

# **vTiger**

## **Customer Relationship Management**

***by: Thomas Mathiesen***

***(thomas at linprofs dot com)***

**PS: If your mobile rings (loud), you'll have to tell everyone who it was, and what it was about... deal?**

**CLUB  
NIX**

Tired of kinda, sorta Open Source?  
Get the honest Open Source : **vtiger CRM**

# The next 45 minutes

- This is a presentation is a product presentation.
- Shout if you have questions during the presentation.
- Content:
  - What is CRM
  - Who needs a CRM
  - FLOSS vs. proprietary
  - vTiger CRM – the true open source option

# What is CRM

- Contact database.
- Sales numbers (\$\$).
- Email communication.
- Documents.
- Customer support / helpdesk.
- Automation!

# Who needs a CRM

- Companies.
- Organizations.
- Everyone who needs collaboration.



# Open source vs. proprietary

- Price (+++)
- Source code (++)
- Community (++)
- Functionality (+/-)



# The story of vTiger

1. SugarCRM released under the SPL.
2. Sugar is forked in 2004 by Sridhar Vembu, CEO of AdventNet.
3. Sugar people upset -> removes SPL from their website.
4. vTiger team openly admits that it's a fork. Open letter to Eric Raymond with the original SPL.
5. vTiger states that they will protect the CRM to stay free as in beer (no dual versioning).
6. With version 5, vTiger has lost almost all SugarCRM code.

# Who's using vTiger?

- German Postbank
- NYSE Euronext
- Nokia
- TheHagueOnline.com
- I am...
- Some of you are or will be trying it ;)



# How does it work?



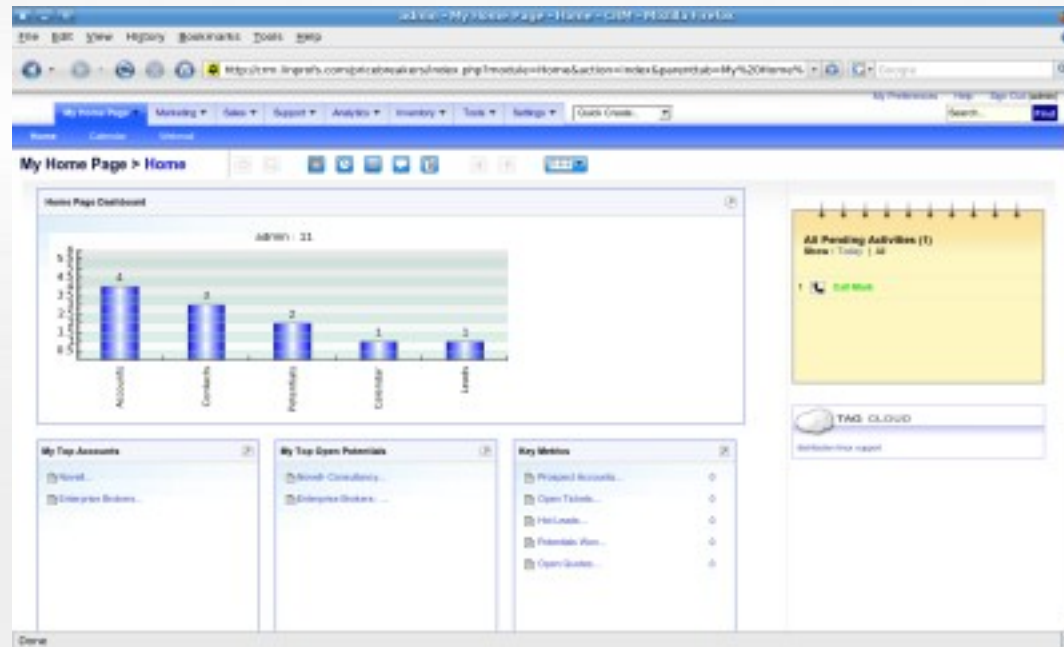
+



+

**vTiger files**

=



# So, what do I need?

- Webserver, running Linux (or the other os if you are suicidal).
- MySQL database server.
- PHP 5 (for vTiger 5.x)
- Enough memory and CPU (depending on the number of records you plan to have).
- Download the package at [vTiger.com](http://vTiger.com) (hosted by sourceforge).

# ok. How to install?

- Point your webbrowser to

<http://yourserver/vtigerinstallation/>

Follow the instructions :)

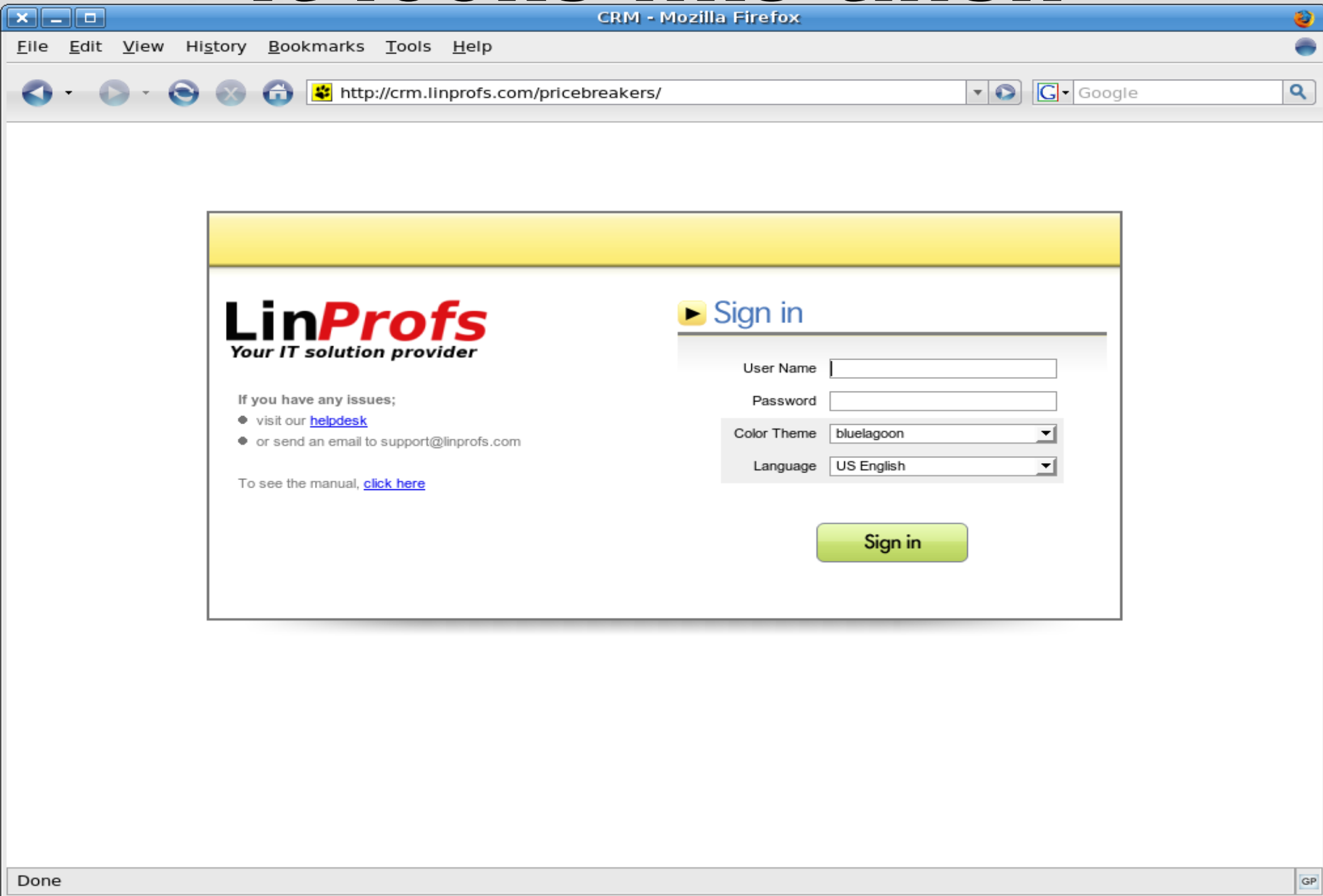
- It will check file permissions, php settings and import the mysql database.

# The important files

Some manual intervention:

- config.inc.php
- cron/\*
- themes/\*
- logs/
- include/language/\*

# It looks like this..



# and... like this

admin - My Home Page - Home - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?action=index&module= Google

My Preferences Help Sign Out (admin)

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create... Search... Find

Home Calendar Webmail

## My Home Page > Home

Home Page Dashboard

admin : 10

Category	Count
Accounts	4
Contacts	3
Potentials	2
Calendar	1

All Upcoming Activities (1)  
Show : Today | All

1 Call Mark

TAG CLOUD  
distribution linux support

### My Top Accounts

- Novell...
- Enterprise Brokers...

### My Top Open Potentials

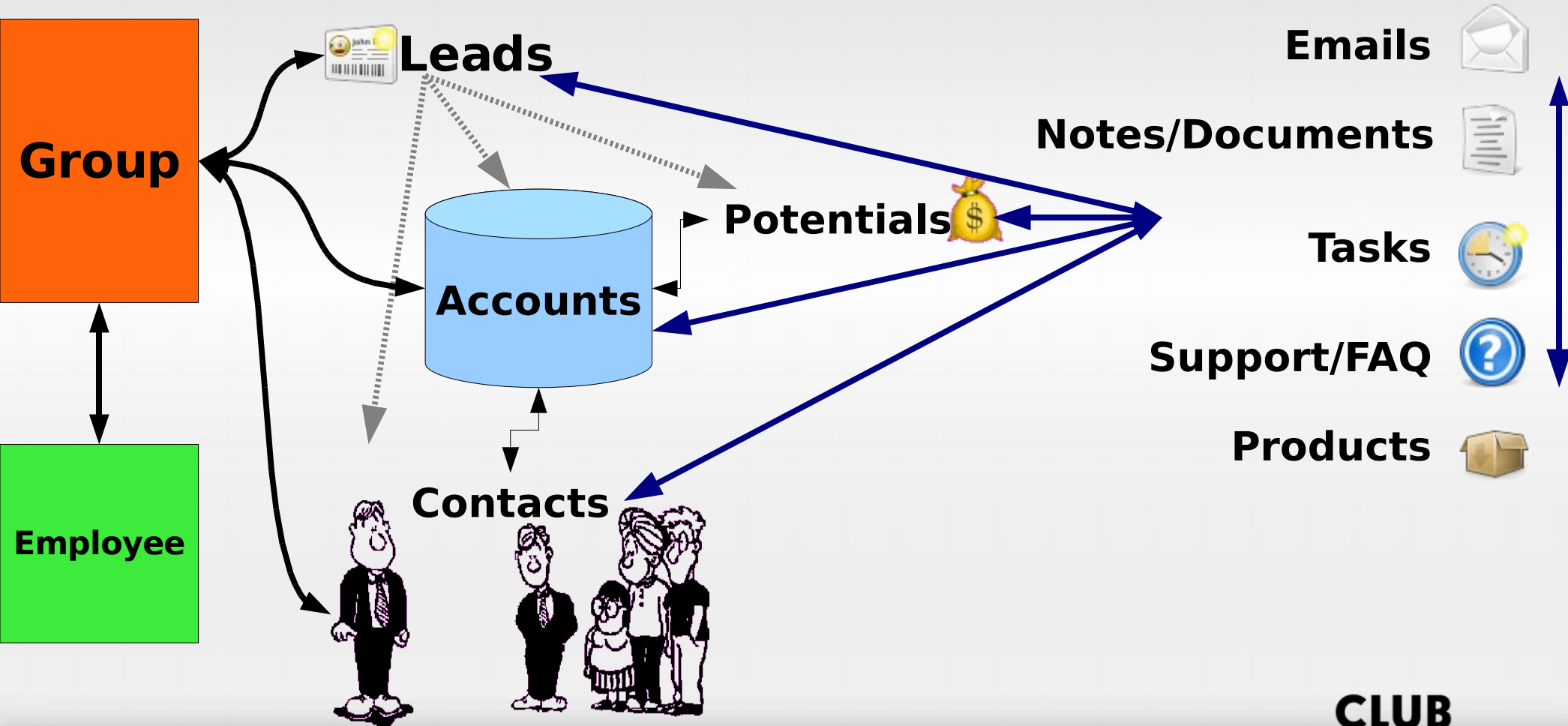
- Novell- Consultancy...
- Enterprise Brokers- ...

### Key Metrics

Prospect Accounts...	0
Open Tickets...	0
Hot Leads...	0
Potentials Won...	0
Open Quotes...	0

Done

# The (main) modules and their relationship



# **Some screenshots**



# Accounts

admin - Marketing - Accounts - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?module=Accounts&action=index&parenttab=Marketing

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

Search... Find

My Preferences Help Sign Out (admin)

Campaigns Accounts Contacts Webmail Leads Calendar Notes

## Marketing > Accounts

+ 🔍 📅 ⌚ 📊 💬 📄 ⬇️ ⬆️ 📄

Delete Change Owner Send Mail Showing 1 - 4 of 4 Filters : All New | Edit | Delete

<input type="checkbox"/>	Account Name ▼	City	Website	Phone	Assigned To	Action
<input type="checkbox"/>	Enterprise Brokers			0709358714	admin	edit   del
<input type="checkbox"/>	LinProfs	The Hague	www.linprofs.com	+31703521193	admin	edit   del
<input type="checkbox"/>	Novell	Rotterdam	www.novell.com	0105318998	admin	edit   del
<input type="checkbox"/>	RedHat		www.redhat.com	020336985542	admin	edit   del

Delete Change Owner Send Mail Showing 1 - 4 of 4 Create Mail Merge templates

Done GP

# Contacts

admin - Marketing - Contacts - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?module=Contacts&action=index&parenttab=Marketing

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

Campaigns Accounts **Contacts** Webmail Leads Calendar Notes

Marketing > Contacts

Showing 1 - 3 of 3

Filters : All New | Edit | Delete

	First Name	Last Name ▼	Title	Account Name	Email	Office Phone	Assigned To	Action
<input type="checkbox"/>	Paul	Brown		Enterprise Brokers	paul.brown@enterprisebrokers.com	0709358714	admin	edit   del
<input type="checkbox"/>		Support		LinProfs	support@linprofs.com	+31703521193	admin	edit   del
<input type="checkbox"/>	Mark	van der Ende		Novell	markvanderende@novell.com	0105318998	admin	edit   del

Delete Change Owner Send Mail

Showing 1 - 3 of 3

Create Mail Merge templates

# Leads

admin - Marketing - Leads - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?module=Leads&action=index&parenttab=Marketing

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

Search... Find

My Preferences Help Sign Out (admin)

Campaigns Accounts Contacts Webmail Leads Calendar Notes

Marketing > Leads

+ 🔍 📅 ⌚ 📊 💬 🎵 ⬇️ ⬆️ 📄

Delete Send Mail Change Owner Change Status Showing 1 - 1 of 1 Filters : All New | Edit | Delete

	Last Name ▼	First Name	Company	Phone	Website	Email	Assigned To	Action
<input type="checkbox"/>	Engoe	Heidi	Teachers inc.	+4733475987		heidi@teachersinc.com	admin	edit   del

Delete Send Mail Change Owner Change Status Showing 1 - 1 of 1 Create Mail Merge templates

# Calendar

admin - Marketing - Calendar - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?action=index&module=Calendar&view=month&hour=0& Google

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

Search... Find

Campaigns Accounts Contacts Webmail Leads Calendar Notes

Marketing > Calendar

Calendar All Events & Todos

Day Week Month Year October 2007

Events To Dos

Add

My Total Events : 1, 1 Pending / My Total To Dos : 0

View : Monthly Calendar View

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 ✱	2	3 ☎ 21:20 - 21:25	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

Done

# Helpdesk (support tickets)

admin - Support - Trouble Tickets - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?module=HelpDesk&action=index&parenttab=Support

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

My Preferences Help Sign Out (admin)

Search... Find

Trouble Tickets FAQ Accounts Contacts Products Notes Webmail Calendar

Support > Trouble Tickets

Showing 1 - 1 of 1

Ticket ID	Title	Related To	Status	Priority	Assigned To	Action
18	Email stopped working	van der Ende Mark	Open	Normal	admin	edit   del

Create Mail Merge templates

# RSS Reader

admin - Tools - RSS - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?module=Rss&action=Index&parenttab=Tools

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

RSS My Sites Notes

Tools > RSS

Add RSS Feed

vtiger RSS Reader

Feed Sources

- Google News - linux
- Linux Today

Feeds list from : Linux Today

Delete Set As Default

Subject	Sender
The Four Freedoms Applied to Software as a Service	Linux Today
If I Were in Charge of...	Linux Today
Why the Unbundling Windows Sceptics are Wrong	Linux Today
Open Source-- Then and Now: A Conversation With Ray Gans of the OpenJDK Community Program	Linux Today
OpenOffice vs. Lotus Symphony	Linux Today
Linux Shops Navigate the Nuanced Support Landscape	Linux Today
A Journey Into the Dumb-o-Sphere	Linux Today
Cedega to be Packaged with Mandriva	Linux Today
Fedora Patches Old OpenOffice Flaw	Linux Today
That's One Way To Reinvent A Company	Linux Today

If I Were in Charge of...

GENERATE COMPLETE .NET WEB APPS IN MINUTES! IRON SPEED

I was taking a walk with my wife the other day, talking about all the kooky-nuttiness that is the Linux and Open Source world sometimes. I think I was harping on a certain company in Washington State and their recent "attempts" to "open source" some of their code.

A consummate Linux spouse, she listened as I ranted and raved but I could tell she was getting a bit weary of this latest session when she said, "well, what would you do about it?"

Sun Developer Network (SDN) Free Tools & Resources

Featured on the Sun Developer Network (SDN) Free Tools and Resources

Tutorials: JavaOne Online Technical Sessions and Labs

Advance your development skills by experiencing hundreds of

javascript:display('http://linuxtoday.com/news\_story.php3?itsn=2007-10-05-024-26-OP-BZ','feedlist\_2')

# My Sites

admin - Tools - My Sites - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?module=Portal&action=index&parenttab=Tools

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Preferences Help Sign Out (admin)

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

RSS My Sites Notes

Tools > My Sites

Manage Sites

Bookmark List : ClubNix

Log in / create account

## CLUB NIX

article discussion edit history

### Main Page

ClubNix is a Linux/Unix group based in The Hague. Over time this page will evolve and provide more information.

This is our wiki, but you may also:

- [Signup](#) for our newsletter.
- [Access](#) our forums.

### Next Meeting

[edit]

Our next Meeting will be October **14th** at 13:00 in the offices of [LinProfs](#), [Benoordenhoutseweg 23](#), 2596 BA Den Haag.

[Z-push activesync and pushmail](#)

*Details on future meetings/events can be found by clicking [Check out events](#) (Also available in the Navigation menu to the right)*

### Future Meetings

[edit]

Our initial plans for meetings:

- Meetings will be on the second Sunday of the Month at 13:00.
- Meetings will be divided into 2 parts

navigation

- Main Page
- Community portal
- Current events
- Recent changes
- Random page
- Help
- Donations

search

Go Search

toolbox

- [What links here](#)

Done

# Settings

admin - Settings - Settings - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/index.php?module=Settings&action=index&parenttab=Settings

Acc. CRM DMS mail DB VG digi DLinux LI TM Linux Linux1 LT \* News FSFM Entr OS OSS NF GetDeb

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

Search... Find

Settings

## Settings

**Users & Access Management**

- Users**  
Manage users who can access vtiger CRM
- Roles**  
Set up hierarchy of roles and assign to the users
- Profiles**  
Manage user-specific modules access to different Roles
- Groups**  
Manage different types of teams based on roles, users, and profiles
- Sharing Access**  
Manage module sharing rules & custom sharing rules
- Fields Access**  
Define global field-level access in each module
- Audit Trails**  
Display data operations performed by users
- User Login History**  
Display login history of users

**Studio**

- Custom Fields**  
Manage different types of user-defined fields
- Picklist Editor**  
Customize Picklist values in each module

**Communication Templates**

- E-mail Templates**  
Manage templates for E-Mail module
- Mail Merge Templates**  
Manage templates for Mail Merging
- Notification Schedulers**  
Manage Notifications that will alert in case of important actions
- Inventory Notifications**  
Change Settings of Inventory related Notifications

Done



# Other modules

- Sales orders
- Invoices
- Products
- Marketing campaigns
- Quotes
- Notes
- FAQ
- Webmail (imap)
- and more..

# Example relationship

admin - My Home Page - Calendar - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create... Search...

Home Calendar Webmail

My Home Page > Calendar

Calendar All Events & Todos

**[ 10 ] Call Mark - Event Information**  
Updated today (02 Oct 2007)

Edit Duplicate Delete

Event Information

Event Type	Call	Visibility	Private
Event Name	Call Mark		
Description	Check if they need us for consultancy		
Location			
Status	Planned	Assigned To User	admin
Priority	High	Send Notification	No
Created Time	02-10-2007 21:24:23	Modified Time	02-10-2007 21:24:23
Event starts at	Event ends on		
21:20	21:25		
03-10-2007	03-10-2007		

Invite Reminder Repeat Related to

Potential Name [Novell- Consultancy](#)

Contact Name [van der Ende Mark](#)

TAG CLOUD

Tag it

javascript:doNothing()

# Example relationship

admin - My Home Page - Contacts - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create... Search...

Home Calendar Webmail

My Home Page > **Contacts**

[ 7 ] van der Ende Mark - Contact Information  
Updated today (02 Oct 2007)

Contact Information More Information

Edit Send Mail Duplicate Delete

Contact Information			
First Name	Mr. Mark	Office Phone	0105318998
Last Name	van der Ende	Mobile	0641022697
Account Name	Novell	Home Phone	
Lead Source	Partner	Other Phone	
Title		Fax	
Department		Birthdate	--
Email		Reports To	
Assistant		Yahoo Id	
Assistant Phone		Do Not Call	no
Email Opt Out	no	Assigned To User	admin
Reference	no	Notify Owner	no
Created Time	02-10-2007 21:11:56	Modified Time	02-10-2007 21:11:56

Customer Portal Information

Portal User	no	Support Start Date	--
-------------	----	--------------------	----

Actions

- Add Event
- Add To Do

TAG CLOUD

Tag It

Select template to Mail Merge:

Create Mail Merge templates

Done

# Example relationship

admin - My Home Page - Contacts - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

My Preferences Help Sign Out (admin)

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create... Search...

Home Calendar Webmail

My Home Page > Contacts

[ 7 ] Mark van der Ende - Contact More Information  
Updated today (02 Oct 2007)

Contact Information More Information

Potentials Showing 1 - 1 of 1 Add Potential

Potential ▼	Account Name	Sales Stage	Amount (in €)	Expected Close Date	Assigned To	Action
Novell- Consultancy	Novell	Prospecting	15000	19-10-2007	admin	edit   del

Activities Showing 1 - 1 of 1 Add To Do Add Event

Type	Subject	Related To	Start Date	Start Time	End Date ▼	End Time	Recurring Type	Assigned To	Contact Name	Action
Call	Call Mark	Novell- Consultancy	2007-10-03	21:20	2007-10-03	21:25		admin	van der Ende Mark	edit   del

Email Add Email

None Included

Trouble Tickets Add Ticket

None Included

Quotes Add Quote

# Why all these relationships?

- Find the information in 10 ways (easy).

- **REPORTING**











on-screen, pdf, excel, csv...

# How to do reporting

- Views
- Reports
- Your own sql statements/imagination

# Views (filters)

**Contacts**

[Change Owner](#) [Send Mail](#) Showing 1 - 3 of 3 Filters :  [New](#) | [Edit](#) | [Delete](#)

ie	Last Name ▼	Title	Account Name	Email	Office Phone	Assigned To	Action
	Brown		Enterprise Brokers	paul.brown@enterprisebrokers.com	0709358714	admin	<a href="#">edit</a>   <a href="#">del</a>
	Support		LinProfs	support@linprofs.com	+31703521193	admin	<a href="#">edit</a>   <a href="#">del</a>

# Views (filters)

**Contacts** > New Custom view

---

**Details**

\*View Name:  ☐ Set as Default ☐ List in Metrics

---

**Choose Columns**

<input type="text" value="Last Name"/>	<input type="text" value="Assigned To"/>	<input type="text" value="None"/>	<input type="text" value="None"/>
<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>
<input type="text" value="None"/>			

---

**Standard Filters** **Advanced Filters**

Set the search conditions to further restrict the list.

- You can use "or" filters by entering multiple items in the third column.
- You can enter up to 10 items, separated by commas. For example: CA, NY, TX, FL searches for CA or NY or TX or FL.

---

**RULE**

<input type="text" value="Mailing Postal Code"/>	<input type="text" value="starts with"/>	<input type="text" value="25"/>	And
<input type="text" value="None"/>	<input type="text" value="None"/>		



# Views (filters)

admin - Marketing - Contacts - CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

ht...

My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create...

Campaigns Accounts Contacts Webmail Leads Calendar Notes

Marketing > Contacts

Showing 1 - 3 of 3

Filters: All New | Edit | Delete

	First Name	Last Name	Title	Account Name	Email	Office Phone	Assigned To	Action
<input type="checkbox"/>	Paul	Brown		Enterprise Brokers	paul.brown@enterprisebrokers.com	0709358714	admin	edit   del
<input type="checkbox"/>		Support		LInProfs	support@linprofs.com	+31703521193	admin	edit   del
<input type="checkbox"/>	Mark	van der Ende		Novell	markvanderende@novell.com	0105318996	admin	edit   del

Showing 1 - 3 of 3

Create Mail Merge templates

# Reports

Analytics > Reports

Account and Contact Reports			
#	Report Name	Description	Tools
1	Contacts by Accounts	Contacts related to Accounts	
2	Contacts without Accounts	Contacts not related to Accounts	
3	Contacts by Potentials	Contacts related to Potentials	

Lead Reports			
#	Report Name	Description	Tools
1	Lead by Source	Lead by Source	
2	Lead Status Report	Lead Status Report	

Potential Reports			
#	Report Name	Description	Tools
1	Potential Pipeline	Potential Pipeline	
2	Closed Potentials	Potential that have Won	

Activity Reports			
#	Report Name	Description	Tools
1	Last Month Activities	Last Month Activities	
2	This Month Activities	This Month Activities	

Trouble Tickets Reports			
#	Report Name	Description	Tools

# Reports

**Create Report**

**Custom Reports**

1. Report Details

2. Related Module

3. Report Type

4. Select Columns

5. Specify Grouping

6. Calculations

7. Filters

**Filters**  
Select Filters to Streamline Report Data

**Standard Filters**

Column:

Start Date:

End Date:

Contacts - Support S

Custom

(dd-mm-yyyy)

(dd-mm-yyyy)

**Advanced Filters**

You can use "or" filters by entering multiple items in the third column.

You can enter up to 10 items, separated by commas. For example: CA, NY, TX, FL searches for CA or NY or TX or FL.

Account Name

not equal to

and

None

None

and

None

None

and

# Automate requests

- Customer portal.
- Web-forms.
- Your imagination (and php skills).

# Customer Portal

**[ 7 ] van der Ende Mark - Contact Information**  
Updated today (02 Oct 2007)

**Contact Information** **More Information**

**Edit** **Send Mail** **Duplicate** **Delete**

**Contact Information**

First Name	Mr. Mark	Office Phone	0105318998
Last Name	van der Ende	Mobile	0641022697
Account Name	Novell	Home Phone	
Lead Source	Partner	Other Phone	
Title		Fax	
Department		Birthdate	--
Email	markvanderende@novell.com	Reports To	
Assistant		Yahoo Id	
Assistant Phone		Do Not Call	no
Email Opt Out	no	Assigned To User	admin
Reference	no	Notify Owner	no
Created Time	02-10-2007 21:11:56	Modified Time	02-10-2007 23:57:57

**Customer Portal Information**

Portal User	yes	Support Start Date	02-10-2007
Support End Date	02-10-2008		

# Customer Portal

The screenshot shows the LinProfs Customer Portal. At the top is a red header bar with navigation links: HOME, ABOUT, PRODUCTS, NEWS, OPEN SOURCE, CONTACT, and SUPPORT CENTER. Below the header is a search bar and a user menu with links for My Settings and Log Out. The main content area is divided into two tabs: My Tickets and FAQ. The My Tickets tab is active, showing a 'Show All Tickets' dropdown and buttons for 'New Ticket' and 'Search'. Below this, there are two sections: 'My Open Tickets' and 'Closed Tickets'. The 'Closed Tickets' section contains a table with one row of data.

Ticketid	Title	Priority	Status	Category	Modified Time	Created Time
1397	test 2	Low	Closed	Hardware	2007-08-22 16:28:00	2007-08-22 16:28:00



# Webforms

*Memori Yipang* A- RESET A+

Home Page • Application

Spanish - Español  
English

Main Menu

- Home Page
- Blog
- Search Listings
- Properties
- Commerical
- Lots
- About us
- Contact us
- Agents
- Calculators
- Application
- Privacy policy

This demo form has user feedback and validation

To test you need only to complete first, last, phone and email.  
Your actual data is sent via email to yourself and me, but your last name, phone and email address is not saved in the database.

- To find your entry in vtiger, look for the first name.
- Thank you for stopping by.

Online application short-form

First Name

Last Name

Your E-Mail

Phone

City

State

Property Type

Loan Purpose

Current balance \$

Loan amount \$

Credit Rating

Best time to call

My Home Page Marketing Sales Support Analytics

Campaigns Accounts Contacts Webmail Leads

Marketing > Leads

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Delete Send Mail Change Owner Change Status Showing

<input type="checkbox"/>	Last Name ▼	First Name	Company
<input type="checkbox"/>	Engoe	Heidi	Teachers inc.

Delete Send Mail Change Owner Change Status Showing

# Your own sql statements

Professional and internationally  
based in the Hague the Netherlands

Workshops/Events   Membership   Member ads   Useful links   Contact us

Home

Forename \*

Surname \*

Nationality(s) \*

Telephone no

Mobile no

E-mail \*

Address \*

Postcode \*

City \*

Country \*

Website

Payment method

Education

Date of birth

Current occupation



my-own.php





# Addons

- Outlook plugin
- Microsoft Office plugin
- Thunderbird extension
- Firefox toolbar
- Joomla integration (beta)
- Timecard module
- Project Management module (untested by author of slides)
- Asterisk integration (pre-alpha)

# Outlook plugin

- Requires: Outlook 2000/2003
- Functionality:
  - Add emails to contacts.
  - Sync. contacts
  - Sync. tasks
  - Sync. calendar
- Does resolve conflicts (vtiger vs. outlook contacts etc.)
- Not optimized for WAN – more than 1500 contacts and normal ADSL might be a bit slow.

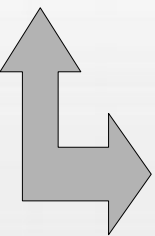
# Outlook plugin



# Microsoft Office plugin

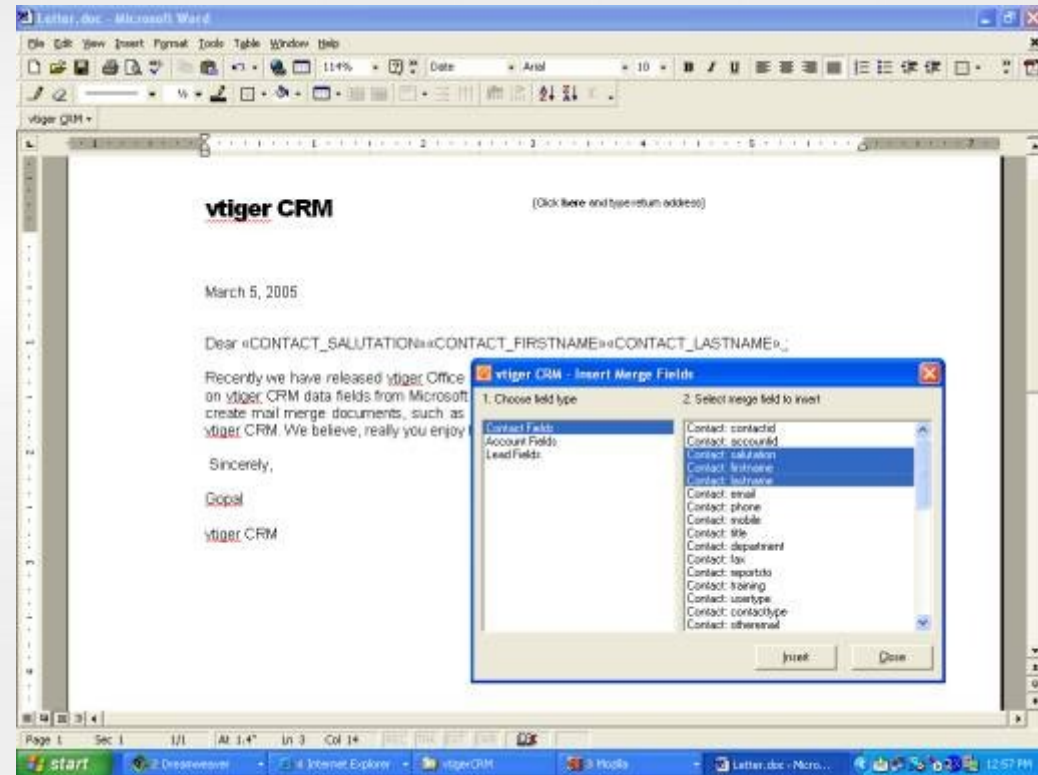
- Requires: the other os, Word 2000/2003 and IE 5.5+
- Functionality:
  - Mailmerge (fields from vTiger).
  - Saving word mailmerge templates on server.

# Microsoft Office plugin



php script

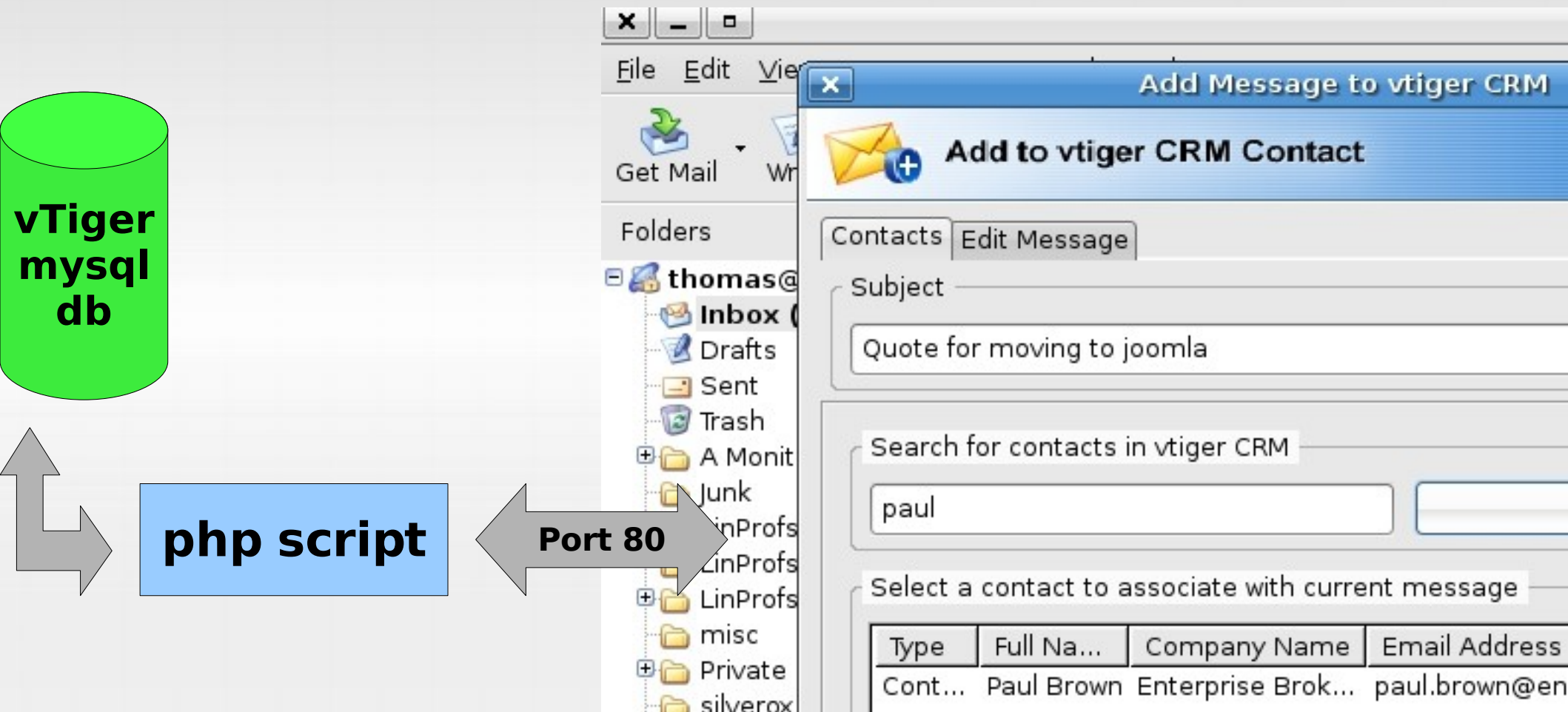
Port 80



# Thunderbird Extension

- Requires: Thunderbird 1.0+ and Linux or the other os.
- Functionality:
  - Add emails to contacts.
  - Sync contacts.
- Not optimized for WAN – more than 1500 contacts and normal ADSL might be a bit slow.

# Thunderbird Extension

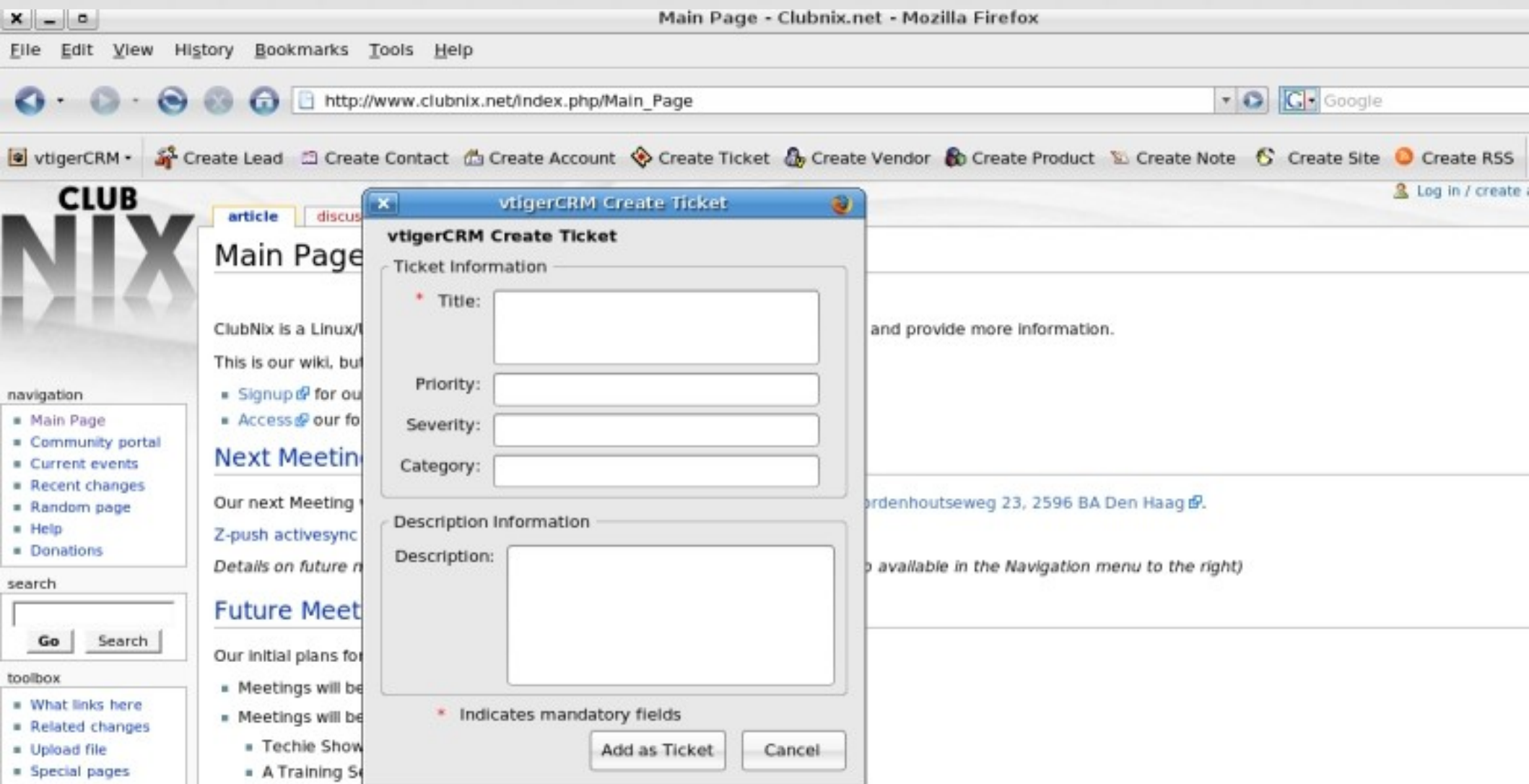


# Firefox Toolbar

- Requires: Firefox 1.0+ and Linux or the other os.
- Functionality (quick way to create):
  - Leads.
  - Accounts.
  - Contacts.
  - Support tickets.
  - Notes
  - etc...



# Firefox Toolbar



Club Nix presentation

29/10/07



Slide: 49

# Joomla integration (beta)

- Requires: Joomla 1.0.13
- Functionality (within your joomla website):
  - Lead creation form.
  - Helpdesk.
  - Product catalog.
  - Shopping cart (create sales orders in vTiger).

# Timecard module

- Functionality:
  - Add timecards to support tickets.
  - Add material/products used to timecards.
  - Convert timecards to invoices.

# Where to get help?

- vtiger.com:
  - forums
  - wiki
  - mailing lists
  - documentation
  - blogs
  - bounty system
  - community meetings
- flash tutorials at woznet.com
- commercial companies.

# How can you help?

- Translate.
- Answer forum posts.
- Write documentation.
- Bug-test beta versions.
- Write patches.
- Start your own project in the forge.
- Spread the word!

# Release..

- When tickets in Trac have been resolved.. (Schedules are to be broken).
- Planned schedule:
  - 5.0.4 by mid-October.
  - 5.1.0 by end of December 2007.
  - 6.0 in 2008

# Roadmap 5.1.0

- iCal export.
- Microsoft Entourage plugin.
- Scheduled (email) report mechanism.
- Support ticket creation in webmail.
- One-click backup.
- LDAP support for contacts and accounts.
- Google maps support.
- Calendar print function.
- .....etc.