



# CRM - Word Connector (CWC) For the vtiger CRM

User's Manual

Manual Version 1.0

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## CRM Word Connector – User’s Manual

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1<sup>st</sup> Edition

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## 1. CWC Purpose

The CRM Word Connector (CWC) extension connects MS Word™ with the vtiger CRM and provides CRM data for the creation of serial letters. The following features are provided:

- ✓ Fast installation as MS Word™ extension
- ✓ Uses contact data from the CRM's campaign module
- ✓ Secured connection to the CRM with encrypted storage of user's credentials
- ✓ Considering of the CRM's privilege configuration
- ✓ Providing of all CRM content, incl. custom fields
- ✓ Unrestricted document layout possibilities
- ✓ Automatic serial letters generation
- ✓ Automatic storage of documents at the CRM system
- ✓ Full browser independence
- ✓ Compatible to all vtiger versions 5.2.1 or better

The CWC extension adds to the already existing serial letter function of the CRM a more flexible solution.

## 2. Requirements and Installation

The CWC extension is a Windows™ program and installs on a local computer. The computer must meet the following requirements:

- Operating System:** Microsoft™ Windows XP™ or better  
.NET 4.0 or better
- Application:** Microsoft Word™ 2007 or better

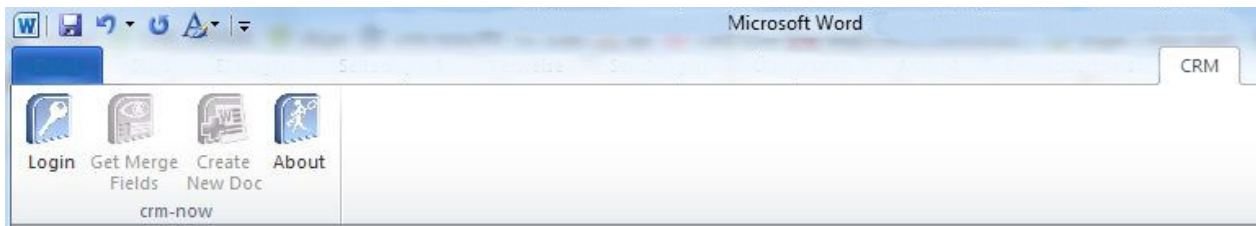
Make sure that your computer meets these requirements before installation.

### Installation:

- Close all running programs at your computer
- Execute the CWC program (\*.exe)
- Select the language for your installation, read and accept the license conditions.
- After installation there is a new program folder available. This folder is needed for the CWC operation and should not get removed. You may run the uninstall program if you do not need the CWC extension anymore..

After the installation start your MS Word™ program. The menu of this application has been extended as illustrated in the next figure.

**In addition to the local computer installation an update of the CRM's server programs is required. You CRM administrator may install these programs by the Module Manger. The instructions can be found in the readme.txt file which comes with the CWC download.**



If you do not see this new menu extension, please check your Com AddIn settings. You may also try to install the Plugin by this settings menu.

### 3. CWC Usage

#### 3.1.1. About Menu and License Purchase

Click the *About* Icon as shown in the previous figure. The following menu appears:



You may use this menu to buy a license. The *Buy License* button will open an Internet connection to the online store. This store will provide you a CWC authorization code. You may avoid the sales tax if your company offices are located within the European Community and if you provide a valid European tax identification number (VAT).

Check the CRM version before you make your purchase. There might be already an improved version available.

### 3.1.2. Login Menu

Click the *Login* Icon as shown on the figure at the previous page. The following login menu appears if you have installed a license key:

If you do not have a license key the following menu appears before the Login menu:

You may continue without a license key within a period of 30 days.

The following table explains the entry fields of the Login menu:

Field name	Description
CRM User's name:	Enter the CRM's login user's name.
Access Key:	Enter the user's access key to the CRM. This is not the CRM's password! You may get this key from the CRM's "My Preferences" menu. This key remains unchanged even if a CRM user modifies the password.

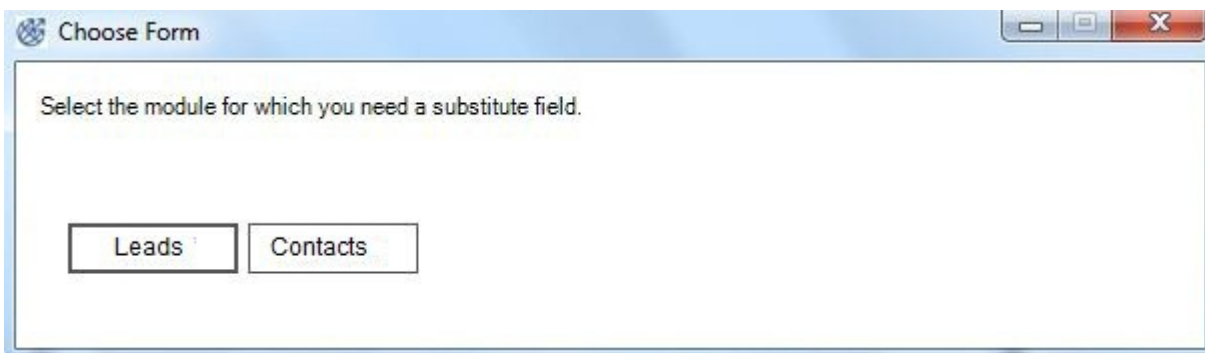
Field name	Description
URL:	Enter the CRM's URL. Make sure you enter the short URL as requested for a CRM login.
Save Data:	If you click this checkbox you may store your CRM access data at your computer. Your user name and your access key are stored encrypted. However, someone else may gain CRM access from your computer when unattended.

Click OK to connect MS Word™ with the CRM. The system will check your access permissions and available data and modules. You may only gain access to CRM data to which you have access permissions during the CRM usage.

### 3.1.3. Get Merge Fields Menu

For the usage of CRM data at a serial letter so called substitute fields are used. These are fields which you include in your document are getting substituted by the CRM data automatically when the serial letters are created.

Click the *Get Merge Fields* Icon to open the following menu:

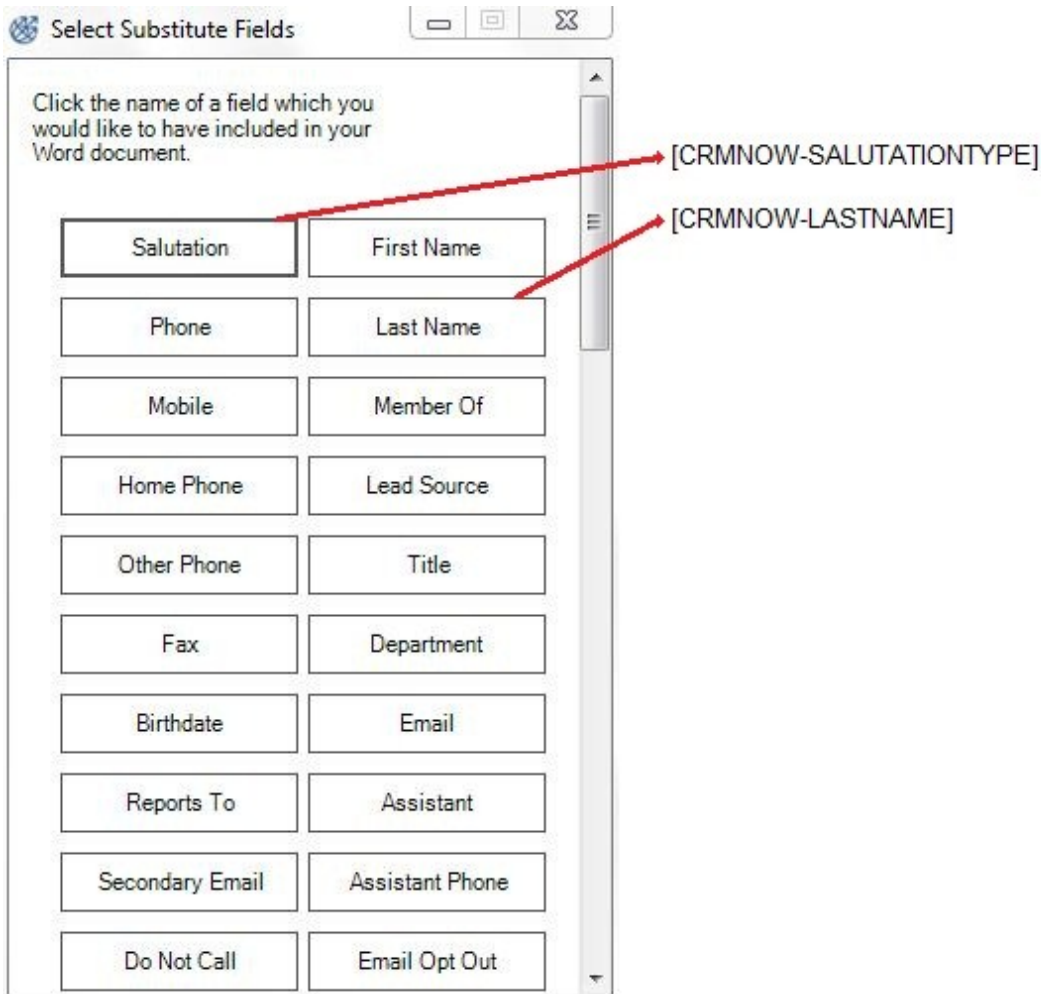


In this menu you decide which type of CRM contact data you want to use in a serial letter. For each type you need a different set of substitute fields.

Select the type and a new window will open as demonstrated at the next figure.

Now you need to find a place at your document for positioning the substitute fields. Move your cursor to this place and click the appropriate substitute field in the menu. This will enter the substitute field into your document.

You may identify such a field, like *[CRMNOW-LASTNAME]* by the brackets and the text *CRMNOW-*. Make sure that you do not use this combination in your regular letter text.



In this figure is demonstrated how a click on the *Salutation* field enters the substitute field [CRMNOW-SALUTATIONTYPE] into the document. You may format, copy or move this field in your document like regular text.

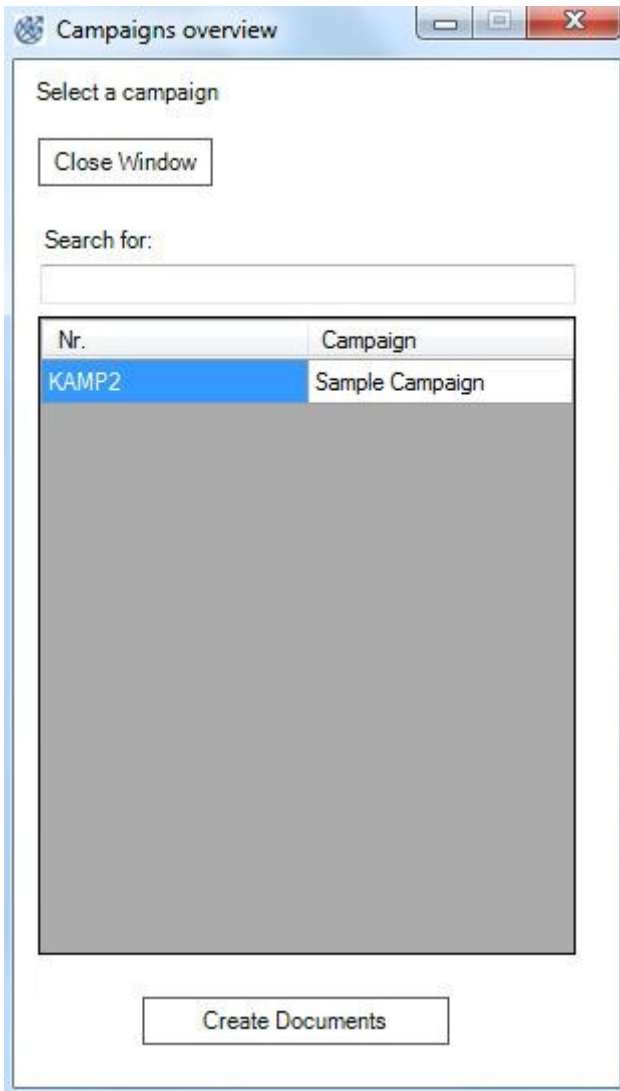
### 3.1.4. Create Serial Letters

When your document is ready and the substitute fields are included click the *Create New Doc* icon.

This will open another menu which allows you to select the source for your substitute fields at your CRM as illustrated in the next figure.

In this sample you see a complete list of campaigns located at your CRM to which the user has access. You may use the search function to look up a specific campaign. You can only use on campaign for one serial letter but you may save your document template to be used for other campaigns.





Click a campaign name and afterwards the *Create Documents* button.

Immediately a new document gets created and all substitute fields are getting merged with the CRM data. For each CRM contact entry in a campaign a new document is created. In theory the size of documents is unlimited but it gets confined by your computer's resources.

During the document creation the program checks the campaign data for duplicates. A duplicate will get identified if a CRM's contact data set is part of the campaign's data multiple times. The final document will not include duplicates.

## 4. Support

You may contact crm-now with any question you may have 24/7 by email, phone or fax.

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WWW: www.crm-now.com

crm-now improves this CWC extension from time to time. Before you contact crm-now make sure you have the actual version installed.

In order to provide you a good support we will need from you the following information:

- The Windows™ Version used (32 or 62 bit)
- The MS Word™ Version used (32 or 62 bit)
- The CWC Version used (see Info menu)
- An accurate description of your issue, in case of an error with screenshots
- Your Email address

All inquiries will be answered. If you do not get an answer please contact crm-now again.