. Below these three header lines, is a tool bar as shown below:

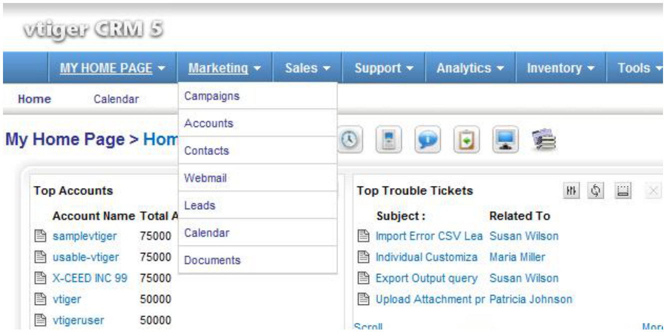
wiki_images/vtiger510-header2.jpg-{{{2}}}

This toolbar shows which specific module you have navigated to (in this case the Home Page), followed by a set of toolbar buttons, such as Add, Open Calendar, Show World Clock, etc. These buttons vary according to the module currently open. You will use these pull-down menus, buttons, and links, as well as context-specific buttons, links and other elements within each screen, to navigate between different screens and modules of the user interface.

Accessing Different Modules



Different modules in the CRM can be accessed from the Menu bar. The top bar lists functional categories (sections) such as Marketing, Sales, etc. and drop-down menus for each of these sections to access vtiger CRM modules. Hover the cursor over any of the sections to see a drop-down menu with the related modules listed in the drop-down menu as shown in the image below.



Click on the desired module to be taken to the home screen of that module, e.g. click on Leads to access the Leads module. Each of the standard vtiger CRM modules are described in the rest of this manual. When you are in a specific module, e.g. Leads, links to the modules that are functionally related to the current module are shown in the third line of the header as described above. This provides another, more direct, way of accessing the related modules. In addition to using the drop-down menus to go to the main screen of different modules, you may find the following tools useful to get you directly to specific module screens or specific module data.

- Quick Create: This drop-down select in the header bar offers direct access to the create forms of many of the modules in vtiger CRM.
- Search: Use search to quickly access specific records in any of the vtiger CRM modules.

Preferences

Click on the My Preferences link at the top right of your vtiger CRM screen to be taken to your preference settings page. Here you will be able to view and/or configure a number of user preferences and information for your vtiger CRM user account.

CRM Home Page

After login, you will see your Home page screen as shown in the image below. Note that each individual CRM user has his/her own Home page. Based on the theme selected, the system settings chosen by your administrator, your selected preferences, and the data in the CRM system, your own vtiger CRM homepage screen will look different.

The following section explains how you can personalize the Home Page so that the information most important to you is readily available.

Home Page Content

The main area of the Home Page is designed to display a summary of CRM and other information most important to you, so that you see it quickly and easily. The information is presented as a set of widgets that you can add or remove as desired. You can change the order of these blocks by dragging and dropping. You may also change the content of your home page. There are multiple ways to customize the content of your home page.

The first option is to select from a list of standard widgets by using the home page edit function or by selecting home page components in My Preferences. The second is to create your own widget with CRM data, which can be a list of data or a dashboard chart. Next, you can display data from any RSS feed in a widget. And you can create a Notes widget to write and track notes.

There are the following widget types available in vtiger for now:
Default widgets â We have 15 default widgets for vtiger homepage. These are:

- **Upcoming Activities** â This widget will display the upcoming activities for the user for the day.The Admin Users can able to view all Upcoming activities for the day regardless to whom ever it is assigned to
- **Pending Activities** â This widget displays the pending activities for the user for the day. The Admin Users can able to view all Pending activities for the day regardless to whom ever it is assigned to
- **Top Accounts** â This widget displays the top accounts for you. A top account is one with the highest amount and for which the related potentials sales stage is not Closed Won/Closed Lost.
- **Home Page Dashboard** â This widget displays the number of leads, accounts, contacts etc that are available (or assigned) for the current user. This widget is hidden by default. Check the show/hide widgets section for details on how to enable this widget.
- **Top Potentials** â This widget displays the top potentials for the user. The criteria for a top potential is that it has the highest amount and it's sales stage is not Closed Won/Closed Lost.
- **Top Quotes** â This widget displays the top quotes for the user. A quote is a top quote if it has maximum total and the quote stage is not ejected/Accepted. Valid Till field must be greater than or equal to current Date.
- **Key Metrics** â This widget displays the custom filters that have been marked to be shown in key metrics, and the module and the number of records for the filter(s).
- **Top Trouble Tickets** â This widget displays the top trouble tickets for the user.The criteria for a trouble ticket to appear here is that, it's status should not be closed.The order of the tickets depends upon the status.The tickets with status Open will come first,then the tickets with status In Progress and then tickets with status Wait For Response.
- **My Group Allocation** â This widget displays the records allocated to the group(s) of the user.
- **Top Sales Orders** - This widget has all the sales orders which have a due date greater than or equal to the current date ordered by amount, descending.
- **Top Invoices** â This widget displays the top invoices for the user. These are ones with highest total and status not as Paid.
- **My New Leads** â This widget displays the new leads for the user. The criteria for a new lead is that it should not be Lost Lead/Junk Lead.
- **Top Purchase Orders** - This widget has all the purchase orders which have a due date greater than or equal to the current date ordered by total (descending).
- **My Recent FAQs** â This widget shows the most recent FAQs for the user which don't have status Obsolete.
- **Tag Cloud** â This widget displays the tags available for the current user.

Custom Widgets â vtigerCRM gives you the ability to add four different types of custom widgets. These are:

- **Module** â This type of widget gives you the ability to see the contents of any module in a listview format in the homepage. You can use any available filters for the module to create the widget contents. The number of columns in the widget is limited up to two.
- **RSS** â You can add live RSS feeds to vtiger using this type of widget. The contents of the RSS feed are displayed in the widget.
- **Dashboard** â You can add custom dashboard type widgets for vtigerCRM homepage using this option. The dashboard type widgets have a default width of two columns. All the dashboards present in the vtigerCRM dashboards module can be used here as widgets.
- **Notebook** â You can create a notebook type widget in vtigerCRM. This gives you the capability to add/edit your notes on the fly to vtiger. Refer to the documentation on vtiger Notebook widget for more details on this.

Use these widgets as needed to create a useful summary view of information including CRM and other external information. This can be valuable to quickly give you access to key information.

Next >>

Feature Recurring Invoice

From vtiger.com

Faq | Howto

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About

Recurring Invoice feature, let's the users to use a SO as template and generate Invoice from that SO regularly based on some frequency.

Usage

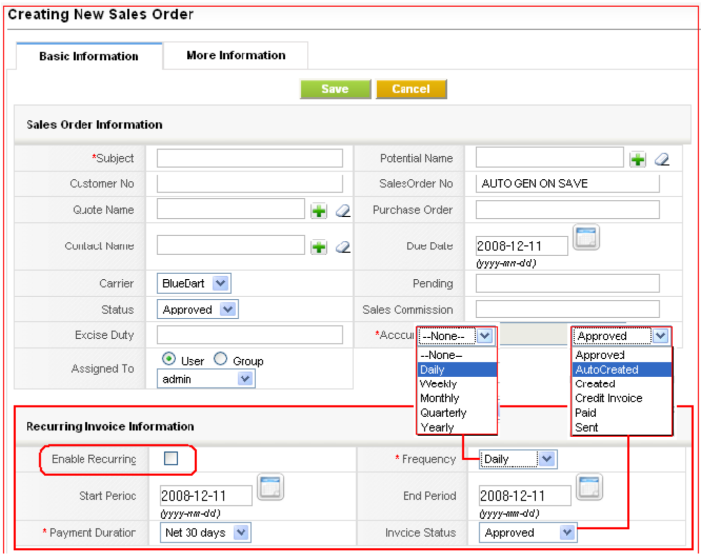
Enable Recurring, Recurring Frequency, Start Period and End Period, Payment duration and Invoice Status are taken as input in the SO. Based on whether the Recurring is enabled or not,

Invoice is generated at specified frequency between the start and end periods. The ***due date*** for the generated Invoice is set to the ***(Generated date + payment duration)*** and the ***status*** is set to the same as the one set for ***Invoice Status*** in Recurring Invoice Information block.

Recurring Frequencies supported are:

Daily, Weekly, Monthly, Quarterly, Yearly.

Following is the snapshot of a SO creation page:



Installation/Setup

Path to Batch File ***:*** <vtigercrm-source-directory>/cron/modules/SalesOrder/RecurringInvoiceCron.bat

Path to Shell Script : <vtigercrm-source-directory>/cron/modules/SalesOrder/RecurringInvoiceCron.sh

Setup Cron job

A Cron job has to be set to run every day, which will fetch the SO to be used as template for Invoice creation based on the Frequency set for the SO. All the information from the SO template is moved to the new Invoice created and the product quantity is deducted every time a Invoice is generated.

(Refer to How to setup cron job documentation for details)

Also You need to apply the **Appkey** in

vtigercrm/Cron/config.cron.php

To know how to do it please go to the following link

How to apply app_key

Update batch/shell script

Windows Users

Following is the contents of the ***RecurringInvoiceCron.bat*** file

```
set VTIGERCRM_ROOTDIR="C:\Program Files\vtigercrm5\apache\htdocs\vtigerCRM"
set PHP_EXE="C:\Program Files\vtigercrm5\php\php.exe"

cd /D %VTIGERCRM_ROOTDIR%

%PHP_EXE% -f vtigercron.php service="RecurringInvoice"
```

1. Update **VTIGERCRM_ROOTDIR** with path to Vtiger source directory.
2. Update **PHP_EXE** with path to php.exe file of PHP setup.

*nix Users

Following is the contents of the ***RecurringInvoiceCron.sh*** file

```
export VTIGERCRM_ROOTDIR=`dirname "$0"`/../../..
export USE_PHP=php

cd $VTIGERCRM_ROOTDIR

$USE_PHP -f vtigercron.php service="RecurringInvoice"
```

You do not need to update anything in this file.

UserManual Marketing Automation

From vtiger.com

Contents

Marketing Management

Marketing in an enterprise may include many types of business activities, e.g. generating business, building a brand, product management, etc. A focus area for CRM systems is the set of marketing activities, usually referred to as marketing campaigns, with one or more of the following goals

- Generate new leads, i.e. sales prospects
- Generate new business from existing leads, customers or prospects
- Build awareness or brand with new prospects or existing customers through targeted communications

A key marketing capability is managing and measuring marketing campaigns, including email, and direct mail. Marketing also helps a business identify and target its best customers and generate qualified leads for the sales team. Thus, Marketing also includes capabilities for managing prospect lists, collateral, and internal marketing resources.

vtiger CRM supports Marketing through a set of tools to manage, execute and monitor marketing campaigns. It also provides tools to manage prospect and customer lists, marketing and sales documents, price books and other information related to products and services, generate sales and marketing reports, and other tools.

The following sections describe how to use vtiger CRM in your marketing activities.

Managing Campaigns

vtiger CRM supports your marketing efforts with a Campaign module. You can find the Campaigns module in the Marketing section. A Campaign (or Marketing Campaign) is a marketing effort to increase sales through a set of marketing activities. The goal of this effort is often to generate new leads and help convert them to new sales. A campaign can have other goals, e.g. improve the awareness or brand of the company. vtiger CRM can help manage, execute and monitor marketing campaigns.

Many CRM campaigns work with a list of leads or contacts as the starting point. These leads may be obtained in a number of ways, e.g. trade shows, and imported into the C RM system, e.g. as a CSV file from a leads spreadsheet. As required by the campaign, these leads are then sent communications via phone, email, direct mail, etc., and the responses recorded. Campaigns are then tracked for response rates and other success criteria, e.g. number of sales.

When you open the Campaigns module, a paged list of campaigns will be displayed on your screen. From this screen you can perform operations on campaigns. vtiger CRM supports a number of operations on campaigns, which include

- View different lists of campaigns, including custom subsets (using filters) of campaigns
- Create, delete, and edit campaigns
- Search campaigns
- Mass edit, used to edit properties of multiple campaigns at one shot.

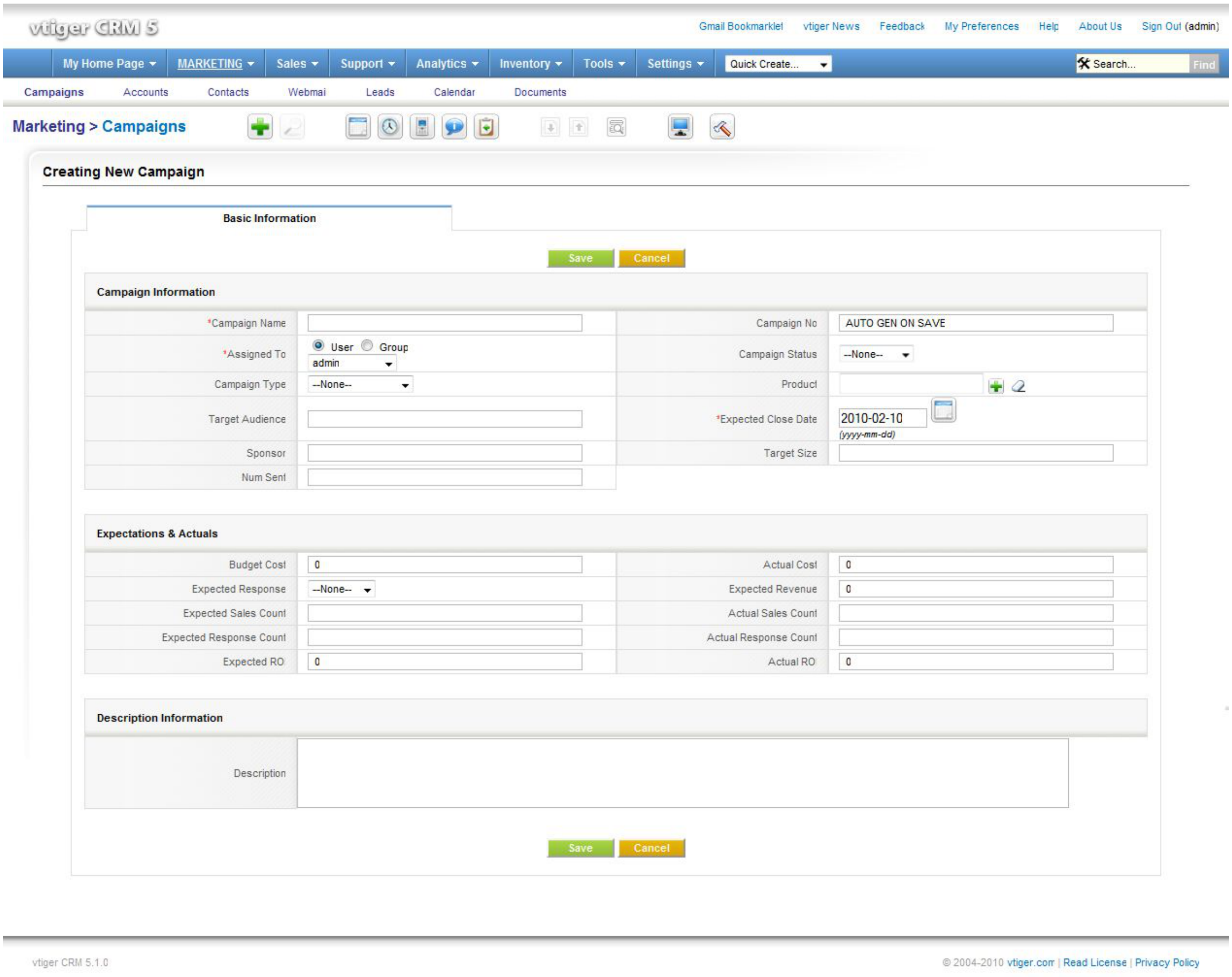
When you click on a campaign, the Campaign Detail View will be shown on your screen. This campaign detail screen displays information on the campaign, which may include (this form may be customized by your administrator for your organization and may contain other fields and sections).

- **Campaign information fields:** Detailed records pertaining to this campaign.
- **Expectation and Actuals:** Budget, incurred costs, response rates, and other information for this campaign.
- **Contacts:** The list of contacts in this campaign
- **Leads:** The list of leads for this campaign
- **Description information:** A description, i.e. how you describe this campaign.
- **Potentials:** Listing of potentials arising from the campaign
- **Activities:** List of scheduled activities, i.e. calls, to do's, meetings, etc.

In the Campaign Detail View screen, you can perform a number of operations on the campaign. You can edit each of the campaign property fields in this form by enabling edit for the specific field, or click the Edit button to open a form where all the property fields are editable. Operations available in the Campaign Detail View include (This may vary a little if your Administrator has customized this form)

- **Edit:** Use this button to open a form to change campaign properties
- **Duplicate:** Use this button to create a new campaign record with similar properties
- **Delete:** To delete this campaign from the CRM database
- **Send Mail to Contacts:** To send email to the contacts in this campaign
- **Load List of Contacts:** To load a predefined list of contacts into this campaign. Select a list from one of the drop-own lists, which have been created in the Contacts module.
- **Select Contact:** To add an existing contact to this campaign
- **Add Contact:** To add a new contact to this campaign
- **Send Mail to Leads:** To send email to the leads in this campaign
- **Load List of Leads:** To load a predefined list of leads into this campaign. Select a list from one of the drop-own lists, which have been created in the Leads module.
- **Select Lead:** To add an existing lead to this campaign
- **Add Lead:** To add a new lead to this campaign
- **Add To Do:** Add a task (To Do) associated with this campaign, which are listed in the activities list for this campaign
- **Tag It:** To tag this campaign with some label that can be used to access this campaign using labels

You can create a new Campaign either through the Quick Create menu or from Marketing -> Campaigns -> Click on the â +â icon. The create view of a Campaign would appear as shown below



Leads, Contacts, Potentials %26 Activities can be related to a campaign through the More Information page of a campaign detail view.

Navigating Campaigns

You can navigate the campaigns according to the status of the campaigns.

To navigate campaigns

1. Click the **Marketing Â» Campaigns** tab.

2. In the *Campaigns Home page'*, under the **Campaign** List section, select one of the views from Select View drop-down list to display the list of campaigns according to the status of the campaigns (For example, Upcoming, Planned, Withheld, and others).

3. In the *Campaign List* section, click the Start, Previous, Next, or End links to access the respective list of campaigns.

Searching Campaigns

You can search campaigns with basic details, such as name, status, expected revenue, or all the details in advanced search. You can also search campaign names alphabetically.

To search campaigns

1. Click the **Marketing Â» Campaigns** tab.

2. In the *Campaigns Home page*, click the **Search** toolbar icon.

3. In the *Campaigns Home page*, under *Campaign Search* section, do one of the following:

- Enter the search criteria in First Name, Last Name, and/or Company fields and click the Search button. Or
- Select the Advanced hyperlink, enter the search criteria, and click the Search button. Or
- Select one of the alphabetical search links.

4. In the Campaign List page, a list of campaigns is displayed as per search criteria.

Creating Campaigns

In vtiger CRM, you can create campaigns by manually entering the data in Campaign Details form, quickly from the Quick Create section, or duplicating from the existing campaign information.

List of Standard Campaign-related Fields

In the Campaign: Edit form, you need to specify the campaign-related information. The following table provides descriptions of the various standard fields in the form.

Field Name	Description	Data Type
Campaign Owner	Specify the owner name of the campaign.	Lookup
Campaign Name*	Specify the name of the campaign.	Text box, alphanumeric (40)
Type	Select the type of the campaign.	Check box
Status	Select the status of the campaign.	Pick List
Start Date	Specify the date on which the campaign starts.	Date
End Date	Specify the date on which the campaign ends.	Date
Expected Revenue	Specify the revenue expected after launching the campaign.	Currency
Actual Cost	Specify the actual amount spent on the campaign.	Currency
Budgeted Cost	Specify the planned amount to be spent on the campaign.	Currency
Expected Response	Specify the campaign turnout percentage.	Currency
Number sent	Specify the number of leads/contacts to whom the campaign details has been sent.	Integer
Description	Specify additional details about the campaign.	Text area (32KB)

You can create campaigns by:

- Filling details in the campaign creation form
- Using the New Campaign, a quick create component present in left hand-side of the Campaigns Home page.
- Duplicating the campaign with few changes in the existing campaign details

```
Note: By default, the person who creates the campaign owns the campaign. If you want to assign the campaign to a differe
select the user name from the Assigned To field in the campaign creation form.
```

To create campaigns individually

1. Click the **Marketing Â» Campaigns** tab.

2. Click the *New Campaign* toolbar icon.

3. In the *Campaign:Edit* page, enter the campaign-related information.

```
  Campaign name is a mandatory field. Refer to the â  List of Standard Campaign-related Fieldsâ   section for more detai
```

4. Click **Save**. Campaign details are displayed in *Campaign: <Campaign Name>* page where you can perform the additional operations. Refer to the Associating Campaigns with Other Records section for more details.

To create campaigns instantly

1. Click the **Marketing Â» Campaigns** tab

2. In the Quick Create drop-down menu click the **New Campaign** option, enter the mandatory details, such as Last Name and Company name.

3. Click **Save**. Campaign details are displayed in *Campaign: <Campaign Name>* page where you can update the additional details or perform the additional operations.

To create duplicate campaigns

1. Click the **Marketing Â» Campaigns'** tab.

2. In the *Campaign List view* page, select the campaign to be duplicated.

3. In the *Campaign: <Campaign Name>* page, click the **Duplicate** button.

4. In the *Edit: <Campaign Name>* page, modify some of the campaign details.

5. Click the **Save**. Campaign details are displayed in the *Campaign: <Campaign Name>* page where you can perform the additional operations.

Associating Campaigns with Other Records

After creating campaigns, you can associate them with other records, such as leads, contacts, tasks, events, products, attachments, and notes until the campaign is reached to a certain stage where it can be converted to potential as per your organization's sales process.

To associate campaign with other records

1. In the *Campaign: <Campaign Name>* page, you can update the following details:

- **Activities:** To add tasks and events.
- **Leads:** To display the leads generated through campaign.
- **Contacts:** To display the contacts added for mass mailing.
- **Potentials:** To display the potentials converted through campaign.

2. After updating the associated records, you can proceed to the next record.

Changing Campaign Owner

When the campaign is in progress, occasionally it may be very useful to change the owner of some of the campaigns in a single step. You can change the owner of an individual campaign or a group of campaigns.

To change owner of campaigns individually

1. Click the **Marketing Â» Campaigns** tab.

2. In the *Campaigns: Home page*, select the campaign.

3. In the *Campaign: <Campaign Name>* page, click the **Edit** button.

4. In the *Campaign: <Campaign Name>* page, change the Campaign owner from the Campaign Owner lookup field.

5. Click **Save**.

To change campaigns owner in bulk

1. Click the **Marketing Â» Campaigns** tab.

2. In the *Campaigns: Home page*, go to the **Campaign List** section and select the check boxes corresponding to the campaigns. You can also select all the Campaigns.

3. Click the **Change Owner** button.

4. In the *Campaigns: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the Campaigns permanently.

To delete Campaigns

1. To delete a campaign, select the check box of the campaign you wish to delete.

2. You can use the delete button here to remove the campaign.

More Information

You can click on the More Information tab in the Campaigns section to see the following information.

Add Contacts

<IMG Add Contact>

The details of name, account details, email details, owner of the campaign are all displayed here.

The options available here are :

- **Load List:** You can load the list of all your contacts here by selecting the filter for viewing contact addresses, Birthdays or All contacts.
- **Select Contacts:** You can select a particular contact for creating a campaign.
- **Add Contacts:** You can also add new contacts from here.

Add Leads

<IMG Add Leads>

The details of name, account details, email details, owner of the Leads are all displayed here.

The options available here are :

1. **Load List:** You can load the list of all your Leads using the filter for displaying leads under Hot Leads, leads for this month or All leads.

2. **Select Leads:** You can select a particular Lead for creating a campaign.

3. **Add Leads:** You can also add new Leads from here.

From the More Information section, you can also use the options to add new potentials and ToDos using the respective buttons in the UI.

Email Marketing

Email has become a useful marketing tool for businesses to reach out to new prospects and stay in touch with existing customers. Typical uses of email marketing include

- Send out company and product information to new prospects
- Send periodic newsletters to prospects and customers
- Send coupons or deals to prospects
- Notification of new products or upgrades

Vtiger CRM supports email marketing to lists of leads or customer contacts. It provides the following tools for email marketing

- **Email Templates:** A desirable feature is personalization of emails sent to lists of prospects or customers, i.e. include the name or the prospect or other personal information in the email sent to a prospect. Email templates allow writing communications with personalized fields from the CRM database inserted for each email sent out. For example, the prospect can be referenced by his/her first name in the email communication.
- **Email Lists:** vtiger CRM supports sending email to lists of leads or contacts in the CRM database, as well as imported mailing lists. Along with email templates, this makes it easy to send personalized emails to selected lists of prospects or customers.
- **Email Tracking:** Once emails are sent out to a list of prospects or customers, you want to know which of those customers viewed the email that you sent. Vtiger CRM counts the number of views of each email by a prospect, and displays this in the list of emails sent to a lead or contact. This relies on an image embedded in the email, which unfortunately under-counts whether emails have been viewed since embedded images are not always opened when the email is opened.
- **Mail Scanner:** vtiger CRM provides the ability to scan a response mailbox and attach responses to the corresponding contact record in the CRM database. This can be used to automate the tracking of responses to the marketing emails sent out.

Email Templates

If you use the CRM for sending standard emails frequently it is most helpful to have such emails available as templates. To see any existing email template list, click the Email Templates menu. The CRM comes with templates as shown in the image below. You may modify existing templates or create an unlimited number of new templates. Note that there are public and private templates.

Public templates are available to all CRM users. Private templates are only provided to particular users. Using Email Templates for communicating Customers provides opportunities for you to provide better, faster communication to boost service, sales, employee relations.

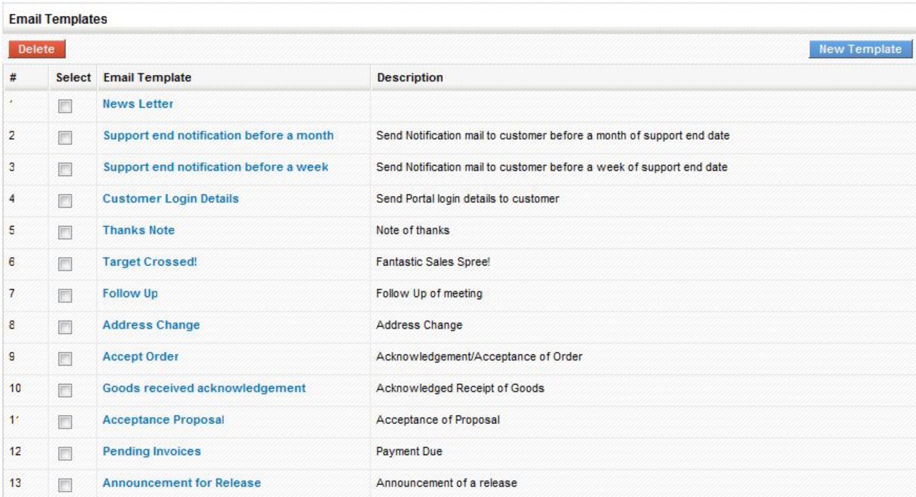
The goal of the Templates feature is to allow users to quickly insert blocks of text into email messages, without having to type that text over and over again to send personalized Emails rapidly to individuals and multiple recipients at one click.

Modules Supported

- Leads
- Accounts
- Contacts
- Users

Email Template Creation

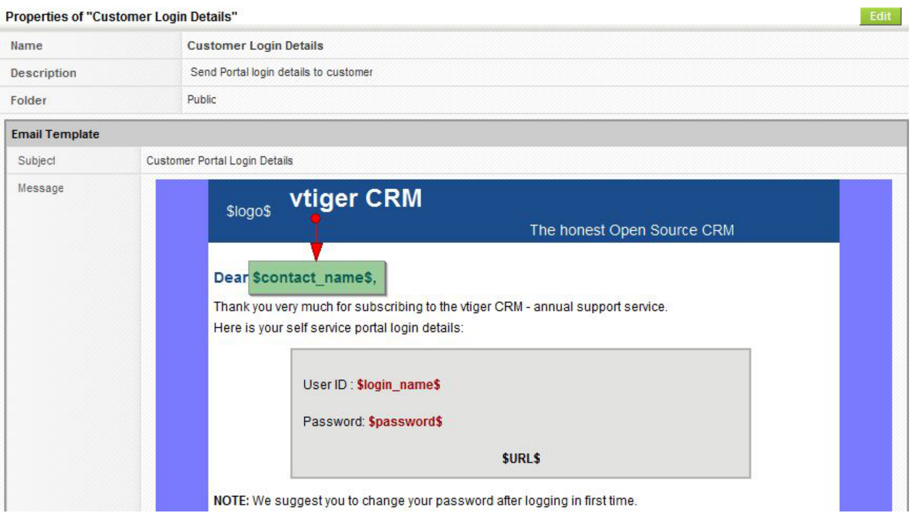
The Templates creation feature can be accessed from **Settings Tab > Email Templates**.


Email Templates

Delete | New Template

#	Select	Email Template	Description
1		News Letter	
2		Support end notification before a month	Send Notification mail to customer before a month of support end date
3		Support end notification before a week	Send Notification mail to customer before a week of support end date
4		Customer Login Details	Send Portal login details to customer
5		Thanks Note	Note of thanks
6		Target Crossed!	Fantastic Sales Spree!
7		Follow Up	Follow Up of meeting
8		Address Change	Address Change
9		Accept Order	Acknowledgement/Acceptance of Order
10		Goods received acknowledgement	Acknowledged Receipt of Goods
11		Acceptance Proposal	Acceptance of Proposal
12		Pending Invoices	Payment Due
13		Announcement for Release	Announcement of a release

The predefined templates are shown in the List.. You can start building a new template by Clicking **New Template**.

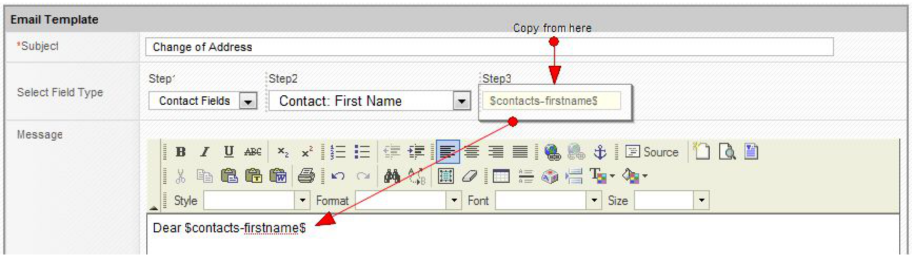


In create view, Specify the following which appear in email template as following **Subject** - Subject of Email when template is included while composing Email. **Description** -Holds the description of the template. The template description should ideally hold the function/use/type of the template. **Selected Field Type** â In this section we can select field variables from vtigercrm which will be replaced with that particular record values when email is sent. We can add standard fields and custom fields of these modules to the templates. There is one more category called General Fields in which we can add Current Date and Current Time to the template.

Step 1 Select module

Step 2 Select field

Step 3 Copy the variable. Image showing how to use field variables in message body.



Message - The template content is merged while composing Email for the supported modules with the website to generate the page you see on the website.

User can select current date and time through general fields in step1.

Save the template.

Using created template : While composing an email in vtiger there **Select Email Template** to add template and choose any one from the list.

Clicking on the template name will take you to the Template Content section, as it is the most likely template part that would be updated after a template has been created.

Click the templates name to see the detail view of an existing template. An example is shown in image shown below. Note the merge field values highlighted in this figure. Merge field values are used to dynamically include data from your CRM into the mail. In this example mail, the merge field value $contacts_name$ represents the name of a contact.

You may include dynamic merge fields into your template at the edit view as shown in the image below. The merge field dialog supports you for defining the merge field syntax. You may include standard as well as custom fields as merge field. Use the copy and paste to enter the field codes. You must fill in all mandatory fields. You shall not mix field codes from different modules. For instance, if you use "Contact Fields" as shown in the figure you shall not add "Account Fields" to this template.

All emails are sent in the HTML format. You may use the HTML editor functions to design a special layout. You may also include HTML code which has been created by an external editor. But make sure to test your results, not all HTML code options are supported.

Email Tracking

Once emails are sent out to a list of prospects or customers, you want to know which of those customers viewed the email that you sent. vtiger CRM counts the number of views of each email by a prospect, and displays this in the list of emails sent to a lead or contact. This relies on an image embedded in the email, which is tracked by vtiger CRM so that a counter is incremented each time a user opens the email. (**Note:** This method under-counts whether emails have been viewed since in many email clients embedded images are not always opened when the email is opened.) Email tracking records the number of times each email is opened, and stores the data in the CRM database. You can view this information in the Detail View screens of leads and contacts to whom emails have been sent out by vtiger CRM.

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Feature Custom Fields In Email Templates

From vtiger.com

Faq | Howto

Contents

About

Using Email Templates for communicating Customers provides opportunities for you to provide better, faster communication to boost service, sales, employee relations.

Features

The goal of the Templates feature is to allow users to quickly insert blocks of text into email messages, without having to type that text over and over again to send personalized Emails rapidly to individuals and multiple recipients at one click.

Modules Supported

```
Leads
Accounts
Contacts
Users
```

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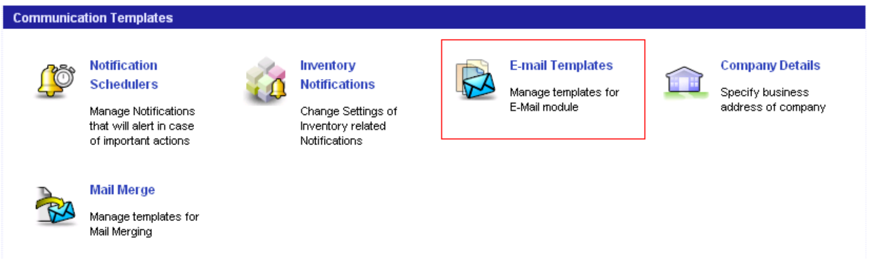

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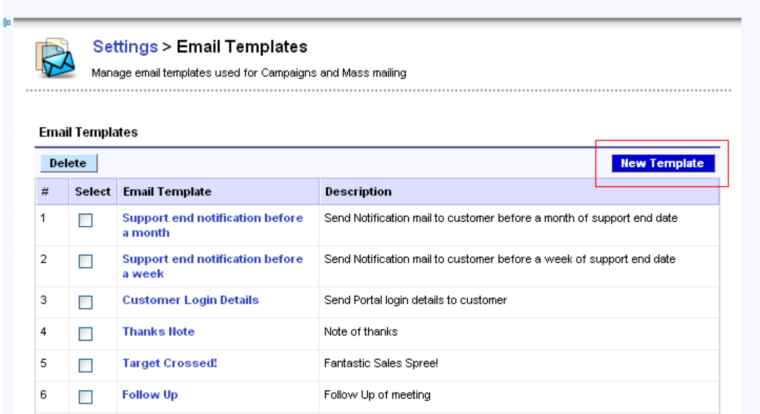
You can start building a new template by Clicking **New Template**



In create view, Specify the following which appear in email template as following

Subject - Subject of Email when template is included while composing Email.

Description-Holds the description of the template. The template description should ideally hold the function/use/type of the template.

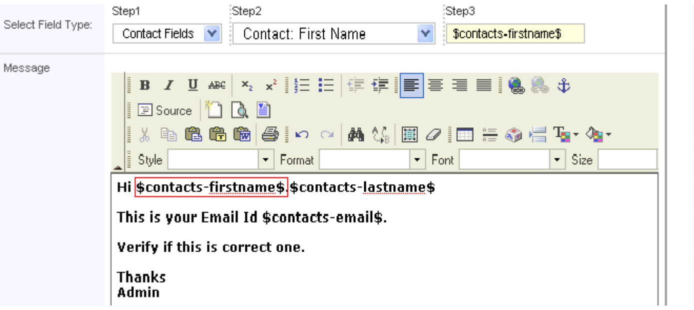
Selected Field Type â In this section we can select field variables from vtigercrm which will be replaced with that particular record values when email is sent.

We can add standard fields and custom fields of these modules to the templates. There is one more category called General Fields in which we can add Current Date and Current Time to the template.

In this section we have three steps :

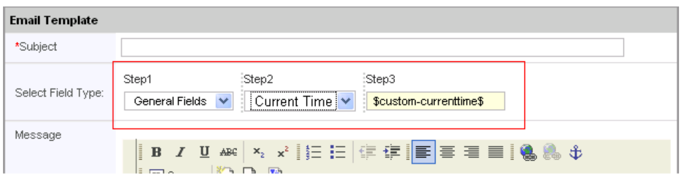
Step 1 Select module.
Step 2 Select field and
Step3 Copy the variable.

Image showing how to use field variables in message body.



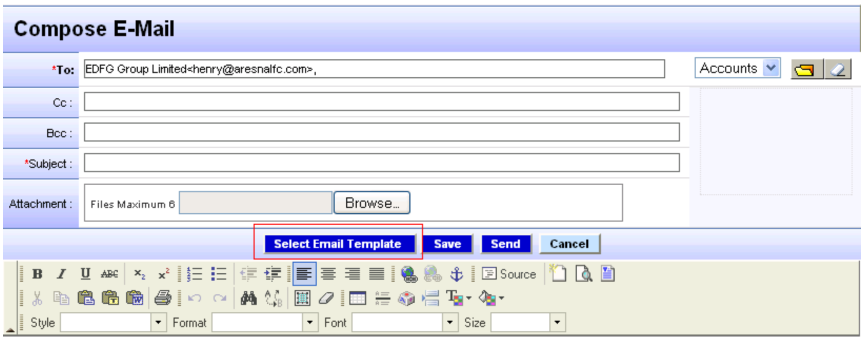
Message- The template content is merged while composing Email for the supported modules with the website to generate the page you see on the website.

User can select current date and time through general fields in step1.

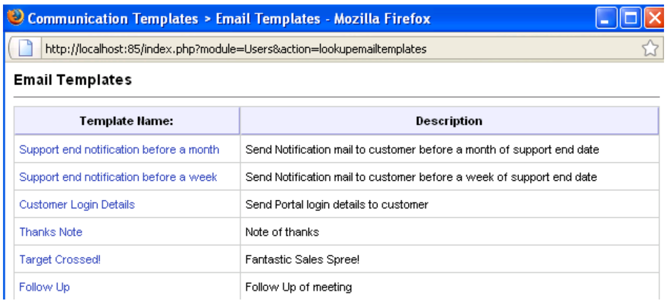


Save the template.

Using created template : While composing an email in vtiger there **Select Email Template** to add template and choose any one from the list.



Clicking on the template name will take you to the Template Content section, as it is the most likely template part that would be updated after a template has been created.



UserManual Marketing Automation Leads Management

From vtiger.com

Contents

Managing Marketing Leads

Managing leads is a critical component of marketing for most organizations. Once leads are obtained, e.g. by buying lists or via a tradeshow, it is important to record, manage and use these lists of leads in marketing activities. These marketing activities may include marketing promotions, product and service announcements, market analysis, etc. Some of the common tasks need to manage marketing leads include:

- **Import Leads:** When leads are bought as lists, or obtained from tradeshows or other sources, these need to be entered into the system.
- **Manage Lead Lists:** Marketing often creates new lead lists from existing leads and perhaps other sources, e.g. list of leads in mid-size companies. These are then used for targeted campaigns and other marketing activities.

vtiger CRM provides a number of useful tools and features to manage leads. These have been described earlier in this manual in the Managing Leads Section under Sales Force Automation. Many of the same tools can be used to manage marketing actiivities.

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UserManual Marketing Automation Price Books

From vtiger.com

Contents

Using Price Books

Price Books are required to be maintained in order to implement the function of differentiated price lists for different customer groups. You may vary your product cost to different groups based on various criteria suitable for your business. A typical illustration is a reseller operating in a segment where the cost of living is high, may operate with higher profit margins compared to his counterparts in other locations.

Unit Price: A fixed price of the product decided by manufacturer.

List Price: The manufacturer may sell the product with different prices to their resellers and customers. These variable prices for the same product are called as List Prices. The List Prices may vary according to the manufacturerâ s understanding with the reseller.

You can perform the following operations in Price books module:

- Navigate price books
- Search price books (Basic and alphabetical)
- Create new price books (Form filling or duplicate options)
- Associate price books with products
- Delete price books individually or in bulk

Navigating Price Books

You can navigate price books available in the Price books List.

To navigate price books

1. In vtiger CRM, click the Inventory Â» Price Books tab.

2. In the Price books Home page, under the Price Books List section, click the Start, Previous, Next, or End link to access the list of price books. Searching Price Books

You can search the price books with basic details, such as Price book Name, status of the price book. You can also search price books alphabetically.

To search price books

1. In vtiger CRM, click the Inventory Â» Price Books tab.

2. In the Price books Home page, under the Price Book Search section, do one of the following:

- Enter the search criteria in Price book Name and click the Search button. Or
- Select one of the alphabetical search links.

3. In the Price books List page, list of price books are displayed as per search criteria.

Creating Price Books

In vtiger CRM, you can store price book details by entering data in price book form.

In the Price book: Edit form, you need to specify the price book-related information. The following table provides descriptions of the various fields in the form.

List of Standard Price Book-related Fields

Field Name	Description	Data Type
Price book Name*	Specify the name of the price book. This field is mandatory.	Text box, alphanumeric (50)
Active	Select the Active check box to set the status of the Price Book as active.	Check box
Description	Specify any other details about price book.	Text area (long text)

To create price books

1. Click **Inventory Â» Price Books** tab.

2. In the *Price Books Home page*, click the New Price book toolbar icon.

3. In the *Price book: < > page*, enter the price book details.

```
Note: Price book Name is a mandatory field. Refer to the â  List of Standard Price book-related Fieldsâ   section for mo
```

4. Click **Save** to save the price book details.

Associating Products with Price Books

You can associate products with price books to create different list prices for the same product.

To associate Product with Price Book

1. In vtiger CRM, click the **Inventory Â» Price Books** tab.

2. In the *Price books Home page*, under the Price book List section, select the required price book. 3

. In the *Price book: <Price book Name>* page, do the following:

1. In *Product List* section, click the **Select Product** button.
2. In *Add Products* to *Price Book* page, specify the List Price and select the products to be added to the price book.
3. Click the **Add to Price Book** button to add the products to the price book.

Deleting Price Books

Rarely, you may need to remove the unnecessary price books, which are not tracked further. This will help you manage your price books in a better way. You can delete price books either individually or in bulk.

```
Warning: Deleting price books is a destructive operation, hence use this option carefully
```

To delete price books individually

1. In vtiger CRM, click the **Inventory Â» Price Books** tab.

2. In the *Price books: Home page*, select the price book to be deleted.

3. In the *Price book: <Price book Name>* page, click **Delete**.

4. In the *Confirmation* dialog, click **OK** to delete the price book permanently.

To delete price books in bulk

1. In vtiger CRM, click the **Inventory Â» Price Books** tab.

2. In the *Price books: Home page*, go to the Price books List section and select the price books to be deleted using the Select check box.

3. Click the **Delete** button.

4. In the *Confirmation* dialog, click **OK** to delete the selected price books permanently.

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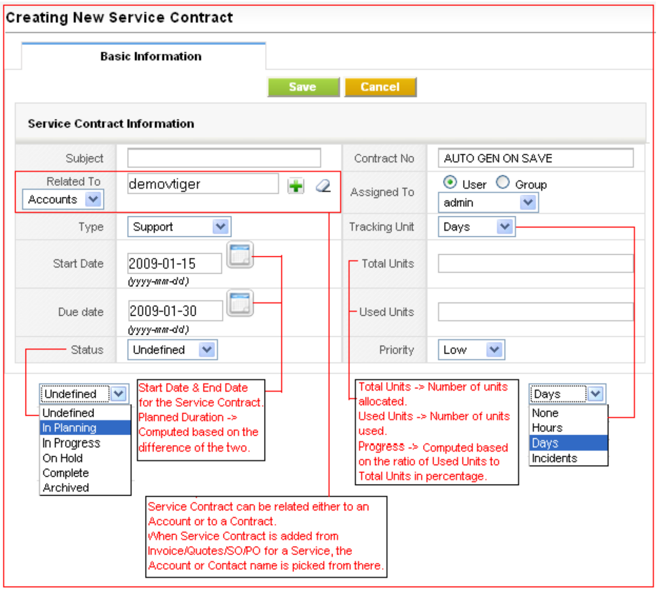
UserManual Customer Support Automation

From vtiger.com

Contents

Service Contracts

Service Contracts module helps to track professional and support service agreements. They are done at an item level (only for Services) in the Invoice/Quotes/SO/PO. Following snapshot illustrates the Create View And Detail View of a Service Contract and the importance of different fields:-



Fields %26 Computations

Field	Value	Description	Computation Criteria
End Date	Current Date	Date which marks the end of the Service Contract.	When the status is set to 'Complete' (OR) when Used units reaches/exceeds Total units

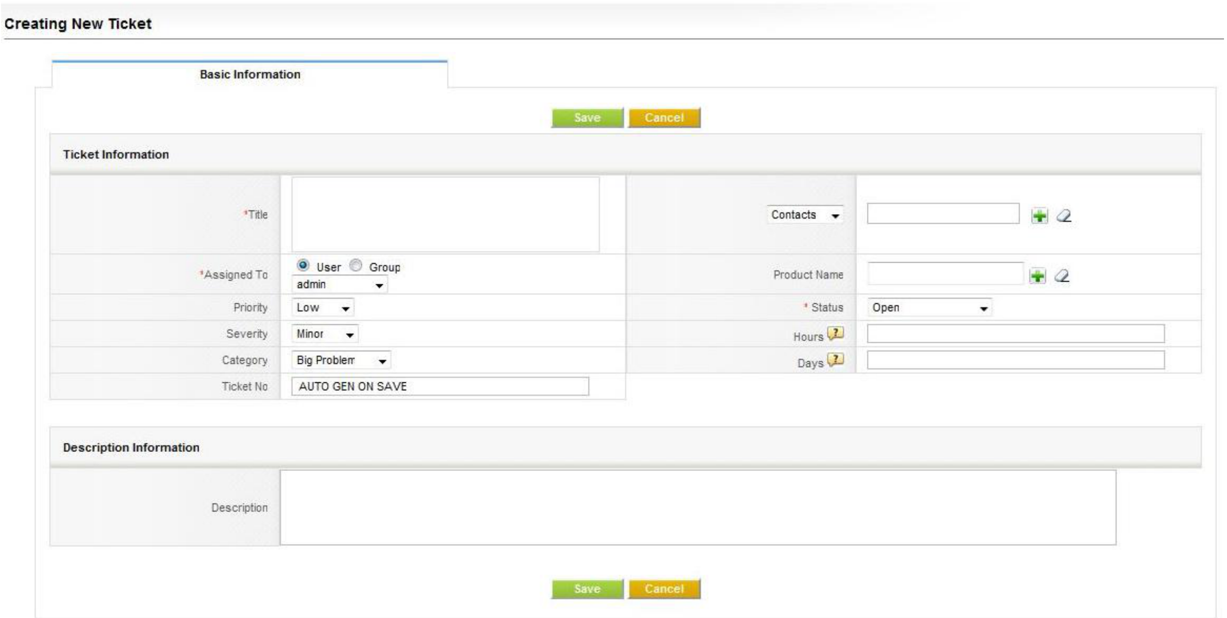
Planned Duration	Due Date â Start Date	Period (in days) for which the Service Contract is planned for.	Everytime the record is saved.
Actual Duration	End Date â Start Date	Actual period (in days) used by the Service Contract.	Everytime the record is saved OR When the Used units is updated.
Progress	(Used Units / Total Units) * 100	Progress (in %) of the Service Contract.	Everytime the record is saved OR When the Used units is updated.
Related To	Account / Contact Name	Account or Contact for which the Service Contract is associated.	When Service Contract is added for a Service from a Invoice/Quotes/SO/PO, the 'Related To' is filled up with Account or Contact to which the Invoice/Quotes/SO/PO is associated (First precedence is given to Account name)
Tracking Unit	None / Hours / Days / Incidents	Unit based on with the Used units for the Service Contract is computed.	When Service Contract is added for a Service from a Invoice/Quotes/SO/PO, the 'Tracking Unit' is filled up with 'Usage Unit' of that Service.
Used Units	Sum of the units utilized by each of the closed Trouble Ticket associated with the Service Contract	Indicates the number of units utilized for the Service Contract	Â· Ticket(s) are associated to the Service Contract either by 'Select Trouble Tickets' or by 'Add Trouble Ticket' operations. Â· Ticket(s) are removed/deleted from the Service Contract. Â· Status of a ticket associated with one or more Service Contract(s) changes.

Related To :

- When Service Contract is added to a Service from Invoice/Quotes/SO/PO -> Account name if not empty, otherwise Contact Name -> becomes the 'Related To' field value of the Service Contract.
- When a Trouble Ticket is associated with a Service Contract -> If 'Related To' field of the Trouble Ticket is empty -> It is filled with the 'Related To' field of the Service Contract ('Related To' is updated only once the ticket is associated with Service Contract, not during Trouble Ticket creation).

Managing Customer Tickets

In the CRM terminology, tickets are any kind of customer service requests as they occur after sales. Tickets are listed at the Support > Trouble Tickets menu. The support functions help you to collect and sort customer requests, inquiries, disturbances, problems etc. related to sold goods or services. The support functions keep CRM users and customers informed on the status reached in respect to the response to customers messages. Sales staff and management can get a quick overview of support activities related to customers or products or both. A trouble ticket can be created from the Quick Create menu or from Support -> Trouble Tickets -> Click on the â +â icon. The create view of a trouble ticket would appear as shown below.



Each ticket can go through different working stages and will be closed sooner or later. The CRM will help you to keep track of the working progress and records the changes. Any CRM user can post a comment. The comments will be sorted in chronological order and indicate the CRM user who made the comment. At the end of the live cycle of a ticket, you may present the solution. If you have the ticket related to a contact or account be aware that every time you are making changes to the ticket an automatic email will be send to the related entry, informing about the changes. If you do not want such an email notification to be sent out you have to set the field (check box) Email Opt out of the related entry to yes. All changes to a ticket are displayed at the ticket history. The information allows you to track the following :

- Who changed the ticket information?
- What changes have been made?
- What was the time line of changes?

To view or to add ticket related activities, documents or services can be done from the More Information tab.

Navigating Trouble Tickets

You can navigate trouble tickets available in the Tickets List. To navigate trouble tickets

1.Click the **Support Â» Trouble Tickets** tab.

2.In the *Trouble Tickets Home page*, go to the **Tickets List** section and select one of the views from Select View drop-down list to display the list of tickets according to the priority of the trouble ticket (For example, Low, Medium, High, and others).

3.In the *Tickets List* section, click the Start, Previous, Next, or End link to access the respective list of trouble tickets.

Searching Tickets

You can search trouble tickets with basic details, such as First name, Last name, and Account Name or all the details in advanced search. You can also search trouble tickets alphabetically. To search trouble tickets

1.Click the **Support Â» Trouble Tickets** tab.

2.In the *Trouble Tickets Home page*, click the **Search** toolbar icon.

3.In the *Trouble Tickets Home page*, under the **Tickets Search** section, do one of the following:

- Enter the search criteria in Subject, Priority, and/or Status, and click the **Search** button. Or
- Click the Advanced hyperlink, enter the search criteria, and click the **Search** button. Or
- Select one of the alphabetical search links.

4.In the Tickets List page, a list of trouble tickets is displayed as per search criteria.

Creating Trouble Tickets

In vtiger CRM, you can create tickets by entering data in trouble ticket details form. In the Trouble Ticket: Edit form, you need to specify the trouble ticket-related information. The following table provides descriptions of the various fields in the form.

List of Standard Trouble Ticket-related Fields

Field Name	Description	Data Type
Title*	Specify the title of the trouble ticket. This field is mandatory.	Text box, Alphanumeric (255)
Priority	Select the priority of the ticket from the drop-down list.	Pick list
Status	Select the status of the ticket from the drop-down list.	Pick list
Group	Select the group of the ticket from the drop-down list.	Pick list
Category	Select the category of the ticket from the drop-down list.	Pick list
Submitted By	Displays the name of the contact.	-
Assigned To	Select the name of the vtiger CRM user to whom the ticket is assigned.	Pick list
Contact Name	Select the name of the contact who submitted the ticket.	Lookup
Description	Specify details about the trouble ticket.	Text Area (long text)
Comments	Specify follow-up notes about ticket.	Text Area (long text)

To create trouble tickets

1.Click the **Support Â» Trouble Tickets** tab.

2.Click the **New Ticket** toolbar icon.

3.In the *Ticket: < > page*, enter the trouble details.

`Note: Ticket Title is a mandatory field. Refer to the â  List of Standard Ticket-related Fieldsâ   section for more deta`

4.Click **Save** to save the trouble ticket details. Trouble ticket details are displayed in *Ticket: <Ticket Name>* page where you can perform the additional operations. Refer to the Associating Trouble Tickets with Other Records section for more details.

To create trouble tickets instantly

1.Click the **Support Â» Trouble Tickets** tab.

2.In left hand-side under the *New Trouble Ticket* section, enter the mandatory details, such as Ticket Title and Priority.

3.Click **Save**. Trouble ticket details are displayed in the *Ticket: < Ticket Name>* page where you can update the additional details or perform the additional operations.

To create duplicate trouble tickets

1.Click the **Support Â» Trouble Tickets** tab.

2.In the *Ticket List view* page, select the trouble ticket to be duplicated.

3.In the *Ticket: <Ticket Name>* page, click the **Duplicate** button.

4.In the *Edit: <Ticket Name>* page, modify some of the trouble ticket-related details.

5.Click **Save**. Trouble ticket details are displayed in the *Ticket: <Ticket Name>* page where you can perform the additional operations.

Associating Trouble Tickets with Other Records

You can create a 360-degrees view of the trouble ticket to display all the associated details, such as potentials, trouble tickets, open activities, history of the completed activities, attachments, and notes:

1.**Open Activities**: To add to dos, meetings, and scheduling calls.

2.**History**: To add/track Emails.

3.**Attachments & Notes**: To attach documents and notes.

To associate trouble tickets with other records

1.Click the **Support Â» Trouble Tickets** tab.

2.In the *Trouble Tickets Home page*, under the **Ticket List** section, select the required ticket.

3.In the *Ticket: <Ticket Name>*

- **Edit**
- **Create activities**
- **Attach documents and notes**: (*Refer to : Attaching Documents section for more details*)

4.You can close the Ticket page once all the required information is updated for the ticket.

Converting Trouble Tickets to FAQ

Once the customerâ s trouble ticket is successfully resolved, you can convert the ticket to FAQ for a better reference in future.

To convert Trouble Ticket to FAQ

1.In the Trouble Tickets Home page, select the ticket to be converted.

2.In the Trouble Ticket detailed view, click the Convert to FAQ button.

3.In FAQ edit view, update the FAQ information and click the Save.

Deleting Trouble Tickets

Rarely, you may need to remove the unnecessary trouble tickets, which are not tracked further. This will help you manage your trouble tickets in a better way. You can delete trouble tickets either individually or in bulk.

```
Warning: Deleting trouble tickets is a destructive operation, hence use this option carefully.
```

To delete trouble tickets individually

1.Click the **Support Â» Trouble Tickets** tab.

2.In the *Tickets: Home page*, select the trouble ticket to be deleted.

3.In the *Ticket:* < *Ticket Name*> page, click Delete.

4.In the **Confirmation dialog**, click **OK** to delete the trouble ticket permanently.

To delete trouble tickets in bulk

1.Click the **Support Â» Trouble Tickets** tab.

2.In the *Trouble Tickets: Home page*, under the **Trouble Tickets** List section, select the trouble tickets to be deleted using the Select check box (first column).

3.Click the **Mass Delete** button.

4.In the **Confirmation** dialog, click **OK** to delete the selected trouble tickets permanently.

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Module Services

From vtiger.com

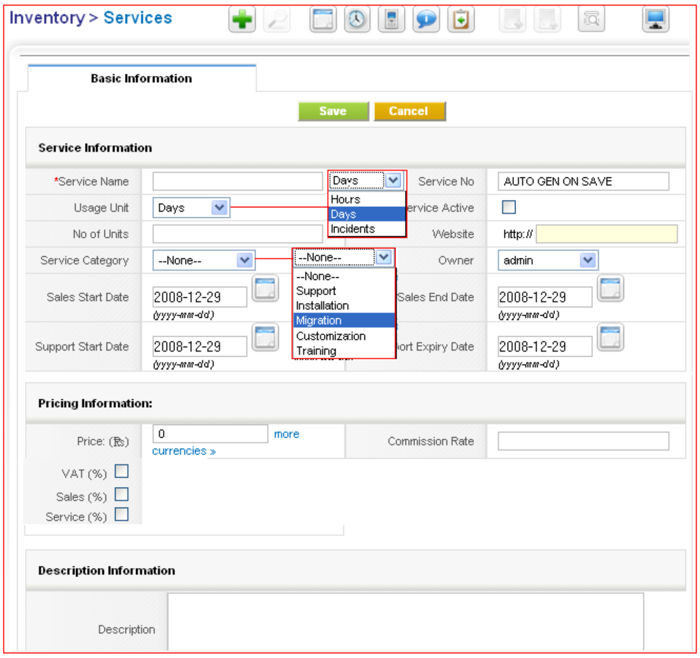
Faq | Howto

Contents

About

Services module is very similar to Products module, except for Stock Information. Services are non-stock items and they do not support bundles (like Product bundles) right now. Services have only non-stock attributes/fields.

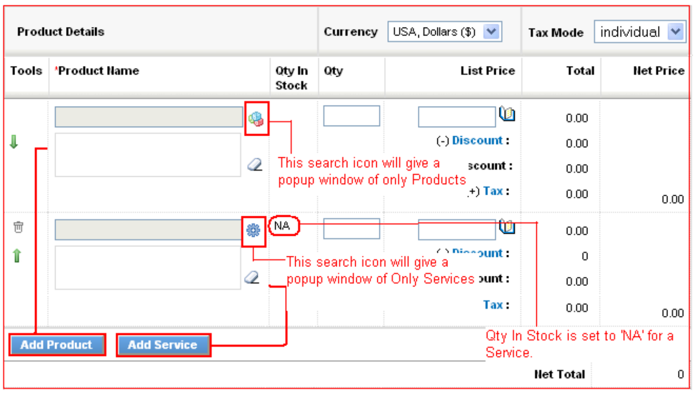
Following snapshot highlights the fields of a Service. (Create mode)



Products v/s Services

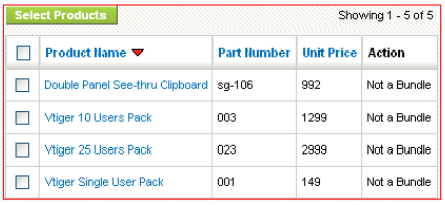
Following snapshots will illustrate how Services can be used in Invoice/Quotes/S0/PO similar to Products and the differences from Products.

Create View of a Invoice/Quotes/SO/PO (except that Qty In Stock will not appear for PO) :-

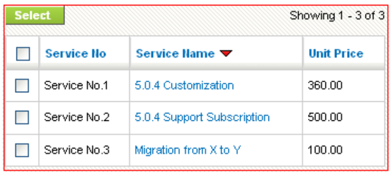


Following is how the Products and Services popup look :-

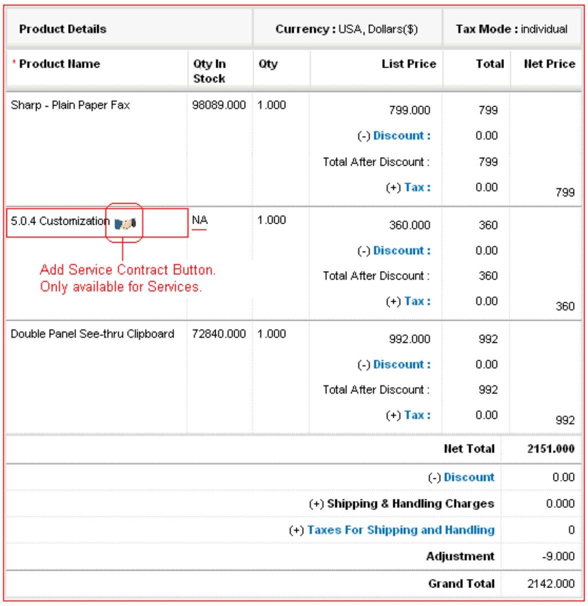
Products Popup



Services Popup



Following is how the Detail view of a Invoice/Quotes/SO/PO look:-



Products	Services
Stock Item (Has stock information)	Non-Stock Item (Doesn't have stock information)
Not related to Service Contracts	Service Contract can be created for a Service of a Invoice/Quotes/SO/PO
Can be associated with a FAQ, which when published will show up in Customer portal too	Not supported yet
Bundling supported (Product Bundles feature)	Not supported yet

UserManual Customer Support Automation Knowledge Base

From vtiger.com

Contents

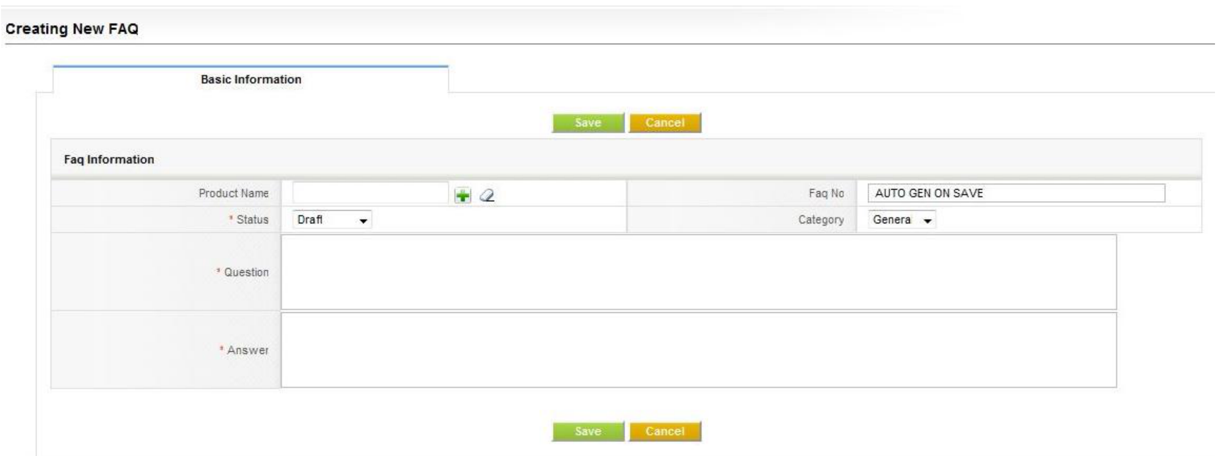
Knowledge Base

The CRM system offers you to have a FAQ list. FAQ refer to listed questions and answers, all supposed to be frequently asked in some context, and pertaining to a particular issue. You may use this for instance

- as a knowledge base to inform your customers about your products, services or procedures,
- for your employees to inform on internal business procedures,
- for your service staff to discuss procedures for helping customers, and much more.

You may see the FAQ list from Support > FAQ menu. Click the â +â icon to enter a new FAQ. In the image below you can see the screen for creating a new FAQ. You may enter a question and an answer. In addition, you may

- link this entry to a product or service your company offers,
- assign a category for this entry,
- set a status for the entry.



A FAQ will be shown in the Knowledge Base if the Status is set as â Publishedâ . A trouble ticket can also be converted to FAQ. By using the â Convert As FAQâ in the Actions section of the detail view of a ticket, a FAQ can be created from Trouble Ticket.

Creating FAQ

Over a period, customer support helps your organization to build a rich knowledge Base for future reference. Knowledge Base in the form of articles and frequently asked questions enables you solving the repetitive problems encountered by your customers. Also, these serve as real time solutions for various issues as it is populated by customerâ s actual experiences.

In the FAQ: Edit form, you need to specify the FAQ-related information. The following table provides descriptions of the various fields in the form.

List of Standard FAQ Fields

Field Name	Description	Data Type

Product	Select the name of the product.	Lookup
Category	Select the category of the FAQ.	Text box, Alphanumeric (255)
Question	Select the priority of the ticket from the drop-down list.	Text box, Alphanumeric (255)
Answer	Select the status of the ticket from the drop-down list.	Text box, Alphanumeric (255).
Status	Specify the status of the FAQ	Pick list
Assigned To	Select the vtiger CRM user's name to which the ticket is assigned.	Pick list
Description	Specify any other details about FAQ.	Text Area (long text)
Comments	Specify additional comments about the ticket	Text Area

To create FAQ

1.Click the **Support Â» FAQ** tab.

2.In the *FAQ: < > page*, enter the FAQ details.

`Note: Question and Answer are mandatory fields.`

3.Click **Save** to save the FAQ details.

Viewing FAQ

Before replying to the trouble tickets, you may refer to the existing FAQ. If the required solution is already available in FAQ, you can save a lot of time and enhance the productivity. If the solution is not available, you can add a new FAQ item so that all the customer support persons can use the solution in future while encountering a similar problem.

To view the FAQ

1.Click the **Support Â» FAQ** tab.

2.In the *Trouble Tickets Home page*, under the **FAQ section** click the View FAQ hyperlink.

3.In the *FAQ Home page*, under the FAQ List section list of FAQ select the required FAQ. In the *FAQ: <FAQ>* page the answer for the question is displayed.

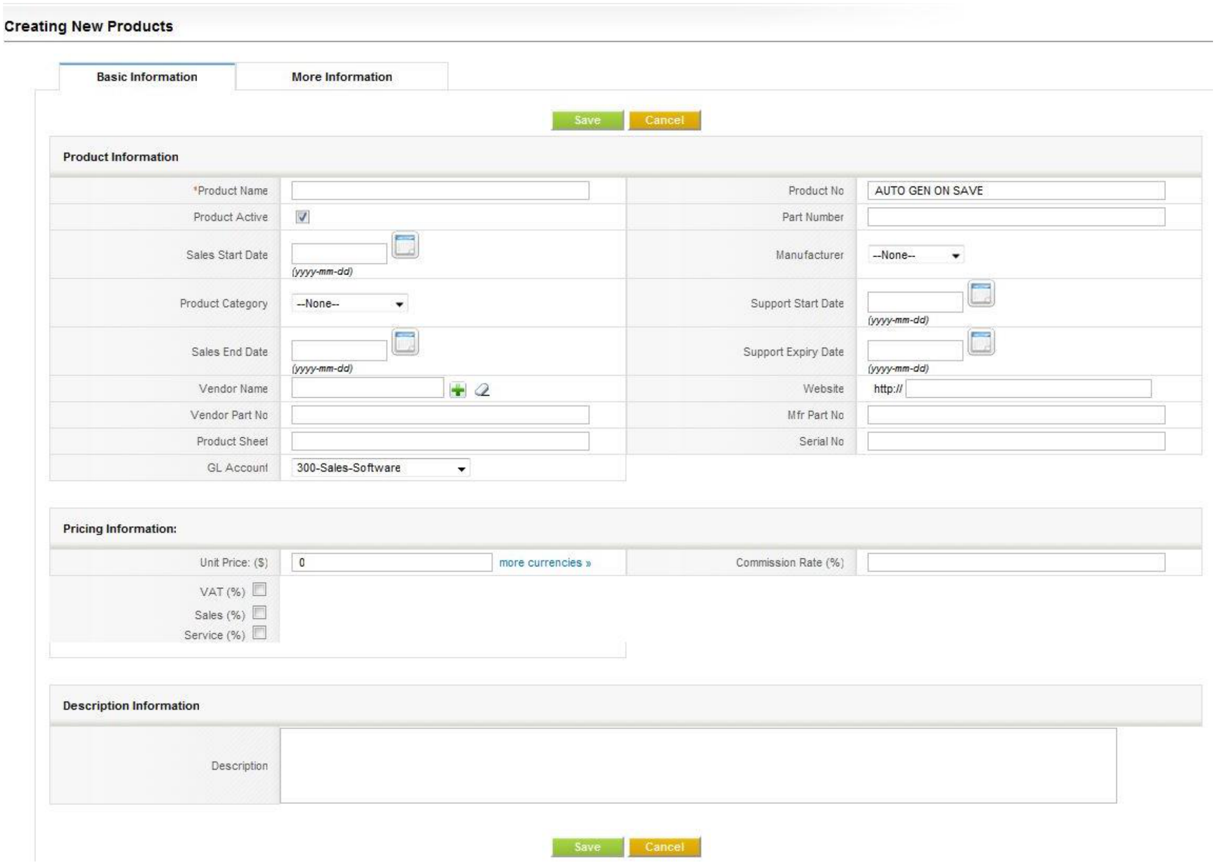
UserManual Inventory Management

From vtiger.com

Contents

Products

The CRM uses the term product as a comprehensive term for all kinds of goods your company offers. Similar to a catalogue, the CRM provides functions to capture and to categorize your products with various prices and vendors and keeps an inventory if needed. However, for some companies it might be necessary to distinguish clearly between products and services. The CRM allows you to link product information with your sales process. To create a new product, click the â +â icon at the Inventory -> Products menu. The create view of a Product would appear as shown below.



Working with Products

In vtiger CRM, you can manage your company-wide products that are sold to the customers as well as procured from your suppliers.

Products can be goods, services or both and it is the main part of Inventory in an Organization. At any point of time, one needs to know the type of products that the Company deals with.

In case your organization procures products from vendors and sells to customers with a margin, both sales and purchase departments can coordinate efficiently by using th Products module optimally.

You can perform the following operations in Products module:

- Navigate products
- Search products (Basic, alphabetical, or advanced options)
- Create new products (Form filling, quick create, or duplicate options)
- Associate products with other records
- Delete products individually or in bulk

Navigating Products

You can navigate products available in the Products List.

To navigate products

1.In vtiger CRM, click the **Inventory Â» Products** tab.

2.In the *Products Home page*, under the Products List section, click the Start, Previous, Next, or End link to access the list of products.

Searching Products

You can search the products with basic details, such as Product Name, Product Code, and Qty/Unit and Unit Price or all the details in advanced search. You can also search products alphabetically.

To search products

1.Click the **Inventory Â» Products** tab.

2.In the *Products Home page*, under the *Product Search* section, do one of the following:

- Enter the search criteria in Product Name, Product Code, and Qty/Unit and Unit Price and click the **Search button**. Or
- Click the Advanced hyperlink, enter the search criteria, and click the **Search** button. Or
- Select one of the alphabetical search links.

3.In the Products List page, list of products are displayed as per search criteria.

Creating Products

In vtiger CRM, you can store product details by entering data in product detail form.

In the Product: Edit form, you need to specify the product-related information. The following table provides descriptions of the various fields in the form.

List of Standard Product-related Fields

Field Name	Description	Data Type
Product Name*	Specify the name of the product. This field is mandatory.	Text box, alphanumeric (50)
Product Code	Specify the product identification.	Text box, alphanumeric (40)
Product Active	Specify the status of the product.	Check box
Commission Rate	Specify the commission rate for selling the product.	Text box, decimal
Qty/Unit	Specify the quantity rate for selling the product.	Decimal
Unit Price	Specify the unit price of the product.	Decimal
Manufacturer	Select the name of the product manufacturer.	Pick list.
Product Category	Select the category of the product.	Pick list.
Purchase Date	Select the date of purchase from the calendar.	Date
Support Start Date	Select the date on which the product support starts.	Date
Support Expiry Date	Select the date on which the product support ends.	Date
Description	Specify any other details about product.	Text area (long text)

To create products individually

1.Click the New Product hyperlink.

2.In the *Product: < > page*, enter the product details.

```
Note: Product Name is a mandatory field. Refer to the â  List of Standard Product-related Fieldsâ   section for more det
```

3.Click **Save** to save the product details.

Importing Products

Importing product details from external source to the CRM system is one of the most important activities while migrating data from legacy systems to vtiger CRM.

You can import products, if you are authorized to perform this operation. Otherwise, Import Products button in Products Home page will be hidden in your user interface. By default, product ownership is held up with the user, who imports the products.

You can change the product ownership while importing by adding a product owner column in import (*.CSV) file and map to the Assigned To field. This will automatically assign products to particular users.

Use the exact vtiger CRM users' names while creating the product import file, otherwise product details are not created in vtiger CRM.

Tips

- Use only *.CSV file format.
- The *.CSV file should contain the header column to map the data with vtiger CRM.
- Disable the Sort filter in *.CSV file (In *.CSV file, disable the filter option by Data Â» Filter Â» AutoFilter).

- Before importing the product details into vtiger CRM close the *.CSV file and the corresponding Spreadsheet program.
- Remove apostrophe if present anywhere in the *.CSV file.

To import product details from external sources

1.Click the **Inventory Â» Products** tab.

2.In the *Products: Home page* under Product Tools section, click the **Import Products** button.

3.In the *Import Products page*, browse the Products-related data in *.CSV format and then click the **Submit** button.

4.In the *Fields Mapping page*, map the *.CSV column header with product related fields in vtiger CRM.

5.Click the **Import** button. It will take a few seconds to complete the importation.

6.In the *Products: Home page*, imported products are displayed under the Products List section. You can continue the importation further or complete the operation.

Associating Products with Other Records

You can create a 360-degrees view of the product to display all the associated details, such as potentials, trouble tickets, open activities, history of the completed activities, attachments, and notes:

1.**Open Activities**: To add to dos, meetings, and scheduling calls

2.**History**: To add/track E-mails

3.**Attachments %26 Notes**: To attach documents and notes

To associate products with other records

1.Click the **Inventory Â» Products** tab.

2.In the *Products Home page*, under the *Product List* section, select the required product.

3.In the *Product: <Product Name>* page, do the following:

- Edit the Product details.
- Create activities, such as to dos, meetings, and calls (Refer to : Managing Activities section for more details)
- Create E-mails (Refer to: Creating Emails and Creating Notes sections for more details)
- Attach documents and notes: (Refer to: Attaching Documents section for more details)

4.You can close the Product page once all the required information is updated for the product.

Deleting Products

Occasionally, you may need to remove the unnecessary products, which are not tracked further. This will help y, or which may be obsolete. This enables you to manage your products much better. You can delete products either individually or in bulk.

```
Warning: Deleting products is a destructive operation, hence use this option carefully.
```

To delete products individually

1.Click the **Inventory Â» Products** tab.

2.In the *Products: Home page*, select the product to be deleted.

3.In the *Product: <Product Name>* page, click Delete.

4.In the **Confirmation** dialog, click **OK** to delete the product permanently.

To delete products in bulk

1.Click the **Inventory Â» Products** tab.

2.In the *Products: Home page*, go to the Products List section and select the products to be deleted using the Select check box.

3.Click the **Mass Delete** button.

4.In the **Confirmation** dialog, click OK to delete the selected products permanently.

Printing Product Details

You can view a printable form and print the product details using browserâ s Print function.

To print product details

1.Click the **Inventory Â» Products** tab.

2.In the *Products: Home page*, go to the Products List section and select the required product.

3.In the *Product: <Product Name>* page click the Print hyperlink.

4.In the *Product: <Product Name>* page, click the **File Â» Print menu** to print the document.

UserManual Inventory Management Product Bundles

From vtiger.com

Contents

Product Bundles

About

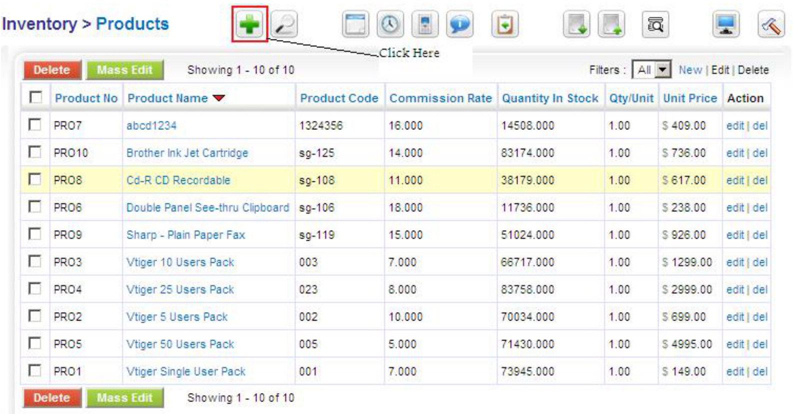
Feature to have sub-products for products and select the products into cart when creating an SalesOrder, PurchaseOrder,Invoice or Quote based on the hierarchy.

Working

This feature provides user to have sub products under a product where the subproducts for a product are shown in related lists under the list 'Product Bundles' and The parent products are shown under the list 'Parent Products' . This Hierarchy is used when adding products to cart in Invoice, Quote, PurchaseOrder and SalesOrder. You can add multiple products at a time. In Product Selection Popup, only the parent products are shown in main list where user can use the link 'Sub Products' to get list of sub products of a product and can select products from that list. If a Parent product is added to the Cart, the sub-products of that Parent Products will also be shown under the Parent Product.

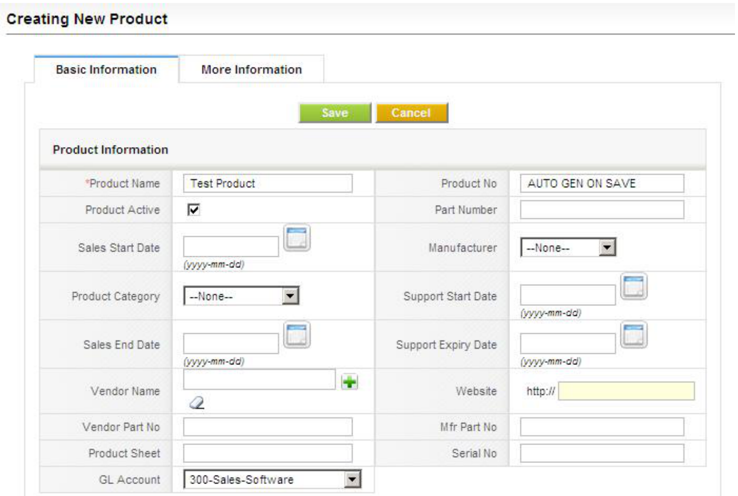
Steps to Create Product Bundles

- Go to Inventory->Products. Click Add button as shown in below fig.

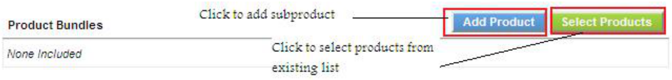


Product No	Product Name	Product Code	Commission Rate	Quantity In Stock	Qty/Unit	Unit Price	Action
PRO7	abcd1234	1324356	16.000	14508.000	1.00	$ 409.00	edit | del
PRO10	Brother Ink Jet Cartridge	sg-125	14.000	83174.000	1.00	$ 736.00	edit | del
PRO8	Cd-R CD Recordable	sg-108	11.000	38179.000	1.00	$ 617.00	edit | del
PRO6	Double Panel See-thru Clipboard	sg-106	18.000	11736.000	1.00	$ 238.00	edit | del
PRO9	Sharp - Plain Paper Fax	sg-119	15.000	51024.000	1.00	$ 926.00	edit | del
PRO3	Vtiger 10 Users Pack	003	7.000	66717.000	1.00	$ 1299.00	edit | del
PRO4	Vtiger 25 Users Pack	023	8.000	83758.000	1.00	$ 2999.00	edit | del
PRO2	Vtiger 5 Users Pack	002	10.000	70034.000	1.00	$ 699.00	edit | del
PRO5	Vtiger 50 Users Pack	005	5.000	71430.000	1.00	$ 4995.00	edit | del
PRO1	Vtiger Single User Pack	001	7.000	73945.000	1.00	$ 149.00	edit | del

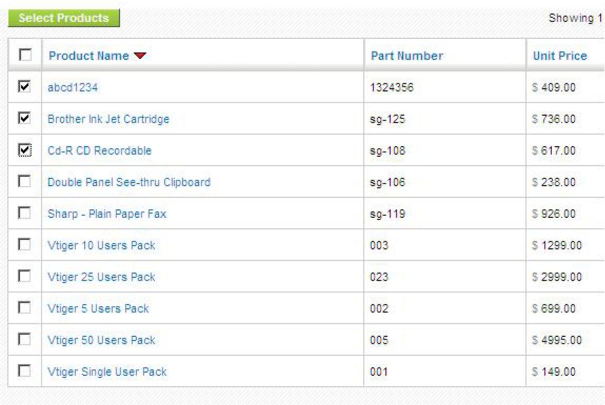
- Providing values for all the required fields, you can create a product from Create View as shown below



- Once The Product creation is done, go to DetailView of the Product or go to detail view of an existing product and Click on More Information Tab as shown below
- Now Under More Information Tab Under the List Product Bundles, the products can be selected from existing products as well created new product



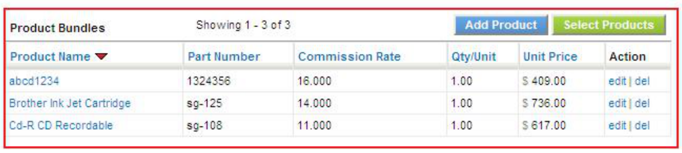
- Add Product takes you to create page, once the creation is done you will get the newly created product in the list. Select Products opens a popup where you can select the products that can be sub products as shown in fig below.



Select Products | Showing 1

	Product Name	Part Number	Unit Price
☑	abcd1234	1324356	$ 409.00
☑	Brother Ink Jet Cartridge	sg-125	$ 736.00
☑	Cd-R CD Recordable	sg-108	$ 617.00
☐	Double Panel See-thru Clipboard	sg-106	$ 238.00
☐	Sharp - Plain Paper Fax	sg-119	$ 926.00
☐	Vtiger 10 Users Pack	003	$ 1299.00
☐	Vtiger 25 Users Pack	023	$ 2999.00
☐	Vtiger 5 Users Pack	002	$ 699.00
☐	Vtiger 50 Users Pack	005	$ 4995.00
☐	Vtiger Single User Pack	001	$ 149.00

- Once the selection of products or creation is done, they are added to the 'Product Bundles' List as shown below.



Product Bundles | Showing 1 - 3 of 3 | Add Product | Select Products

Product Name	Part Number	Commission Rate	Qty/Unit	Unit Price	Action
abcd1234	1324356	16.000	1.00	$ 409.00	edit | del
Brother Ink Jet Cartridge	sg-125	14.000	1.00	$ 736.00	edit | del
Cd-R CD Recordable	sg-108	11.000	1.00	$ 617.00	edit | del

- Now when you go to More Information tab of the sub-products, all the parent products will be shown under the list Parent Products as shown below

Parent Product | Showing 1 - 1 of 1

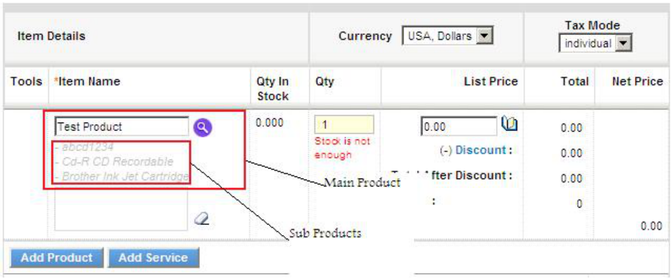
Product Name	Part Number	Commission Rate	Qty/Unit	Unit Price	Action
Test Product		1.000	0.00	$ 0.00	edit | del

NOTE:

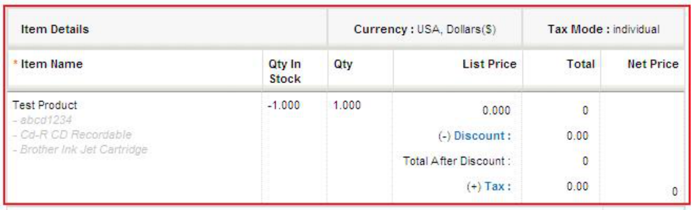
A sub product can never be a parent product and a parent product can never be a sub product

Selecting Product Bundles in Inventory

- While creating or Editing a Quote/SalesOrder/PurchaseOrder or Invoice, when adding products to inventory cart, if the selected product is a bundle all the sub products will be shown under the product as shown below.



- Similarly in DetailView it will be shown as in figure below.



- You can even select sub products instead selecting the whole bundle, by clicking on sub products link. If there are no sub products it will be shown as 'Not a Bundle' . The view is as shown in the figure below.

- Once you click on Sub Products link you can select the products from the list of sub products for the main product.

NOTE:

Depending on the setting you have made for the product reduction, the quantity you select for main product will be reduced even from sub products. By default when creating an invoice the products as well as their sub products will be deducted.

Feature Product Re-Ordering

From vtiger.com

Faq | Howto

Contents

About

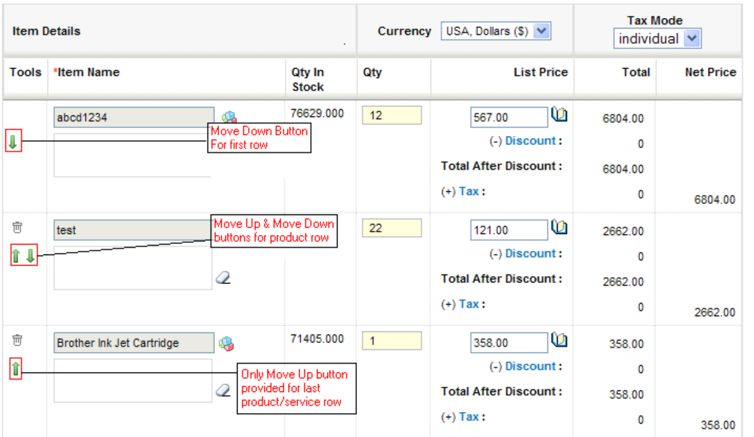
This feature allows user to change the Order of the Selected Products in EditView of an Invoice, Quote, Sales Order or Purchase Order.

Working

In Product Information block of Inventory modules(Like Invoice, Quote, SalesOrder and PurhcaseOrder) Create View or Edit View, Actions column of each line item is provided with "Move Up" and "Move Down" buttons to change the order having two or more products selected.

On clicking the "Move Up" button, all the data from current row and above row will the interchanged. Similarly On Clicking "Move Down" button, Data from current row is interchanged with data from row below it.

Last Product/Service row is not provided with "Move down" button and First Product/Service Row is not provided with "Move Up" button.

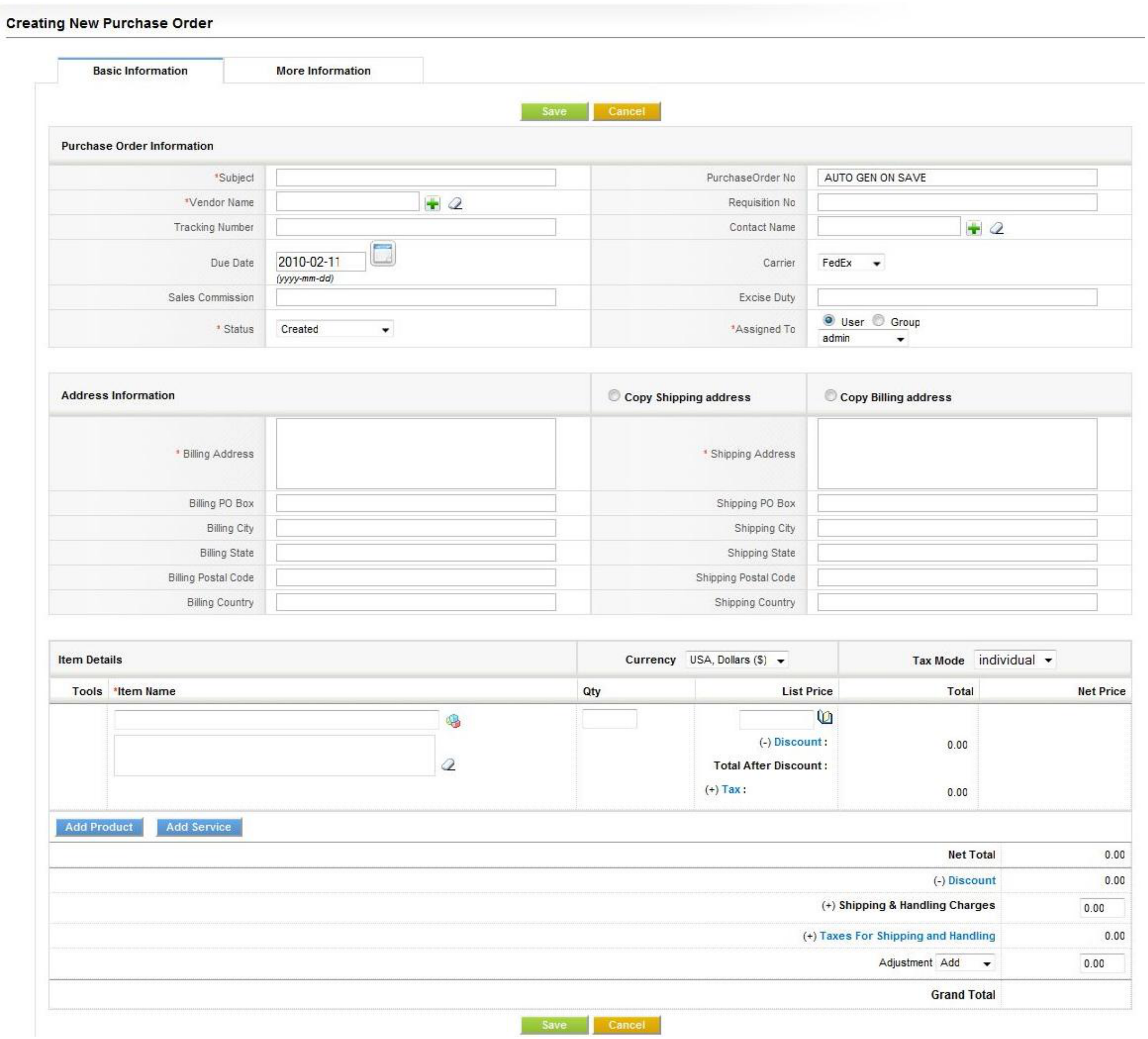


UserManual Inventory Management Purchase Orders

From vtiger.com

Purchase Orders

The CRM supports you in purchasing goods or services. That might be helpful if you have to order something to fulfill a customer sales order or to maintain your company operation. Before you can enter any purchase orders, you must have the vendor in the vendors list. This is explained in Vendors section. You must have also the products or services to be purchased in your price book. To enter a new purchase order, click the â +â icon in Inventory -> Purchase Orders menu. The create view of a Purchase Order would appear as shown below image (1). As another option, you may click the â Add Purchase Orderâ button at the detail view of a vendor at the Inventory -> Vendors menu. By using this option the CRM will transfer the vendor information to the new purchase order automatically as shown in image (2).

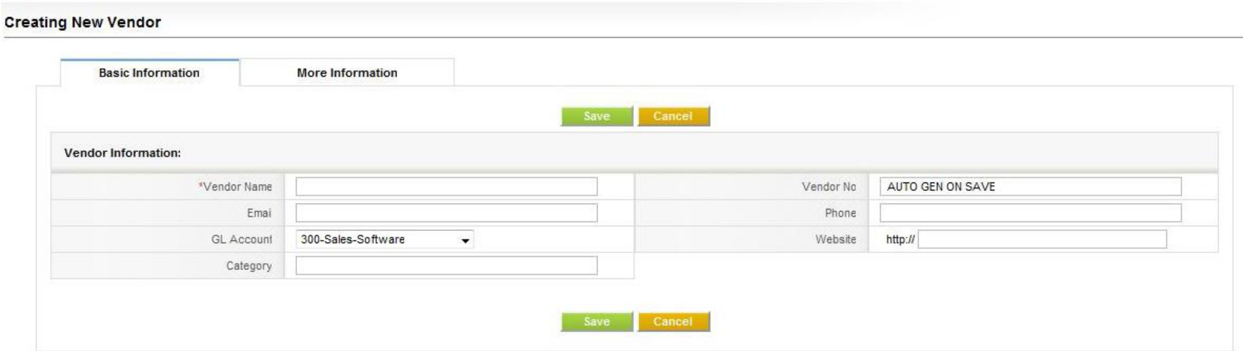


UserManual Inventory Management Vendors

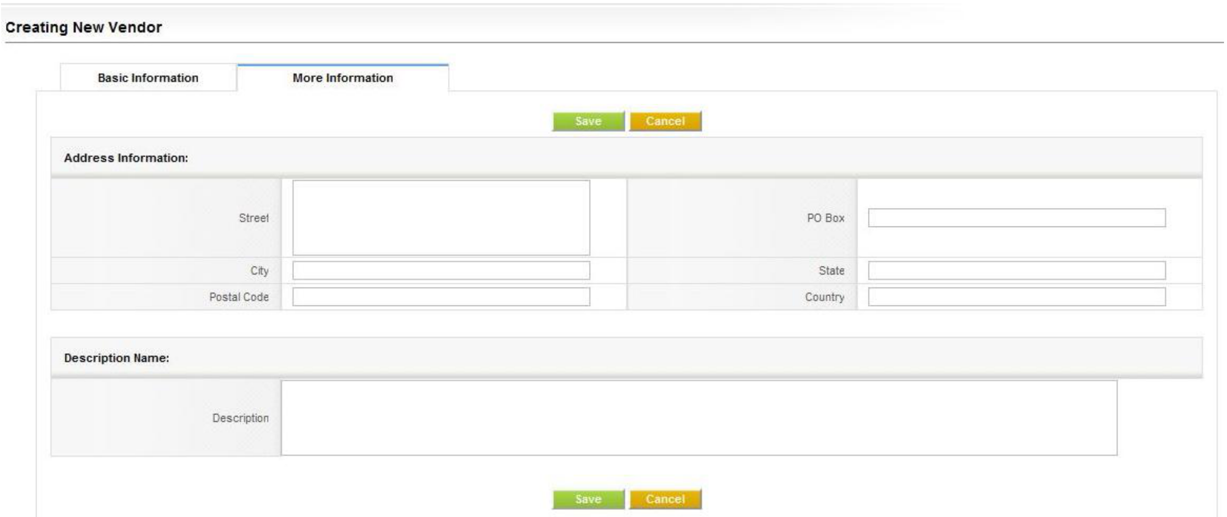
From vtiger.com

Vendors

The CRM allows you to enter an unlimited number of vendors which provide goods or services to your company or to your customers. Such vendors are stored separately and not part of the contacts or accounts lists. To enter a new vendor click the â +â icon in Inventory -> Vendors menu. A vendor create page would appear as show in the image below.



After clicking on the More Information tab, you can complete the vendor information by adding address and description information as shown in the image below..



Assets Module

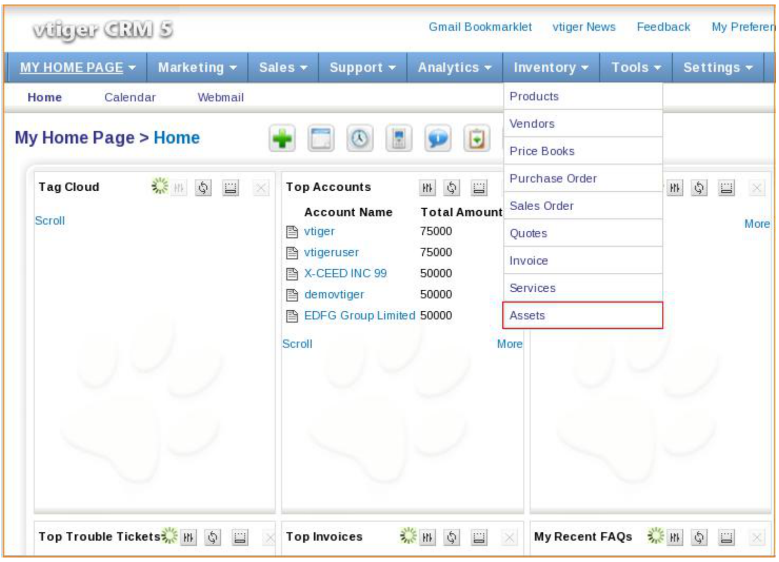
From vtiger.com

Assets Module

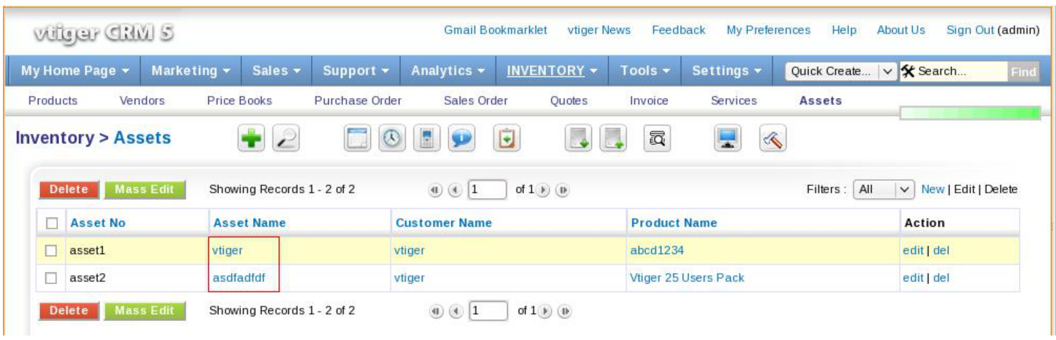
We have added a new module called Assets under the Inventory tab in vtiger. This module will be used to track any physical units that are shipped to the clients. The module has the following fields -

- Asset Name* - mandatory field which will be the entity identifier for each record
- Customer Name* - mandatory field which will be lookup from Accounts and populated using a popup window
- Product Name* - mandatory field which will be lookup from Products and populated using a popup window
- Serial Number* - mandatory text type field
- Date Sold* - mandatory field, defaults to the current date, will allow override
- Date In Service* - mandatory field, defaults to the current date, will allow override
- Status* - mandatory field of picklist type, values are In Service/Out-of-service, defaults to 'In Service'
- Tag Number â   alphanumeric type field, non-mandatory
- Invoice Number â   non-mandatory field which will be lookup from Invoices module and populated using a popup window
- Shipping Method â   alphanumeric type field, non-mandatory
- Shipping Tracking Number - alphanumeric type field, non-mandatory
- Notes - alphanumeric type field, non-mandatory

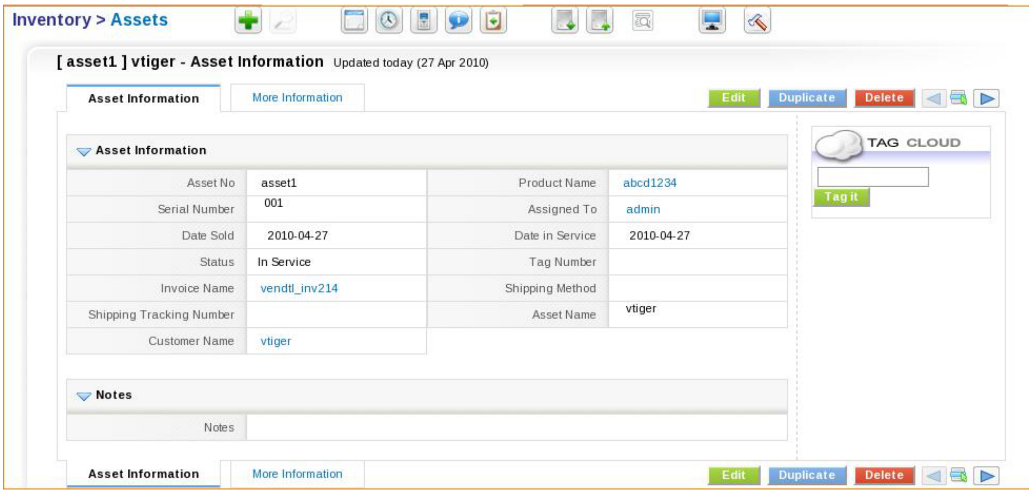
The Screenshot below shows that the Assets Module can be located under the Inventory Tab of Vtiger



The Listview of Assets Module is as shown in the screenshot below wherein, the AssetName field acts as the entity identifier to help navigate to the detailview.



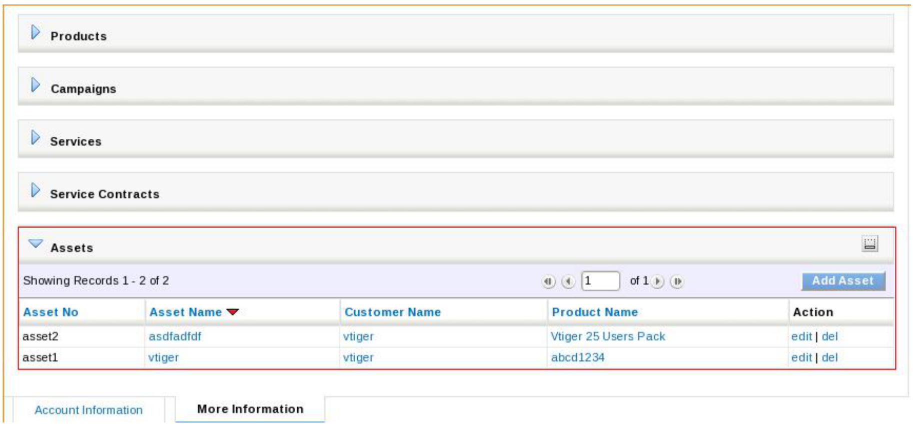
The detailview is as shown in the below screenshot :



The Assets Module is related to 3 existing modules :

- Accounts
- Products
- Invoice

The Assets information is stored in the related lists of each module respectively. The Screenshot below shows the Assets related to information



UserManual Reports & Dashboards

From vtiger.com

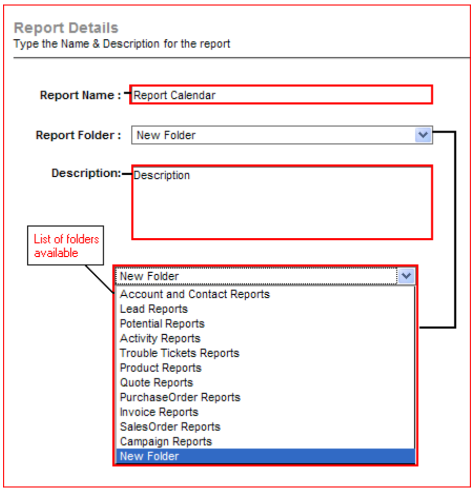
Contents

Reports

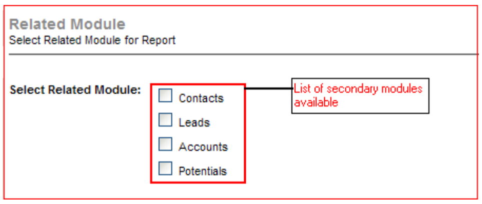
You may summarize your data stored in the CRM by reports. You have a set of predefined reports available which you can customize to your needs. You may use these report features to get an overview of customer related activities and to draw conclusions on how to improve your sales process.You may get a report for almost any data you have stored in your CRM at the Analytics -> Reports menu as shown below.

Creating a Report

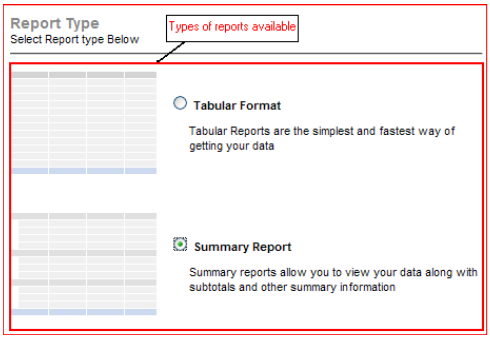
* To create a report you have to select a primary module, which can be selected from list of entity modules. Once a Primary module is selected, A popup window opens up showing Step-1 of report creation. In Step-1, we have to provide Name for the report, Provide Description for the report and select the folder to create report in.



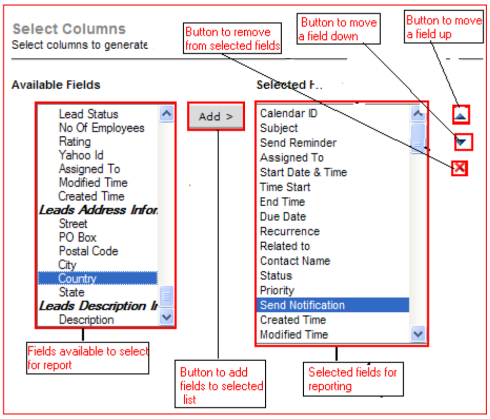
* The report name provide in Step-1 needs to be unique. Once the validation for Step-1 is successful, we will be taken to Step-2 where all the related entity modules for Primary module are shown. We can select one to many related modules from the available list to create the report for or we can continue without selecting the Related Modules.



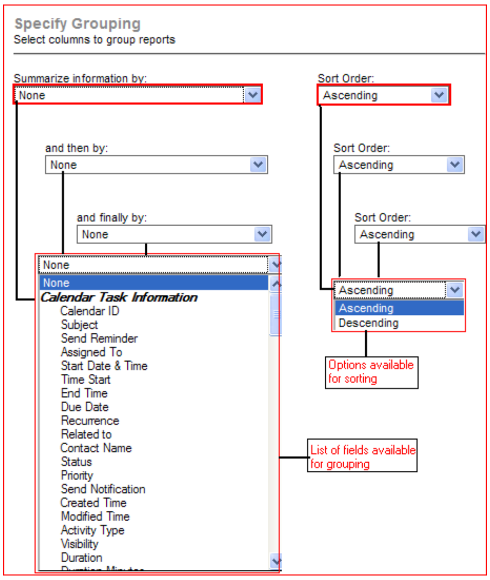
* Now in Step-3, We can choose the type of the report(Either Summary Type or Tabular Type) and Proceed to Step 4. Summary type reports provides us an option to select fields based on which we can group the records for the report where as Tabular report shows the General Tabular view without any grouping specifications.



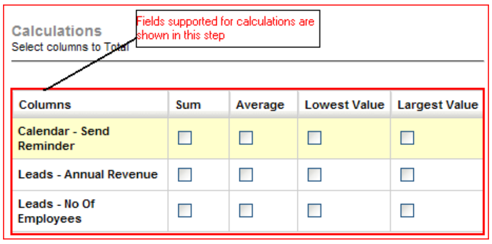
- In Step 4, we can select the fields to show in detail view of a report. These fields can be selected from the modules selected to create report.



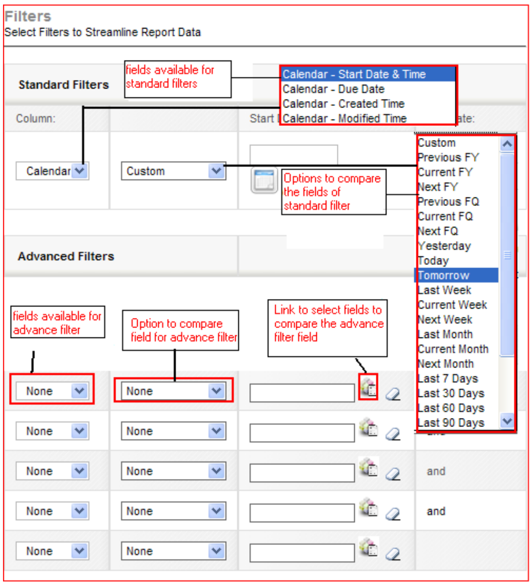
- Step 5 is only shown for the Summary Type report where we can select field to Group records for report and sort them Ascending or Descending.



- In Step 6, we can select the calculations for the Integer fields available across the modules selected to create report. We can select the calculations like SUM, AVG, MIN and MAX values across the records selected.



- In Step 7, we can specify the conditions to filter the results in a report. We can specify conditions in standard filters or Advance Filters. Standard filters have fields like Date %26 Time fields where as advanced filters have all the fields from the selected modules where the comparator and condition can be choosed based on type of field selected. We are allowed to provide a maximum of 5 conditions.



- In Step 8, we can opt for the security of the report. Here you can select the type of report Sharing(Public, Private or Share).

NOTE:

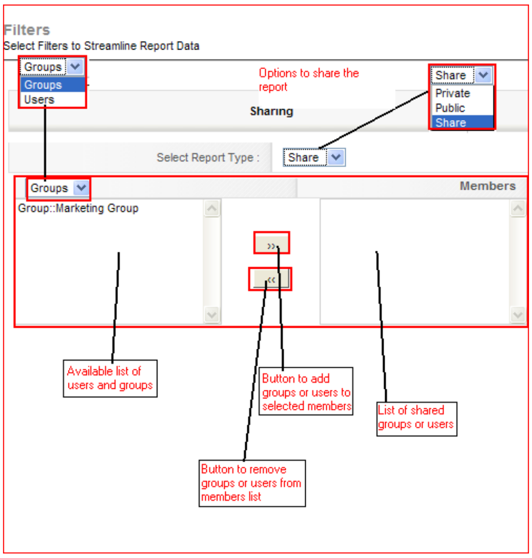
```
Public - Report can be viewed by all the users but can only be edited by users with higher Role (than report owner)
```

NOTE:

```
Private - Report can only be viewed and edited by Owner and users with higher Role (than report owner)
```

NOTE:

```
Share - Owner of the report can share report with selected users or groups. But, the report can only be edited by Owner
```



More

- DetailView

Reports Detail View is divided into two parts, Main content and Calculations.

MainContent of the reports contains the data of the fields that are selected to display in the report.

Contacts First Name	Contacts Last Name	Contacts Lead Source	Contac
Mary	Smith	Public Relations	usable-
Patricia	Johnson	Employee	vtiger
Linda	Williams	Word of mouth	demov
Barbara	Jones	Web Site	demov
Elizabeth	Brown	Other	usable-
Jennifer	Davis	Partner	vtiger
Maria	Miller	Web Site	EDFG C
Susan	Wilson	--None--	EDFG C
Margaret	Moore	Existing Customer	vtigeru
Dorothy	Taylor	--None--	X-CEEI

Calculations Part of the reports contains the Calculations of the fields that are selected for calculations in the report.

Field Names	SUM	AVG	MIN	MAX
Accounts Employees	0	0.0000	0	0
Accounts Annual Revenue	0	0.0000	0	0

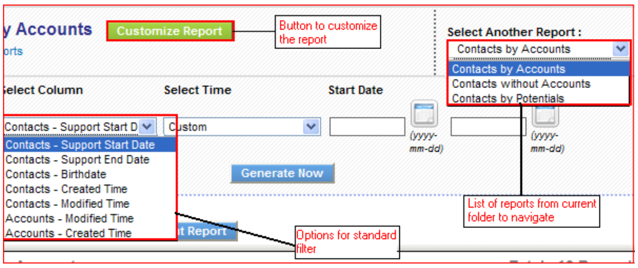
Apart from Content and Calculations, The DetailView holds the operations like Exporting the report to Excel or PDF, To Print, Customize the Report, Navigate to Other Report and Filter the report results.

NOTE:

```
Customizing the Report is just like Editing the Report from Detailview of the Report
```

NOTE:

```
Filtering the results in a report can be done through the standard fields provided
```

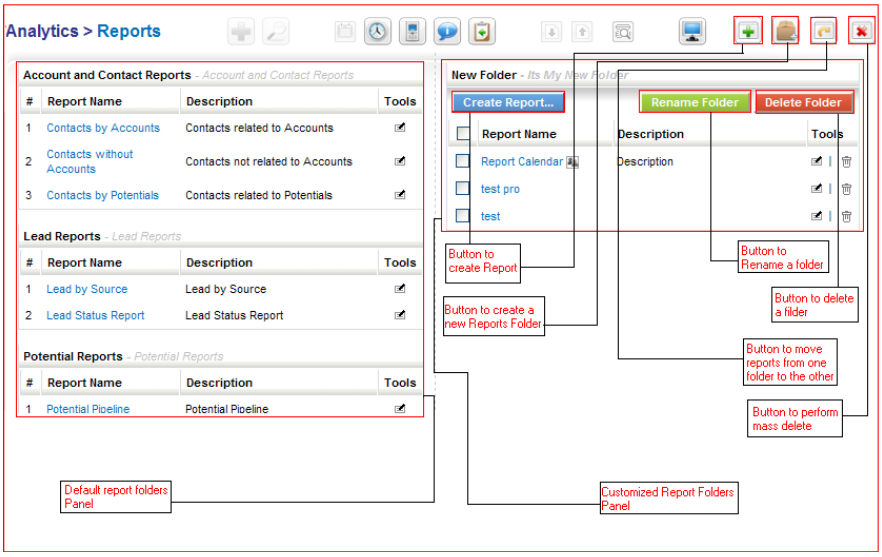


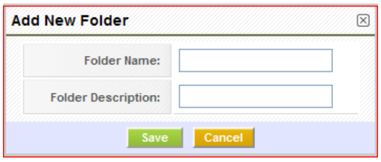
• ListView

Reports ListView is basically splited into three parts. Default Reports, Custom reports and Actions are the three parts of list view. Actions part in ListView comprises of operation like Mass Delete, Moving Reports, Creating Folders and Creating Reports

We can select multiple reports in the list view and delete them using mass delete option. Default reports are not provided with delete option.

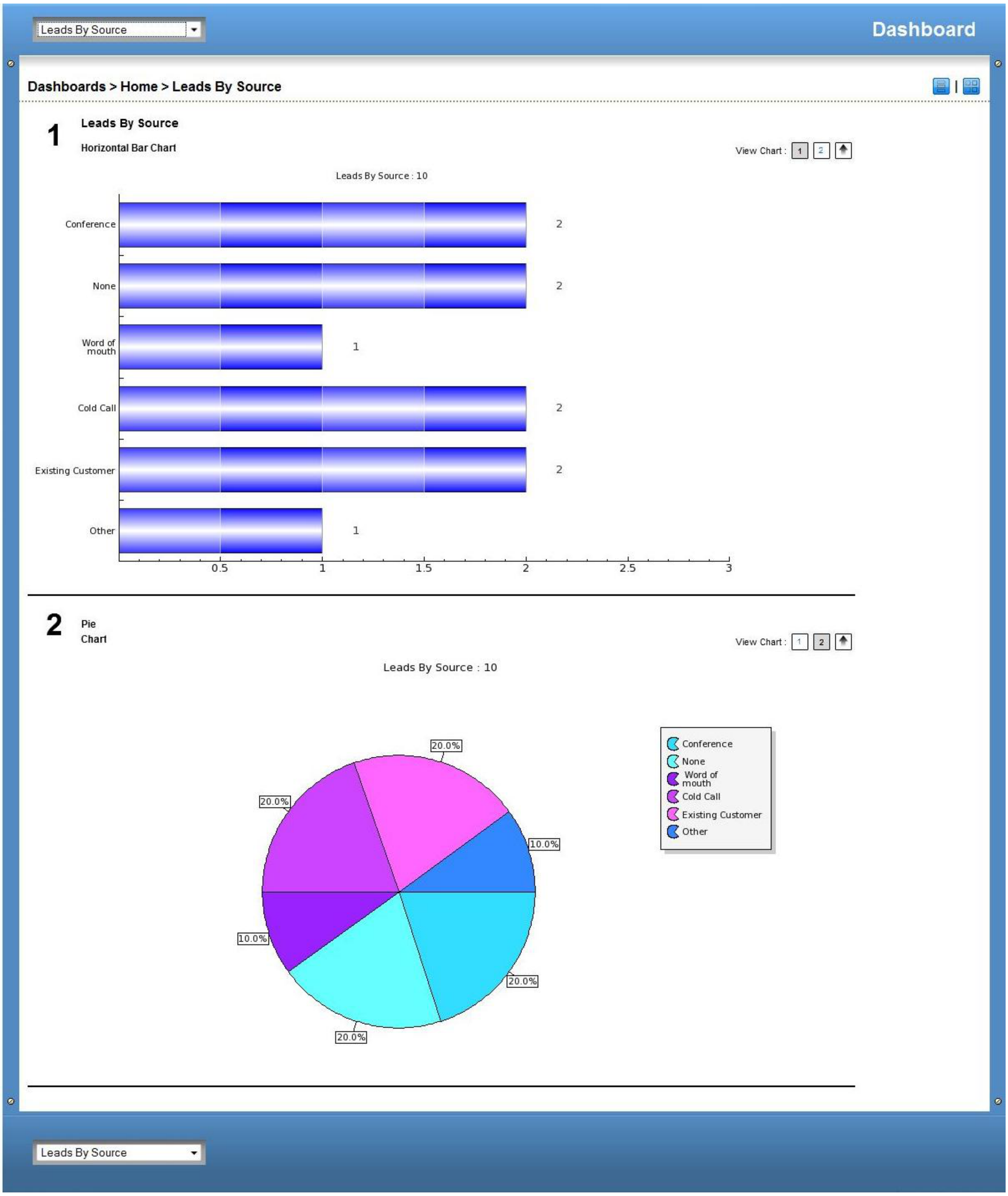
Reports can be moved from one folder to other using the move button in actions list.





Charts and Graphs

The dashboard gives you a graphical representation of your sales and service data. You can reach the Dashboard function at the Analytics > Dashboard menu. The dashboard includes a graphical representation of sales and services related data as partly displayed in the below image



The above Dashboard gives a snapshot of Leads By Source.

UserManual Calendar

From vtiger.com

Contents

Working with Calendar

The vtiger CRM application includes a Calendar module to manage user activities, and allow different CRM users to collaborate on activities. Activities consist of Events (calls and meetings) and To Dos (to dos). Events are designed for scheduled calls and meetings, while To Dos are designed for tasks that need to be completed by a given due date.

You can perform the following operations in the Calendar module:

- Manage To Dos
- Manage Events (Calls and Meetings)

Organization of Calendar

The Calendar can be viewed in one of four views:

- Day view
- Week view
- Month view
- Year view

For each of these views, you can see events in a List View or a Calendar View for the appropriate view interval.

The Calendar application provides the following actions:

- Navigator
- Calendar Settings: for customizing day start time, time format (AM/PM or Military time format, and sharing calendar with other users)
- Segregated views for Events and To Dos
- Add Calls, Meetings, or To Dos
- Select views â   List View or Calendar View

You can perform the following operations in Calendar module:

- Navigate activities
- Search activities
- Create activities (events or to dos)
- Customize the calendar settings
- Share events with other users
- Send reminders before start of the event
- Schedule recurring events based on day, week, month, or year

- Associate events/to dos with leads, contacts, accounts, potentials, or trouble tickets.
- Delete activities

Navigating Activities

You can navigate activities from the Activity List.

To navigate activities

1.Click the **My Home Â» Calendar** tab.

2.In the *Calendar Home page*, under the Events/To Dos List section, select Events or To dos from the Select View drop-down list to display the list of to dos and events respectively.

3.In the Activity List section, click the Start, Previous, Next, or End link to access the respective list of activities.

Searching Activities

You can search activities with basic details, such as subject or details in advanced search. You can also search activity names alphabetically.

To search activities

1.Click the **My Home Â» Calendar** tab.

2.In the *Calendar Home page*, click the **Search** toolbar icon.

3.In the *Activity Search* section, do one of the following:

- Enter the search criteria in Subject field and click the **Search** button. Or
- Select one of the alphabetical search links.

4.In the Activity List page, list of activities are displayed as per search criteria.

Creating To Dos

To Dos are displayed under vtiger CRM user's home page, Activities page, and other related modules.

List of Standard To do-related Fields

In the *To Do: Edit* form, you need to specify the to do-related information. The following table provides descriptions of the various fields in the form.

Field Name	Description	Data Type
To Do	Specify the subject of the to do.	Text box, alphanumeric(50)
Time %26 Date	Specify the start time and date of the to do.	
Due Date	Specify the due date of the to do.	Date (yyyy/mm/dd)
Priority	Select the priority of the to do.	Pick List
Assigned To	Select the user or group to whom the to do is assigned.	Pick List
Status	Select the status of the to do.	Pick List
Related To	Select the module to which the to do is associated.	Pick List
Notification	Select the Send Notification to enable notification service	Check list
Description	Specify any additional details about the to do.	Text Area (long text)

To create to dos

1.Click **My Home Â» Calendar** tab

2.In the *Calendar Home page*, click the **Add Â» To Do** pop up menu. Alternatively, click the To do button from records, such as leads, accounts, contacts, potentials, trouble tickets, and other modules.

3.In the *To do: < > page*, enter the to do-related information.

`Note: â  Subjectâ   and â  Start Timeâ   are mandatory fields. Refer to â  List of Standard To do-related Fieldsâ   sect`

4.Click **Save**. To do details are displayed in Activities page under Activity List section.

Creating Events

Events can be either calls or meetings, which are displayed under vtiger CRM user's home page, Calendar, and other related modules. You can perform the following operations in Events module:

- Create calls or meetings
- Search calls or meetings (Basic/Alphabetical/Advanced search)
- Navigate calls or meetings through Call List
- Associate calls or meetings with other records

List of Standard Event-related Fields

In the Event: Edit form, you need to specify the event-related information. The following table provides descriptions of the various fields in the form.

Field Name	Description	Data Type
Event Type	Select either Call or Meeting	
Event Name	Specify the subject of the event.	Text box, Alphanumeric (50)
Mark Public	Select the check box to make a public event, which is displayed under all users calendar	
Assigned To	Select the user or group to whom the event is assigned.	Picklist
Start Time	Specify the starting date and time of the event.	Date
End Time	Specify the end date and time of the event	Date
Select Module	Select the lead, account, or potential name with which the event is associated.	Pick list
Contact Name	Select the contact name with which the event is associated.	Pick list
Status	Select the status of the event.	Pick list
Priority	Select the priority of the event.	Pick list
Send Notification	Select the check box to send a notification about the event to the vtiger CRM users and the contacts, leads, accounts, and potentials.	Check Box
Activity Type	Select the activity type as â Eventâ .	Event
Location	Specify the location of the event.	Text box, alphanumeric (50)
Description	Specify additional details about the event.	Text Area
Invite tab	Select the other users to the event.	
Reminder	Select the reminder option to send a notification before start of the event	
Repeat	Specify the frequency of events to be planned. You can repeat event on daily, weekly, monthly, or yearly basis	
Related To	Select Leads, Accounts, Contacts, or Trouble Tickets to associate event with them.	

To create events

1.Click the **My Home Â» Calendar** tab.

2.In the *Calendar page*, by default, Day View is displayed. Click the time (for example 08:00 hrs), at which you have to set up an event.

3.In the *Add pop-up* menu, click the *Call* or *Meeting* option, type the subject in Subject field, and click the Save button.

4.In the *Activity <Event Name> page*, click the Edit button to update the event details.

5.In the *Activity <Event Name> page*, enter the other event related details. Refer to â List of Standard Event-related Fieldsâ section for more details.

6.Click **Save**.

Creating Meetings

Meetings are displayed under vtiger CRM user's home page, Calendar, and other related modules. You can perform the following operations in Meetings module:

- Create new meetings (Form filling and quick create options)
- Search meetings (Basic/Alphabetical/Advanced search)
- Navigate meetings through Meeting List
- Associate meeting with other records
- List of Standard Meeting-related Fields

In the *Meeting: Edit* form, you need to specify the meeting-related information. The following table provides descriptions of the various fields in the form.

Field Name	**Description**	**Data Type**
Subject	Specify the subject of the meeting.	Text box, alphanumeric (50)
Assigned To	Select the user or team attending the meeting.	
Start Time	Specify the starting date and time of the meeting.	Date
Duration	Specify the duration of the meeting.	Hrs/Minutes
Select Module	Select the lead, account, or potential name with which the meeting is associated.	Pick List
Contact Name	Select the contact name to which the meeting is associated.	Pick List
Status	Select the status of the meeting.	Pick List
Priority	Select the priority of the meeting.	Pick List
Send Notification	Select the check box to send a notification about the meeting to the vtiger CRM users and the contacts, leads, accounts, and potentials.	Check box
Activity Type	Select the activity type as â Meetingâ .	Event
Location	Specify the location of the meeting.	Text box
Description	Specify additional details about the event.	Text Area

To create meetings

1.Click the **My Home Â» Calendar** tab.

2.In the *Calendar page*, by default Day View is displayed. Click the time (for example 08:00 hrs), at which you have to set up a meeting.

3.In the *Add pop-up* dialog, click the **Meeting** menu, type the subject in Subject field, and click the **Save** button.

4.In the *Activity <Meeting Name>* page, click the **Edit** button to update the event details.

5.In the *Activity <Meeting Name>* page, enter the other meeting-related details. Refer to the â   List of Standard Meeting-related Fieldsâ   section for more details.

6.Click **Save**.

Deleting Activities

Occasionally, you may need to remove some of the unnecessary activities from the vtiger CRM system for a better user experience. You may consider removing activities that are not useful for future reference.

```
Warning: Deleting activities is a destructive operation, hence use this option judiciously.
```

To Delete Activities

1.Click the **My Home Â» Calendar** tab.

2.In the *Activities: Home page*, select the activity.

3.In the *Activity: <Activity Name>* page, click **Delete**.

4.In the *Confirmation* dialog, click **OK** to delete the activity permanently.

Notification-Invitations & Reminders

You can configure notification of any Event by way of enabling the Send Notification Option. This option enables invitation of participants to an Event and also Reminding them about the event well in advance.

To Invite Participants

1.Click on the **Invite** option

2.Select the users from the Available User List and move it to the Selected Users list.

3.You can add or remove users to whom invitation to the Event is to be sent.

To schedule Reminders

1.Click on the **Reminder** Option

2.If you choose to Send reminders, you can select the number of days, hours and minutes at which you want to send reminders before the Event Commencement.

3.You can enter the Email address of the user in the email field provided in the UI.

To schedule repeated notification of events

1.Click on the **Repeat** Tab

2.Select the *Check box* to enable repeats

3.Select the frequency of repeats (no. of times- against days/weeks /months)

4.Select the days on which the notification is to be sent by enabling the check boxes respectively.

To select the accounts,Leads or contacts related to the Event

1.Click on the **Related To** tab

2.Select the Module from the drop down list(leads/accounts/contacts)

3.You can select the particular contact name from the Select button on the right and add them in the list of contacts.

Feature Custom Events In Calendar

From vtiger.com

Faq | Howto

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About

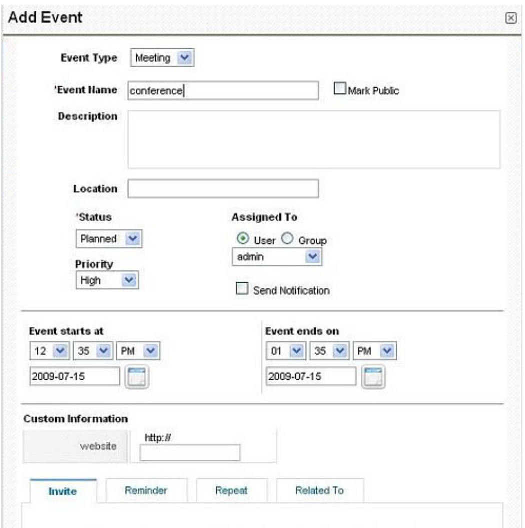
Events are the future upcomings /happenings. VtigerCRM has a feature **Custom events**. This feature provides user to create the events of his own choice leaving the default non editable values. User can add new event labels to picklist from picklist editor.

To Add New Event

- Go to **Calendar** module, click on **Add** button in the **Event** panel.

- This gives a picklist with types of events say meeting,calls etc.Select any event from picklist.

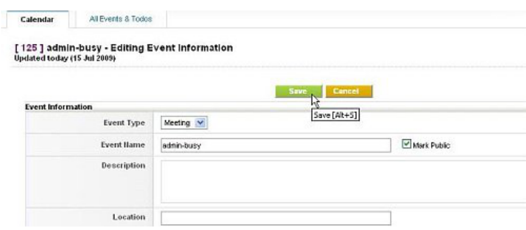
- It pops up a window **Add Event**, fill the fields with necessary data, set event time, set the remainders and specify if any repeatation.



NOTE:

Fields with star mark(*)are manditory fields. Its necessary to fill this fields.

- Cick **Save** to save the event.



To Add /Edit /Delete New Event Type In The Picklist

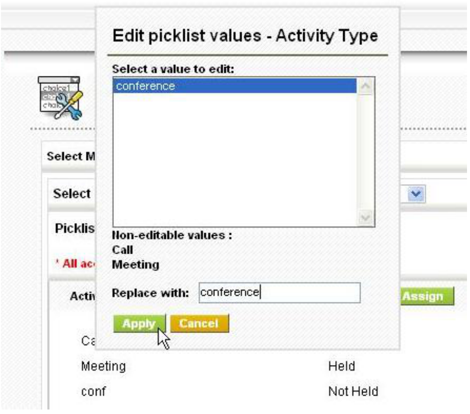
Using this feature we can add /edit /delete new event types in the picklist obtained when **Add /Edit /Delete** button is clicked.Steps to add new event types:

- Go to **Settings** page, select **Picklist Editor** under **Studio**.
- This opens a Picklist Editor page, Select **Event** in the dropdown in the **Select Module** option.
- It gives the list of Activity Type, Status and Priorities.
- Select the Picklist Type in the dropdown.

- Click on global action buttons(Add/ Edit/ Delete) to perform global actions (add /edit /delete)on the picklist values resepectively.

NOTE:

These Global Actions cannot be performed on **Noneditable Values**.



- Click **Assign**, to assign roles to each event type.

Feature Custom Fields In Calendar

From vtiger.com

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About

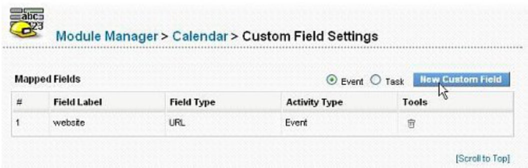
Custom fields are the user defined fields in the Calender module.The user/admin can define multiple custom fields as per requirements.These custom fields are used to obtain additional information than default information from the users when they add an activity(event or to do).

How To Create Custom Field

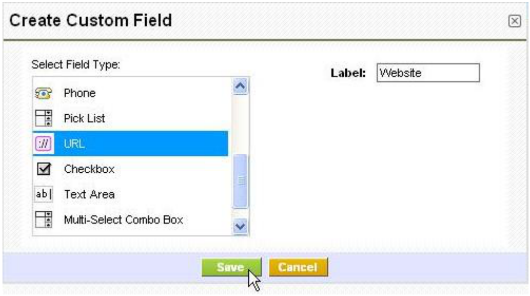
Multiple number of custom fields can be added to Calendar module. Steps to create custom fields are below:

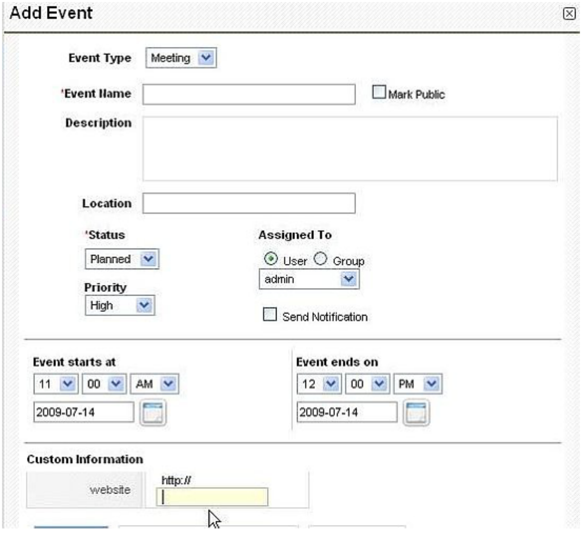
- Go to **Calendar** module, Click on the **Settings** icon on the top right corner.It opens a settings page.
- Click **Calendar Custom Fields** link, which opens a page with list of custom fields and its type if defined earlier.

- Select the activity type and click on **New Custom Field**.



- It pops up a window, select field type from the list provided and enter the label for the new field.
- Click **Save** to save the changes.




Add Event
Event Type
Meeting
*Event Name
Mark Public
Description
Location
*Status
Planned
Priority
High
Assigned To
User
Group
admin
Send Notification
Event starts at
11
00
AM
2009-07-14
Event ends on
12
00
PM
2009-07-14
Custom Information
website
http://

Feature User Filters In Calendar

From vtiger.com

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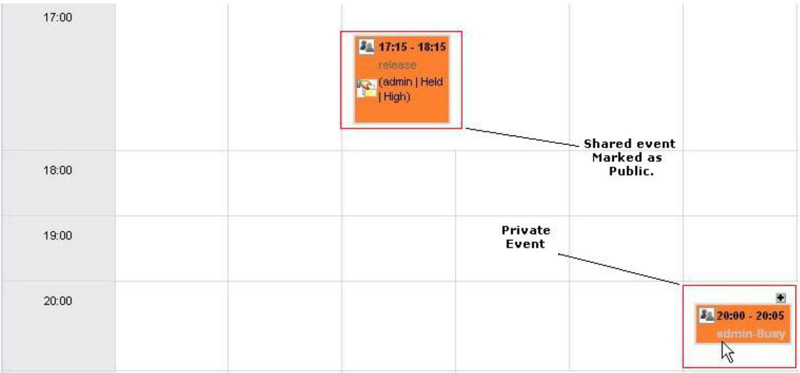
About

User Filters are the new feature provided by VtigerCRM to the calendar module. This feature allows user to filter events by User name. All events in the Calendar are shown in either calendar/ list view.

How Does It Work

When you add an event in a calendar, it can be assigned to selected users. Events that are assigned to subordinate role of current user's role can be viewed by that user. Events that are assigned to higher role levels can be viewed by current user once the records are shared. Events that are not shared and are not accessible to the current user, will be shown but the subject will be named as '{username} â BUSY'.

In Calendar page, Events can be seen in two views calender view and list view.A selection box is provided at right corner to select the type of view. All the details regarding the events are displayed in both the views. You have dropdown list at the right corner in which all the usernames of the vtiger is present. Once you select the username from that select box, the events that are related to that user will be shown.



NOTE:

Only **Admin** has option **All** where the records of all the users are displayed.

Feature Calendar Popup Reminder

From vtiger.com

Faq | Howto

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About

Popup reminder will be shown when ever an activity is created at the interval in which the time of activity falls, where the interval is defined by user within the given choices.

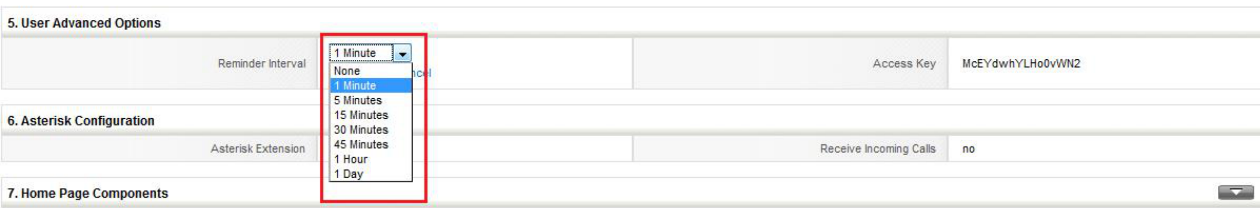
Working

Interval

Each user is given 'None' as interval by default.

The interval is given such that the user can configure the time interval in which the popups are meant to be shown for every interval part of time. i.e. By default the popups are not shown for newly created users.

This can be configured to None, 1 Minute, 5 Minutes, 15 Minutes, 30 Minutes, 45 Minutes, 1 Hour and 1 Day



If the interval by user is set to 'None' then popup will be set as not to be shown.

Reminder Popup

Create an Activity and set a time for that activity and save that.

Now At the time of activity to occur, a popup is shown to the user that the activity is assigned to.

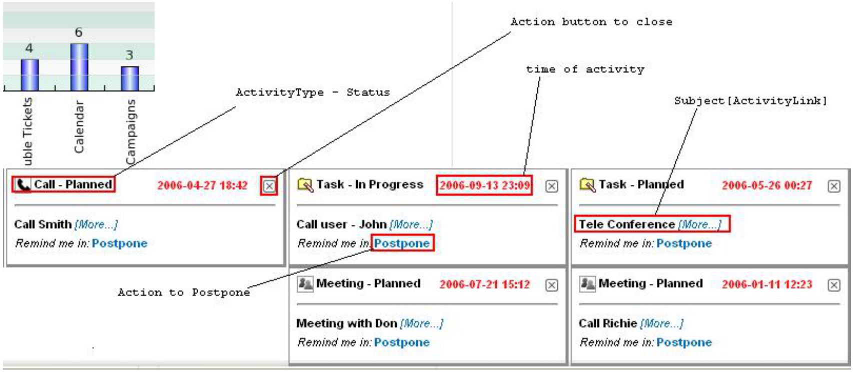
The popup shows the status, time of activity, activity subject and options(Postpone or Close).

On Clicking the link Postpone, The activity reminder popup will be shown in the next interval after the click of postpone.

On Using Close click the popup for the activity will be set as marked and will never be shown until the activity is modified for the next time.

Drawbacks

Microsoft IE7 Issue - Reminder Popup's left for more intervals might get blocked and would not dissappear even after clicking on Postpone (until unless page is refreshed), but all the activities with the Reminder Popup's will still continue to work.



Module Webmail Configuration

From vtiger.com

Faq | Howto

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About

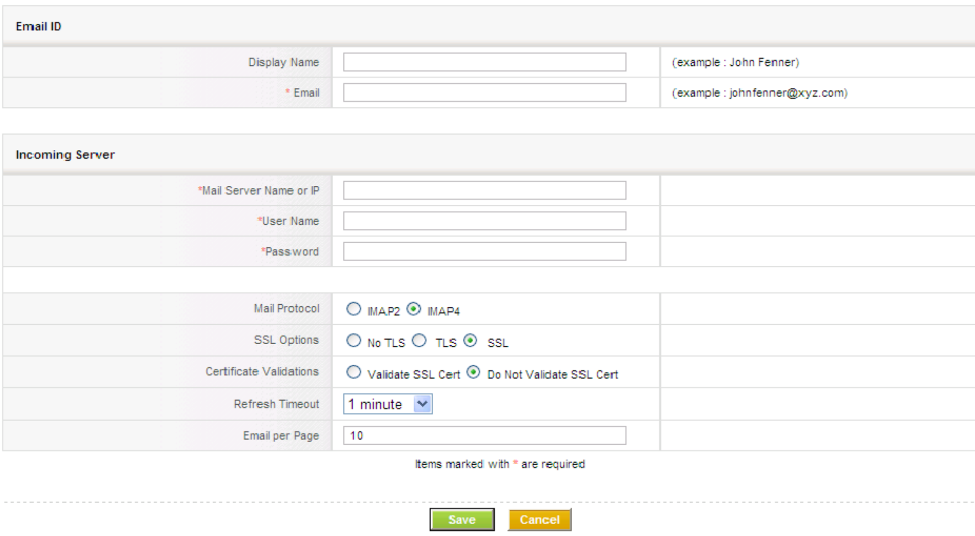
Webmail module provides the ability to interact with your INBOX on the IMAP mail server.

Feature

Webmail allows user to send and receive emails from any computer on web.
Check email automatically every few minutes.
Retrieve and read the messages from your IMAP server, including those in HTML format.

Incoming mail server configuration

Go to My HomePage>Webmail,
Give details of My Incoming Mail Server .



Display Name : Your Name Email : yourname@gmail.com

Mail Server Name or IP : imap.gmail.com

Username : gmail_id

Password : gmail_password

Mail Protocol : IMAP2 or IMAP4 as it is supported by major email clients and and mail servers.

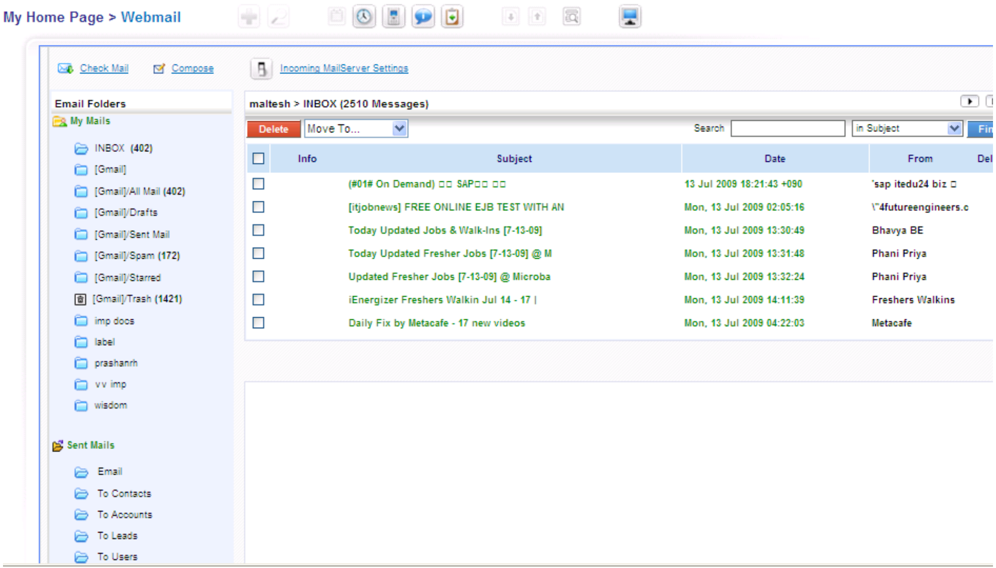
SSL Options : To ensure security of data transmitted choose either SSL or TLS.

Certificate Validations : Security feature, Server responds by sending the siteâ s certificate to the browser.The browser validate the certificate if it is valid

Refresh Timeout : 1 min

Email per Page : as you wish.

Once you have configured Webmail,you can access your account directly from crm



Qualifying Incoming mails

Case 1: If the mail comes from a undefined user on qualifying new contact will be created in the CRM and mail will be attach to newly created contact.

Case 2: If a mail has come from a lead then qualifying the mail to attach the mail to the lead.It will not create any contact.

Case 3: If with same mail id a Lead and a Contact is present then qualifying the mail will attach the mail to the Lead instead of contact.

Case 4: If Lead is converted to Contact then if we will qualify any new mail then the mail will not get attach to the contact but to the already converted lead, if we will access the lead through direct URL(putting record id) then we can see the qualified mail attached there.

If I will delete the converted lead then further qualifying mail will attach the mail to contact.

Case5:If two contacts are there with same mail id then qualifying a mail will attach the mail to the first contact got created in the CRM not to the second one.If i will delete the first contact then the mail which will get qualify after wards will get attach to the 2nd contact.

P.S: Qualify mail is not a Automatic process.Users have to do it manually. Users can see the Qualify Button after clicking on a mail in Webmail.

UserManual Documents

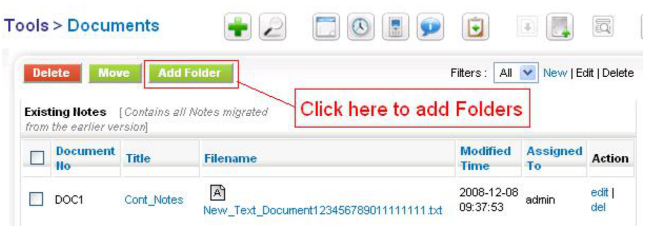
From vtiger.com

Contents

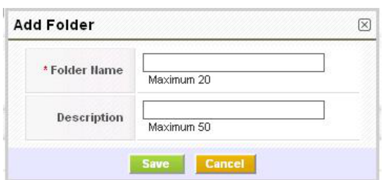
Documents

Vtiger CRM includes a Documents module to manage documents needed for sales, marketing, and any other customer related activities. These documents can then be attached to other CRM records, e.g. leads or accounts, as needed. This allows easy access and recording of related documents, e.g. customer documents for a given customer.

Following is the screen shot of the folder view when there is a default folders



When you click on add folders,you get a pop up which requires you to add a mandatory Folder Name and an optional description.

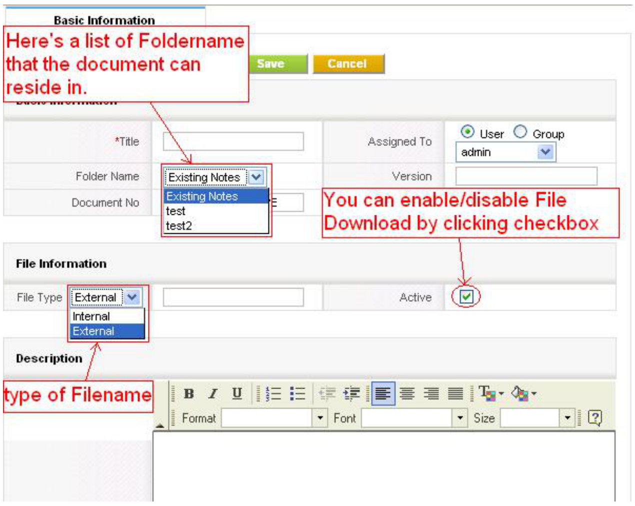


Working

Create View

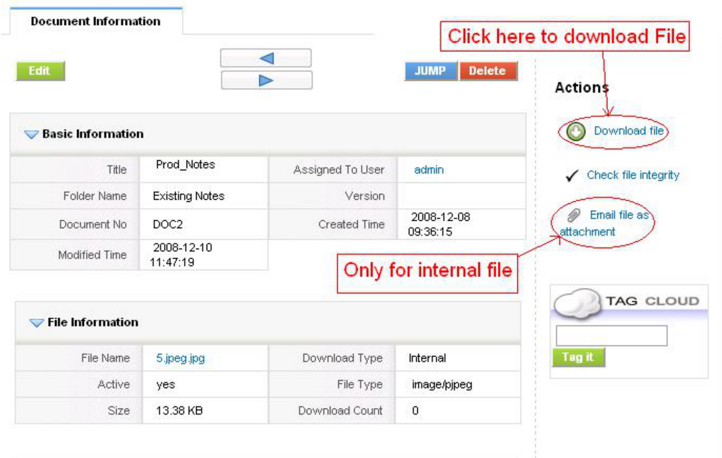
- Title: Its a mandatory Field which gives the name of the document.
  *Folder Name: Its a pick list which gives you a list of folders.
  *Assigned To%26nbsp;: You can assign this to any user and group

*Notes : This has the contents for the note.
*Download Type : Two ways in which you can attach a file to the document.One is throughexternal and other through internal.
*Active : This field gives you the control if the attached file can be downloadable or not.
*Version : You can specify file version.



Detail View

If a file is attached to a document, actions like download, check file integrity (only for administrator and for internal files only), send file attached to an email. A new block called 'File Information' will also come up after attaching a file to the document in the detail view. We can have the download count,size and type of a file from this block. The administrator can change the status of the file to disable/enable file actions to all the other users.



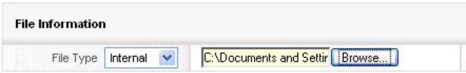
Download Type

External

While creating a document, a user can either upload a file in the file system of his machine or give a URL for the located on the web.To attach a file to the document we have provided two options,through external and internal If external,then you can give the URL as shown on the screen shot.

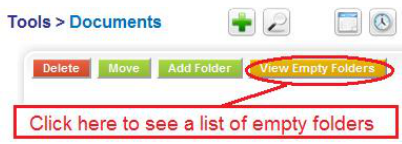
Internal

When you click on the internal type a field with a button is shown,which will allow you to browse through your system to attach any file.



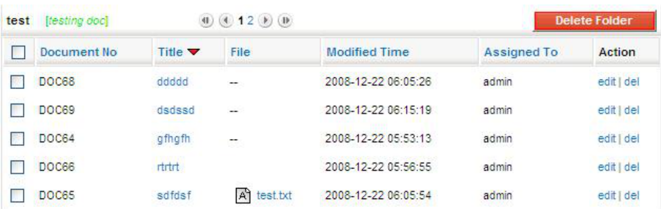
Empty Folders

Folders which does not have any record in it will be hidden from the view and you can see the list of empty folders when you click on the button provided in the listview of Documents as shown.



When you click on the empty folder button ,a list of folders along with an option for delete will appear as shown below.

Listview of a folder is as shown,a button has been provided at the right hand side for deleting the folder. At most 5 record is shown for each folder and a navigation bar is provided on top of each folder if there are more than 5 records.



test [testing doc] 1 2 Delete Folder

	Document No	Title	File	Modified Time	Assigned To	Action
	DOC68	ddddd	--	2008-12-22 06:05:26	admin	edit | del
	DOC69	dsdssd	--	2008-12-22 06:15:19	admin	edit | del
	DOC64	gfhgfh	--	2008-12-22 05:53:13	admin	edit | del
	DOC66	rtrtrt		2008-12-22 05:56:55	admin	edit | del
	DOC65	sdfdsf	test.txt	2008-12-22 06:05:54	admin	edit | del

Related Information

The property of associating a document to a contact or other module has been removed. 'Add Attachment' button has been removed from the More Information tab of the modules and added a new button 'Select Documents'. Users can select any number of documents to add in the related lists of the modules and also can create new documents on the fly from the related lists itself. Following is the screen shot of the related list in the More Information tab of a module:

Documents Showing 1 - 1 of 1 Select Document Add Document

Title	File Name	Assigned To	Folder Name	Action
Cont_Notes	New_Text_Document1234567890111111111.txt	admin	Existing Notes	edit | del

UserManual Other Tools

From vtiger.com

Contents

Export %26 Import of Data

This feature allows vtigerCRM system to export records(depending on conditions specified) for the modules listed below, which can be later imported back into CRM system to update the records.

How Does it works

Records present under the Modules can be saved in CSV format by clicking on Export button.Field delimiter (Character used to separate columns of data.) is auto selected.The records in saved CSV file can be edited offline and can be re-imported using the Import functionality.

Modules Supported

Export/Import feature is enabled to following modules

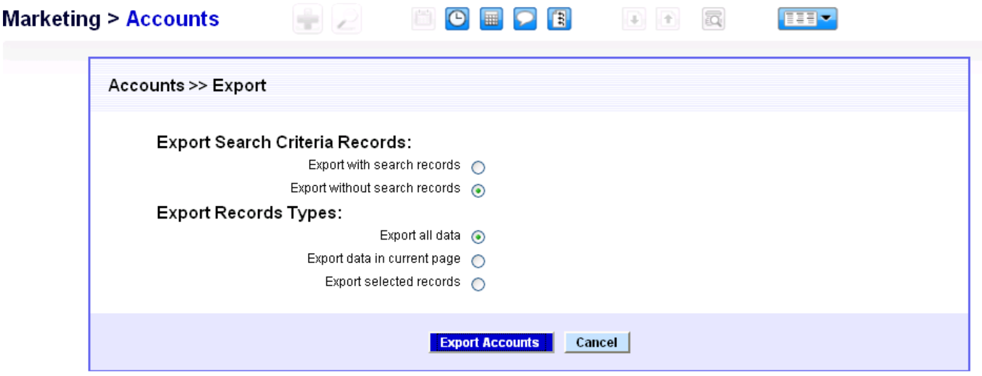
- Contacts
- Accounts
- Leads
- Potentials
- Services
- Trouble Tickets
- Service Contracts
- Products
- Vendors
- Documents(Supports only Export feature).

Steps to Export

The Export functionality is enabled in both List view and Detailed View.

- On your vtigerCRM , click on top arrow icon under any module(*Export window appears).*

- Choose**Export criteria records** and **Export Records Types**:



• Click Export {Module name} and save the file.

The resulting .csv file displays as column headers the field titles from the detail view.

• **Export Selected Records:** To export one or more records on the list(*list view*) select the check boxes of the record(s) you want to export.
• **Export Data in Current Page:** To export all the records listed on the page.
• **Export all Data:** To export all records list inthe module(which could be more than the current page).

NOTE:

For example if you are exporting all records under accounts module then to export click **Export Accounts** Button.

Steps to Import

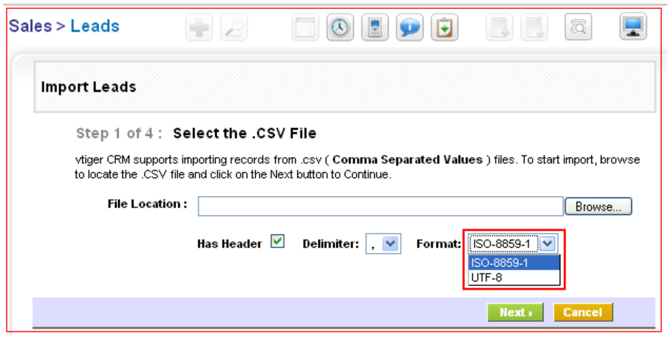
Record type and field mapping available to relate and how you relate the records are unique to each module.

Pre requisites

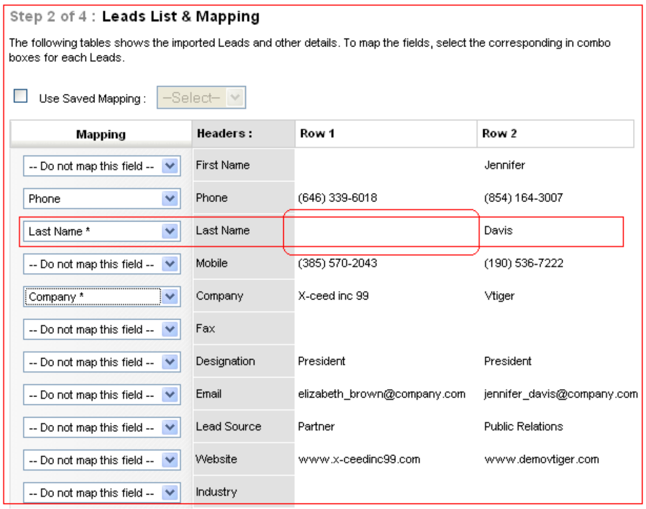
♦ CSV file containing the data you are importing.
♦ A Single CSV file for each vtiger module, like Accounts and Contacts etc..

The table below specifies the records you can relate in each module and how to relate them during import.

• In your vtigerCRM , click on down arrow icon under any module(*import window appears*)
• Choose type of delimiter from the drop down box and format(file type)(Useful while importing records from Microsoft Excel sheet) and click Next.



• Select Mandatory fields and map the fields by selecting the corresponding in combo boxes.Do not proceed to the next step without mapping the mandatory fields



Step 2 of 4 : Leads List & Mapping

The following tables shows the imported Leads and other details. To map the fields, select the corresponding in combo boxes for each Leads.

Use Saved Mapping : --Select--

Mapping	Headers :	Row 1	Row 2
-- Do not map this field --	First Name		Jennifer
Phone	Phone	(646) 339-6018	(854) 164-3007
Last Name *	Last Name		Davis
-- Do not map this field --	Mobile	(385) 570-2043	(190) 536-7222
Company *	Company	X-ceed inc 99	Vtiger
-- Do not map this field --	Fax		
-- Do not map this field --	Designation	President	President
-- Do not map this field --	Email	elizabeth_brown@company.com	jennifer_davis@company.com
-- Do not map this field --	Lead Source	Partner	Public Relations
-- Do not map this field --	Website	www.x-ceedinc99.com	www.demovtiger.com
-- Do not map this field --	Industry		

- When importing an existing vtiger record name, use the exact name as displayed in the existing vtiger record.
- Empty fields in any module while importing will be replaced by '?????',so that the sales person can later insert the name in the module list.

Last Imported Leads

Last Name	First Name	Company	Phone	Website	Email	Assigned To	Action
?????		X-ceed inc 99	(646) 339-6018			admin	edit | del
Davis		Vtiger	(854) 164-3007			admin	edit | del
?????		T3m invest a/s	(635) 142-0315			admin	edit | del
Jones		Vtigercrm inc	(873) 123-7416			admin	edit | del

- vtiger will also allow you to look at duplicate records that might have previously been imported into the system. You will then have the option to delete these records or merge the data.
- You can use the â Undo last importâ button to undo your test import if you have to fine-tune a field mapping.

UserManual Other Tools Asterisk Integration

From vtiger.com

Contents

About

vtiger is a open-source CRM solution. AsteriskÂ® is an open source PBXi, telephony engine, and telephony applications toolkit which allows users to make and receive calls from software phones (softphones) using their computer. The vtiger-asterisk integration will allow users to use vtiger to create calls and receive notifications on incoming calls using the Asterisk Call Manager API provided by Asterisk. This document describes how to configure vTigerCRM to be able to use Asterisk with it.

Features

The following features are provided:

1. Make calls by clicking on phone numbers (links) within vtiger.
2. Provides notification within vtiger giving details of the caller when a call comes to the user. (Notification appears on the bottom right-corner of the screen.)
3. View all past calls under PBX Manager module (Tools => PBX Manager)
4. Associates the call with the Contact/Account/Lead record in Activity History section (in the More Information tab).
5. Setup user extensions through My Preferences (per user basis).

Requirements

- vtigerCRM 5.1.0 should be installed on your system
- You should have a Asterisk system running
- The servers running vtiger and Asterisk should be visible to each other
- You have a valid asterisk user extension and a softphone configured to that extension.

Configuring Asterisk

This section explains how to configure asterisk to work with vtiger. There are some minor (in some cases even none) changes that you require to achive this. Follow the link here on how to configure asterisk to work with vtiger.

Configuring vtiger CRM

Once you have setup asterisk server to work with vtiger, you need to configure vtiger settings so that it can connect to asterisk. Its easy with the steps we explain here.

Setting User Extensions

vtiger allows you to create extensions for each user. These are the asterisk extensions that when configured in vtiger let you call (or receive call) for that user. We explain it here on how to set user extensions in vtiger.

Making Outgoing Calls

So, you are done setting asterisk and vtiger. Start making some calls. Read more here on how to make outgoing calls using vtiger.

Receive Incoming Calls

Outgoing calls achieved. Next step - get incoming call notifications. Click here to know how to achieve this with vtiger.

Number Formats

It is possible to save the number (in vTiger) in any format (with or without prefixing extensions like SIP, PSTN etc.) and create the call. vTiger should recognize the caller in case of incoming call as long as there is a separator â :â between the prefix and the number i.e. like SIP:211 (no spaces). In case there is no prefix specified, the default context is picked for the call

Note: It is recommended not to use any special chars or spaces in the phone number field.

UserManual Other Tools Gmail Bookmarklet

From vtiger.com

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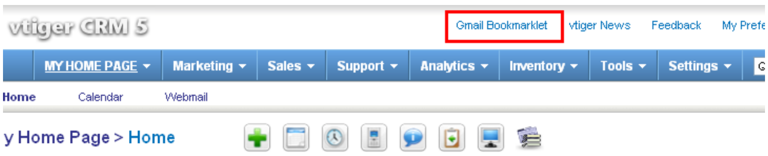
About

The GMail bookmarklet is a script provided by vtiger CRM which makes it easy to incorporate links to emails in your Gmail account into specific CRM records. Use the following steps to setup and use the Gmail bookmarklet to add links to specific email records in your vtiger CRM system records.

How To Use

Step-1

You will see Gmail Bookmarklet link on the header beside vtiger News in upper right corner as highlighted.



Step-2

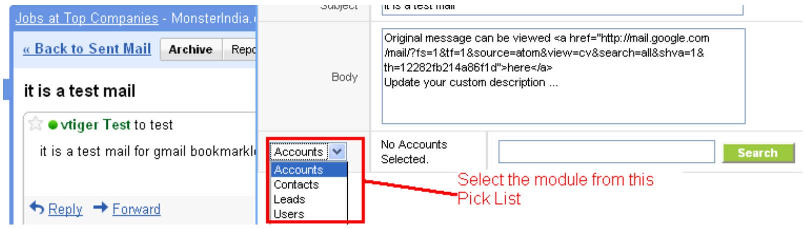
Drag the link highlighted to your Bookmark tool bar. It will be copied as Gmail Bookmarklet.

Step-3

NOTE:

You should be in the Newer Version mode in Gmail.

Open any email you like to add to vtiger CRM in your Gmail and click on the Gmail Bookmarklet option in your bookmark List.You will now see a pop up window, select the related module to which you want to email to be associated with.See the below image.

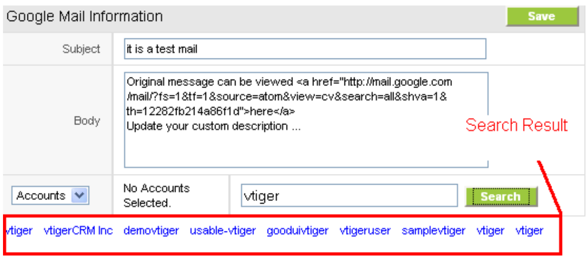


NOTE:

On IE a pop window will appear instead of a layer as shown above, but the behavior and the functionality remain the same.

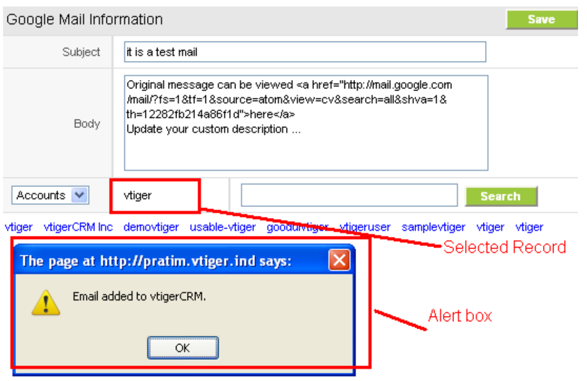
Step-4

Type name of the entity and click on the search.You will get the search result.



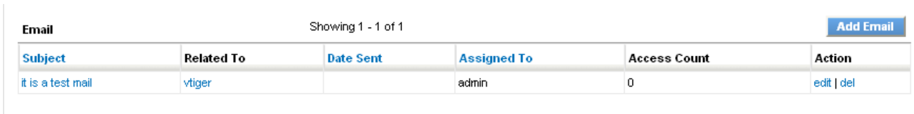
Step-5

Select an entity from the list of displayed results by clicking on them.â ¢Now Click on save button, which will add the email to vtiger CRM And an alert will be shown stating the same.



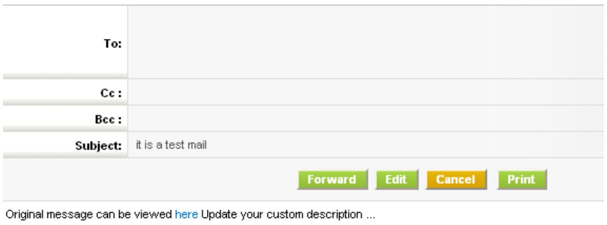
Step-6

In vtiger CRM under More Information tab of Account you can see the email added.



Step-7

Clicking on email record will open up the window which provides the actual link to your email in GMail.


To:
Cc :
Bcc :
Subject:
it is a test mail
Forward
Edit
Cancel
Print
Original message can be viewed here Update your custom description ...

Step-7

UserManual Other Tools Recycle Bin

From vtiger.com

Contents

About

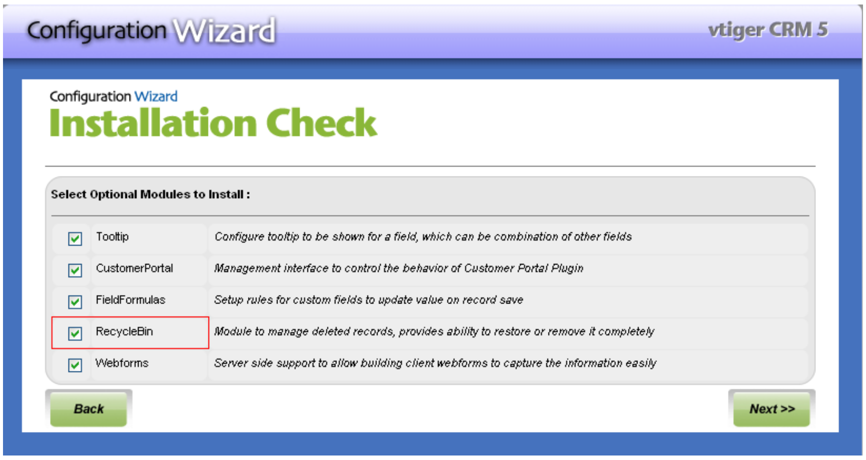
The feature 'Recycle Bin', for vtiger is much similar to the one in an operating system. In an operating system the recycle bin will hold the files or folders deleted from the file system whereas in vtiger, the recycle bin will hold all the deleted records of an entity module.

NOTE:

This features is available only for entity modules

Installation

Recycle Bin is an optional module. At the time of installation, you can optionally install Recycle Bin.



If Recycle Bin module has not been installed at installation time then it is possible to import Recycle Bin module from Module Manager.

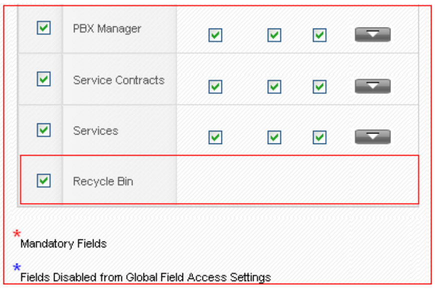
Path of the module zip : <vtigercrm-source-directory>/packages/5.1.0/optional/RecycleBin.zip

Please refer to the **Import Custom Modules** section of Module Manager to know how to install Recycle Bin module.

Configuration

Recycle Bin module can be enabled/disabled anytime for the entire organization through Settings â Module Manager. (Refer to the snapshot below)

Recycle Bin module can be enabled/disabled at profile level. (See the snapshot below)



Usage

Recycle Bin is an extension as well as optional module. It can be selected whether to be installed or not, during Installation/Migration process.

Recycle Bin comes under Tools menu. It has been supported for both admin as well as non-admin users. Added feature for the admin user other than restoring the records is that the admin user can delete the records permanently from recyclebin.

The records are shown based on the module which it belongs to. Only the records of a particular module can be viewed at a time. We can select the module name from the drop down provided.

Following snapshot illustrates how the Recycle Bin module looks:-

Records can be restored either individually or multiple records can be selected to restore at single shot, but within a given module. When a record from particular module is restored, all the related records from other modules are also restored automatically.

Admin user can delete all the records from recycle bin permanently by clicking on **Empty Recycle Bin** button. *(You can UNDO or restore the data, please think twice before performing this operation.)*

NOTE:

1. Records deleted by administrator by using 'Empty Recycle Bin' button, can never be restored back.

2. **Empty Recycle Bin will delete the records of all the modules permanently from database and you can UNDO it.**

3.When records are deleted permanently from recycle bin, the relationship of those records with other entities are not cleaned up as of now. They are still there in the database though cannot be viewed from the CRM.

Known Issues

1. Any records deleted before integrating the recycle bin feature can be restored, but the related entities will not be restored.
2. When restoring any event, the related reminders and recurring events are not restored.

3. When restoring any entity, the tags previously associated with the entity are no more associated with it. (The tag is also deleted if its not associated with any other entity).

Project Management

From vtiger.com

Faq | Howto

Contents

About

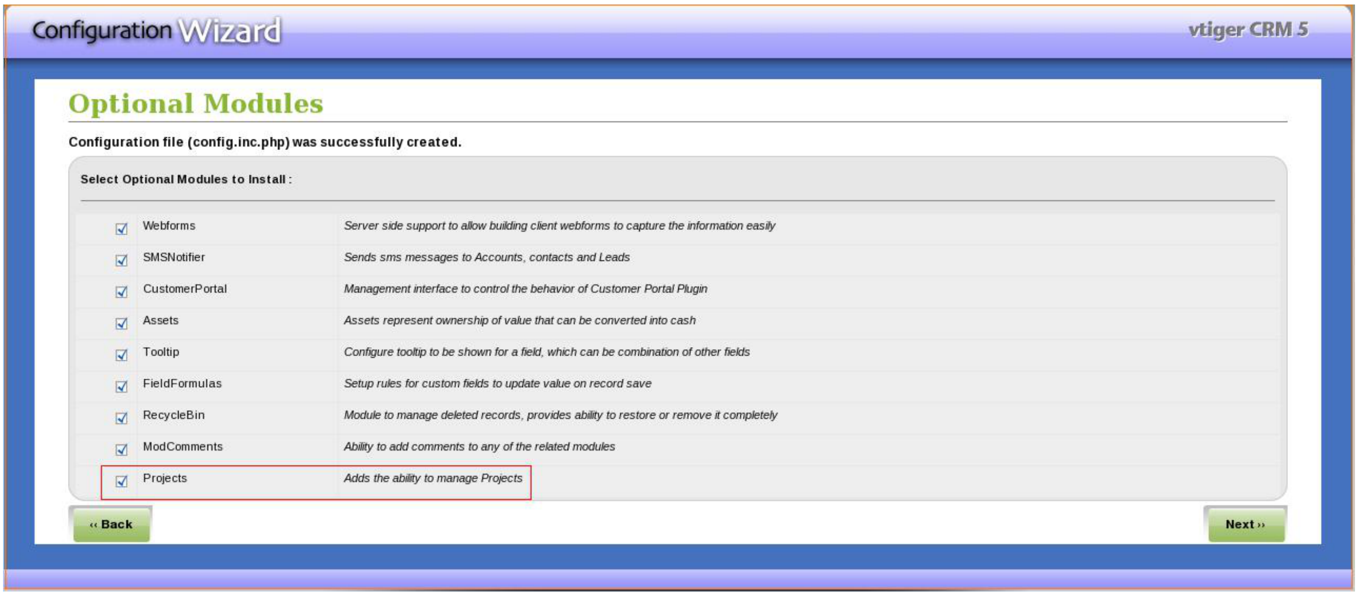
The projects module can be seen in the Support Tab. To successfully install and use the projects module, it is required that the following 3 modules be installed :

1. Projects

2. Project Task

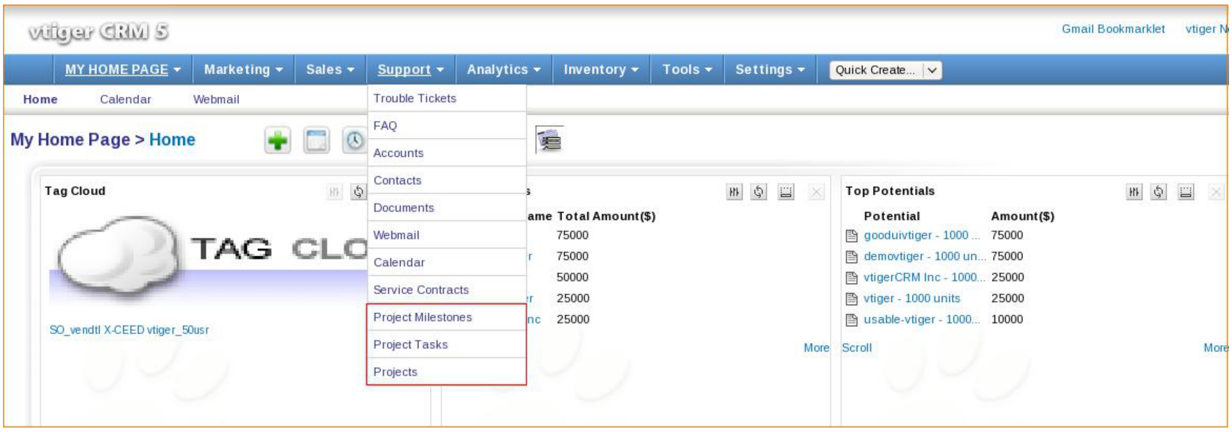
3. Project Milestones

The following screen shot shows the Projects module available during installation.



This will install Projects, Projects Tasks and Project Milestones and make it available for use.

The projects module is installed under the Support Tab that is as shown in the screen shot below:



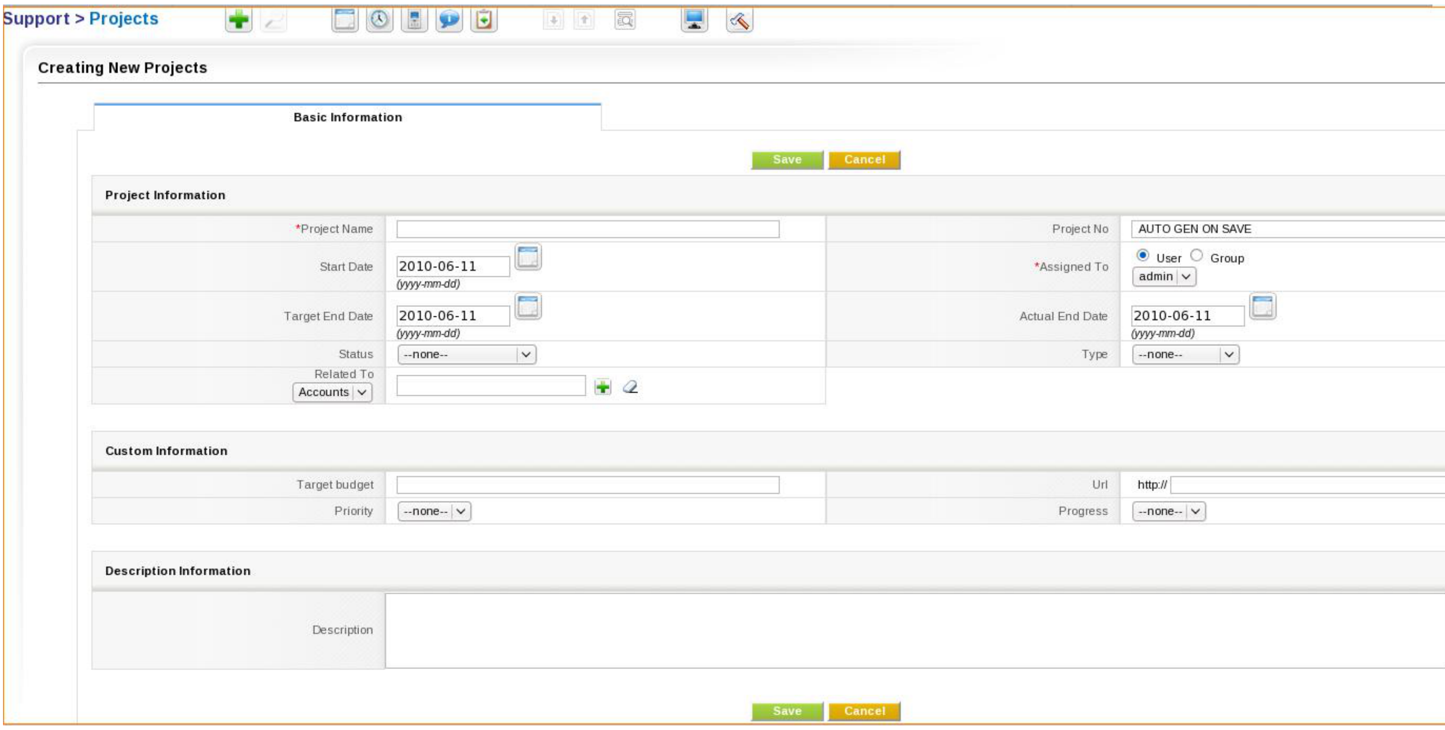
Projects Module

The Projects module works in co-ordination with the other 2 modules :

1. Projects Tasks.

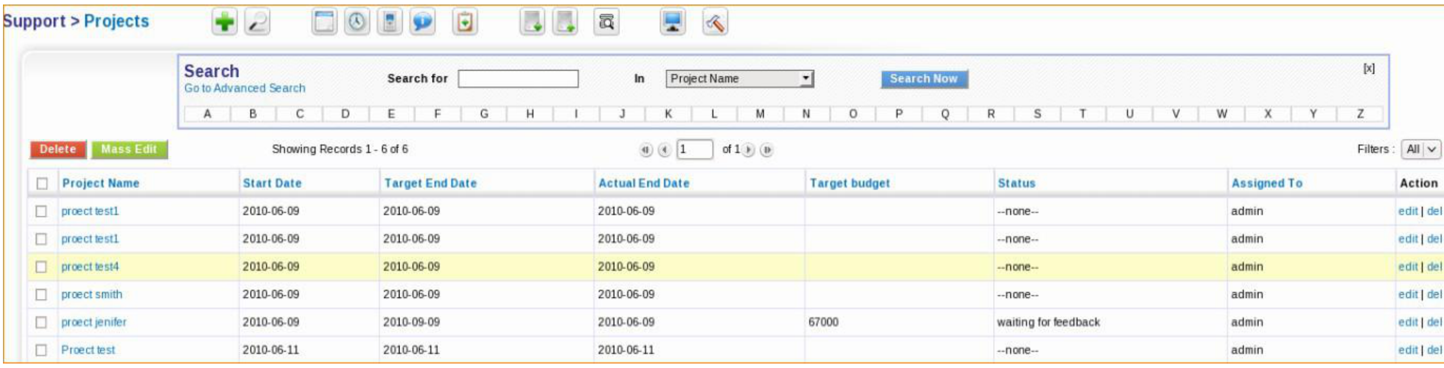
2. Project Milestones.

The Create View of the projects module is as shown in the below screen shot.



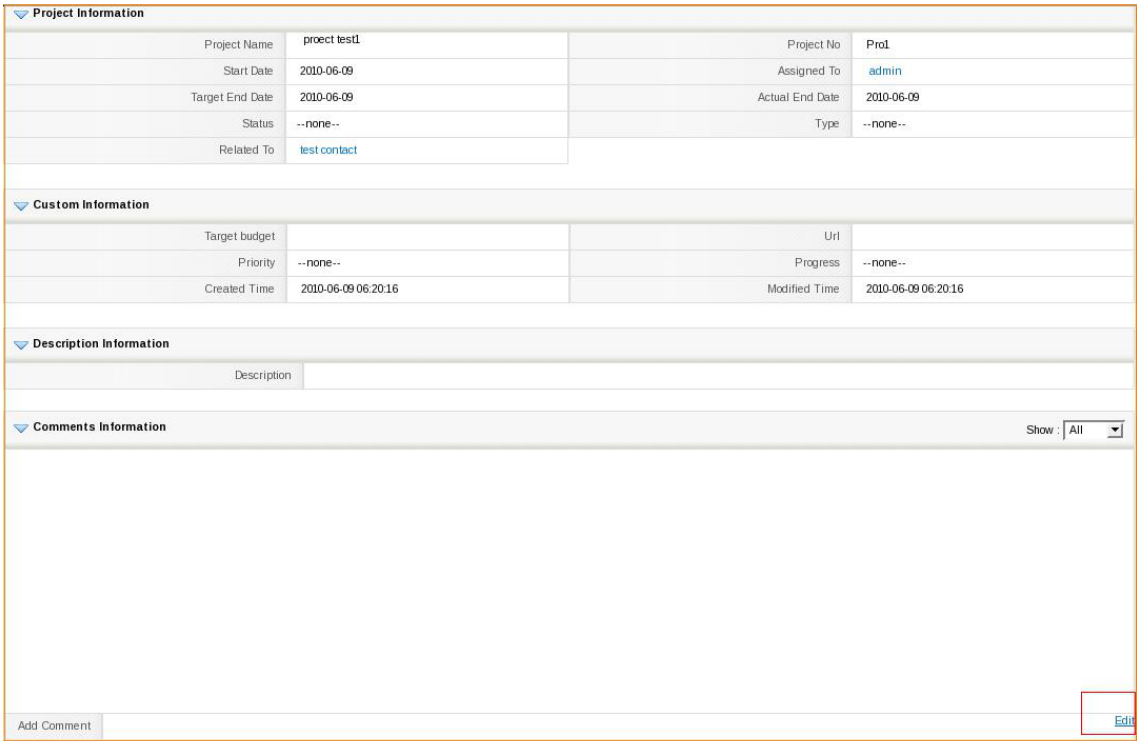
Every Project created can be related to a particular Contact or Account which can be done through the Related To field.

The list view of the projects module is as shown in the below screen shot.



Every project is entitled to have a Start Date, Target End Date(tentative end date of the project) and the actual end date. Each project can also have a unique description.

The detail view of the project module is as shown below :



The related list of projects module consists of the related modules:

1. Project Tasks

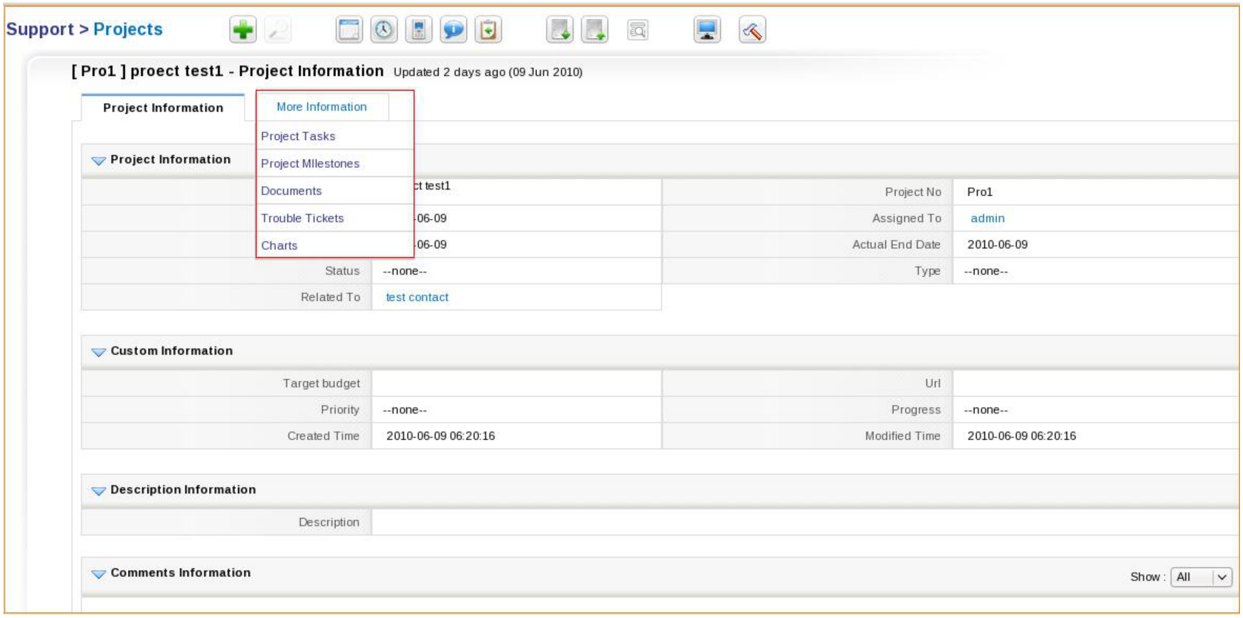
2. Project Milestones

3. Charts

4. Documents

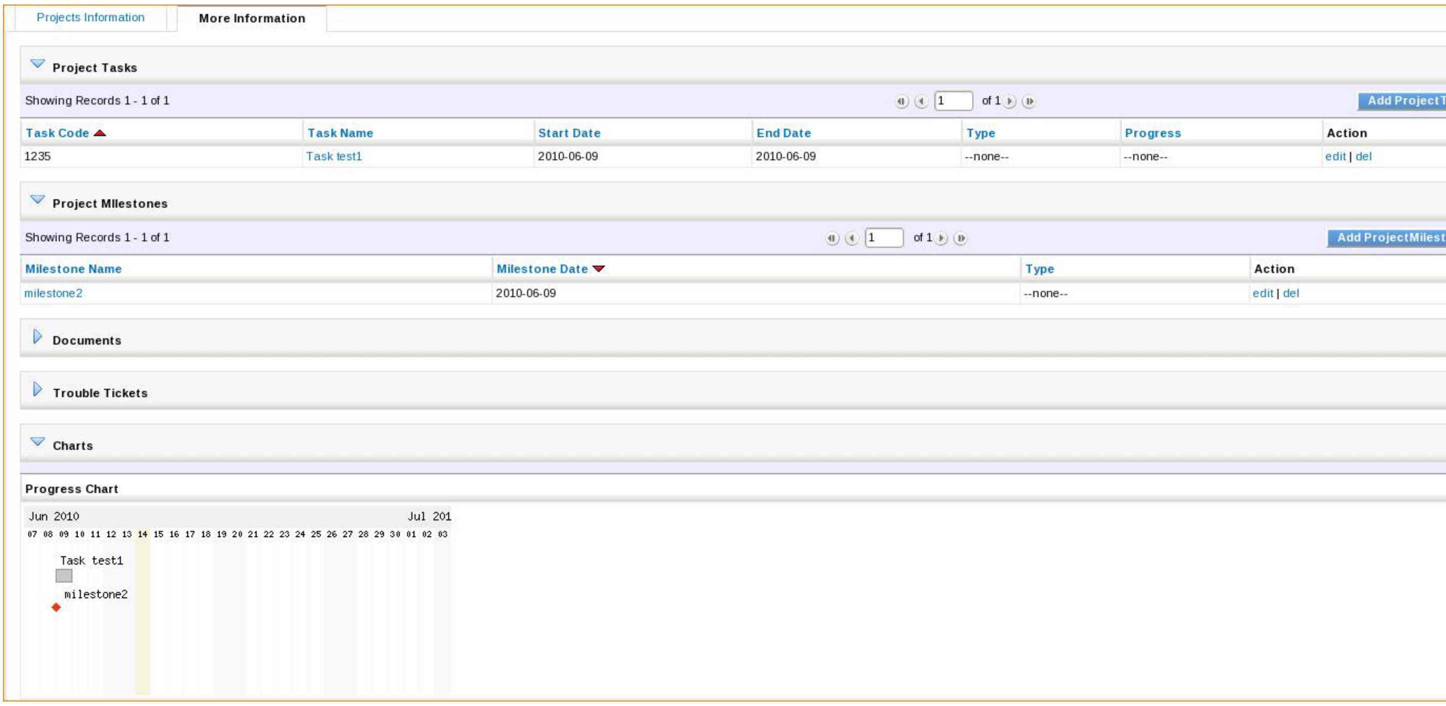
5. Trouble Tickets

The screen shot below shows the related list of the projects module.



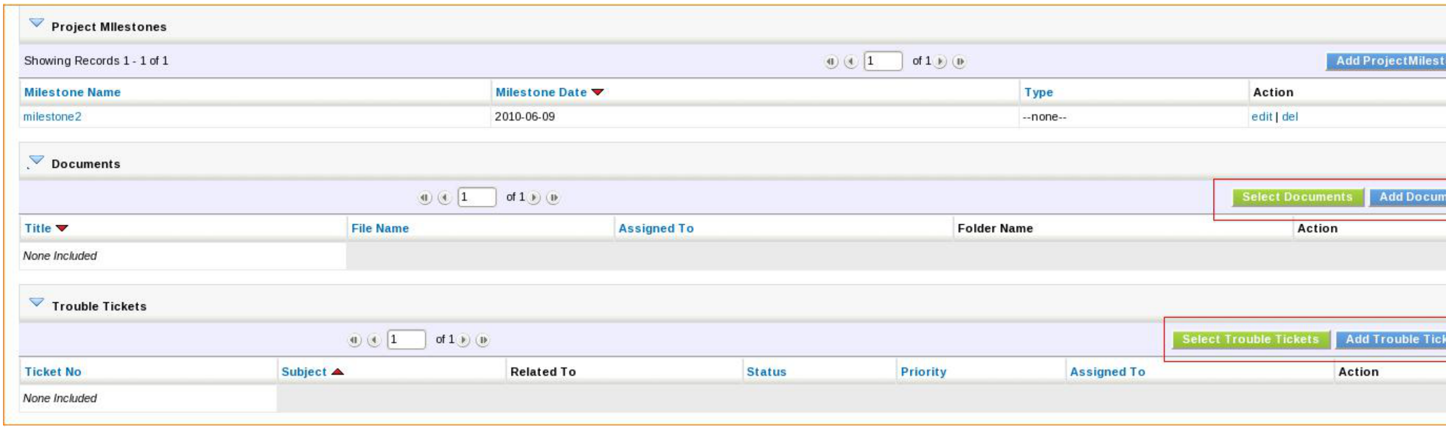
Every Project can be broken down into a number of Project Tasks and each project can have milestones . Based upon the progress of the Project Tasks and the milestones set, the charts will be displayed in the More Information Tab.

The screen shot below explains the above scenario.



In the above screen shot, we have one task for the project Task test1 and one milestone , Milestone2 Based upon this Task Test1's progress and the Milestone2 the chart is generated and displayed as shown in the above screen shot. It is also possible that we add Documents or Trouble Tickets from the more information Tab for each project.

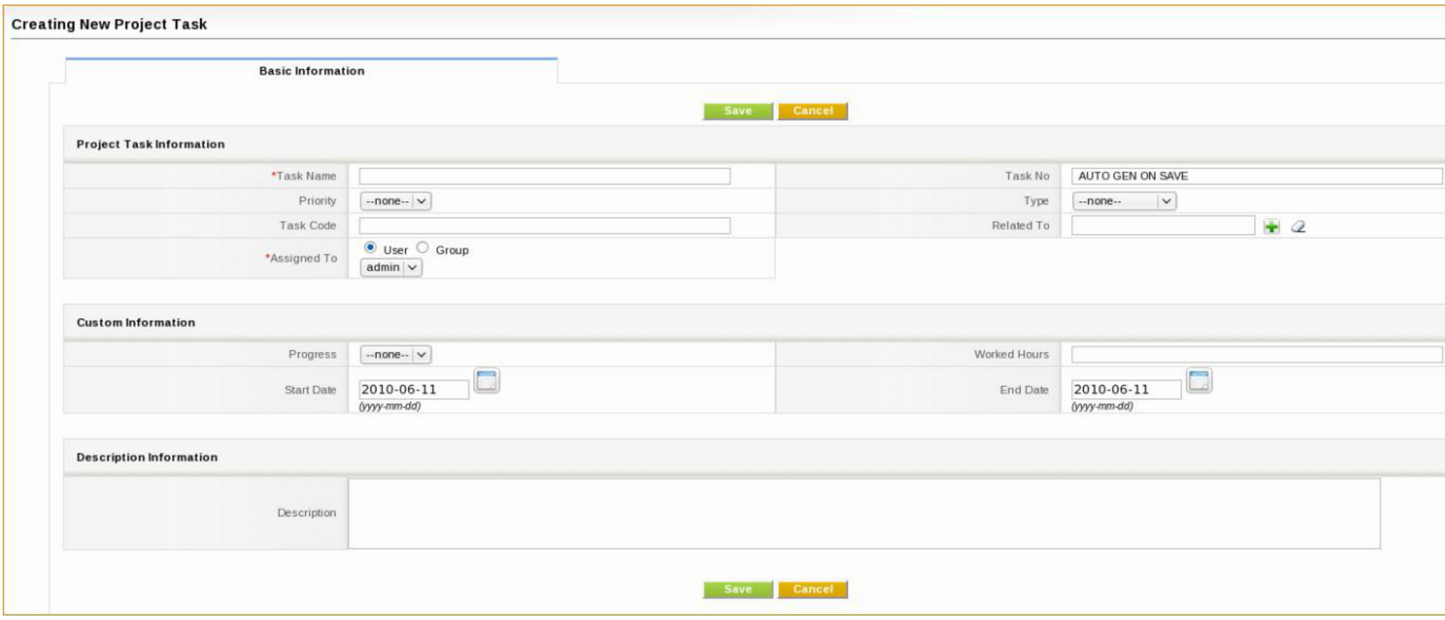
The screen shot below shows this scenario.



Project Tasks

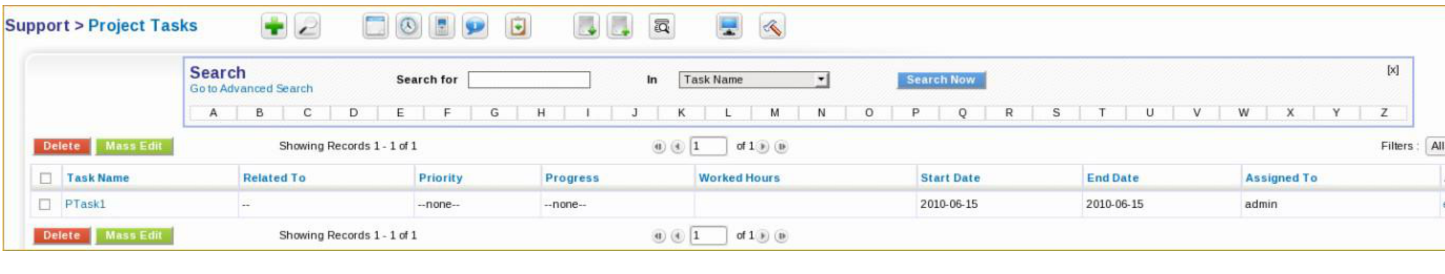
Project Tasks module can be operated as an independent module which can be either associated with the projects module or can be used to add Project Tasks individually and independently.

The Create view of the projects module is as shown in the below screen shot:

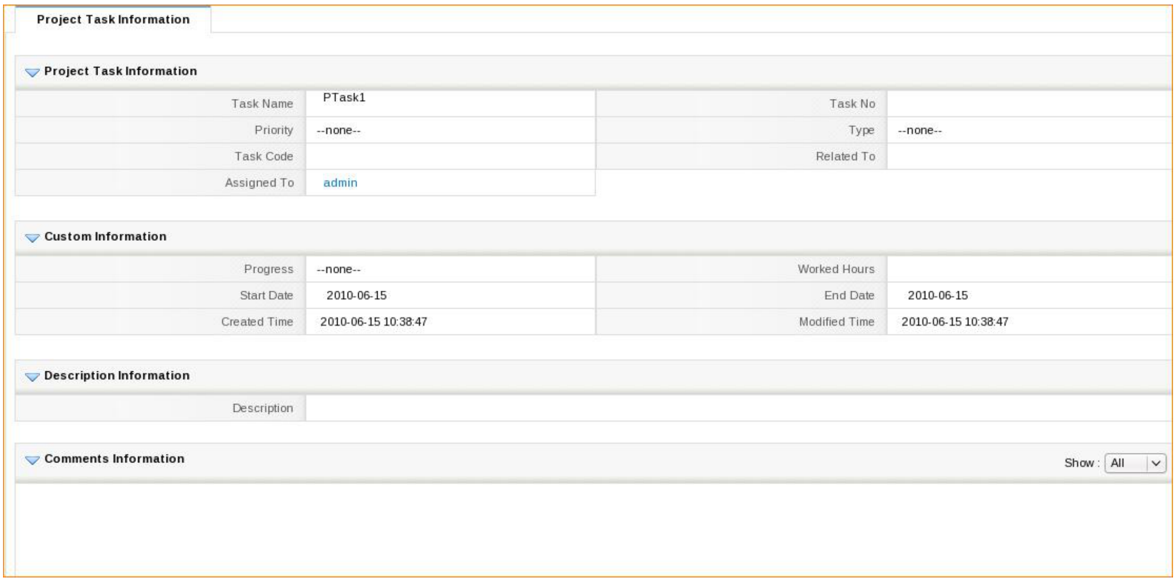


The related to field references the Projects module, through which the created Project Task can be related to any existing Project.

The list view of the project Task module is as shown in the below screen shot.



The detail view of the Project Tasks module is as shown below :



Every created task can be updated with the progress. Based upon the value of this field the charts which are displayed in the related list of Projects are evaluated and designed.

Project Milestones

The Project Milestones module is always used coupled with the Projects module. It cannot be used as an independent module.

For every project that is created, a number of milestones can be set through the More Information Tab of the Projects module.

The screen shot below shows that for every project, it is possible to create a number of milestones.

Project milestones can be created in one of the two ways.

1. From the More information tab of the Projects Module (as shown in the above screen shot). 2. From the Create view of the Project Milestones module.

The Create view of the Project Milestones is as shown in the screen shot below.

The list view is as shown in the screenshot below:

The detail view is as shown in the screen shot below :

SMS Module

From vtiger.com

Faq | Howto

Contents

About

Taking advantage of the growing number of consumers using their mobile devices ,the companies have started advertising their Products and Services to them. Sending SMS to their Clients and Suppliers will allow them to communicate faster and stay in touch with them.

SMS Notifier module in Vtiger is developed to communicate with your clients faster ,by sending personalized SMS Messages to customers, you can increase your sales and improve customer relation. Some of the functionalities of Vtiger SMS Notifier are

- You can send bulk SMS to Clients,
- You can send SMS Notification to the Sales people when any Calendar event is created.

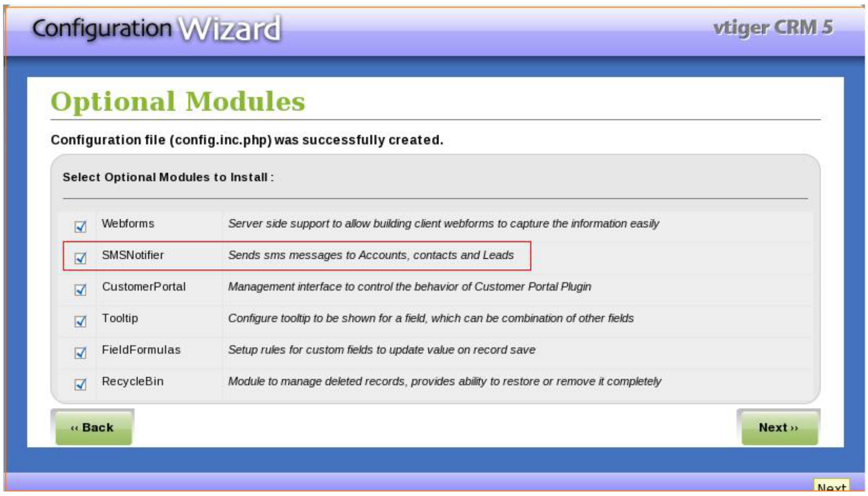
- You can also schedule SMS Notification for Calendar events.
- You can send SMS to Sales Person or a group of Sales people.
- SMS Task has been integrated with the work flow which allows you to create custom events and send SMS when the conditions are satisfied.
- Capture the SMS information in the CRM like to whom it was sent and is the status of the sent SMS.
- Relate the SMS entity that is created in the CRM to the other CRM entities(like Account ,Contact etc.)

Installation

To install SMS Notifier you need to follow these simple steps during vtiger installation

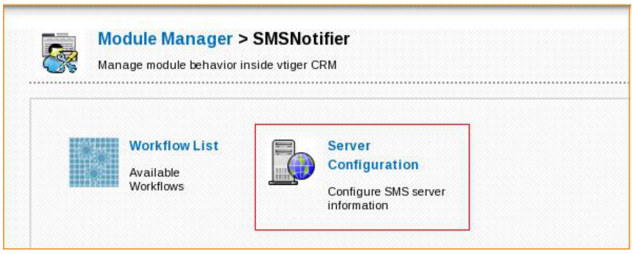
- During Vtiger Installation step 3 ,we show all the Extension modules available .Select the SMS Notifier from the list as shown in the screen shot in next page.

Now SMS Notifier is ready for use.



SMS Server Configuration

To send SMS we need SMS Service provider details ,this can be filled by Administrator from Settings > Module Manager > SMS Notifier > SMS Server Configuration as shown below

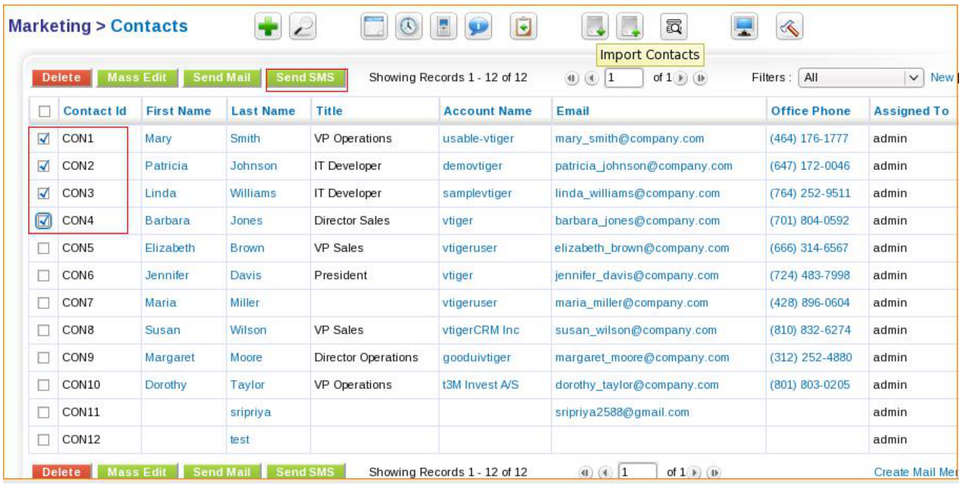


Add your service provider name ,the user name and password they have provided and save it.

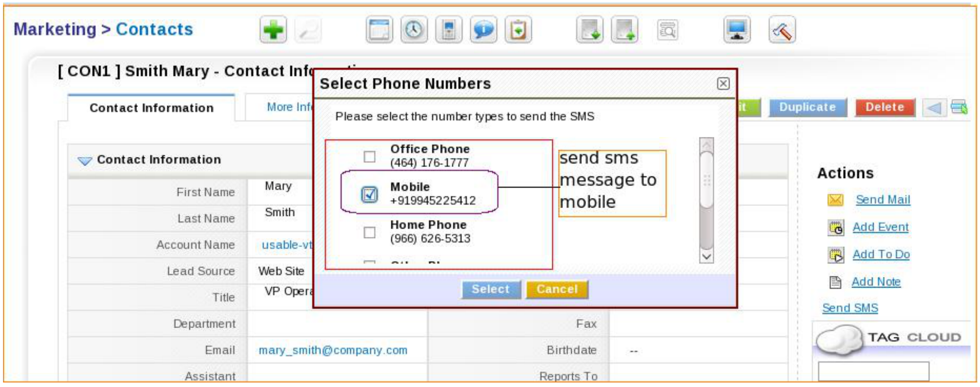
Working

Sending Bulk SMS

To send bulk SMS you need to go to List view of Accounts (or Contacts ,Leads, Vendors) ,select the records to whom you want to sent SMS then click on the Send SMS button as shown below.



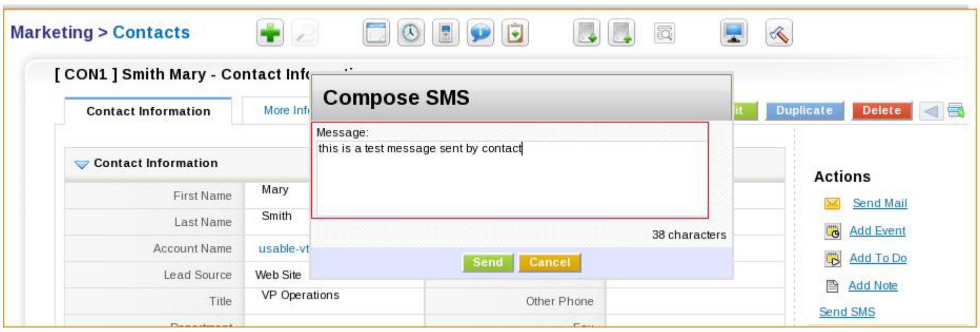
When you click the button it will show all the phone fields available for that module ,you can select the field to which you want to send SMS and click on Next button.




```
The phone no. should be a 12 digit number in the format +(country code)(10 digit mobile no)
For ex : = +919945225412
```

Compose SMS

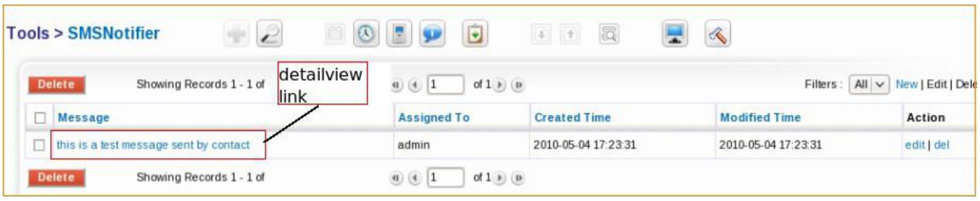
This will open a compose window which will show the phone numbers and a block to type in your message, also we have provided an option to select the templates as show below.



When an SMS is sent to a particular CRM entity (like Accounts or Contacts or leads) , the SMS entity is recorded and related to that CRM entity and is also show in the more information page of that particular entity.

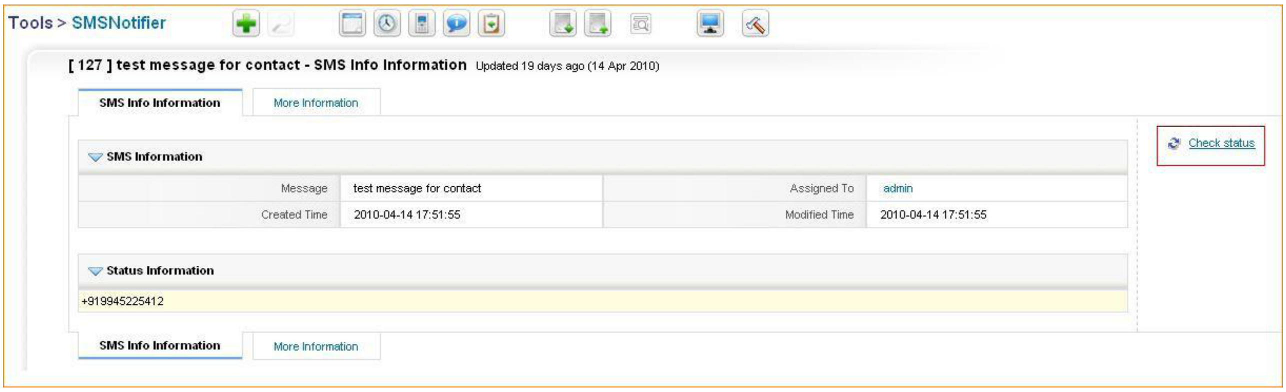
SMS Log Details

Once a SMS is sent we create a entry in Tools > SMS Notifier module ,the list view is shown below If a message is sent to a group the Message Id is termed as Group Message otherwise it has the Unique Message Id from the Server. Also we have Related To field (Parent information like Accounts/Contacts/Leads/Vendors) to whom the SMS was sent . Assign To field is the user who has sent the SMS.



SMS Detail View

The detail view of the SMS Notifier record has the following information like the unique Message Id ,the parent to whom the SMS was sent to ,the content of the message and the status of the message like Pending ,Undelivered or delivered.



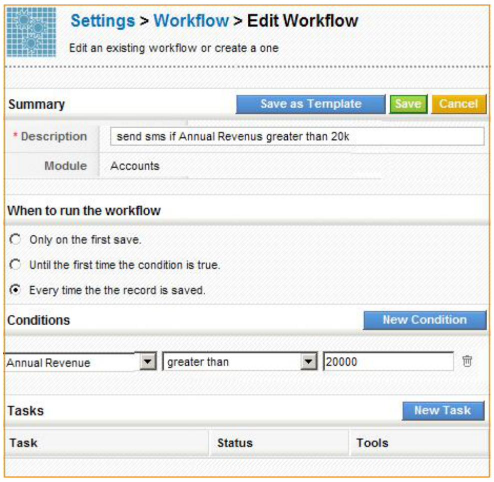
SMS Status

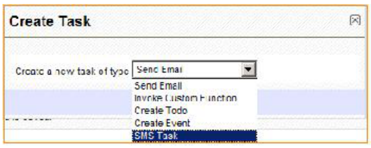
To check the status of the Message ,we have provided a link as shown above. The status can be DELIVERED ,PENDING or UNDELIVERED. The status block has the following color-coded information which has the following meaning.

	Processing	Message sent to SMS service using the provider instance configured and waiting for the status message
	Dispatched	Message sent to SMS service and obtained confirmation token. Waiting to get the delivery status.
(White)	Delivered	Message successfully delivered by SMS service Provider.
	Failed	Message delivery failed by the SMS service provider.

SMS Task with Work flow

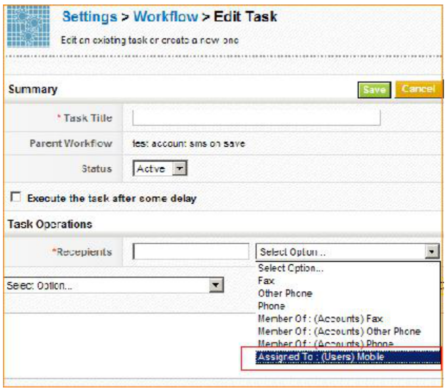
Create a work flow and save it with necessary conditions ,then in the Edit WorkFlow page as click on the New Task and select SMS Task as shown below



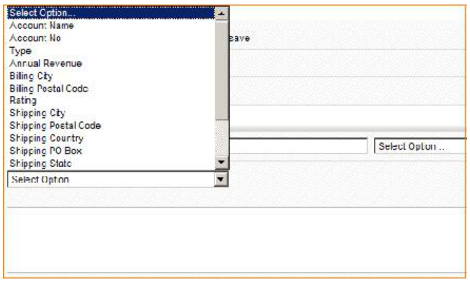


Create SMS Task

We have Status field which allows us to activate/inactivate the task ,then in the drop down you can see a list of phone numbers which you can select to whom the SMS should be sent.



In the next screen shot you can see a list of fields from that particular module which allows you to create your custom message . Select the field name from the drop down and it will be filled in the text area below it and save it. In the below screen shot an example is demonstrated which will send SMS to the assigned users mobile number if the Annual Revenue is greater than 20,000. Here you can select fields from the drop down for your message.



Writing Custom Providers

If you have planning to use SMS service provider and don't find the connector to it, you will need to write one.

SMSNotifier module defines **ISMSProvider** (modules/SMSNotifier/ext/ISMSProvider.php) interface which should be implemented by your custom provider.

A template sample provide is available at: modules/SMSNotifier/ext/providers/MyProvider.php.sample

Also look at ClickATell provider implementation: modules/SMSNotifier/ext/providers/ClickATell.php

Feature Custom Filter

From vtiger.com

Faq | Howto

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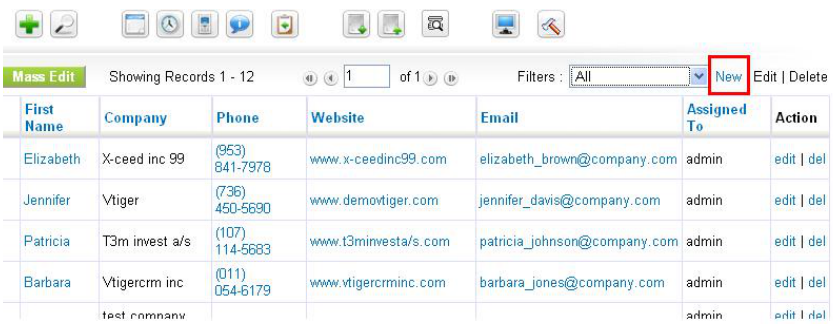
About

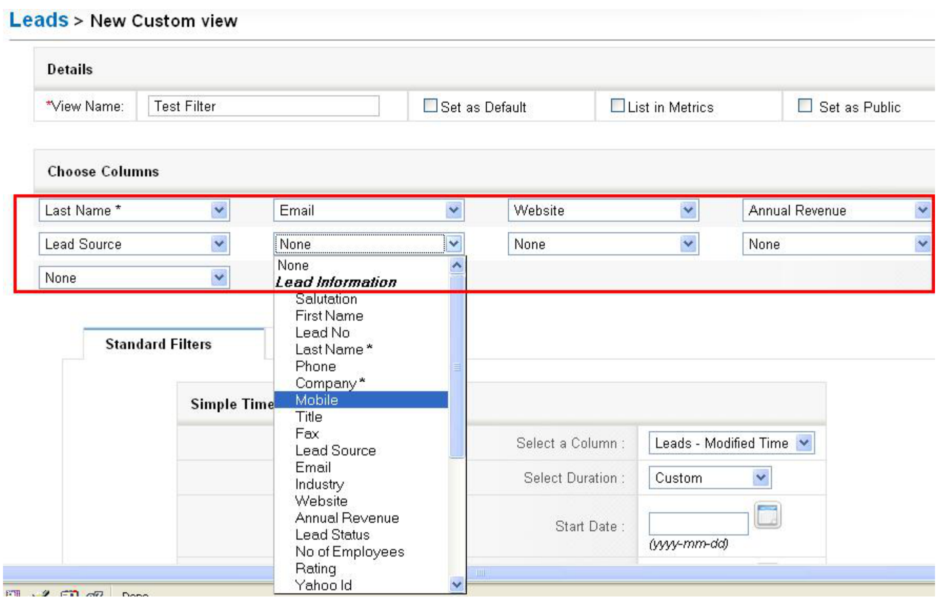
Custom filter is made available in ListView of the module to allow record filtering based on a condition. It helps you view preferred columns of the record quickly also control the filtering criteria.

How To create Custom filter

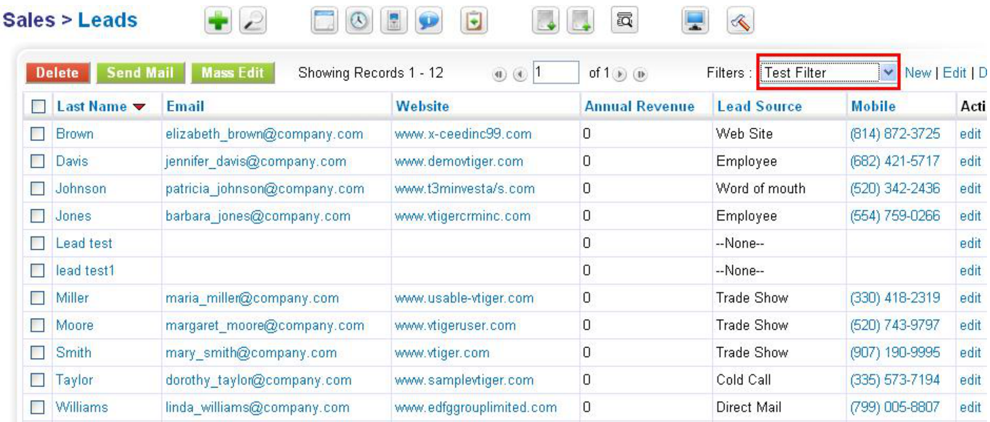
Click on **New** link to create the filter.



You can select the columns to be displayed in the ListView when filter is selected.

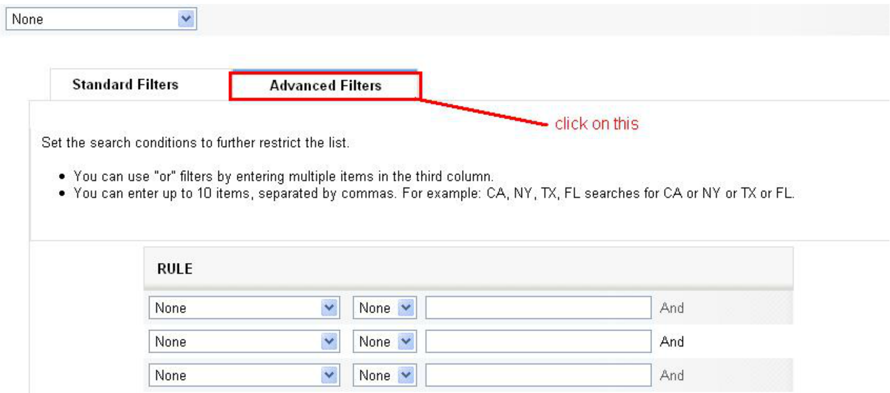


On save you will be able to see the filter in action.

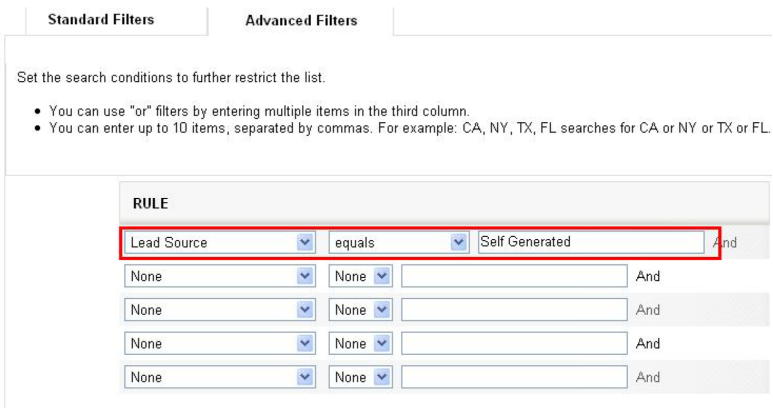


Advance Filter

You can edit the existing filter created earlier and set the Advanced Filtering option (rules).



You can set the condition for filtering as shown in the screen shot below.



After save, the Listview filter the records based on the criteria set in Advanced Filter.

NOTE:

Separate values with comma (,) if your field value could be one of them. Like (LeadSource equals Self Generated,Public Relations, Employee)

Standard Filter

This option filters the records depending upon any Date field for a particular period.

How To Use

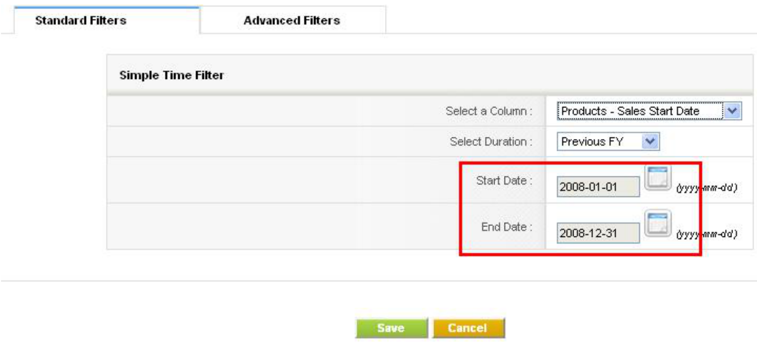
you can find the following options in standard filter

Select a Column -Pick List which will show all the date fields present in that module,

Select Duration -Pick list where we have given some default Duration like Last 7 days,Last 30 days, Next Week etc,if you will choose any value the start date and End date will select automatically.

Star date and End date- You can give the value manually in these option or If you will select a Duration these fields will automatically filled.

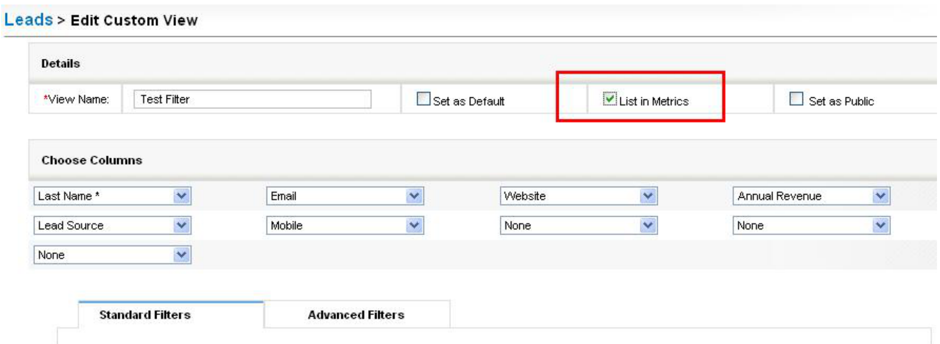
For e.g in the below screen shot in products module I have Select Duration as Previous FY(Previous Financial Year) and the start date and end date automatically taken its value.

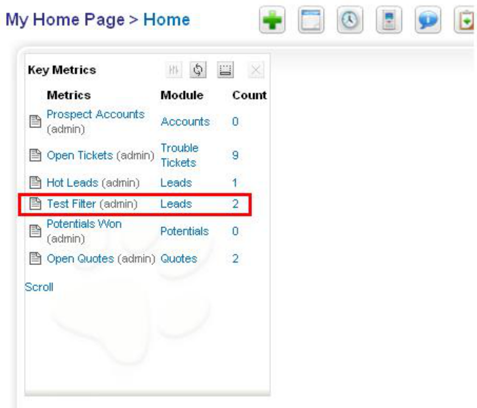


After saving the filter if you will go to List view and select this filter you can see only those products where the Sales Start date lies between 2008-01-01 and 2008-12-31.

List in Metrics

This option if enabled for a customview the count of filtered records will be shown in the â Key Metrics â widget on the Home Page.





Set as Default & Set as Public

To know about this please go here

Feature DetailView Navigation

From vtiger.com

Faq | Howto

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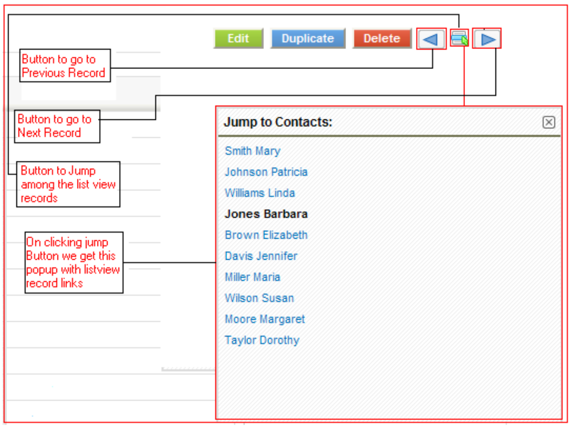
About

This Feature provides user to navigate from a Records Detail View. "Previous","Next" and "Jump" are three buttons provided in Detail view using which a user can navigate.

Working

Three Buttons, "Previous","Next" and "Jump" are provided in a Records detail view for navigation. 'Previous' Button allows user to go to Previous record of the list view. "Next" Button takes us to next record of the list view. "Jump" Button shows a popup with list of record Links from the list view, showing the current record in bold. The size of the jump list will be same as the size of List View.



Feature Duplicate Merging

From vtiger.com

Faq | Howto

Contents

About

Duplicate record detection gives you the capability to detect and handle duplicate record. The merge feature helps you manage system storage consumption and maintain data quality by freeing the system from old, obsolete, or invalid data. Detection rules can be defined for different record types, including custom entities etc..

Feature

Using Duplicate merge functionality user can merge two records found in any moduleand can deactivate the duplicate record. This feature queries your database in search of duplicate records. When you find and merge duplicate record information, the duplicated records are then removed from vtiger, and only the relevant record and data is retained. User can choose master record at the end which will remain active and other will get deactivated.

Modules Supported

vtiger provides merge facility for the modules

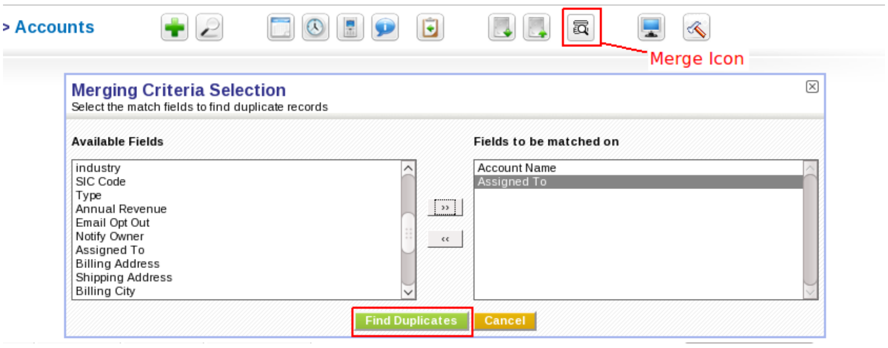
- Accounts
- Contacts
- Potentials
- Leads
- Products
- HelpDesk /Trouble Tickets
- Vendors and Entity modules

Procedure Followed in Duplicate Merging

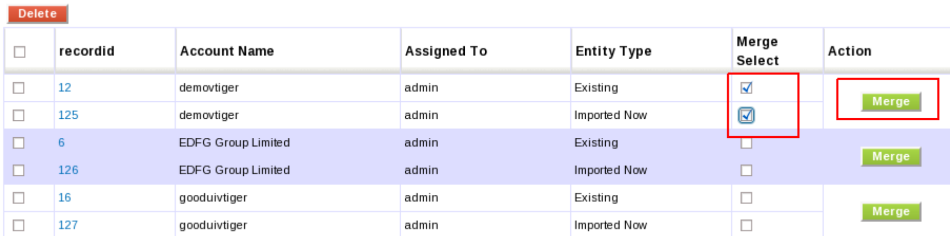
vtiger supports merge capability during import, and separately on existing records in the database.

Identify duplicates and Merging existing records in the database

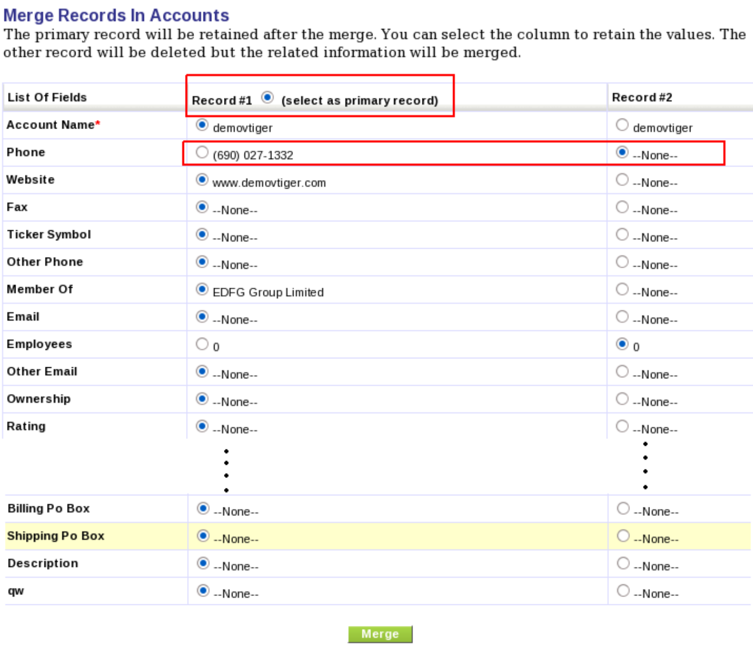
1.For all modules which has this feature will have a merge icon in mini icons list. This will provide a form to select the fields(Merge criteria) depending on which CRM will return duplicate records. In this form we can see two lists of records named 'Available Fields' and 'Selected Fields' . We can choose any number of fields from Available Fields list and copy to Selected fields list using arrow buttons. Click on Find duplicates button to proceed.



If any two records which has same values in all the fields (and condition) chosen in merge criteria (Selected Fields) will be treated as duplicates and all these duplicate sets will get displayed in duplicates listview.



When we click on merge button a window will be displayed where we can find the options to choose record values from any of the records.



Here We can select one record as parent record, from which we want to save maximum number of fields and some from others.

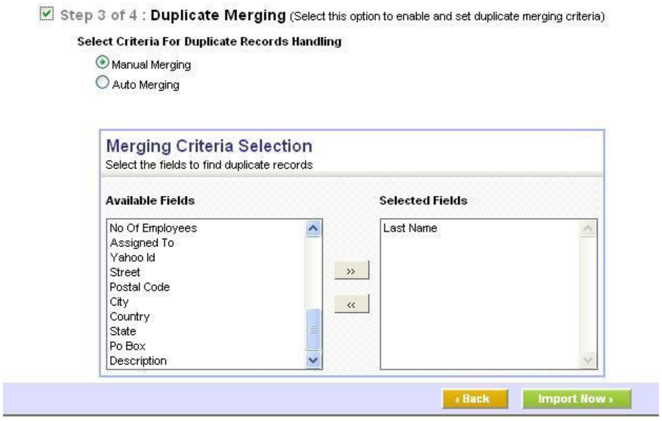
Click on merge button to merge the records.

Next time when the user again come to this form it shows last selected criteria.

Merging records during Import

When a user import records to a module, in Step 3 of he import process there are two options:

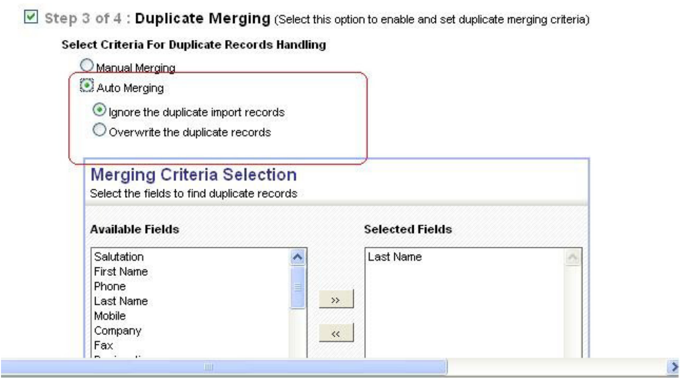
I. Manual merge II. Automatic merge.



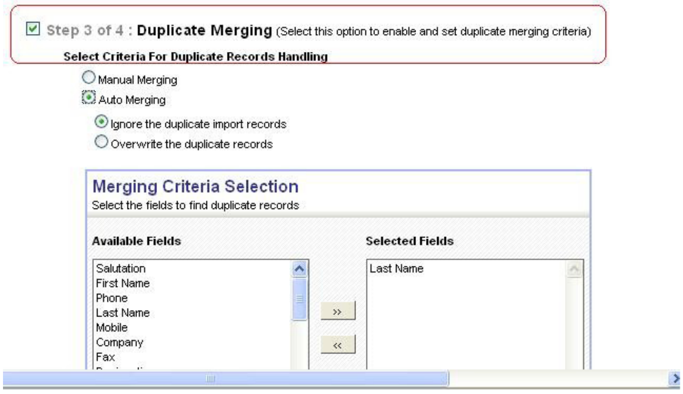
If user select manual merge it shows all duplicate records in imported records with Entity Type as Existing or Imported now. While merging user can not select just imported record as parent record.

Finding and merging duplicate records is optional while importing. In import step 3 user can select merge option otherwise it will work like normal import. But if user select auto merge it will show two options

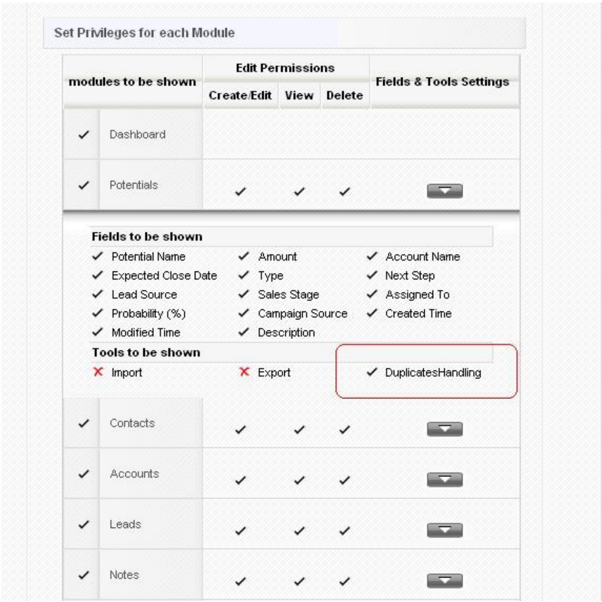
I. Skip duplicate record â which will skip all duplicate records in imported file. II. Overwrite duplicate records - will overwrite the existing duplicate record with imported record.



Finding and merging duplicate records is optional while importing. In import step 3 user can select merge option otherwise it will work like normal import.



We can add/remove the permissions to find duplicates for a particular profile. The modules which supports duplicates merging will have an extra utility called 'Duplicates Handling'



NOTE:

While merging two records main information is stored according to users choice, but related module information will be combined and will be saved in with parent record.

Feature Mass Edit

From vtiger.com

Faq | Howto

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About

This feature allows user to change the values in multiple fields of multiple records directly from the listview.

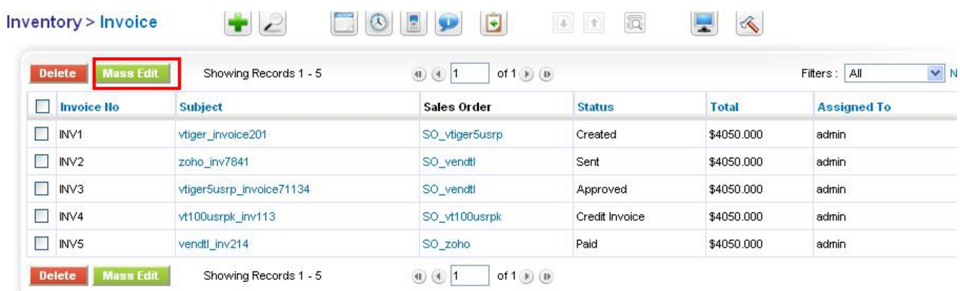
Working

With this feature, User can edit multiple records from list view by just selecting them and clicking on the mass edit button to get the mass edit view. In that MassEditView, one can select the checkbox for the fields that are to be updated and add data to that field an click on save.

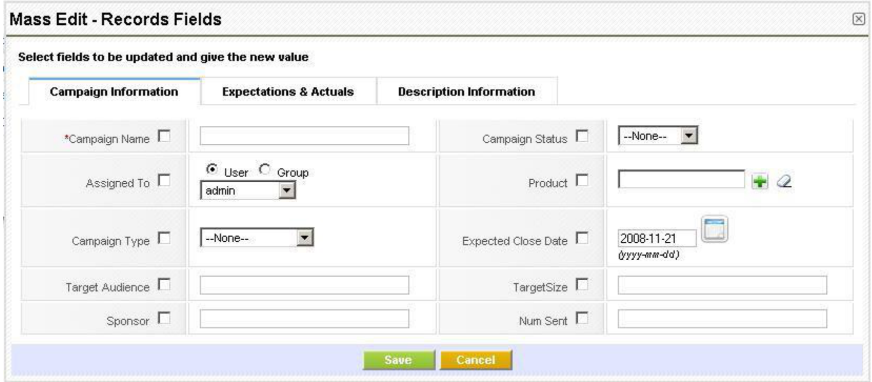
On clicking save button, all the selected records will be updated with the values user has provided for the field that has been checked to get udpated.

This feature does not allow user to change email field to blank without disabling portal access for all the selected records by updating Portal User field as false as shown in below figure.

The List view with Mass Edit is as shown in the below figure



The figure below shows the Mass Edit view of a page where the blocks are shown i tabs. You can select fields from all the tabs and update the records that you have selected.


Mass Edit - Records Fields
Select fields to be updated and give the new value
Campaign Information
Expectations & Actuals
Description Information
*Campaign Name
Campaign Status
--None--
Assigned To
User
Group
admin
Product
Campaign Type
--None--
Expected Close Date
2008-11-21
(yyyy-mm-dd)
Target Audience
TargetSize
Sponsor
Num Sent
Save
Cancel

Feature Role Based Custom View

From vtiger.com

Faq | Howto

Contents

About

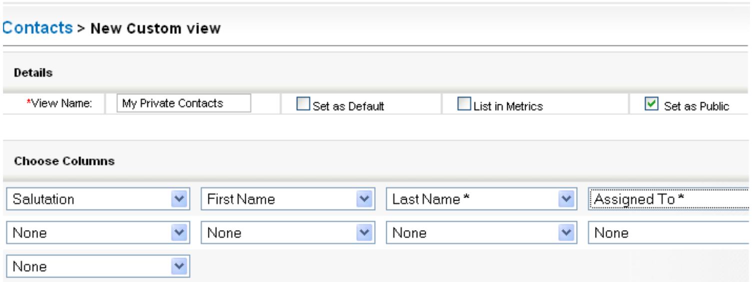
Role Based Custom view or Custom filters has been introduced for easier management of custom views and sharing custom views with other users.

Any user can create Custom filter. By default any created custom filter will be marked as **Private**.

'***Private'*** -> Only the user who created the custom filter and the users above this user in the role hierarchy can view this custom filter.

Users can mark the custom filter as **Public** during custom filter creation or even after creation by editing the custom filter through a check box **Set as Public**

'***Public'*** -> Any user of the CRM irrespective of his position/role in the organization can view it. (Under **Public** section)



When a user marks a custom filter as **Public**, it doesn't directly become a public filter. Rather it has to be approved by the admin and only then is publicly available. Till then it will be in **Pending** state.

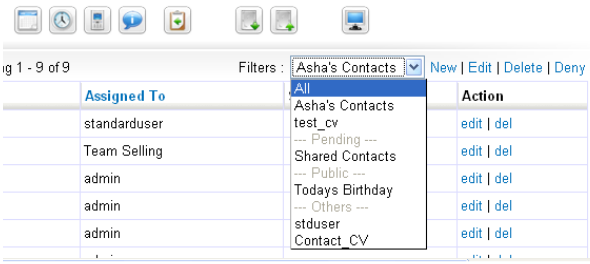
'***Pending'*** -> Custom filter is marked as **Public** by the created user, but waiting for approval from admin. This will be shown for admin user under 'Pending' section.

Once a custom filter is approved by the admin, it will be publicly available for all users. Admin can still go ahead and deny the access by which the custom filter will no more be publicly available and will enter **Pending** state again.

Usage

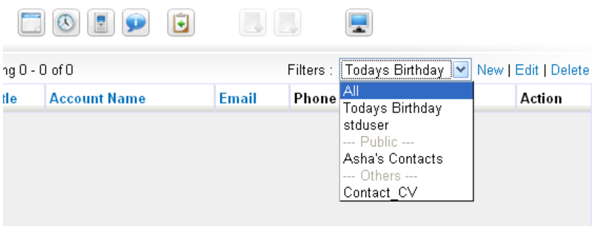
Admin users can see following types of Custom views (refer to the snapshot) :-

1. Default or those created by the logged in user
2. Those which are created by Other users and set as public, but waiting for approval (Under **Pending** section)
3. Those which are created by Other users and set as public and also approved to be public (Under **Public** section)
4. Those which are private but created by the users who are under the logged in user in role hierarchy of the organization. (Under the section **Others**)



Non-Admin users can see the following types of Custom views (refer to the snapshot) :-

1. Default or those created by the logged in user
2. Those which are created by Other users and set as public and also approved to be public by admin user (Under **Public** section)
3. Those which are set as private but created by the users who are under the logged in user in role hierarchy of the organization. (Under the section **Others**)



Setting Default Custom View

Particular Custom view can be set as default by a logged in User. This default custom view is specific to that user and to that module.

Different users can set their own default Custom Views. If none of the custom views are set as default by a user, then '**All'** is assumed to be the default Custom view for that User.

Module Asterisk

From vtiger.com

Faq | Howto

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About

vtiger is a open-source CRM solution. AsteriskÂ® is an open source PBXi, telephony engine, and telephony applications toolkit which allows users to make and receive calls from software phones (softphones) using their computer. The vtiger-asterisk integration will allow users to use vtiger to create calls and receive notifications on incoming calls using the Asterisk Call Manager API provided by Asterisk. This document describes how to configure vTigerCRM to be able to use Asterisk with it.

Features

The following features are provided:

1. Make calls by clicking on phone numbers (links) within vtiger.
2. Provides notification within vtiger giving details of the caller when a call comes to the user. (Notification appears on the bottom right-corner of the screen.)
3. View all past calls under PBX Manager module (Tools => PBX Manager)
4. Associates the call with the Contact/Account/Lead record in Activity History section (in the More Information tab).
5. Setup user extensions through My Preferences (per user basis).

Requirements

- vtigerCRM 5.1.0 should be installed on your system
- You should have a Asterisk system running
- The servers running vtiger and Asterisk should be visible to each other
- You have a valid asterisk user extension and a softphone configured to that extension.

Configuring Asterisk

This section explains how to configure asterisk to work with vtiger. There are some minor (in some cases even none) changes that you require to achive this. Follow the link here on how to configure asterisk to work with vtiger.

Configuring vtiger CRM

Once you have setup asterisk server to work with vtiger, you need to configure vtiger settings so that it can connect to asterisk. Its easy with the steps we explain here.

Setting User Extensions

vtiger allows you to create extensions for each user. These are the asterisk extensions that when configured in vtiger let you call (or receive call) for that user. We explain it here on how to set user extensions in vtiger.

Making Outgoing Calls

So, you are done setting asterisk and vtiger. Start making some calls. Read more here on how to make outgoing calls using vtiger.

Receive Incoming Calls

Outgoing calls achieved. Next step - get incoming call notifications. Click here to know how to achieve this with vtiger.

Number Formats

It is possible to save the number (in vTiger) in any format (with or without prefixing extensions like SIP, PSTN etc.) and create the call. vTiger should recognize the caller in case of incoming call as long as there is a separator â :â between the prefix and the number i.e. like SIP:211 (no spaces). In case there is no prefix specified, the default context is picked for the call

Note: It is recommended not to use any special chars or spaces in the phone number field.

UserManual Administration Tools

From vtiger.com

Contents

User Management

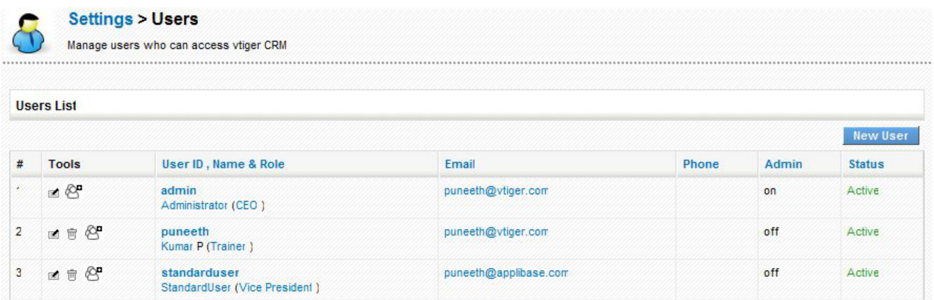
The user management functions are the core of the security management of the CRM system. They control the access to the CRM system based on the users privileges. The following sections will explain in detail the purpose of these functions and the features available.

From the organisation point of view, user administration means administration of privileges. Essentially, the use of privileges depends on the number of users and the company structure. Few users in small enterprises have few requirements for privilege administration. With an increasing number of users the complexity of the relations between the users increases and usually develops the need to assign and administer privileges. The CRM system offers a privilege system that is based on the following simple looking rules:

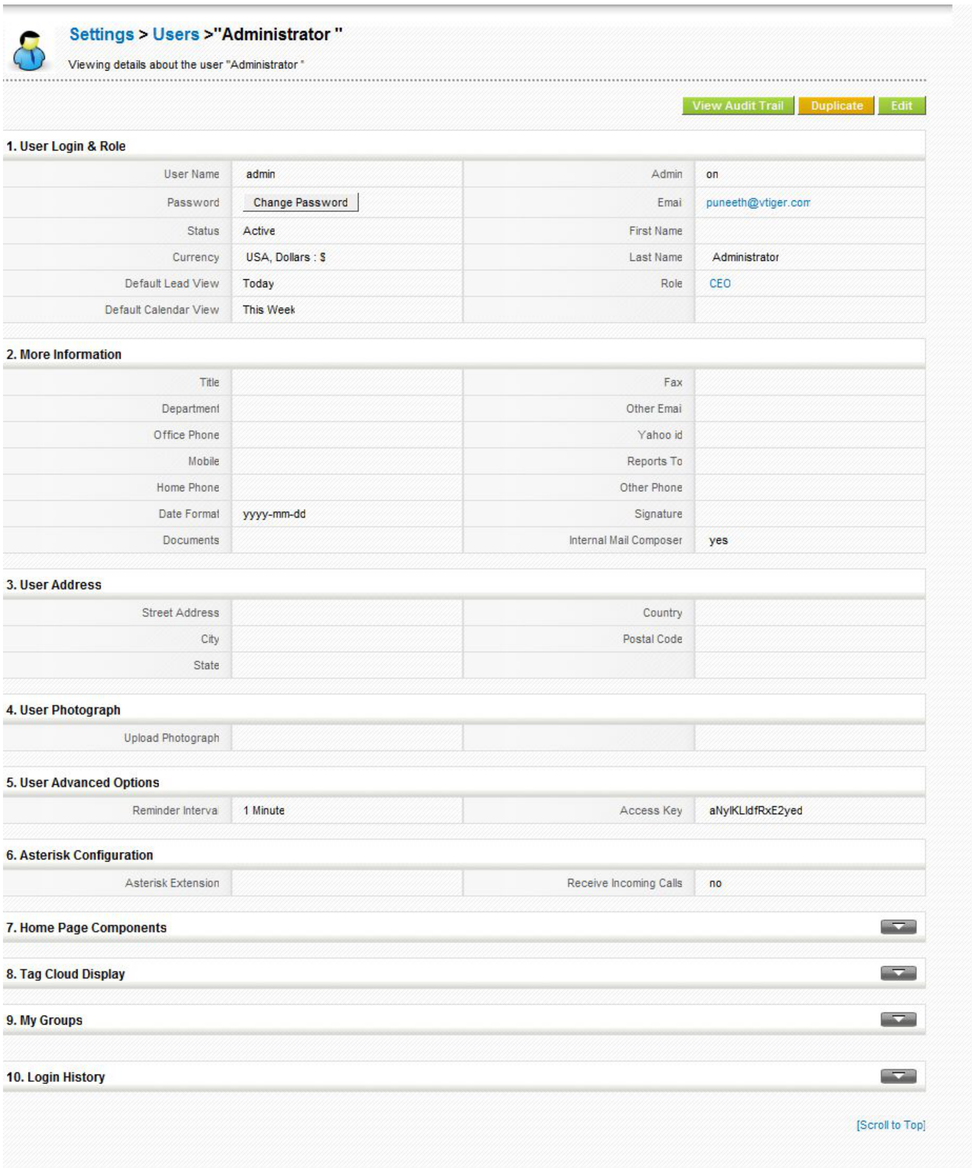
- Who can see certain data?
- Who can change certain data?
- Who can delete certain data?
- Who can create certain data?

Adding New User

To create or to manage users, click the Users menu to open the users list as shown in the image below.



This user list includes the user name, the role, the email address and other details for each individual active or inactive user. You may edit or delete users at this view. If you want to delete a user click the [Trash Icon] at the users row. This function deletes a user but not the users data. You will be asked who you want to assign as the new owner of the data. You cannot delete the admin user. Click the users name (User ID) to open the detail view of a particular user as shown in the image below. This view includes user master data related to the login and to the users role and other user information. User information are not visible to other users. User privileges are not shown. These privileges are defined by the user profiles and organisation-wide settings as it will be explained later.



Deleting User

To delete a user, you would need to go to the Settings > Users page, and click on the *delete* icon next to the user's name in the list. When deleting a user, vtiger CRM will prompt you to identify a new owner for the records currently owned by the user. All those records will be transferred to the new owner. (i.e., the *Assigned To* value in those records will now have the new owner's name).

Access Control

vtiger CRM supports powerful access control features allowing Administrators to control

1. which users can access specific records,
2. what fields within a record can a user access,
3. what actions (edit, delete, export, import) can a user perform

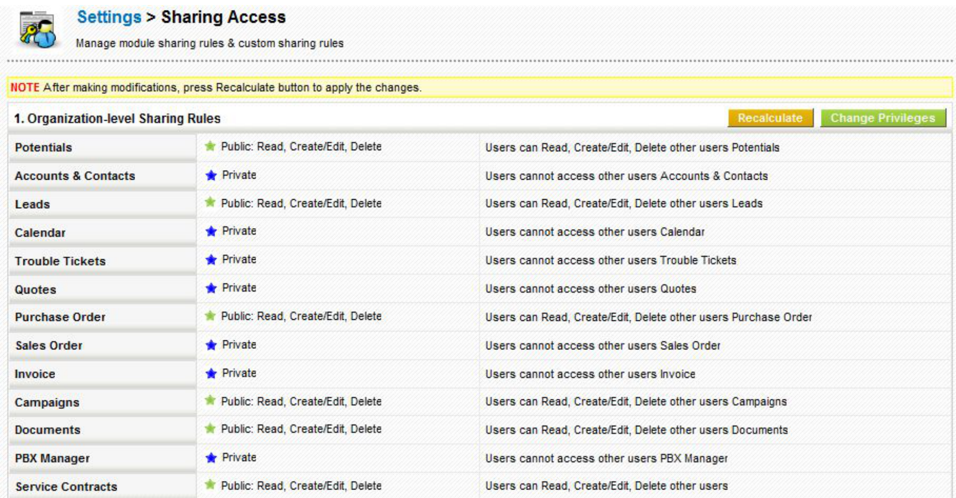
To understand these features, it is important to know that each record in vtiger CRM has a designated owner (the owner is identified by the **Assigned To** field in the record). This owner could be a *User* or a *Group*. The owner always has access to the record. If the owner is a Group, then all members of the group have access to the record. Administrators can control which other users can access the record and what actions they can perform. These permissions are configured through the following features.

- Sharing Access
- Roles and
- Profiles

Sharing Access

Module specific sharing rules can be configured from this page. For example, an organization might decided to make the Trouble Tickets module public (so that all users view all tickets), and make Leads module private (so that only the owner and superiors see the record). The table below explains the different options.

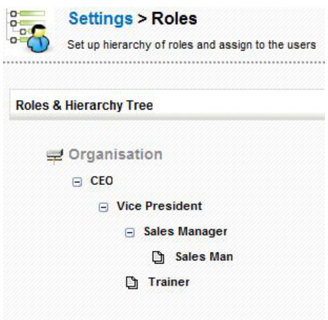
Sharing Option	Description
Public (Read, Edit, Delete)	All Users can do all operations on all records of this module - This is the default setting for all modules (except Calendar)
Public (Read, Edit, Delete)	Other users cannot delete, but can read and edit all records
Public (Read, Edit)	Other users view and edit records but cannot delete.
Private	Only the owner and the users with higher Role than the owner can access the records



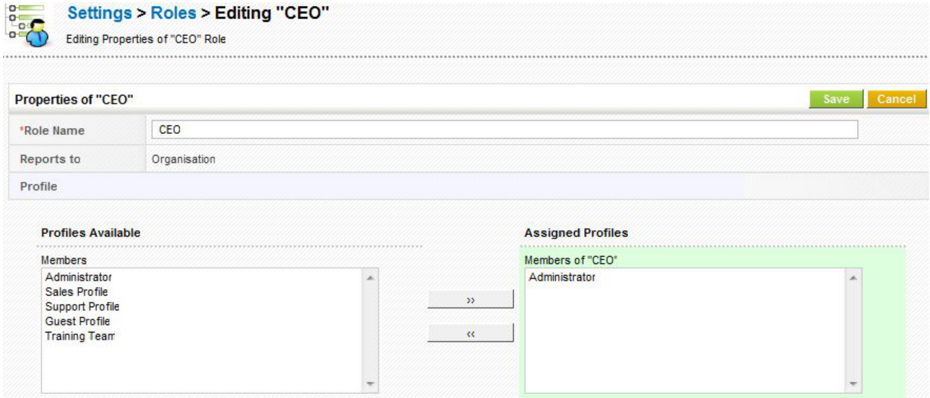
Administrators can also set custom sharing access rules from the Sharing Access page, if the module specific rules and options do not cover their needs.

Roles

Click the Roles menu to open the hierarchical role view as shown in the image below

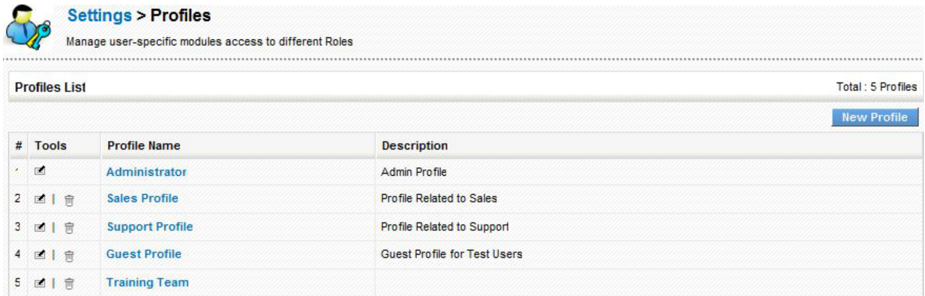


At this menu you are offered to add, edit, delete or move roles. Move your computer mouse pointer over a role entry. You will see a set of icons that allows you to perform these operations. The "+" function creates a new role which is located in the hierarchical order one level below an existing role. The image below displays a sample for an edit view of an existing or new role. You have to give the role an unique name and to decide which profiles will be associated with a particular role. Furthermore, the superior role will be displayed.

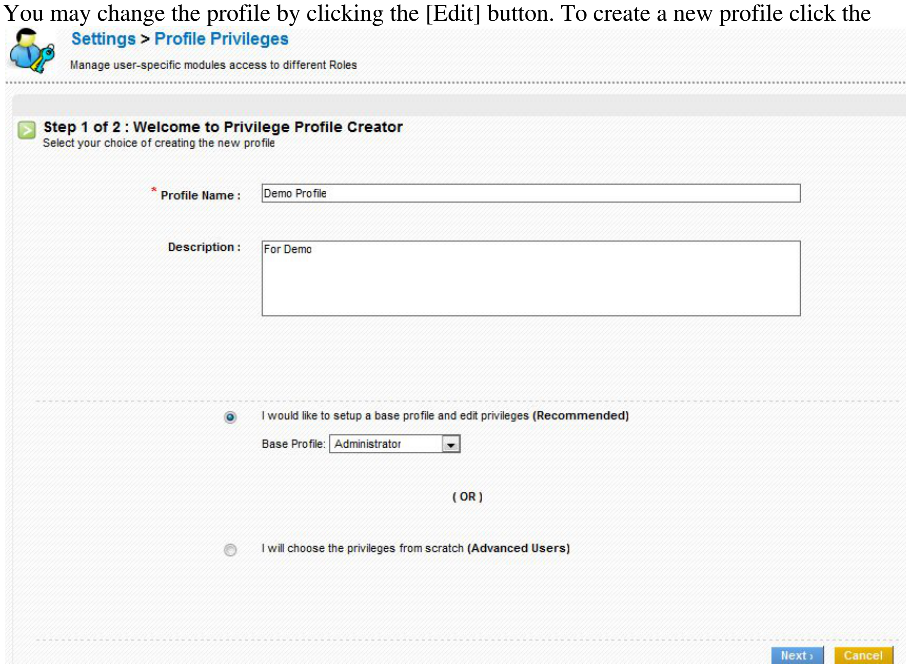


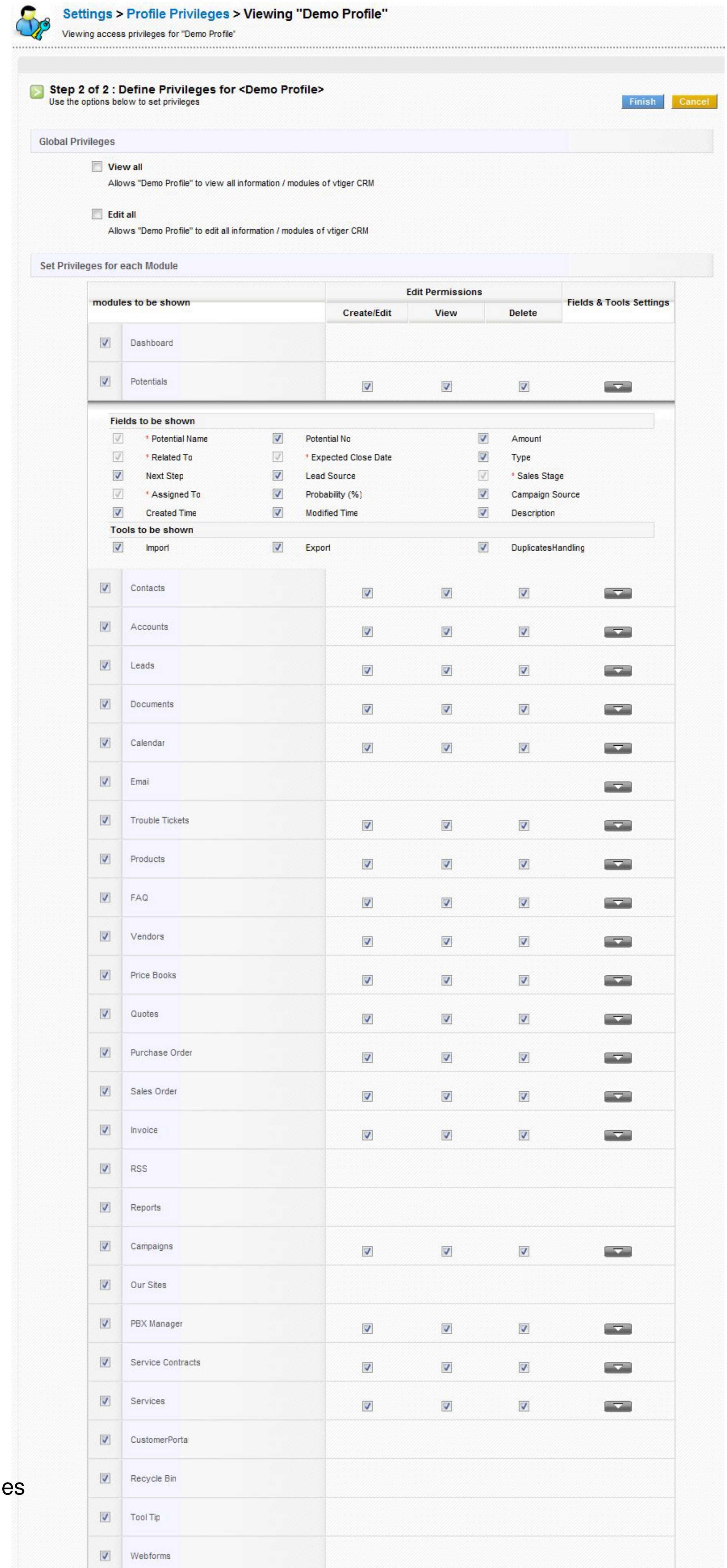
Profiles

All roles are based on profiles. With profiles you set the user privileges to access, change or delete data. The CRM system uses profiles in relation to the access privileges to modules and fields as described in Sharing Access. Please note that the settings of the Global Privileges are always superior to the other privilege settings. Click the Profiles menu to open the list view of your profiles as shown in the image below. Here you see a list of all profiles that have been defined in your CRM system. The CRM systems comes with a set of pre-defined profiles which you can use and change but not delete.



Click the name of a profile to see the details. You may change the profile by clicking the [Edit] button. To create a new profile click the [New Profile] button at the list view. Step 1 :




Settings > Profile Privileges > Viewing "Demo Profile"
Viewing access privileges for "Demo Profile"
Step 2 of 2 : Define Privileges for <Demo Profile>
Use the options below to set privileges
Finish
Cancel
Global Privileges
View all
Allows "Demo Profile" to view all information / modules of vtiger CRM
Edit all
Allows "Demo Profile" to edit all information / modules of vtiger CRM
Set Privileges for each Module
modules to be shown
Edit Permissions
Create/Edit
View
Delete
Fields & Tools Settings
Dashboard
Potentials
Fields to be shown
* Potential Name
Potential No
Amount
* Related To
* Expected Close Date
Type
Next Step
Lead Source
* Sales Stage
* Assigned To
Probability (%)
Campaign Source
Created Time
Modified Time
Description
Tools to be shown
Import
Export
DuplicatesHandling
Contacts
Accounts
Leads
Documents
Calendar
Emai
Trouble Tickets
Products
FAQ
Vendors
Price Books
Quotes
Purchase Order
Sales Order
Invoice
RSS
Reports
Campaigns
Our Sites
PBX Manager
Service Contracts
Services
CustomerPorta
Recycle Bin
Tool Tip
Webforms

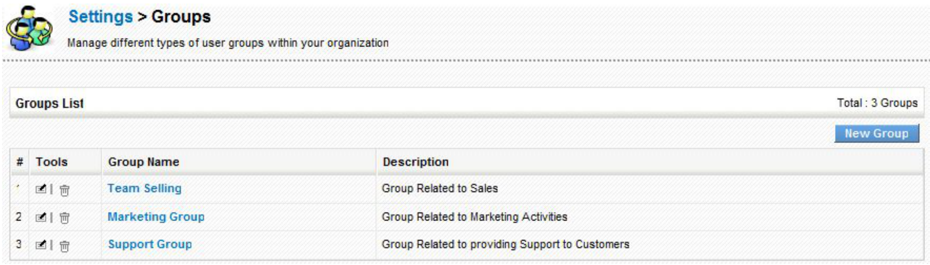
Then you can configure the profile related access privileges for each individual CRM module. You may select Create/Edit, View and Delete privileges as well as the fields to be displayed in each module. Click [Finish] to save your profile at the CRM system. Note that a new profile always has a parent but can be edited independently

Groups

Groups are a very effective tool in order to summarize users and privileges. Any type of relationship can be used to form a group, such as:

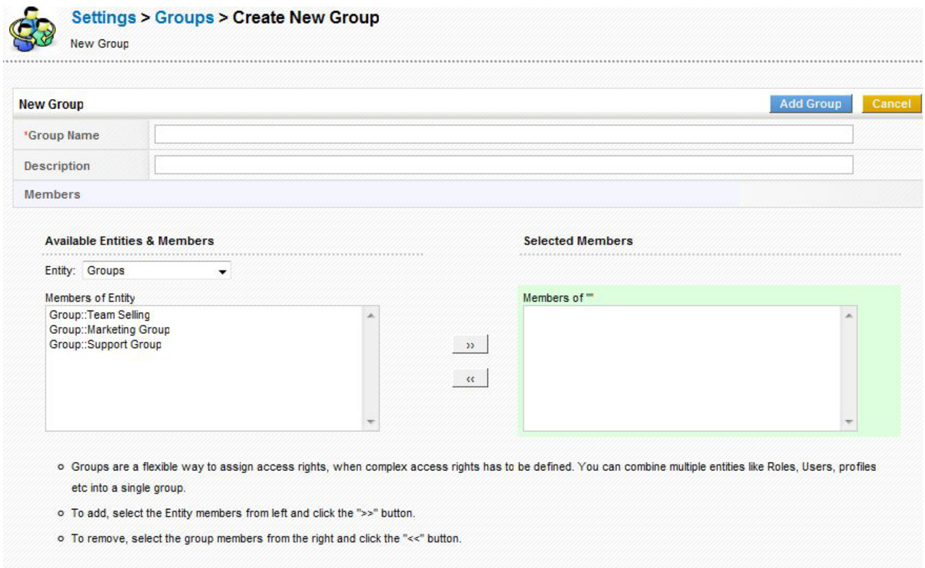
- users at the same location
- users with a common task
- user at the same department
- users with the same working history
- users with the same interests

Click the Groups menu to open the list view as shown in the image below. You see a list of all existing groups.



Click the name of a group to get the details as shown in the image below. The detail view lists the name, the description and the current users who are members of this group. You may change the group settings by clicking the [Edit] button.

To create a new group click the [Create New Group] button at the list view. The new entry window as shown in the image below allows you to define the conditions for a group.



First, give the group a name and provide a short description. Then select the criteria for a membership of this group. The filter function as well as the search function allows you to select members quickly. You may choose users, roles, roles and subordinates as well as other groups as group members. Click [Save] to store you new group in the CRM system. The assignment of a user to a group will also be displayed at the users detail view.

UserManual Administration Tools Module Manager

From vtiger.com

Contents

About

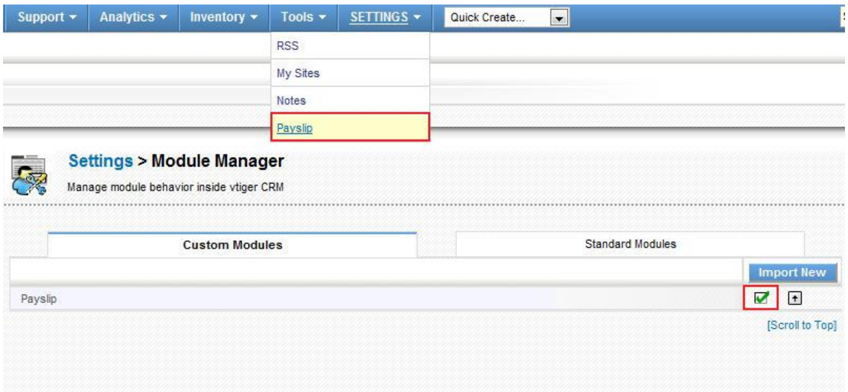
Module Manager configuration tool is found under Settings. With this you can enable, disable or control settings of vtiger CRM modules.

Modules are categorized as Standard (which are provided as a core part of vtiger CRM), and Custom (which you have imported or created)

Disable Module

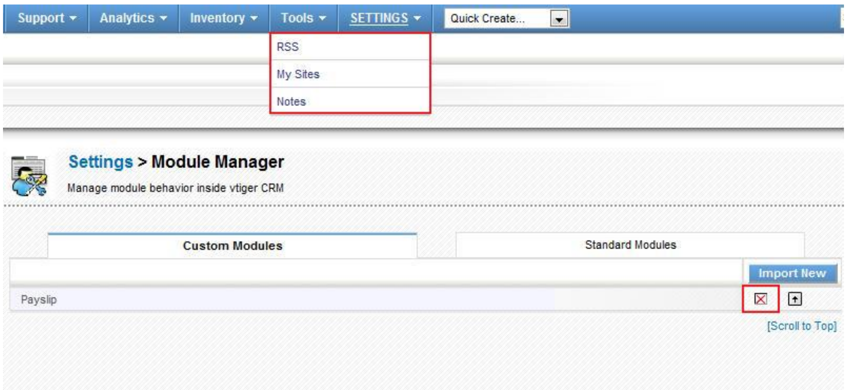
You can disable module by clicking on the green tick mark icon.

On disabling a module, it won't be shown on the Menu and access is restricted (including for the administrator).



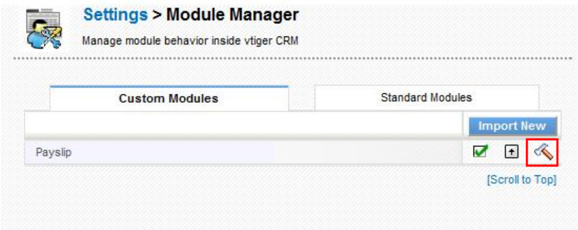
Enable Module

You can enable module by clicking on the red tick mark icon.



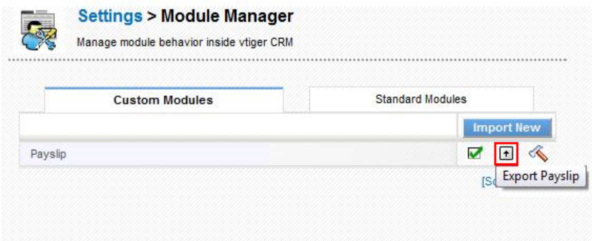
Module Specific Settings

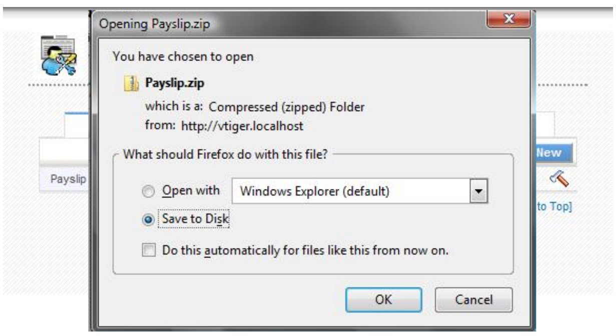
A module can have its own specific settings. In such cases, Settings.php should be created under the module folder. This file will be invoked (if found) when Settings icon is clicked.



Export Module

Click on the UP arrow icon in the module manager, which will export the module as a zip file.

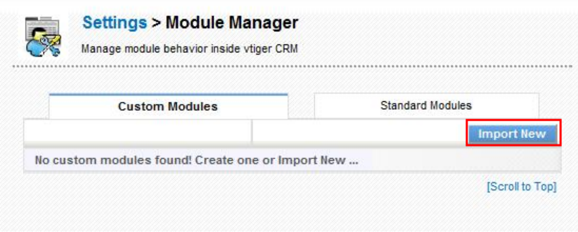




Import Module

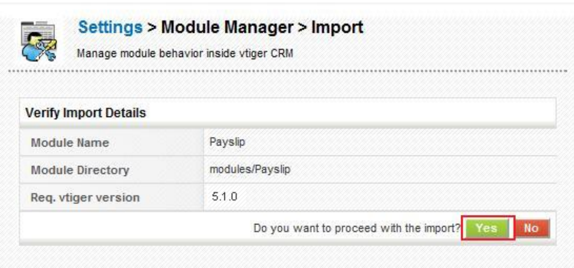
Module manager will let you import new modules. Follow the steps given below:

Click on the Import New button

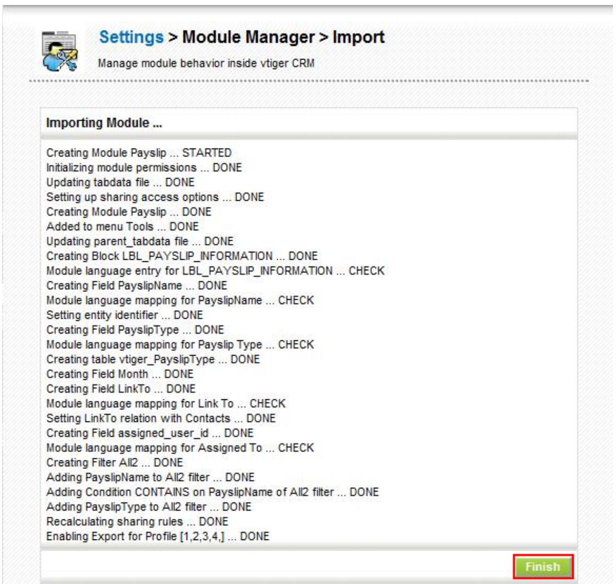


Select the module zip (package) file that was previously exported or created.

Verify the import details parsed from zipfile. Click Yes to proceed or No to cancel.

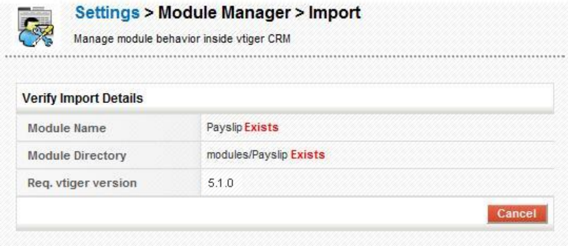


Click on Finish to complete the module import.



NOTE:

If you are trying to import a module which already exists or a directory which is present in the modules folder you will see the following message.



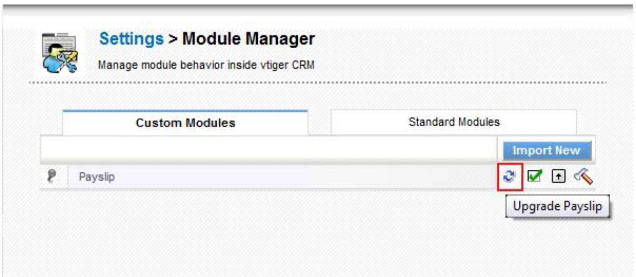
Upgrade Module

Upgrading the module to next version is possible through Module Manager.

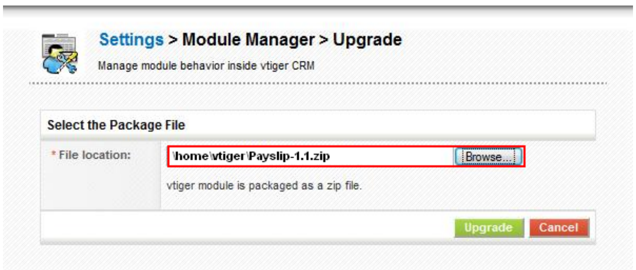
NOTE:

Currently this module upgrade feature does not support deletion and modification of exiting module fields. Before you use this feature, please ensure your modified module does not change or delete existing fields.

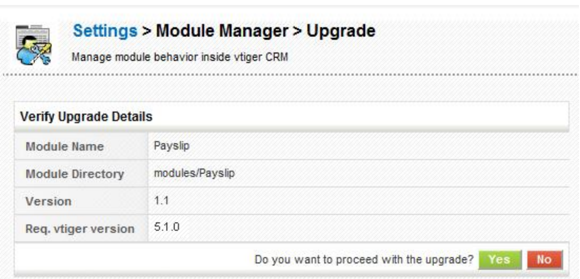
Click on the upgrade icon:



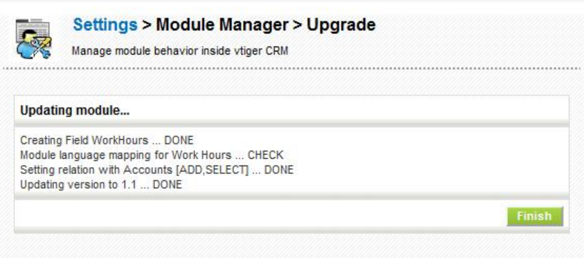
Select the new package file for the module:



Verify the package details before you upgrade:



Finally your module will be upgraded:


Settings > Module Manager > Upgrade
Manage module behavior inside vtiger CRM
Updating module...
Creating Field WorkHours ... DONE
Module language mapping for Work Hours ... CHECK
Setting relation with Accounts [ADD,SELECT] ... DONE
Updating version to 1.1 ... DONE
Finish

Mail Scanner

From vtiger.com

(Redirected from vtiger520:Mail Converter)

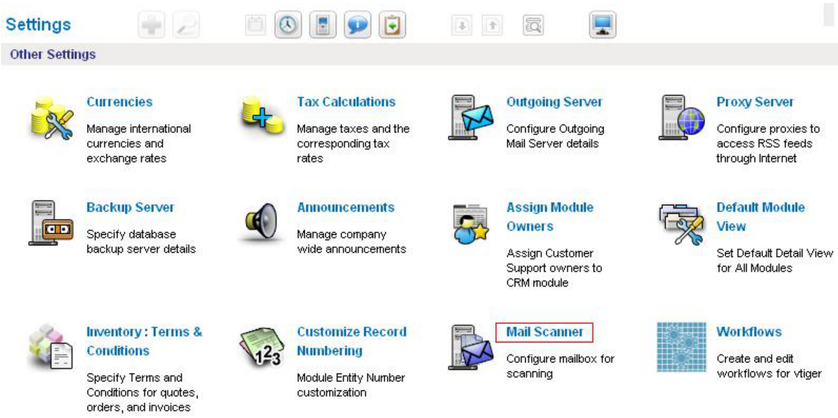
Faq | Howto

Contents

About

Mail Scanner adds the capability to scan your mailbox take actions on messages which matches the criteria. vtiger CRM administrator has the access to Mail Scanner through Settings Page.

This feature has been renamed as Mail Converter in vtiger CRM 5.2.0 and support for adding more than one Mailbox for scanning is enabled.



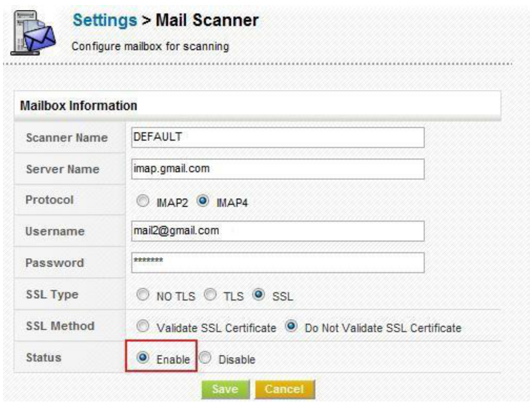
How does it work

After setting up at least one rule you can scan the mailbox. As soon as scanning will be finished you can get changes according to the rules you have set for creating and updating Trouble Ticket or adding a e-mail for Accounts or Contacts.

Configure Mailbox

You need to provide the mailbox information on which scan needs to be performed. By default the mailbox will be disabled as no information is available.

Make sure to enable the status before saving the mailbox information.



When you click on Save, using the given information connection is tried to the mail server, all the available folder names will be fetched. If it fails then information will not be Saved otherwise the information gets saved.

NOTE:

If you disable status of the mailbox, scan on it will not be performed.

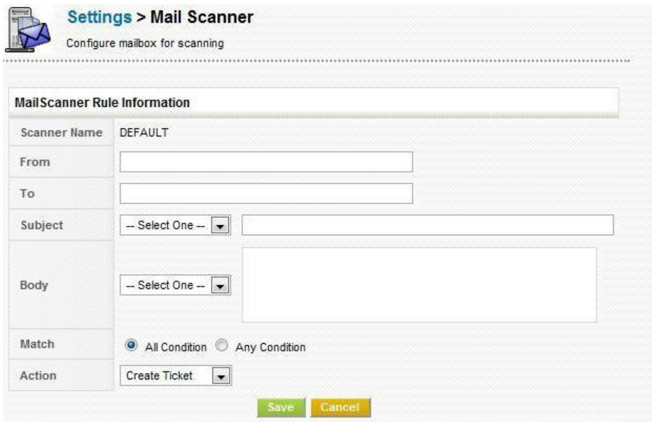
Select Folders

After mailbox setup you can select the folders which should be considered for scanning the mails.

You can exclude or include the folder by selecting/de-selecting the checkbox as shown here:

Rules

You can setup one or more rules on a mailbox, which lets you take action on a mail based on the criteria.



Rule criteria

Rule criteria are evaluated as follows:

From	Check for the input occurrence in the FROM field of the email
To	Check for the input occurrence in the TO field of the email
Subject	

	Compare the input with SUBJECT of email using one of the condition selected (Contains, Not Contains, Equals, Not Equals, Begins With, Not Begins With, **Regex**)
Body	Compare the input with BODY of email using one of the condition selected (Contains, Not Contains, Equals, Not Equals, Begins With, Not Begins With)
Match	All Condition â All the input conditions should evaluate as true to take Action Any Condition â At least one condition should evaluate as true to take Action

One finding a successful matching email, the action will be applied on it as follows:

Create Ticket	Creates a new trouble ticket record with the following: Title = SUBJECT of email Description = BODY of email Attachments of email will be linked to the trouble ticket record Lookup is made for existing Contact/Account based on FROM field of email and ticket is associated to matching record (if found)
Update Ticket	Updates existing trouble ticket record with the following: Comment = BODY of email Lookup is made on existing trouble ticket based on FROM field of email and title or CRMID match. *Preferable to use Regex Subject criteria as explained in previous section.*
Add to Contact[FROM]	Lookup is made for existing Contact based on FROM field of email. On success a new email record is created and is associated to matching record.
Add to Contact[TO]	Lookup is made for existing Contact based on TO field of email. On success a new email record is created and is associated to matching record.
Add to Account[FROM]	Lookup is made for existing Account based on FROM field of email. On success a new email record is created and is associated to matching record.
Add to Account[TO]	Lookup is made for existing Account based on TO field of email. On success a new email record is created and is associated to matching record.

Example: Rule to create trouble ticket from any email is shown below:

Rule Priority

One or more rules for the mailbox which are applied in sequence while Scanning. You can change the order (Priority) by clicking the arrow marks.

NOTE:

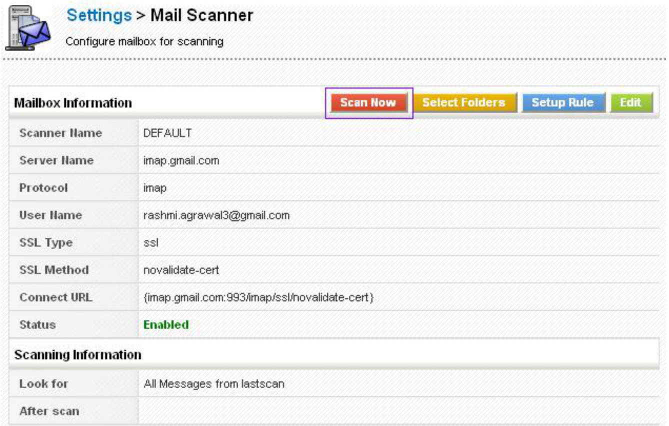
If the email matches the conditions defined for a given rule, the remaining rules are not applied.

Scanning

Manual Scanning

After setting up at least one rule you can scan the mailbox. Click at **Back** after setting rule or rules.

Now click on the **Scan Now** button. It might take long time based on the amount of emails that will be present in the mailbox (configured folders)



Automated Scanning

Path to Batch File **:** <vtigercrm-source-directory>/cron/MailScannerCron.bat

Path to Shell Script : <vtigercrm-source-directory>/cron/MailScannerCron.sh

Setup Cron job

A Cron job has to be set, to scan the mailbox configured at required intervals.

(Refer to How to setup cron job documentation for details)

Also You need to apply the **Appkey** in

vtigercrm/Cron/config.cron.php

To know how to do it please go to the following link

How to apply app_key

Update batch/shell script

Windows Users

In ***MailScannerCron.bat*** file,

1. Update **VTIGERCRM_ROOTDIR** with path to Vtiger source directory.
2. Update **PHP_EXE** with path to php.exe file of PHP setup.

*nix Users

You do not need to update anything in the shell script.

Module Field Formulas

From vtiger.com

Faq | Howto

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Field Formulas

About

Field formulas is a feature provided with vtiger which allows you to define custom rules for custom fields. This gives you the ability to auto fill values of different fields based on formulas and/or conditions. The feature is in the form of an extension module (which is optional).

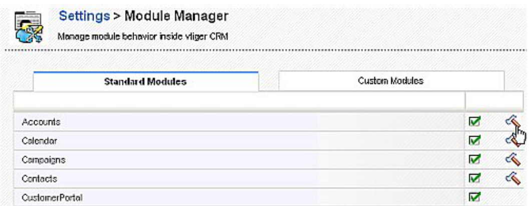
Features

This feature basically allows the Admin user to set formulas for the custom fields. Based on this, the value in the custom field is calculated and auto-filled. Using this feature, an admin can define his own rules to the custom fields and get the desired value for that field automatically, each time the record is saved.

To Add Field Formula

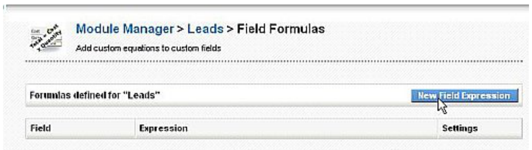
In order to add a field formula to the Custom fields -

- Go to **Settings >> Module Manager.**
- In **Module Manager** page, you will find a list of modules.
- Go to settings page of a particular module you need; by clicking the settings icon at the right corner of that module.

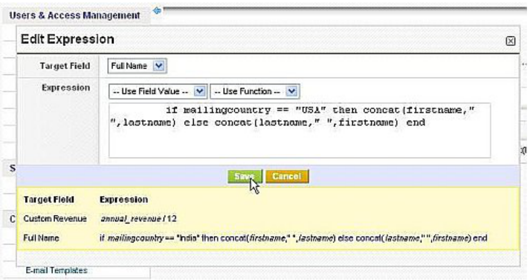


- You will find **Field Formulas** link on the module's settings page (If Field Formulas is supported for that module).Click on it.

- You need custom fields in order to create formulas in vtiger. In case no custom fields are present, it displays a link to create custom fields for the particular module. Once you have custom fields for the module, you can add formulas to those fields.
- If the custom fields are present, it shows the list of custom field with formaulas created to it.
- To add a new field formula, click on **New Field Expression** button.



- It opens a **Edit Expression** popup window.
- Select the **Target field** from dropdown, which gives a list of custom fields of selected module.
- Define an expression in the provided text area.
- You can use the dropdown provided in vtiger to select the field value and in-built functions defined.
- In your expressions, you can use the column names without **$**. All the string constants needs to be enclosed within **" "** (double quotes).
- After defining expression, click on **Save**. Return to the selected module, checkout the results of the expression of a related custom field.



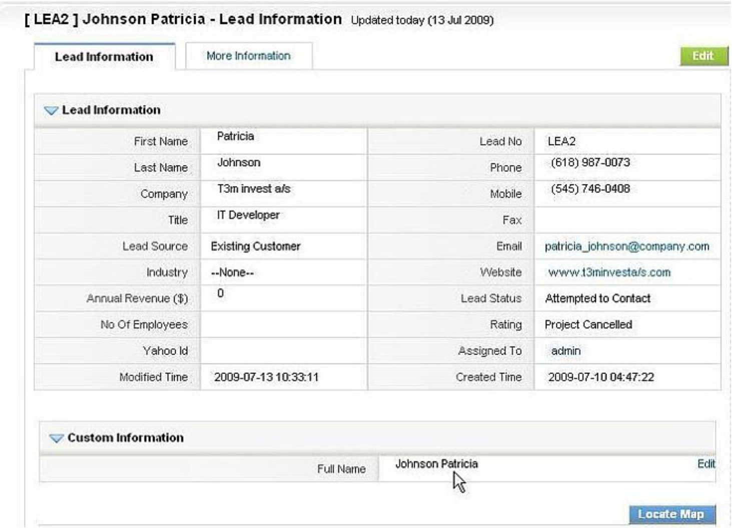
Examples

Lets say we want to create formulas for the **Leads** module such that two custom fields are populated, the conditions being -

```
Condition 1: if mailingcountry == "India" then concat(firstname," ",lastname)
             else concat(lastname," ",firstname)

Condition 2: annual_revenue / 12.
```

Now whenever a Lead is saved, these two custom fields will get their values from the defined formulas.


[LEA2] Johnson Patricia - Lead Information Updated today (13 Jul 2009)
Lead Information
More Information
Edit
Lead Information
First Name
Patricia
Lead No
LEA2
Last Name
Johnson
Phone
(618) 987-0073
Company
T3m invest a/s
Mobile
(545) 746-0408
Title
IT Developer
Fax
Lead Source
Existing Customer
Email
patricia_johnson@company.com
Industry
--None--
Website
www.t3minvesta/s.com
Annual Revenue ($)
0
Lead Status
Attempted to Contact
No Of Employees
Rating
Project Cancelled
Yahoo Id
Assigned To
admin
Modified Time
2009-07-13 10:33:11
Created Time
2009-07-10 04:47:22
Custom Information
Full Name
Johnson Patricia
Edit
Locate Map

Feature MultiCurrency

From vtiger.com

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About

Multi-Currency Support is a feature which supports the usage of multiple currencies in Products, Price Books and other Inventory modules.

Current Working Model

All currency input for Product, Pricebook or any other inventory module are taken in the currency of the logged in user's preferred currency. The currency value is converted to base currency of the CRM and stored. So basically base currency of the CRM is used as the reference for any Currency value and all conversions with respect to the User are based on this.

New Working Model

In Products module, User will be provided with an option to choose any one of the existing currency as base currency and also be able to define the values for the same product in other currencies, which may not be the same as the converted value from the base currency. In Invoice/Quotes/SO/PO modules, User can choose a currency for each Invoice/Quotes/SO/PO and all the products of that i Invoice/Quotes/SO/PO will stick to that currency. The price values for all the products of that Invoice/Quotes/SO/PO will be the value specific to the chosen currency. In Price Book module, User can define each pricebook to be binded with one specific currency. The prices of all the products in that price book will be the value specific to the chosen currency.

Multi Currency Support in Products

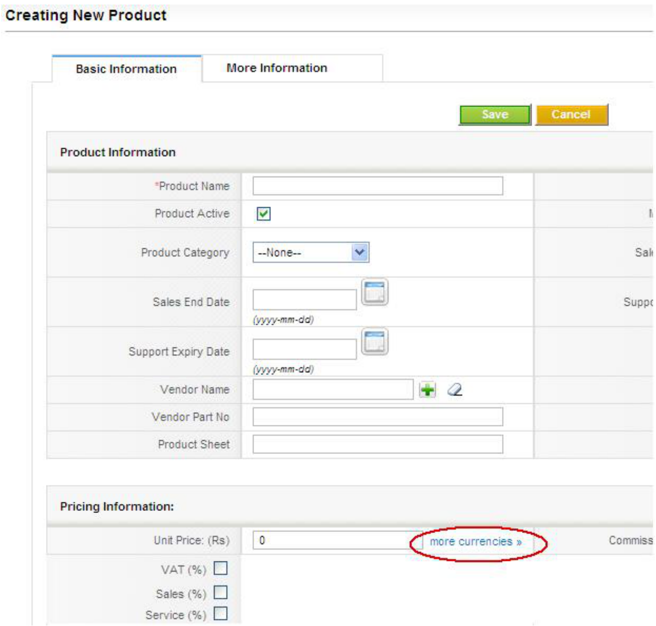
When you create a product, next to the input box for Unit price you can find a link called 'more currencies'. This link will let you set the different prices for the product in different currencies and set one of the currency as the base currency for the product.

1. List View of products will show the price in the base currency of the product with currency symbol as prefix.

2. Detail View and Edit View of a product will show the Unit price in the base currency of the product. Clicking on 'more currencies' link, will show the price of the product set in different currencies. (Note: 'More Currencies' link will not be shown in the detail view, if the product price is not set for more then one currency)

3. No Ajax Edit is available for editing multiple currencies. But Unit price can be edited through Ajax Edit. 4. Quick Create of Products will not have an option to add multiple currencies. Once a product is created through quick create, multiple currencies can be added to it through Edit View of the product.

Product Create View

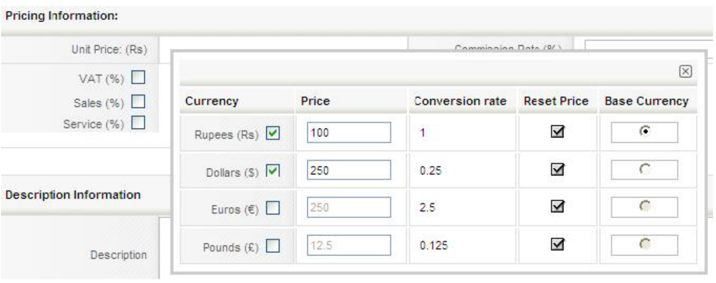


1. All the currency conversions will be based on the Base Currency. If the Base Currency is changed, then the new base currency will come into affect only from the next edit of the product and not in the current editing of the product. (Old base currency will still remain as the base for conversions for current editing)

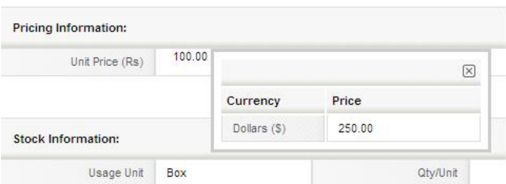
2. When a particular currency is checked to override the existing converted value, the input box will be filled with the converted price of the current base currency. This value can be changed and will be in affect unless until the currency is unchecked.

3. Clicking on 'Reset Price' will reset the currency value to the converted price from the base currency.

Multi Currency in Product Create/Edit View



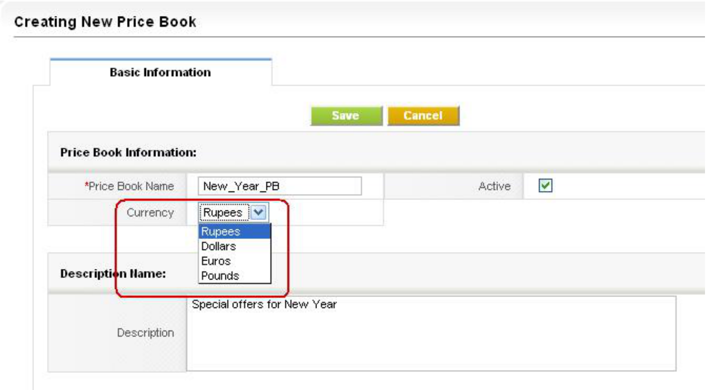
Multi Currency in Product Detail View



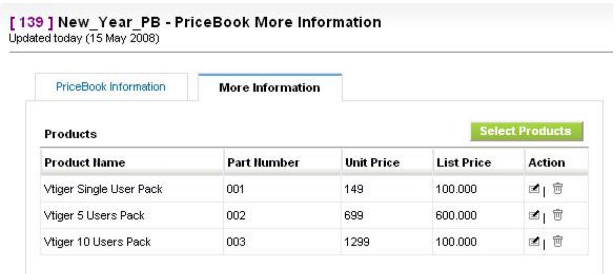
Multi Currency Support in Price Book

Price Book are now associated with a particular currency. So when creating a price book, we need to choose the currency on which the price book will be built. Prices for all the products in that price book will be based on the chosen currency. List prices for the products are updated with their unit price whenever there is a change in the price book currency.

Price Book Create View

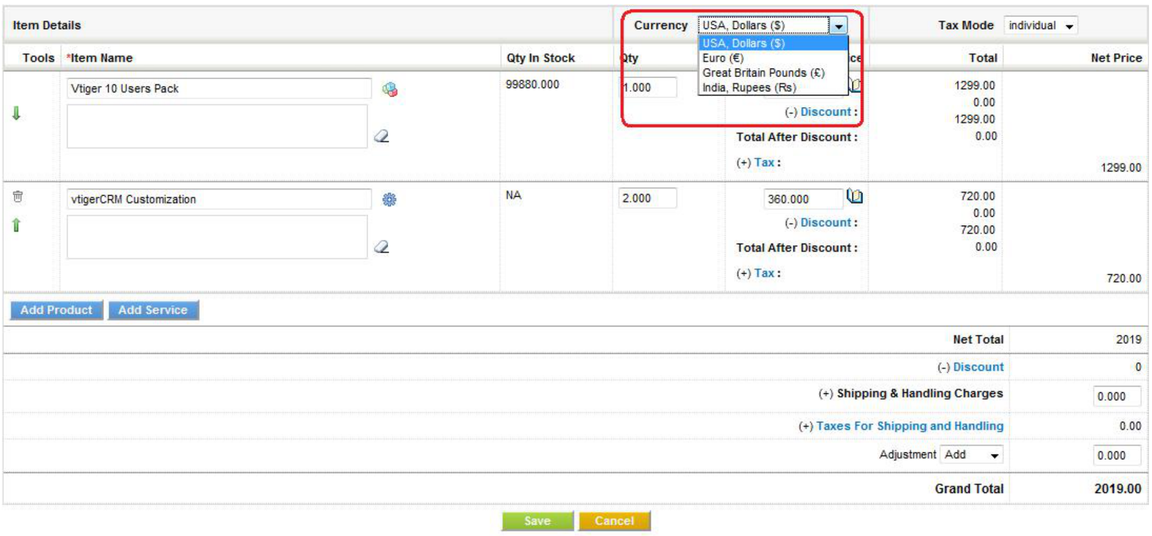


List Price for Price Book based on Price Book Currency



Multi Currency Support in Inventory Modules

When creating an Invoice/Quotes/SO/PO, a new picklist field is provided wherein the user can select the currency based on which the Invoice/Quotes/SO/PO has to be generated. Currency can be changed at any point of time (as long as the user has the Edit permission for the inventory) to generate the Invoice/Quotes/SO/PO in preferred currency. Every time the currency is changed, the price for all the products of the Invoice/Quotes/SO/PO are filled with the unit price of the product in the chosen currency (This will not consider the price book from which the currency was chosen previously) When the user clicks on Price book icon for a particular product (previously all price books that had the product in it were shown), only those price books for which the product is added and the price book currency is same as the currency chosen by the user for the Invoice/Quotes/SO/PO, are shown. If the product is not in a particular price book or if the price book currency is not same as the currency chosen for the inventory item, then the price book is not listed. On selecting the price book link from the price books list, the value for the product is returned in the same currency as chosen for the Invoice/Quotes/SO/PO.

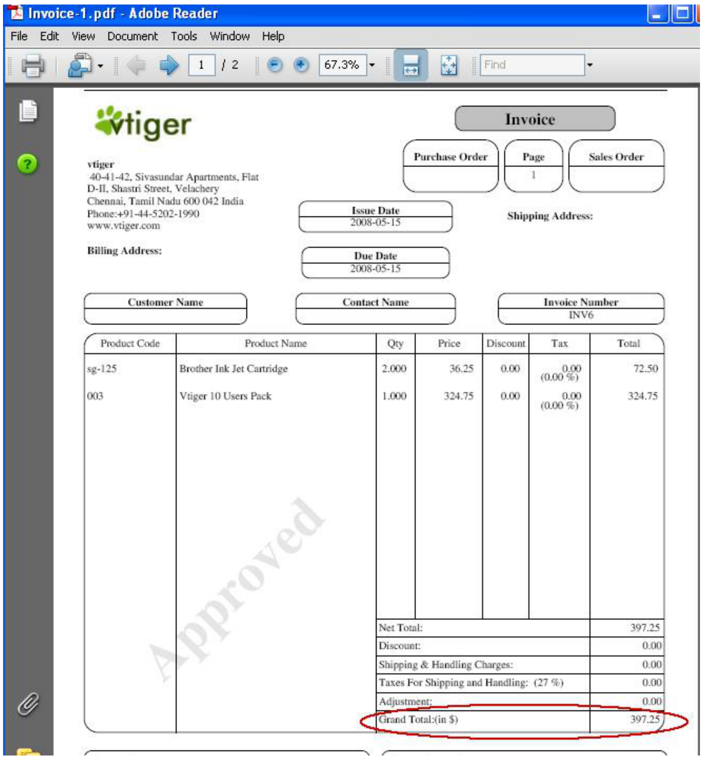


1. Tax value will change with change in the currency and the products.

2. Discount value will change only if the discount is mentioned in %. If direct value is given for deduction, then it will be reset to 0 with change in the currency. (Discount value will have to be manually updated in that case)

3. 'Shipping %26 Handling charges' and 'Adjustment' values will be reset to 0 with change in currency as they are direct values. So manual updating of these values are required with change in currency.

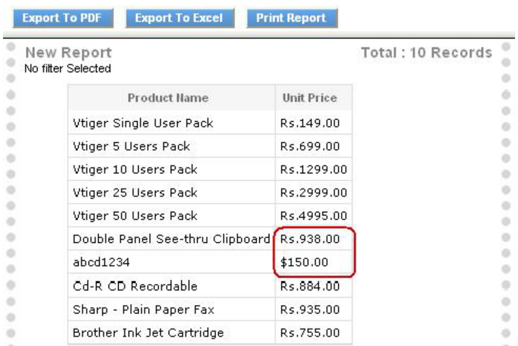
The generated pdf for the Invoice/Quotes/SO/PO will also have the price values in the same currency as the Invoice/Quotes/SO/PO irrespective of the currency set by the User in 'My Preferences'.



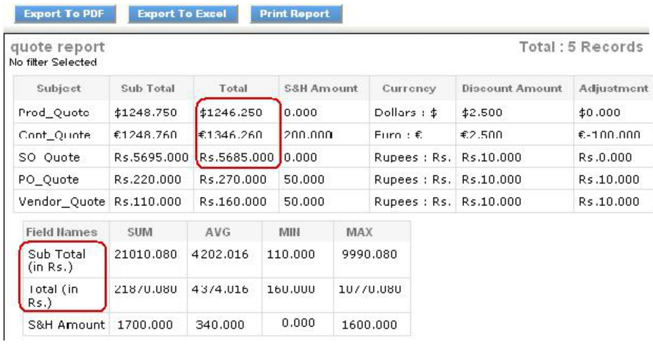
Multi Currency Support in Reports Module

1. When reports are created with Product module or Invoice/Quotes/SO/PO module, and if any of the chosen column has support for multiple currencies, then the value for that column will be shown in the 'base currency of the product' â for Products module and 'chosen currency for the Invoice/Quotes/SO/PO' â for any of the other modules like Invoice/Quotes/SO/PO with currency symbol as prefix.

2. Aggregate functions in Inventory modules for the columns that has support for multiple currencies, will be computed based on the User preferred currency and the User preferred currency symbol will be shown in the header of the column.



Product Name	Unit Price
Vtiger Single User Pack	Rs.149.00
Vtiger 5 Users Pack	Rs.699.00
Vtiger 10 Users Pack	Rs.1299.00
Vtiger 25 Users Pack	Rs.2999.00
Vtiger 50 Users Pack	Rs.4995.00
Double Panel See-thru Clipboard	Rs.938.00
abcd1234	$150.00
Cd-R CD Recordable	Rs.884.00
Sharp - Plain Paper Fax	Rs.935.00
Brother Ink Jet Cartridge	Rs.755.00



Affects of Deleting an Existing Currency or Marking it as Inactive

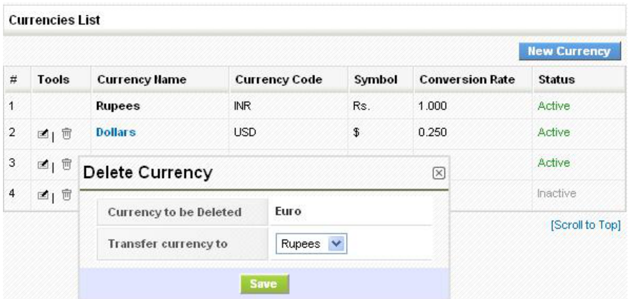
When a existing currency is deleted or marked as inactive, the user is forced to move all the references to some other currency.

1. All the Products and the associated Unit Price will be updated with the new currency.

2. All the Price Books will be updated with the new currency.

3. Price for all the Products associated with a Price Book will also be updated with their list price based on the new currency

4. Invoice/Quotes/SO/PO will still retain the old currency. The old currency will still be displayed and the prices for all the products will also be still with reference to the old currency. The generated pdf will also give the results in the same old currency. But if the User tries to Edit this inventory item, then will be forced to choose a different currency as the old currency will no more be available for fresh use.



Feature Module Sequence Numbering

From vtiger.com

Faq | Howto

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Feature

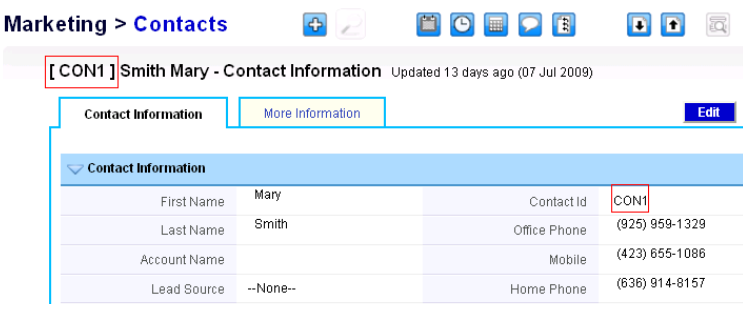
The Module Sequence Numbering feature helps classifying the records by unique numbers. Once the auto number field is added to CRM module, the number gets added sequentially to the new records.

ScreenShots

Following are the screen shots of how module number will appear in a record's detail view and list view.

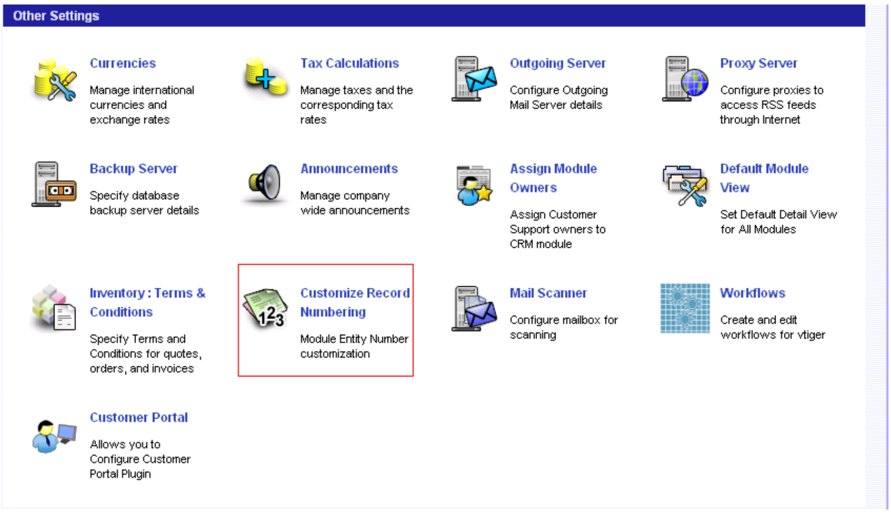
ListView

DetailView



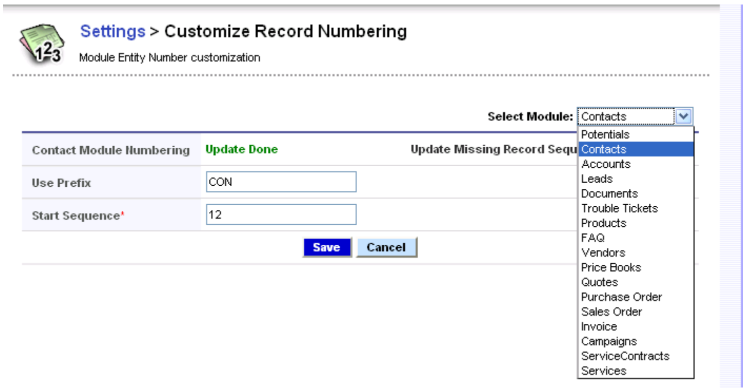
Configuring Module Sequence Numbering:

- Log in to vtiger CRM with Administrator privileges.
- Click on Settings > Customize Record Numbering [Under Other Settings].



- Select **Module**,Give Desired **Prefix** and than Sequence Number.Click **Save**.

The auto-number field is added to the respective module. To check the field, select the corresponding module and add a record. The auto-number field is displayed once you save the record.



Email Notifications Disable

From vtiger.com

vtiger CRM sends default email notifications for some actions. Some of these notifications are not configurable from the Settings page (they will be made configurable in a future update). However, Administrators can follow the steps below to disable such preconfigured notifications

Contents

User Module

User Creation

When a new user account is created, an email is sent to the user with their log in credentials. This notifications is currently hardcoded and not configurable from the Settings.

File Name - Go to modules/Users/Save.php

Change - Comment the following line (add # before the link to comment)

$mail_status = send_mail('Users',$user_emailid,$HELPDESK_SUPPORT_NAME, $HELPDESK_SUPPORT_EMAIL_ID,$subject,$email_body); (Around line no 215)

Calendar Module

Event Creation (Assigned to User)

When a new Event/ToDo is created, vtiger CRM will send mail to 'Assigned To' user, if 'Send Notification' checkbox is enabled. To disable this notification:

Edit File Name - modules/Calendar/CalendarCommon.php

Change - In function getEventNotification() comment the following line

send_mail('Calendar',$to_email,$current_user->user_name,,*$subject,$description);(Around line no 421)*

Event Creation (Assigned to Group)

If new Event/ToDo is 'Assigned To' a group and 'Send Notification' checkbox is enabled, then vtiger CRM will will send an email to members of the group. To disable this notification:

Edit File Name - modules/Calendar/CalendarCommon.php

Change - In function getEventNotification() comment the following line

$mail_status = send_mail('Calendar',$emailadd,getUserName($curr_userid),,*$subject,$description);(around line no 439)*

Invitation Email

When a user will invite another user then vtiger CRM will send email to the invited user. To disable this notification:

Edit File Name - modules/Calendar/Save.php

Change - Comment the following line

sendInvitation($_REQUEST['inviteesid'],$_REQUEST['activity_mode'],$_REQUEST['subject'], $mail_contents); (Around line no 233)

Trouble Tickets

1)While creating ticket in CRM a mail will go to assign to user of the ticket. To turn this off You have to go to

modules/HelpDesk/Save.php Go to line no 139 and comment the following line

$mail_status = send_mail('HelpDesk',$user_emailid,$HELPDESK_SUPPORT_NAME,
$HELPDESK_SUPPORT_EMAIL_ID,$subject,$email_body);

2)While creating ticket in CRM the mail will go to the related Contact mail id. To turn this off go to

modules/HelpDesk/Save.php Go to line no 168

and comment the following line

$mail_status = send_mail('HelpDesk',$parent_email,$HELPDESK_SUPPORT_NAME,
$HELPDESK_SUPPORT_EMAIL_ID,$subject,$email_body);

3)While edit a ticket a mail will go to the assign to user of the ticket. There are two way of edit which send mail one direct edit by clicking on edit link in List view or Edit button on detail view another is by doing ajax edit in detail view

- To disable notification for edit view.

Go to modules/HelpDesk/Save.php Go to line no 146

comment out the following line

$mail_status = send_mail('HelpDesk',$user_emailid,$HELPDESK_SUPPORT_NAME,
$HELPDESK_SUPPORT_EMAIL_ID,$subject,$email_body);

- To disable mail notification for detail view ajax edit

Go to modules/HelpDesk/DetailViewAjax.php

Go to line no 90 and comment out the following line

$mail_status = send_mail('HelpDesk',$user_emailid,$HELPDESK_SUPPORT_NAME,
$HELPDESK_SUPPORT_EMAIL_ID,$subject,$email_body);

4)While edit a ticket mail will go to the related contact of the ticket. There are two way of edit which send mail one direct edit by clicking on edit link in List view or Edit button on detail view another is by doing ajax edit in detail view

- To disable notification for edit view.

Go to modules/HelpDesk/Save.php

Go to line no 174 and comment out the following line

$mail_status = send_mail('HelpDesk',$user_emailid,$HELPDESK_SUPPORT_NAME,
$HELPDESK_SUPPORT_EMAIL_ID,$subject,$email_body);

- To disable mail notification for detail view ajax edit

Go to modules/HelpDesk/DetailViewAjax.php

Go to line no 96 and comment out the following line

```
$mail_status = send_mail('HelpDesk',$user_emailid,$HELPDESK_SUPPORT_NAME,
$HELPDESK_SUPPORT_EMAIL_ID,$subject,$email_body);
```