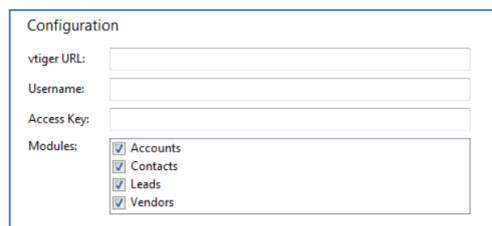# vTiger CRM Addin Guide

This document will guide you through configuration of the vTiger CRM addin. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the addins. See the User Guide for these topics.
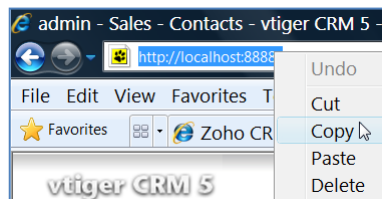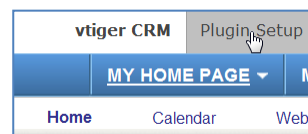
Configuration

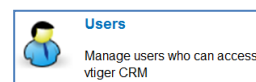On the 'Configuration' group, enter your vTiger CRM account login information.

There are two versions of vTiger CRM supported by this addin and where you find some of this information depends on which version you use.

If you use the more recent vTiger CRM On Demand, you can find the URL by logging in to vTiger CRM and clicking the 'Plugin Setup' link. The URL listed as 'Instance Location' is what you need to enter into the 'vtiger URL' box.

If you haven't got a 'Plugin Setup' link, you probably use the original vTiger CRM so you can find your 'vtiger URL' by opening vTiger CRM and looking in the address bar of your internet browser. Copy part of the address shown in the bar starting from 'http' up to and including everything before 'index.php' e.g. 'http://localhost:8888/' and then paste or type it into the 'vtiger URL' box.

Regardless of which version of vTiger CRM you use, your 'Username' and 'Access Key' can be found by opening your vTiger CRM account and clicking on the 'Settings' button. On the page that loads, click the 'Users' link in the 'Users & Access Management' section.
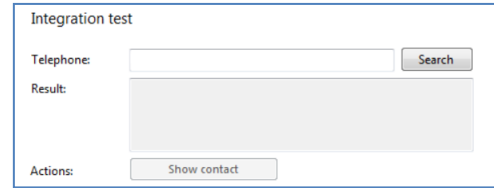

A list of users registered on the account is displayed and you should click on the user you are configuring the addin for to display their specific details. In the group called '1. User Login & Role', the information you need to enter into the 'Username' textbox is listed as 'User Name'. Further down the page in the section called '5. User Advanced Options', the information that needs to go into the 'Access Key' textbox is helpfully listed as 'Access Key'.

In the 'Modules' section, select the vTiger modules you want to be used by ticking the corresponding boxes.
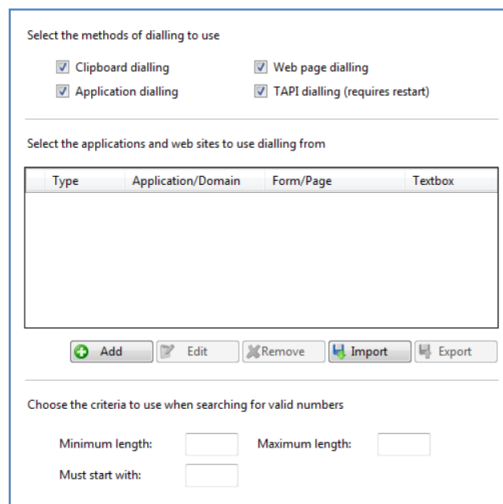
Testing

To test if the configuration worked, enter a phone number from your vTiger CRM account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialling configuration

To dial out from within vTiger CRM, dialling needs to be configured correctly.

Right-click the tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.
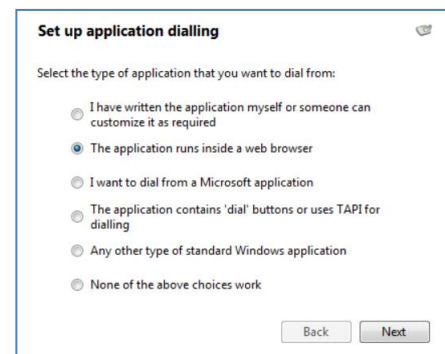
Make sure the 'Web page dialling' box is ticked. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box.

If you would like to be able to dial directly when you are entering new information in vTiger CRM e.g. on the new contact page, we need to carry out some further configuration so click the 'Add' button to start the Dialling wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'The application runs inside a web browser' option.

Click the 'Next' button.

We've already covered converting identified numbers into hyperlinks so select the 'Text boxes' option on the second screen of the wizard and click the 'Next' button.

Open your vTiger CRM account in Internet Explorer and find the text box you want to dial out from, it needs to have a number in it already so add a temporary one if you need to. Copy or make a note of the telephone number currently displayed in the text box and leave the web page open.

Back in the wizard, paste or type the number into the 'Number to search for' box and click the 'Detect' button.

The wizard will search the current web page for the telephone number you entered and, once found, display the details. Click 'Next' and then 'Close'.

You can add as many textboxes as you like, just start the process by clicking the 'Add' button and working your way through again.

Click 'Save' to store your settings and you're ready to go.

Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox. Refresh the page in vTiger CRM to see it in action.