



Outlook Plugin for VTECRM

USER MANUAL

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Chapter 1: Installation e Login

1 Installation requirements

The Outlook plugin for VTE CRM is available for following versions of Outlook and Windows:

	OUTLOOK 2007		OUTLOOK 2010		OUTLOOK 2013		OUTLOOK 365
	x86	x64	x86	x64	x86	x64	
WINDOWS 7 x86	AVAILABLE	/	AVAILABLE	/	AVAILABLE	/	NOT AVAILABLE
WINDOWS 7 x64	AVAILABLE	AVAILABLE	AVAILABLE	AVAILABLE	AVAILABLE	AVAILABLE	NOT AVAILABLE
WINDOWS 8 x86	AVAILABLE	/	AVAILABLE	/	AVAILABLE	/	NOT AVAILABLE
WINDOWS 8 x64	AVAILABLE	AVAILABLE	AVAILABLE	AVAILABLE	AVAILABLE	AVAILABLE	NOT AVAILABLE



2 Installation

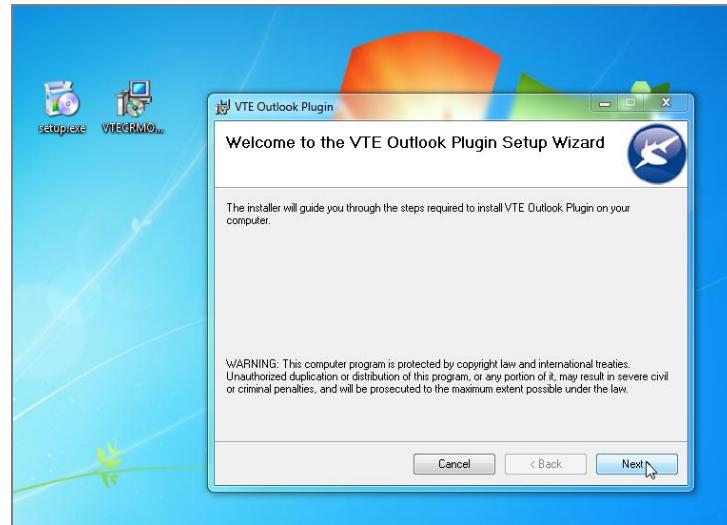
First you have to download the installation files from site www.vtecrm.com.

Notice: You have to choose the installation file that is compatible with your Outlook.

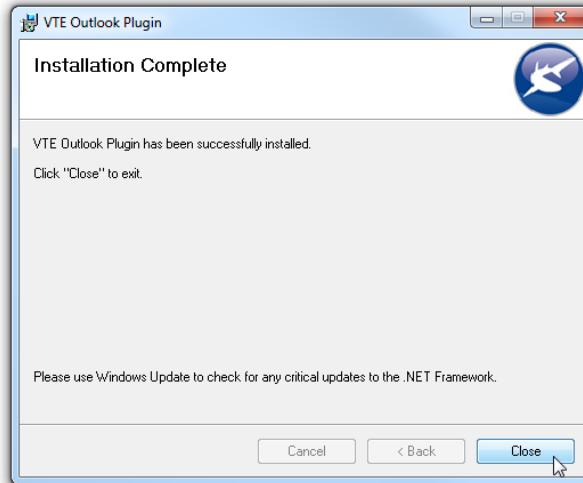
Example: If you have installed Outlook x32 and Windows 7 x64, you have to choose the installation files for x32.

Notice: Before start with installation, please close your Outlook.

To start the installation click on *setup.exe* and follow the wizard:

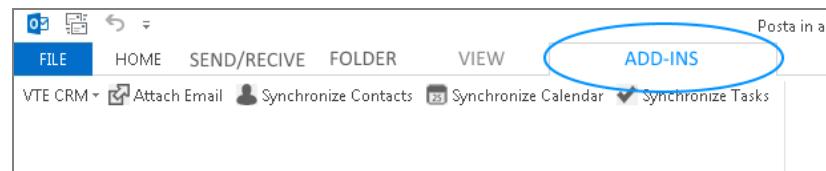


At the end of the wizard click on "Close" button:



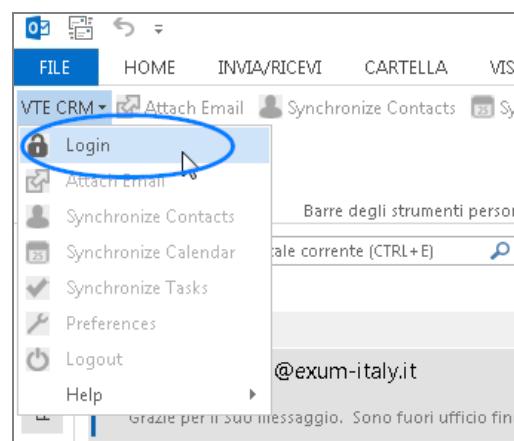


Now you can see the functions of Outlook plugin in your Outlook in the “Add-ins” tab:



3 First Login

From the menu “VTECRM”, click on “Login”:

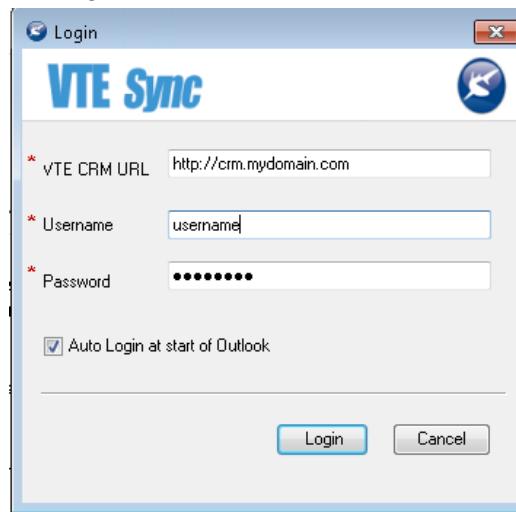


Then insert:

VTE CRM URL: the url of your VTECRM (with http://)

Username: the username of VTECRM

Password: the password of the user in VTECRM



If you check “Auto Login at start of Outlook”, the plugin will do the login automatically at the start of Outlook.

Click on button “Login”.



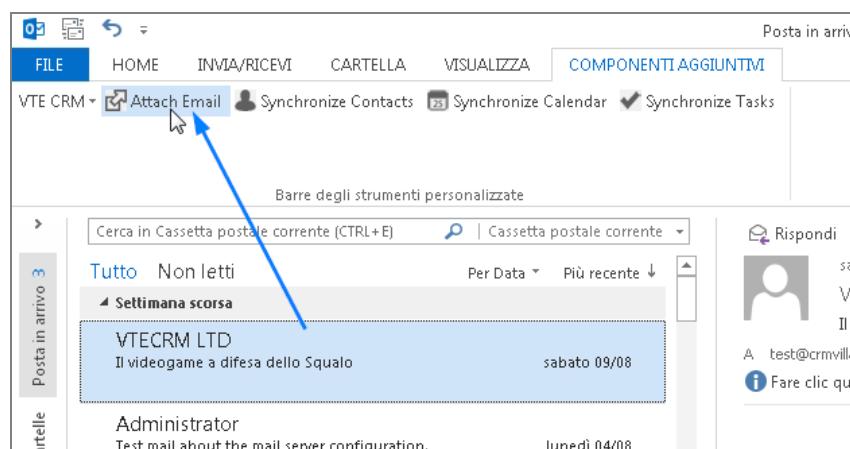
Chapter 2: Work with the Outlook Plugin for VTECRM

1 Attach emails

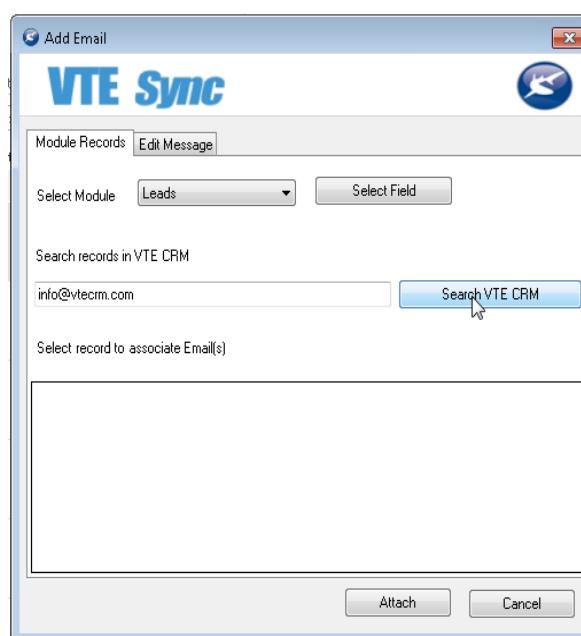
The emails that you have in Outlook, could be attached to Lead, Contact, Account or Vendor in VTE CRM through the button “Attach Email”:



To attach one or more emails, select one or more emails from the list and click on the button “Attach Email”:



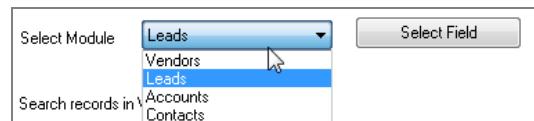
Then you can search the lead, the account, the contact or the vendor in VTECRM:



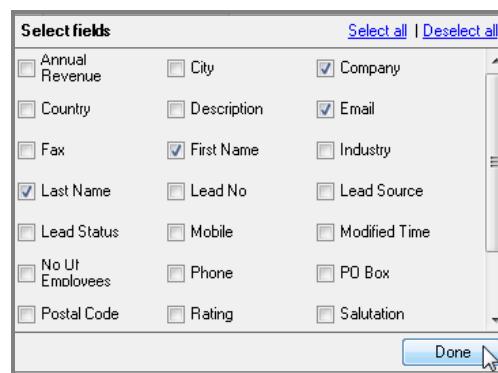


Then:

1- Select the module Lead, Account, Vendor or Contact:



2- Through the button “Select Field” you can choose the fields of VTECRM for the search:

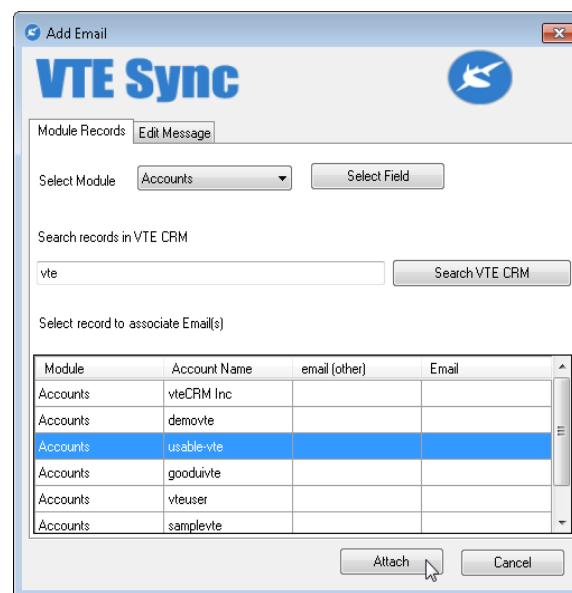


3- Put the value that to search and click on “Search in VTECRM” button:



Notice: The plugin suggest to search the sender email, you can change the value to search.

4- Select the record from the result and click on “Attach” button:



The tab “Edit Email” allow you to modify the email before attach it.

Notice: VTECRM does not scan the attachment of the email to check the presence of virus.

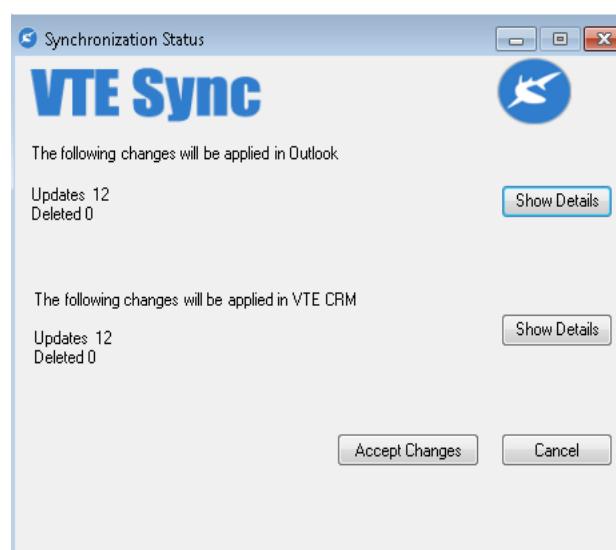


2 Sync of Contacts

The sync of contacts allow you to synchronize the module Contacts of VTECRM with the address book of Outlook. To start the synchronization click on “Synchronize contacts”:



The plugin shows the update that will be done in Outlook and in VTECRM:



Click on “Show Details” if you want to see the details of the records that will be updated.

Status	First Name	Last Name	Email
create	Patricia	Johnson	patricia_johnson@...
create	Linda	Williams	linda_williams@co...
create	Barbara	Jones	barbara_jones@co...
create	Elizabeth 2	Brown	elizabeth_brown@...
create	Jennifer	Davis	jennifer_davis@co...

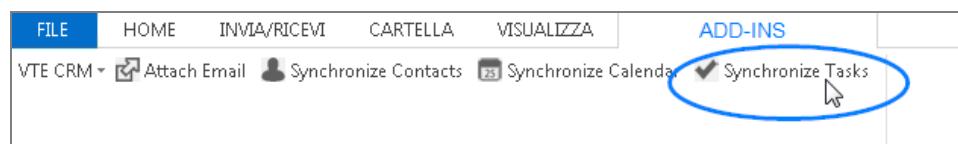
Click on “Accept Changes” to make the update.

Notice: the plugin synchronizes only the contacts assigned to the user in VTECRM.

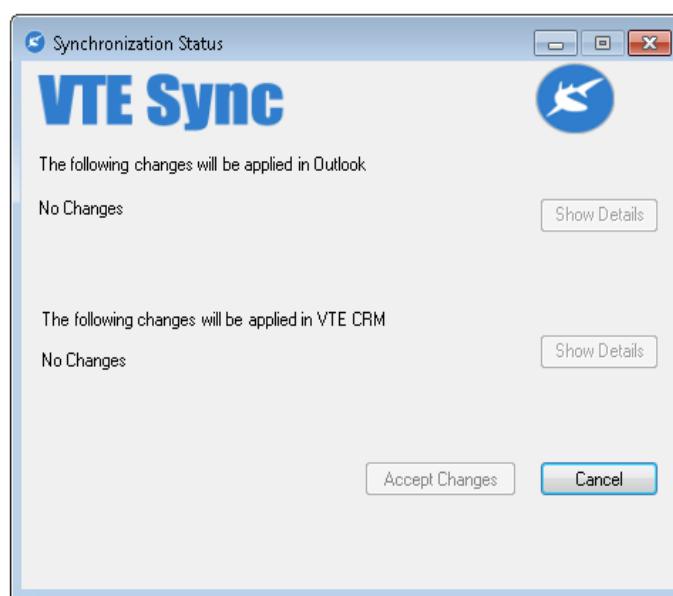


3 Sync of Tasks

The sync of tasks allow you to synchronize the tasks of VTECRM with the XXXX of Outlook. To start the synchronization click on “Synchronize tasks”:



The plugin shows the update that will be done in Outlook and in VTECRM:



Click on “Show Details” if you want to see the details of the records that will be updated.

Click on “Accept Changes” to make the update.

Notice: the plugin synchronizes only the tasks assigned to the user in VTECRM.

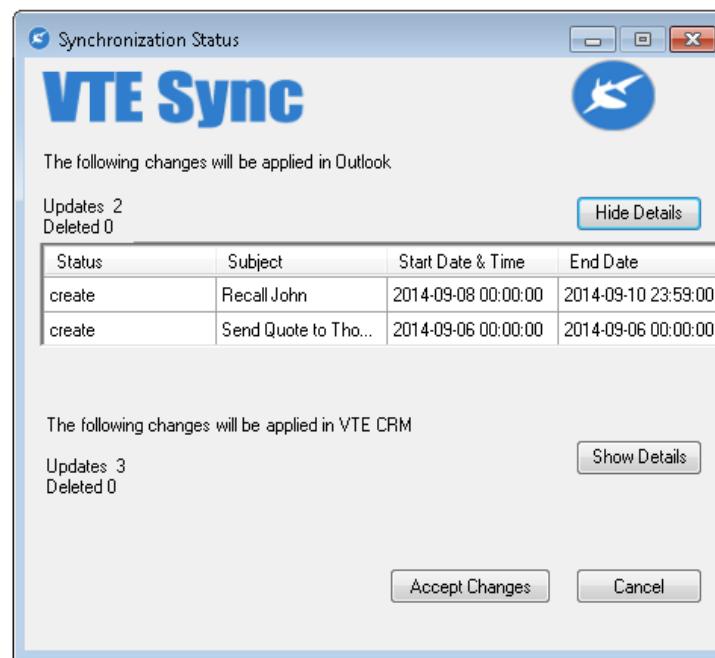


4 Sync Calendar

The sync of tasks allow you to synchronize the events of VTECRM with the calendar of Outlook. To start the synchronization click on “Synchronize Calendar”:



The plugin shows the update that will be done in Outlook and in VTECRM:



Click on “Show Details” if you want to see the details of the records that will be updated.

Click on “Accept Changes” to make the update.

Notice: the plugin synchronizes only the events assigned to the user in VTECRM.

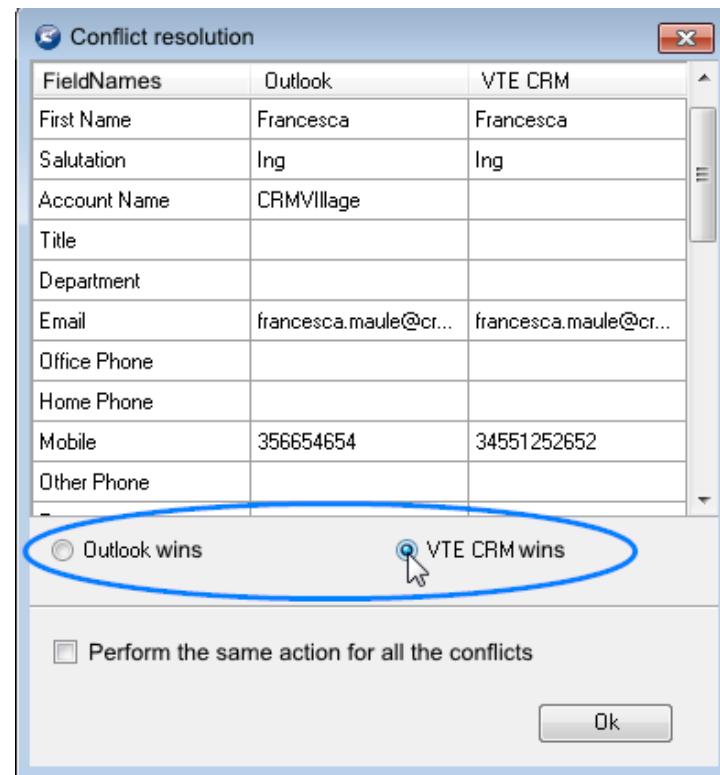


5 Manage the conflicts

During a synchronization some conflicts can occur: for example if a record has been modified both in Outlook and both in VTECRM.

The user can set, on his preference of Outlook plugin, how the plugin have to manage the conflict (Outlook wins, VTECRM wins or Decide on conflict). See the chapter on Preference.

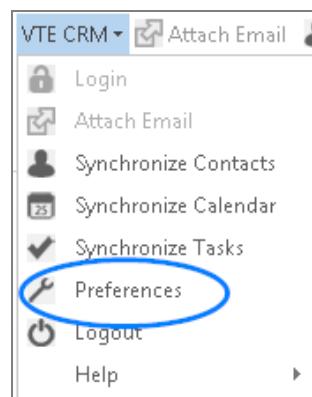
If the user choose to “Decide on conflict”, when a conflict occurs, the plugin will ask to the user to decide if maintain the value modified in Outlook or in VTECRM:





6 Preference

To set the preference click on “Preference” in “VTECRM” menu:



1 General

From “General” you can:

- set if the plugin log in the VTECRM automatically at the start of Outlook

- set if it's possible to modify a mail before attach it in the VTECRM

- set how manage conflict:

Decide on conflict: the user will decide on conflict

Outlook wins: the information on VTECRM will be updated

VTE CRM wins: the information on Outlook will be updated



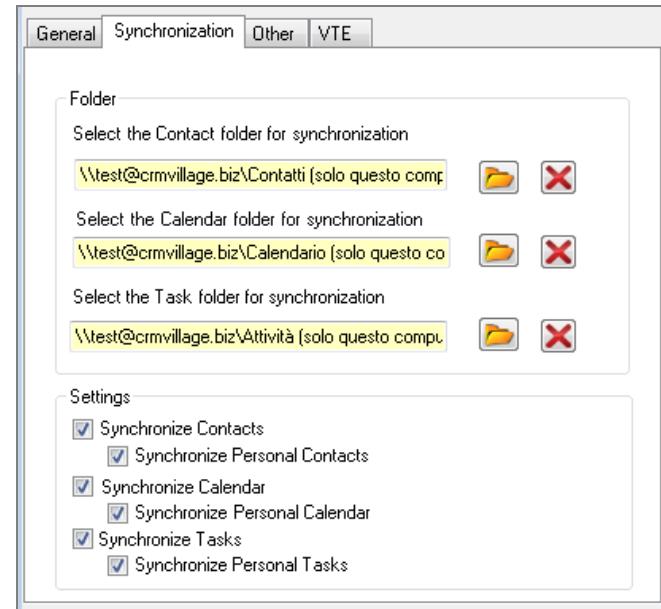
2 Synchronization

You can:

- set the folders

Notice: If you change folders after a synchronization with VTECRM you can lose your data in VTECRM: the Outlook plugin does not find the data in the folder and considers that the data is been deleted.

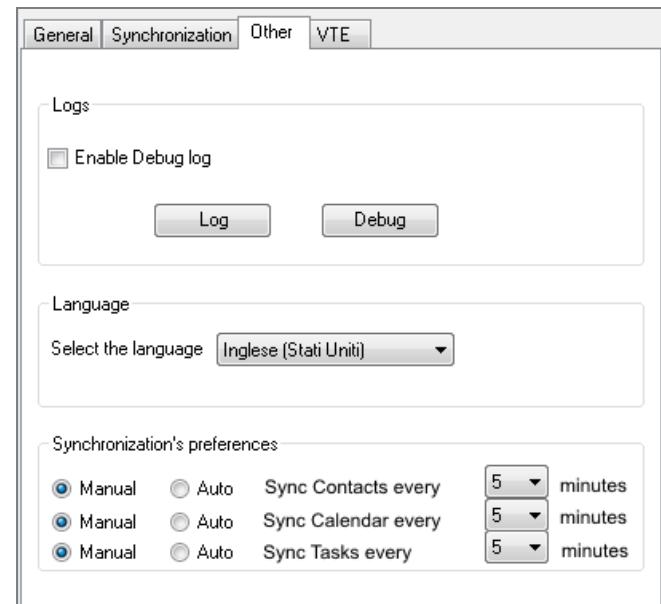
- set if you want to synchronize personal contacts, events and tasks in Outlook



3 Other

You can:

- activate the log and see the log and debug files
- set the language
- set the preference for the synchronization: the synchronization can be manual (only on click) or automatic (with frequency only when Outlook is working)

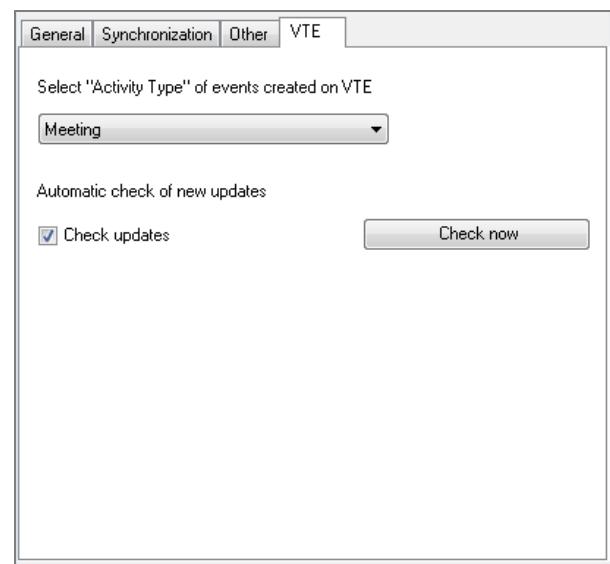




4 VTE

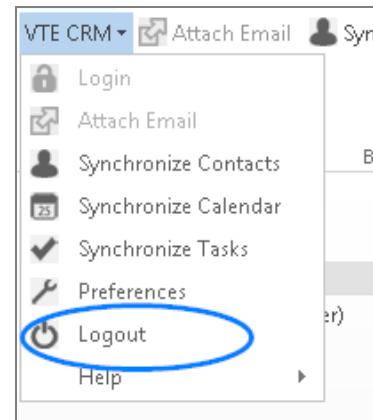
You can:

- choose the “Activity type” for the event send from Outlook to VTECRM
- check new update



Chapter 3: Logout

We recommend to always log out before close Outlook:





Chapter 4: Known Issues

- The functionality of the plugin could be compromised if Windows does not use the character ":" as time separator. Set on Windows the time format as HH:mm and as HH:mm:ss.
- Errors can occur if you close Outlook while the Outlook plugin is open.
- The recurring events of Outlook are not managed by the plugin (so are not synchronized)
- During the automatic synchronization, if the Outlook is working but the connection with VTECRM is not available, the plugin shows an error
- After the change of a folder, the plugin may consider that you have deleted data and the plugin may try to delete data from your VTECRM.

Chapter 5: Customer service

If you have some issue, problem or suggestion please don't hesitate to write us at :

info@vtecrm.com