

vTiger

Customer Relationship Management

by: Thomas Mathiesen
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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

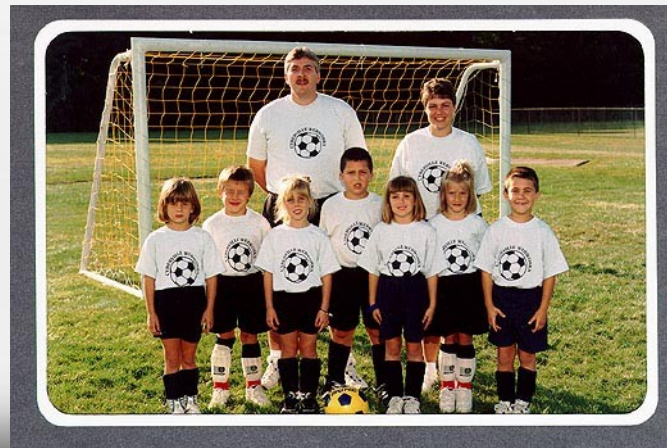
- This is a presentation is a product presentation.
- Shout if you have questions during the presentation.
- Content:
 - What is CRM
 - Who needs a CRM
 - FLOSS vs. proprietary
 - vTiger CRM – the true open source option

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?



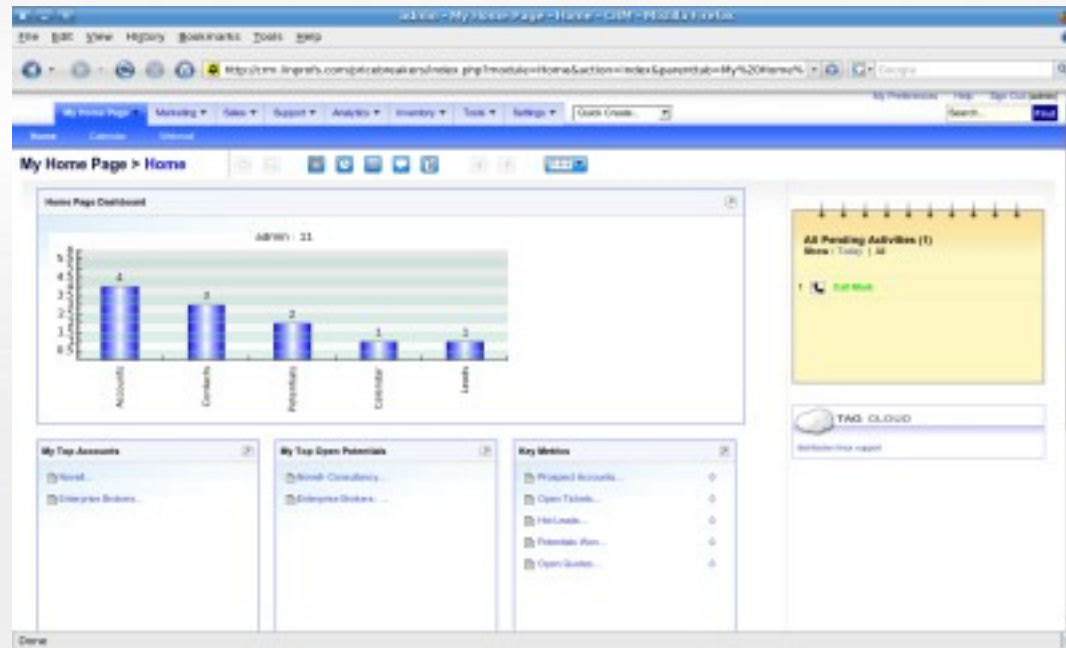
+



+

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 (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..

CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://crm.linprofs.com/pricebreakers/ Google

LinProfs

Your IT solution provider

If you have any issues;

- visit our [helpdesk](#)
- or send an email to support@linprofs.com

To see the manual, [click here](#)

Sign in

User Name

Password

Color Theme

Language

Done GP

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)

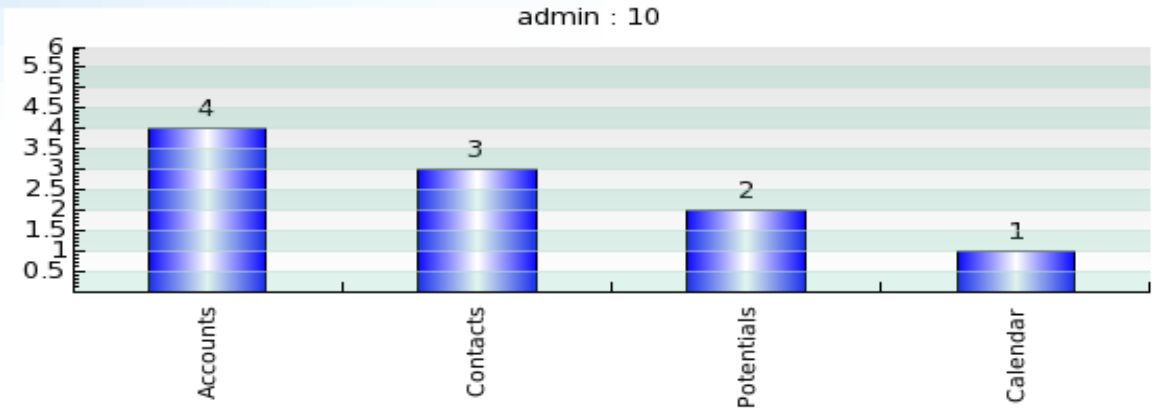
My Home Page Marketing Sales Support Analytics Inventory Tools Settings Quick Create... Search... Find

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

My Top Accounts

- Novell...
- Enterprise Brokers...

My Top Open Potentials

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

Key Metrics

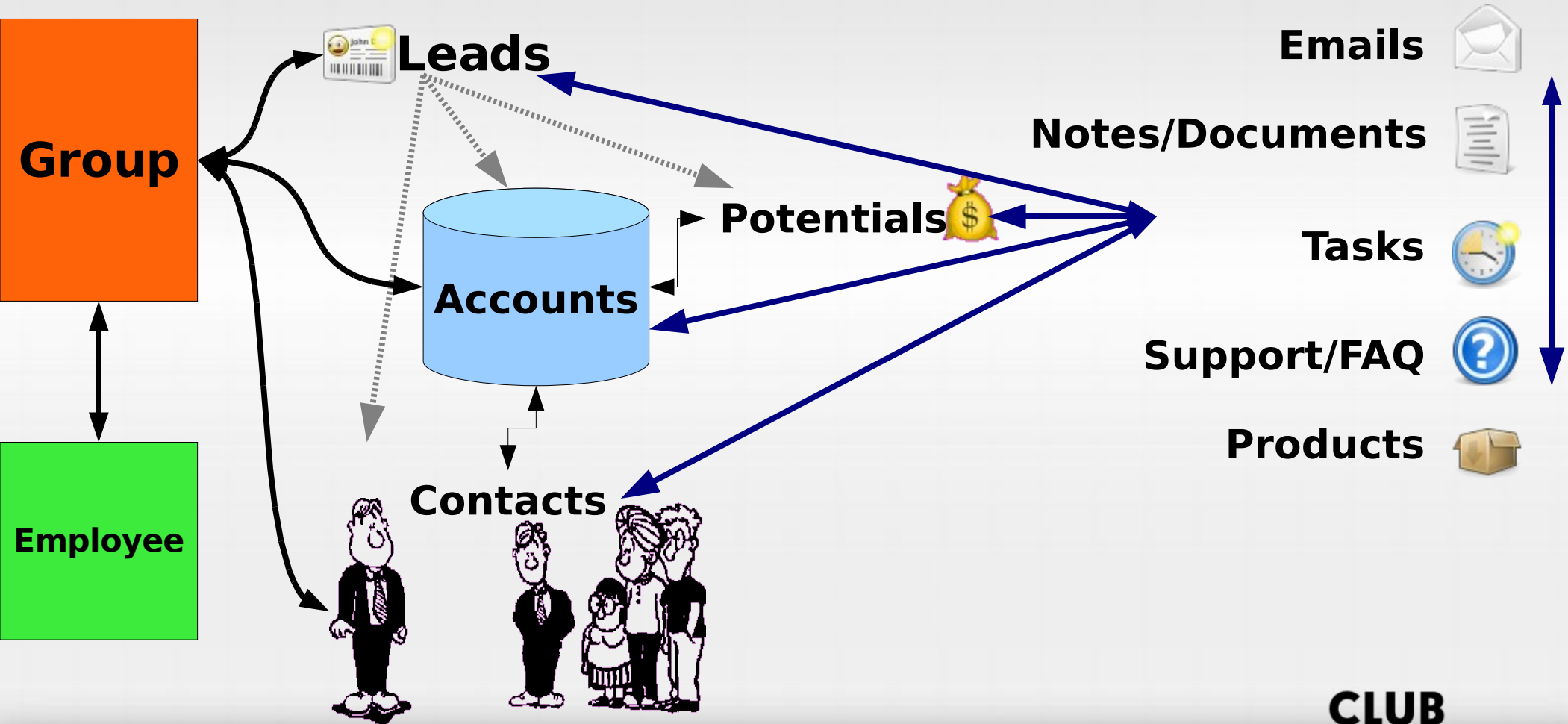
Prospect Accounts...	0
Open Tickets...	0
Hot Leads...	0
Potentials Won...	0
Open Quotes...	0

TAG CLOUD

distribution linux support

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

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 > 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

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

<input type="checkbox"/>	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

Campaigns Accounts Contacts Webmail Leads Calendar Notes

Marketing > Leads

Showing 1 - 1 of 1 Filters: All New | Edit | Delete

<input type="checkbox"/>	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

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 Calendar

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

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

Filters : All New | Edit | Delete

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

Showing 1 - 1 of 1

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 Preferences Help Sign Out (admin)

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

Search... Find

RSS My Sites Notes

Tools > RSS

vtiger RSS Reader

Add RSS Feed

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...

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?"

GENERATE COMPLETE .NET WEB APPS IN MINUTES!

IRON SPEED

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

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 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

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

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

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

The screenshot shows a web browser window titled "admin - My Home Page - Contacts - CRM - Mozilla Firefox". The browser's address bar and menu bar are visible. The application interface includes a navigation menu with options like "My Home Page", "Marketing", "Sales", "Support", "Analytics", "Inventory", "Tools", and "Settings". Below the navigation menu, there are tabs for "Home", "Calendar", and "Webmail". The main content area is titled "My Home Page > Contacts" and displays a list of contacts. A yellow arrow points to the contact entry "[7] van der Ende Mark - Contact Information", which was updated today (02 Oct 2007). The contact information is displayed in a table format with two tabs: "Contact Information" (selected) and "More Information". The "Contact Information" tab shows a table with fields such as First Name, Last Name, Account Name, Lead Source, Title, Department, Email, Assistant, Assistant Phone, Email Opt Out, Reference, Created Time, Office Phone, Mobile, Home Phone, Other Phone, Fax, Birthdate, Reports To, Yahoo Id, Do Not Call, Assigned To User, Notify Owner, and Modified Time. The "Actions" panel on the right includes buttons for "Add Event", "Add To Do", "Tag it", and "Select template to Mail Merge". The "Customer Portal Information" section at the bottom shows fields for Portal User and Support Start Date.

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	--
-------------	----	--------------------	----

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] 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		in	van der Ende Mark	edit del

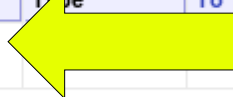
Email [Add Email](#)

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	edit del
	Support		LinProfs	support@linprofs.com	+31703521193	admin	edit del

Views (filters)

Contacts > New Custom view

Details

*View Name: Set as Default List in Metrics

Choose Columns

Last Name	Assigned To	None	None
None	None	None	None
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

Mailing Postal Code	starts with	25	And
None	None		


Views (filters)

The screenshot shows a web browser window with the address bar displaying 'admin - Marketing - Contacts - CRM - Mozilla Firefox'. The browser's menu bar includes 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. The application interface features a navigation menu with options like 'My Home Page', 'Marketing', 'Sales', 'Support', 'Analytics', 'Inventory', 'Tools', and 'Settings'. Below this is a secondary menu with 'Campaigns', 'Accounts', 'Contacts', 'Webmail', 'Leads', 'Calendar', and 'Notes'. The main content area is titled 'Marketing > Contacts' and contains a toolbar with various icons. A table of contacts is displayed, with columns for 'First Name', 'Last Name', 'Title', 'Account Name', 'Email', 'Office Phone', 'Assigned To', and 'Action'. The table shows three records: Paul Brown (Enterprise Brokers), Support (LihProfs), and Mark van der Ende (Novell). The interface also includes buttons for 'Delete', 'Change Owner', and 'Send Mail', and a 'Filters' dropdown menu set to 'All'.

	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		LihProfs	support@linprofs.com	+31703521193	admin	edit del
<input type="checkbox"/>	Mark	van der Ende		Novell	markvanderende@novell.com	0105318996	admin	edit del

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:
<input type="text" value="Contacts - Support S"/>	<input type="text" value="Custom"/>	<input type="text"/>
	 (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.

<input type="text" value="Account Name"/>	<input type="text" value="not equal to"/>	<input type="text"/>	and
<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text"/>	and
<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text"/>	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, there is a red header bar with navigation icons (A+, A-, R) on the right. Below the header is the LinProfs logo and a search bar. A black navigation bar contains links for HOME, ABOUT, PRODUCTS, NEWS, OPEN SOURCE, CONTACT, and SUPPORT CENTER. The main content area includes a user profile section with 'My Settings' and 'Log Out' links. Below this are tabs for 'My Tickets' and 'FAQ'. The 'My Tickets' tab is active, showing a 'Show All Tickets' dropdown, a 'New Ticket' button, and a 'Search' button. There are two tables: 'My Open Tickets' (empty) and 'Closed Tickets' (containing one entry with Ticketid 1397, Title 'test 2', Priority 'Low', Status 'Closed', Category 'Hardware', Modified Time '2007-08-22 16:28:00', and Created Time '2007-08-22 16:28:00').

Webforms

Memori Yipang A- RESET A+

Home Page • Application Search...

Spanish - Espanol
English

Main Menu

- Home Page
- Blog
- Search Listings
- Properties
- Commercial
- 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

+ 🔍 📅 ⌚ 📅 💬

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 Bank transfer

Education

Date of birth 1 January (yyyy)

Current occupation



my-own.php



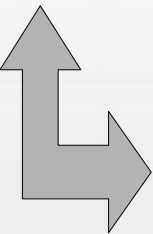
Addons

- 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)

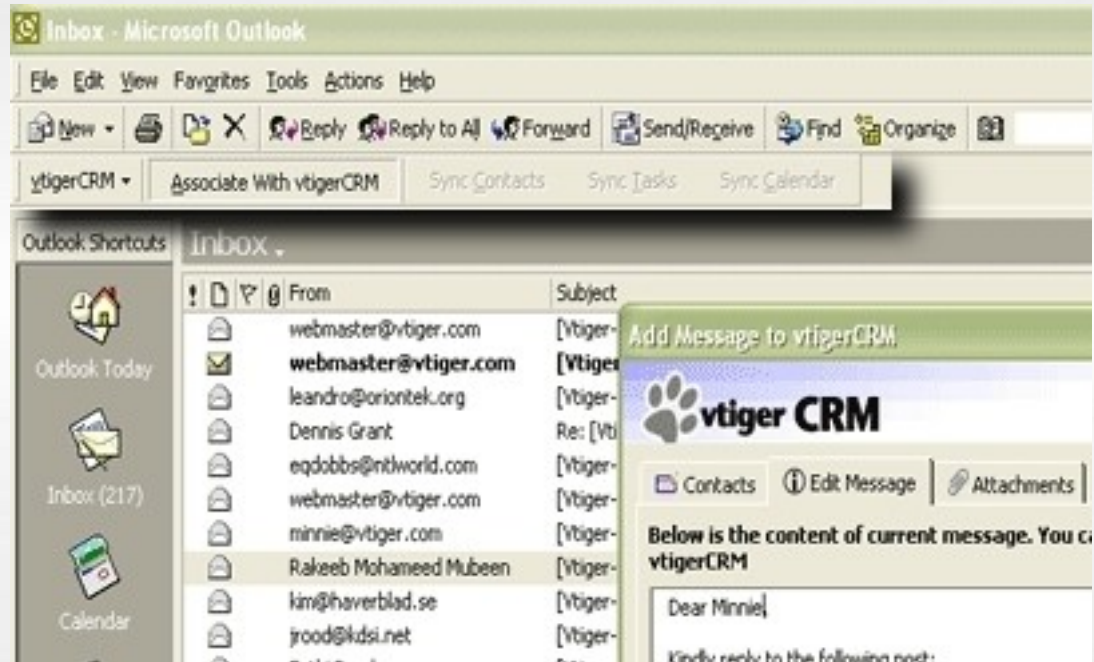
Outlook plugin

- 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



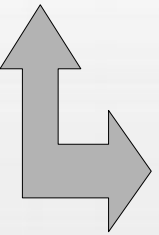
php script



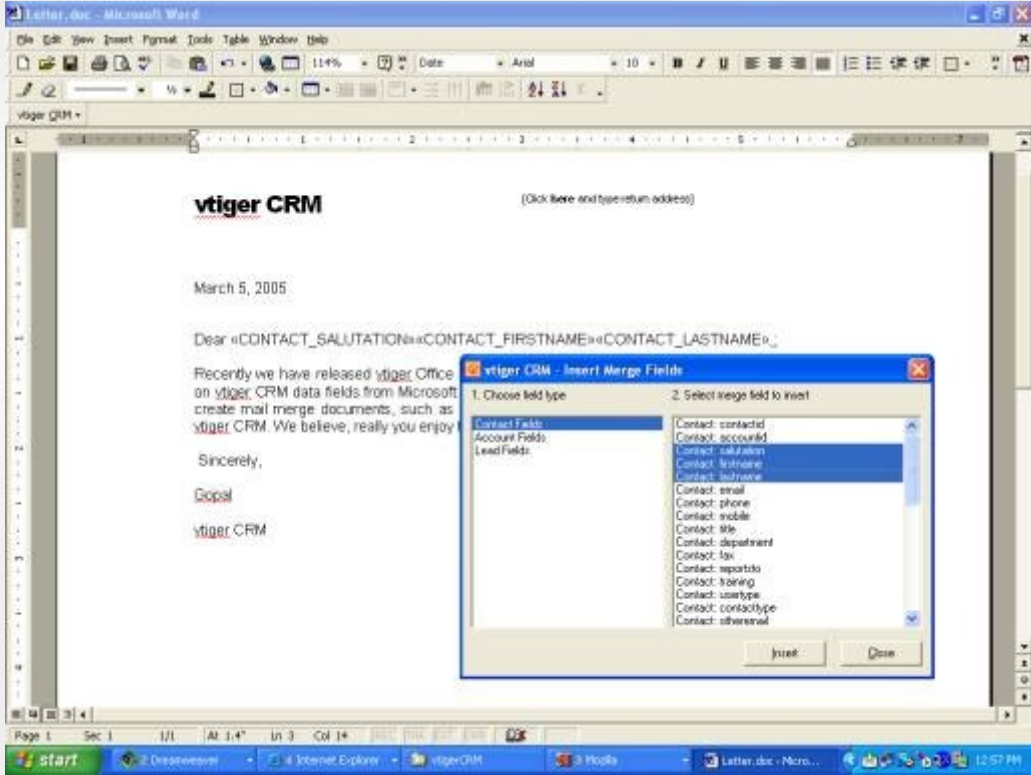
Microsoft Office plugin

- 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



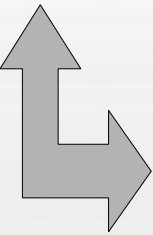
php script



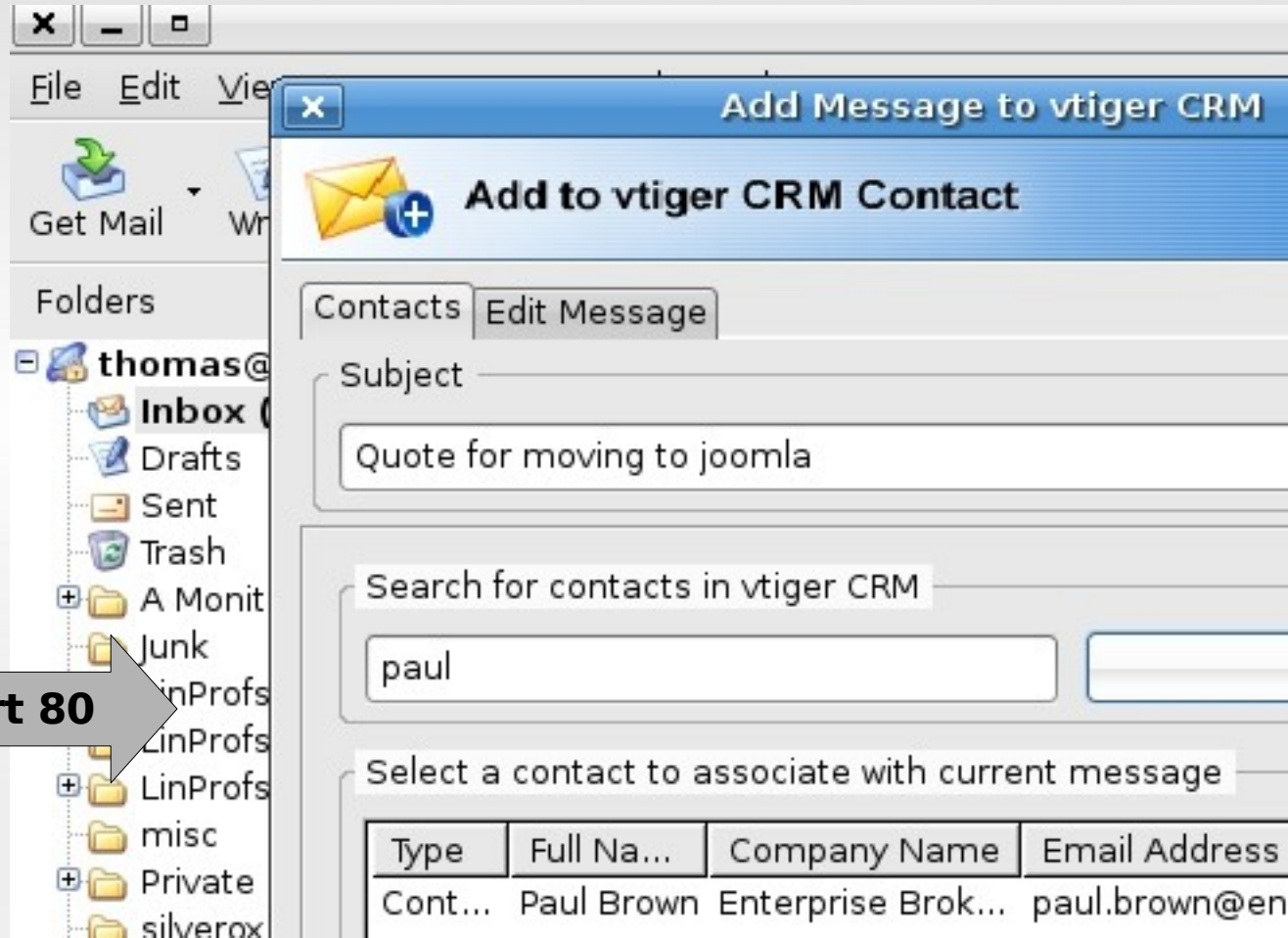
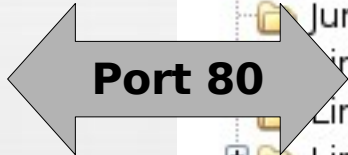
Thunderbird Extension

- 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



php script



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

The image shows a Mozilla Firefox browser window displaying the ClubNix website. The browser's address bar shows the URL http://www.clubnix.net/index.php/Main_Page. The website's main page features a navigation menu on the left with links such as 'Main Page', 'Community portal', and 'Recent changes'. A search box is also visible. Overlaid on the website is a 'vtigerCRM Create Ticket' dialog box. This dialog box contains two sections: 'Ticket Information' and 'Description Information'. The 'Ticket Information' section includes fields for 'Title', 'Priority', 'Severity', and 'Category', with a red asterisk indicating that the 'Title' field is mandatory. The 'Description Information' section includes a 'Description' field. At the bottom of the dialog box, there are two buttons: 'Add as Ticket' and 'Cancel'. The background website content is partially obscured by the dialog box.

Club Nix presentation

29/10/07



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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.