**Definition: crm**

customer Relationship Management (CRM) is a strategy, supported by technology, that campanies use to manage interaction with current & potential customers.

The goal is to improve business, relationships, assist in customer retention, & sales growth.

**Types of crm**

1) **Operational CRM**:- Focuses on automating improving customer-facing processes (sales, marketing, services)

(2) **Analytical CRM**:-uses data analysis to understand customer behaviour & support strategic decision making.

.(3) **Collaborative CRM:-**enhances communication between different departments to ensure cohesive customer interactions

**Key features of vtiger CRM-**

**(1) Sales Automations**

**(2) Marketing Automations**

**(3) customer support.**

**(4) Inventory management**

**(5) Project Management**

**(6) Analytics & Reporting.**

**(7) Mobile Access.**

1. **Sales Automation**  
   Like having a smart assistant: When a new customer shows interest, the system automatically sends their info to the right salesperson.
2. **Marketing Automation**  
   Like autopilot for emails: When someone signs up, they get a welcome email without you lifting a finger.
3. **Customer Support**  
   Like a digital help desk: If someone emails a problem, it turns into a ticket and gets sent to the right support person.
4. **Inventory Management**  
   Like a stock tracker: It tells you how much product you have and warns you before it runs out.
5. **Project Management**  
   Like a team planner: You can assign tasks, set deadlines, and track everyone's progress in one place.
6. **Analytics & Reporting**  
   Like a performance dashboard: You can see what’s working—like which salesperson closed the most deals last month.
7. **Mobile Access**  
   Like having your office in your pocket: Check your schedule or update customer info from your phone—anytime, anywhere.

**Q) Explore Vtiger modules?**

A) Vtiger is a feature-rich platform that includes several modules to help businesses manage their customer relationships, sales pipelines, support requests.

**->** This modules is used for perform tasks from one central platform.

**Types of Modules**

1) Leads ->capture & manage potential customer information.

2) Contacts -> Accounts: store detailed information about customer organization.

3) Opportunities-> Track sales deals through various stages.

4) Activities-> Manage call's, meeting, task events.

5) Product service-> Manage inventory & service offerings.

6) Support-> Handle customer service requests with ticketing system.

**Task 1**

**Q) Understand the Vtiger CRM architecture (open source vscloud)?**

1. Vtiger CRM is a cloud-based, open-source CRM solution that offers a modular architecture. Allowing for customization & integration with various business process

**Vtiger CRM architecture:**

1) **Open source**:-

large community of developers to customization.

2) **Modular design**:-

The CRM is designed with a modular architecture allowing businesses to select and implement only the modules they need such as marketing, customer Support.

3**)cloud-Based**:-

Vtiger CRM is cloud-based solution meaning it can be accessed from any where with an internet connection, making it accessible to teams across different locations.

4)**customization:-**

The CRM offers extensive customization ion options, allowes specific needs.

**5) Integration**:-

Vtiger CRM integrates with various third party applications & services**, functionality & capabilities**

**Functionality**:-means that only specific features a System

**Capabilities**:-Represents the overall potential (or) Capacity of the system to handle various tasks.

**------------------------------------------------------->**

Q) **Explore Vtiger UI ? (**user interface)

A) Vtiger user interface refers to the design & layout of the vitger CRM software. Which is used to CRM.

The **UI** is the visual representation of the System, where users interact with the features & functions of the CRM.

**------------------------------------------------------->**

**Q) What is the Vtiger Dashboard?**  
**A)** The Vtiger Dashboard is a key feature within the Vtiger CRM system. It provides users with a centralized, customizable interface to quickly view important business metrics, recent activities, and key data at a glance..

**------------------------------------------------------->**

**Q) How Lead Module will work?**

A) In Vtiges CRM, the lead Module is used to manage potential sales opportunities (or) leads that may eventually convert into customers.

**Lead Details**

Name, Company, Contact, information email, phone etc…

**Lead source:-**To-track Where the Lead came from (website, social media etc..)

**Status** :- leads have a status, like ( New, Assigned, converted, qualified etc...

**Priority :-** leads prioritized based on can be urgency & other factors.

**------------------------------------------------------->**

**Q) How Contact module work in vtiger ?**

A) It is used for designed to help manage detailed information about individual people, often customers, partners, or potential clients

-> The Module plays very central role in maintaining relationships and managing communication with key individuals.

**Contact information:**

1. personal details.
2. contact information.
3. Address information .
4. company information.
5. Anniversary

**---------------------------------------------------->**

**Q) What is organization module in Vtiger?**

A) In Vtiger CRM organization module is designed to manage and store information related to businesses companies or organizations that your company interacts with.

**Organization information-**

1)organization Name

(2) Account Type

(3) Industry

(4) Phone Numbers

(5) Email Address

(6) Website.

**------------------------------------------------------->**

**Q) How deals module works in vtiger?**

A) The Deals module in vtiger CRM is designed sales opportunities or to manage and track sales deals that your company is Working on.

**------------------------------------------------------->**

**Q) How tickets modules work in vtiger?**

**A)** The tickets module in vtiger CRM is design customer support and service requests.

**------------------------------------------------------->**

**creating custom module (09/04/2025)**

**Q) What is custom module?**

A) A custom module refers to a user define extension or addition to the standard set of modules provided by the crm.

Custom module means that adding leads , contacts & opportunities etc…

**Custom module contain**

**->create new module.**

**->create new layouts.**

**->Language pack.**

**->Test language pack.**

**->Import module.**

**->Update module.**

**->Remove module.**

**------------------------------------------------------->**

**Q) What is a Module in CRM?**

A **module** in a CRM (Customer Relationship Management) system is like a **section** or **category**  that helps you manage a specific type of information.

 The **Leads** module stores potential customer info.

 The **Contacts** module stores people you already do business with.

 The **Deals** module tracks your sales opportunities.

### Q2)What is UI in CRM?

**UI** stands for **User Interface**.

The UI (User Interface) in a CRM (Customer Relationship Management) system means that how users interact with the system—what the screens look like, how information is presented, and how workflows are carried out.

Let’s break down the **Roles**, **Profiles**, and **Permissions** system in a CRM. This is crucial for managing what users can see and do in the CRM.

**Q) Roles – Who Can See What?**

**Roles** define **what data a user can access** based on their position in the company.

For example:

* **Admin**: Has access to everything in the CRM.
* **Sales Manager**: Can view all leads, deals, and accounts, but may not access settings or sensitive company data.
* **Sales Representative**: Can only see and modify their own leads and deals.

**Q) what is Profile?**

Profiles are used to control actions that users can perform on records. Also, profiles can be used to restrict access to specific fields, modules, and features such as import, export, etc

**Q) Different between profile and role**?

| **Profile** | **Role** |
| --- | --- |
| Controls **what actions** a user can take | Controls **what data** a user can see |
| Same profile can be used for different roles | Roles are based on company hierarchy |
| Ex: Edit/Delete permission | Ex: View only your team's |

### ****Q) Understanding Permissions in CRM?****

Permissions control **what users can see or do** in the CRM. They're essential for **data security**, **workflow control**, and **role-based access**.

### Q) What is a Picklist?

A **picklist** is a user interface element that allows users to **select a value from a predefined list**. It’s also called a dropdown, combo box, or select menu depending on the platform.

**🧩 Where Are Picklists Used?**

* **Forms:** To select states, countries, job roles, etc.
* **CRMs (like Salesforce):** To standardize field values (e.g., Lead Status: New, Working, Closed).
* **Databases:** To enforce data integrity by limiting options.
* **Surveys:** For consistent user responses.

**🛠️ Types of Picklists**

1. **Single-select Picklist:** Only one option can be selected.
2. **Multi-select Picklist:** Users can choose multiple values.
3. **Dependent Picklist:** Options change based on another field (e.g., State options based on selected Country).

**Q) what is Workflow?**

A **workflow** is a series of steps or tasks that are carried out in a specific order to complete a process.

### 🔄 ****Simple Vtiger Workflow Example:****

**Goal:** Automatically send a "Welcome Email" when a new **Contact** is created.

### 📋 ****Workflow Steps in Vtiger:****

1. **Module:** Contacts
2. **Trigger:** Record is created
3. **Condition:** Email is not empty
4. **Action:** Send email using a template

### 🔧 How to Set It Up (in the UI):

1. Go to **CRM Settings > Automation > Workflows**
2. Click **"New Workflow"**
3. Choose **Module:** Contacts
4. **Trigger:** On record creation
5. **Condition (optional):**  
   Email is not empty
6. **Action:**  
   Select **Send Email**  
   Choose or create a **Welcome Email Template**

### ✅ What Happens:

Now, whenever you add a new contact, Vtiger will **automatically send them a welcome email** — without you doing anything manually

**Event Handler:**

An **event handler** is a piece of code that runs when a specific event happens.

Q) In java script?

* The **event** is the user submitting the form.
* The **event handler** is the JavaScript code that responds to that event.
* The **workflow** includes what happens before and after the submission (user fills form → clicks submit → gets message).

### Q) ****Event Handler in Vtiger CRM (Simple Definition):****

An **event handler** in Vtiger CRM is a custom script that runs automatically when certain actions happen in the system — like when a record is created, updated, or deleted.

📌 Example: If you want to send an email every time a new contact is added, you can use an event handler to do that.

### Q) 🔔 ****What are Custom Triggers in CRM? (Simple Definition)****

A **custom trigger** in a CRM is a set of rules or code that runs **automatically** when a specific action or event happens — like when a record is created, updated, or deleted.

## ****Steps to Create Custom Triggers in Vtiger CRM****

### 🔹 ****Option 1: Using Workflows (No Coding Needed)****

#### ✅ Steps:

1. **Go to:**  
   Settings > Automation > Workflows
2. **Click:**  
   + New Workflow
3. **Choose Module:**  
   (e.g., Leads, Contacts, Deals)
4. **Set the Trigger:**
   * On record creation
   * On record update
   * On every save
   * Schedule (e.g., daily)
5. **Set Conditions (Optional):**  
   e.g., Status is New
6. **Add Actions:**
   * Send Email
   * Update Field
   * Create Task
   * Invoke Webhook or Custom Function
7. **Save the Workflow**

✅ **Done!** Your custom trigger will now run automatically when the condition is met

**Administration setting guide lines in Vtiger CRM (*10/04/2025)***

**Q) what is User management?**

**User Management in CRM** refers to the process of **creating, organizing, and controlling access** for individuals (users) who interact with the CRM system.

**Authentication Methods**

***.user***

Users are employees in your organization who can log into their Vtiger CRM accounts, access information, and perform tasks according to permissions that have been defined to them.

Users can be requested to change their passwords periodically.

.**Roles**

Roles in CRM define a user's position in the company and control what data they can see or access based on that position.

.**Profiles**

Profiles are used to control actions that users can perform on records. Also, profiles can be used to restrict access to specific fields, modules, and features such as import, export, etc.

**.Sharing Rules**

Sharing Rules is used to configure data sharing rules across users in the role hierarchy.

**.Groups**

The Group is the combination of multiple users, roles, and groups to manage a common set of records.

**.Login History**

Administrators can track Users Login History - Signed In, Signed Off or Continue.

**------------------------------------------------------->**

**Q) Module management?**

Module management in CRM refers to organizing, customizing, and controlling different sections (modules) of the CRM.

* **Modules**

Module Manager helps you to enable, disable and configure the settings for existing modules, and import new modules.

* **Module Layout and Fields**

Layout Editor allows you to add new custom fields, re-arrange fields, edit field properties and move fields inside and across blocks.

* **Module Numbering**

Module Numbering in Vtiger CRM automatically assigns unique numbers to records in each module. It helps you customize the numbering format and automate record identification.

* **Webforms**

Create and integrate web forms in your website to capture website visitors information and create a CRM record.

* **Scheduler**

The Scheduler in Vtiger CRM runs in the background at regular intervals to automatically perform various tasks.

**. Workflows**

Workflows in Vtiger CRM help automate tasks like sending emails, updating fields, or creating activities, making your business processes faster and more efficient.

**------------------------------------------------------->**

**Q) What is Configuration?**

**Configuration in CRM** is the process of setting up and customizing the CRM system to fit your business needs, like adjusting settings, user roles, and automation rules.

* **Company Details**

Company Details enables you to personalize your Vtiger CRM by uploading your company logo and details. The information is used while generating Invoices, Quotes, Sales Orders, and Purchase Orders.

* **Customer Portal**

The self-service channel offers your customers the ability to generate tickets and refer to faqs. You can also share Documents, Products, Projects, Invoices, Quotes, etc..

* **Currencies**

This feature enables you to configure national and international currencies to help you in dealing business operations with your customers around the globe.

* **Outgoing Server**

Configure the Outgoing server to manage to send out emails from within your Vtiger CRM account.

* **Configuration Editor**

Configuration Editor helps you to set up Help-desk details, maximum upload size, default module to be viewed as you sign in, etc.

* **Picklist Field Value**

The picklist is a drop-down field with a list of options available, within which, only one option can be selected.

* **Picklist Dependency Setup**

Picklist Dependency setup helps you to select values in target picklist field more accurately depending upon values in source picklist fields.

* **Main Menu**

Main Menus helps you to place most frequently accessed modules on Module Navigator of a particular App. You can also rearrange them according to your requirements.

**------------------------------------------------------->**

**Q) Marketing and Sales?**

**Marketing and Sales in CRM** refer to how a CRM system helps manage and streamline the processes related to marketing and sales efforts within a business.

* **Lead Conversion Data Mapping**

Vtiger CRM lets you map custom fields created in Leads module to Contacts, Organizations, and Opportunities modules so that the custom data from Leads module can be easily moved to other modules upon Lead Conversion.

* **Opportunity to Project Mapping**

Vtiger CRM helps you to map Standard fields and Custom fields of Opportunity to Project. The field values will be transmitted to the selected target fields.

**------------------------------------------------------->**

Q) [**Inventory Management**](https://code.vtiger.com/vtiger/vtigercrm-manual/wikis/Inventory-management)**?**

**Inventory Management in CRM** refers to the process of tracking, managing, and controlling the goods, products, or services a company sells, directly within the CRM system. It helps businesses maintain accurate records of stock levels, manage orders, and streamline the sales process.

* **Tax Management**

Vtiger CRM gives you the flexibility to manage local and international tax rates through Tax Calculations.

* **Terms and Conditions**

Manage your product services order by including “terms and condition” statement on Quote, Sales Order, Purchase Order, Invoices and exported PDFs associated with these orders.

**------------------------------------------------------->**

**My Preference**

* **My Preference**

My Preferences will help you to configure your personal information.

* [Calendar Settings](https://code.vtiger.com/vtiger/vtigercrm-manual/wikis/Calendar-Settings)?

The **use** of **Calendar Settings** in CRM is to personalize how your calendar appears and functions, making it easier for you to manage tasks, meetings, appointments, and deadlines efficiently. It helps you:

Configure your Calendar like the way you wanted it to be.

* **My Tags**

Tags give you a quick link to CRM records.

**------------------------------------------------------->**

**Q) Integration?**

**PBX Manager** is used to manage internal and external communication within a company.

**PBX Manager** in CRM is a feature that connects your phone system to the CRM. It helps you manage phone calls directly from the CRM, automatically logs calls, and provides easy access to customer information during calls.

A majority of the PBX systems deployed currently are IPBX systems.

**IPBX (Internet Protocol Private Branch Exchange)**

Q) [**Extensions**](https://code.vtiger.com/vtiger/vtigercrm/wikis/Extensions-store-guidelines)**?**

In CRM, **Extensions** refer to additional features or integrations that can be added to the CRM system to extend its functionality. These extensions can enhance the CRM’s capabilities, allowing businesses to tailor the system to their specific needs and integrate with other tools or services.

* **Extension Store**

Extension store is an online marketplace or repository where you can find, download, and install various add-ons, plugins, or extensions for your CRM system. These extensions can add new features, integrations, or customizations to the CRM, enhancing its capabilities.

For example:

* **Email integrations** (like Gmail or Outlook).
* **Social media integrations** (like Facebook, LinkedIn).
* **Marketing tools** (like Mailchimp or HubSpot).

The Extension Store allows users to easily extend the CRM's functionality without needing to build custom features from scratch.

**Google**

In CRM, **Google** typically refers to the integration of Google’s tools and services into the CRM system. Common integrations include:

1. **Google Calendar**: Syncing CRM tasks, meetings, or events with Google Calendar.
2. **Google Contacts**: Syncing CRM contact information with Google Contacts.
3. **Google Drive**: Storing CRM documents, files, or notes on Google Drive for easy sharing and collaboration.
4. **Google Analytics**: Integrating CRM data with Google Analytics for deeper insights into customer behavior and sales performance.

**------------------------------------------------------->**

**Q) Templates ?**

**Templates in CRM** are pre-designed formats that can be used to standardize and automate communication, documents, or other processes in the CRM system. These templates help save time, maintain consistency.

* **Email Template**

Create email templates and easily populate them while sending emails