



Grandstream Networks, Inc.

UCM6xxx IP PBX Series

SugarCRM Integration Guide



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INTRODUCTION

Customer relationship management (CRM) is a set of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers.

The UCM6xxx series support two CRM API, SugarCRM and Salesforce CRM, allowing users to get full information about their contacts, customers and leads, and save call information details to specific table history for further usage. It also supports click to dial feature on SugarCRM.

This guide contains step-by-step configuration needed to set up SugarCRM with the UCM6XXX.



UCM6XXX CONFIGURATION

The UCM6XXX series allows the following feature on SugarCRM:

- Querying
- Updating
- Adding CDR records through SugarCRM
- Click-to-Dial from SugarCRM

Two steps are required to configure UCM6xxx with SugarCRM:

1. **Admin Configuration.**
2. **User Configuration.**

Admin Configuration

This step is required to provide SugarCRM Server Address, Contact Lookups... These settings will apply to all users on this UCM6xxx using SugarCRM platform.

SugarCRM configuration page can be accessed using admin login at “Web GUI→**Value-Added Features**→**CRM**”.

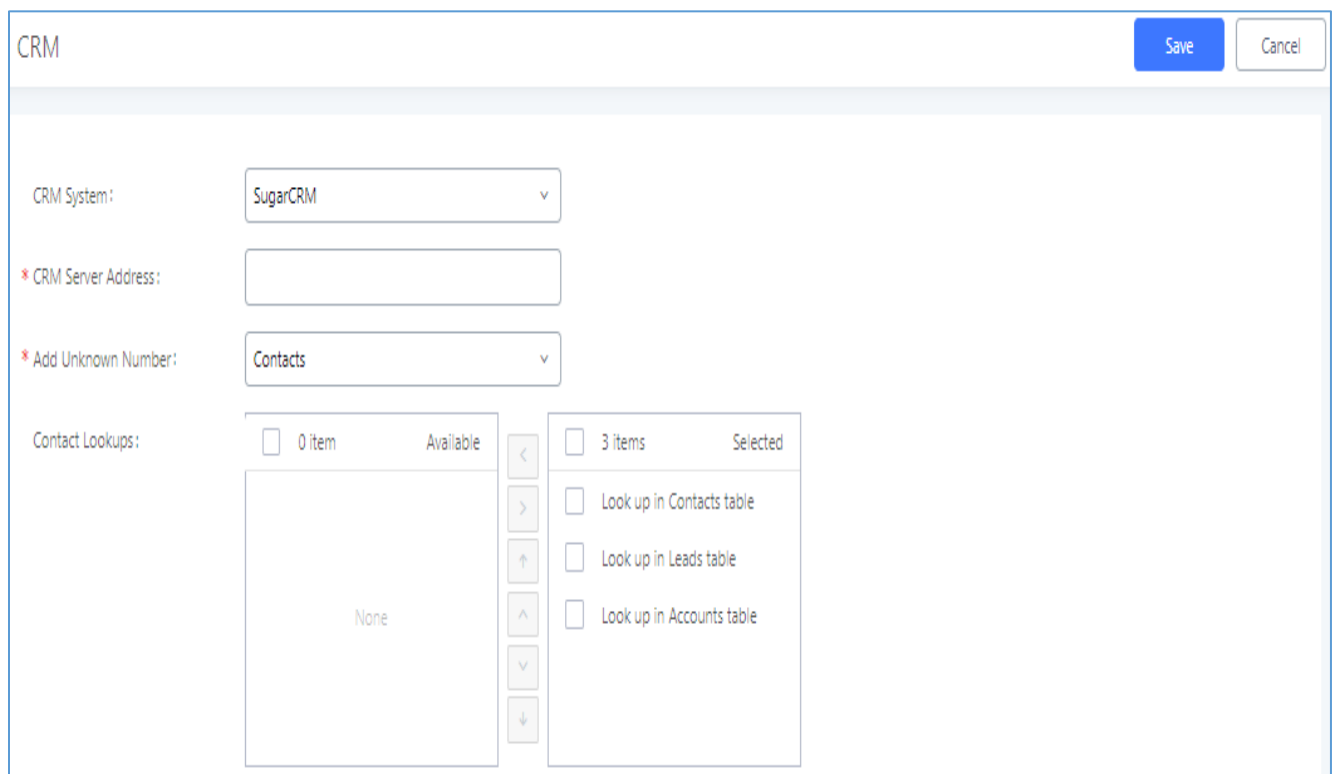



Figure 1: SugarCRM Basic Settings


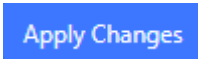
1. Select **SugarCRM** from the CRM System Dropdown to use SugarCRM.



Table 1: SugarCRM Settings

CRM System	Allows users to select a CRM system from the drop-down list, choose SugarCRM to use SugarCRM system.
CRM Server Address	Specifies the IP address of SugarCRM server.
Add Unknown Number	Allows to automatically save received calls from numbers not previously logged in SugarCRM and add contact phone number to specific table (Contacts, Leads...).
Contact Lookups	Selects from the “ Available ” list of lookups and press  to select where the UCM can perform the lookups on the CRM tables, Leads, Accounts, and Contacts.


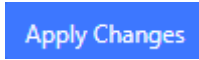
Once users finish configuring above settings using admin access:

2. Click on  and .
3. Logout from admin access.

User Configuration

This configuration is per user, it will allow users to authenticate and sync up with SugarCRM platform.

Note: Admin Configuration needs to be set before enabling CRM for users.

1. Login to the UCM as user and navigate to “User Portal→**Value-added Feature**→**CRM User Settings**”.
2. Click on “**Enable CRM**” and enter the username/password associated with the CRM account then click on  and .

The status will change from “Logged Out” to “Logged In”. User can start then using SugarCRM features.



CRM User Settings

Enable CRM:

* Username:

* Password:

Login Status: Logged In

Figure 2: CRM User Settings

Table 2: CRM user settings

Username	Enter SugarCRM username to login.
Password	Enter SugarCRM Password to login.

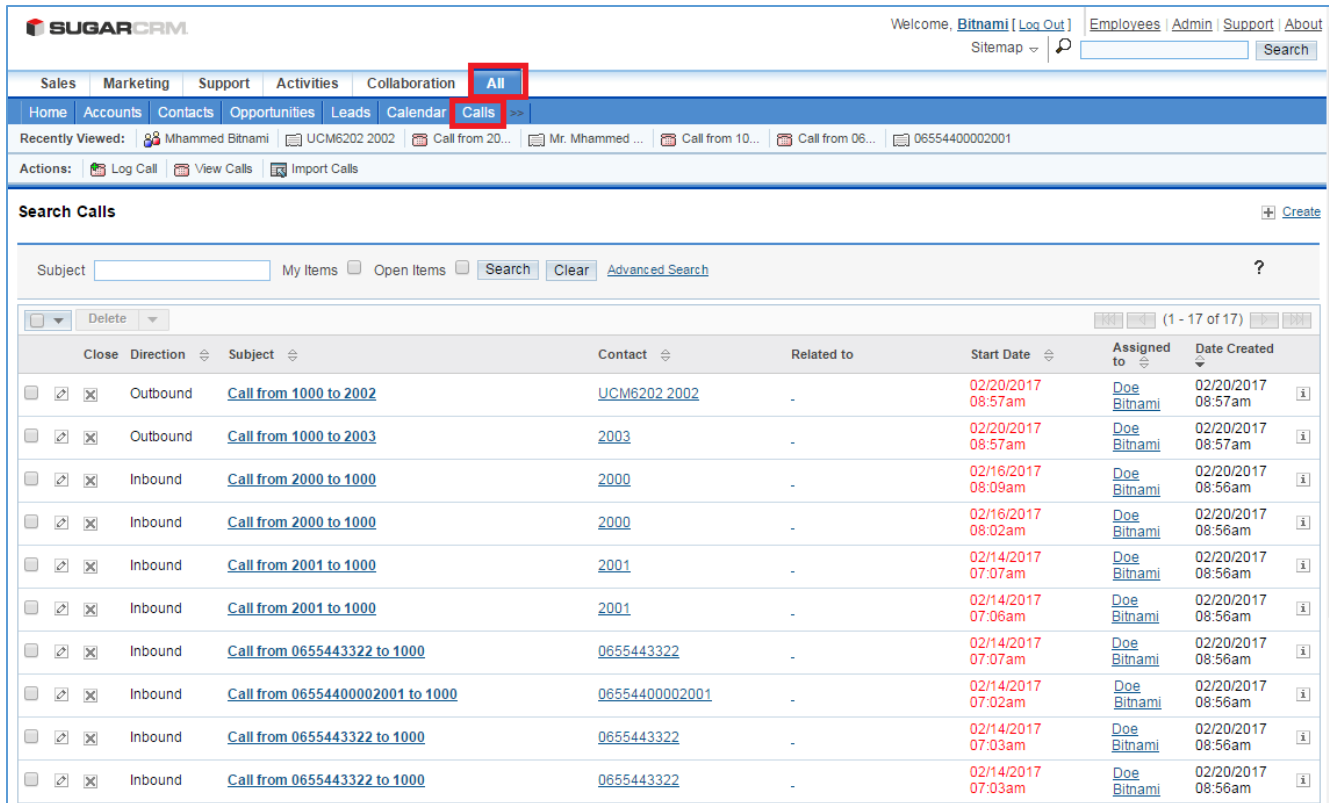
SUGARCRM INTERFACE

We assume that SugarCRM desktop application is installed, or users have access to SugarCRM web account.

Please refer to following steps:

1. Access SugarCRM web page.
2. Navigate to All→Calls, users will find list of all inbound/outbound calls made to/by the user registered extension as shown on figure below.





The screenshot shows the SugarCRM interface with the 'Calls' tab selected. The page title is 'Search Calls'. Below the search bar, there is a table of call records. The table has the following columns: Close, Direction, Subject, Contact, Related to, Start Date, Assigned to, and Date Created. The records are as follows:

Close	Direction	Subject	Contact	Related to	Start Date	Assigned to	Date Created
<input type="checkbox"/>	Outbound	Call from 1000 to 2002	UCM6202_2002	-	02/20/2017 08:57am	Doe Bitnami	02/20/2017 08:57am
<input type="checkbox"/>	Outbound	Call from 1000 to 2003	2003	-	02/20/2017 08:57am	Doe Bitnami	02/20/2017 08:57am
<input type="checkbox"/>	Inbound	Call from 2000 to 1000	2000	-	02/16/2017 08:09am	Doe Bitnami	02/20/2017 08:56am
<input type="checkbox"/>	Inbound	Call from 2000 to 1000	2000	-	02/16/2017 08:02am	Doe Bitnami	02/20/2017 08:56am
<input type="checkbox"/>	Inbound	Call from 2001 to 1000	2001	-	02/14/2017 07:07am	Doe Bitnami	02/20/2017 08:56am
<input type="checkbox"/>	Inbound	Call from 2001 to 1000	2001	-	02/14/2017 07:06am	Doe Bitnami	02/20/2017 08:56am
<input type="checkbox"/>	Inbound	Call from 0655443322 to 1000	0655443322	-	02/14/2017 07:07am	Doe Bitnami	02/20/2017 08:56am
<input type="checkbox"/>	Inbound	Call from 06554400002001 to 1000	06554400002001	-	02/14/2017 07:02am	Doe Bitnami	02/20/2017 08:56am
<input type="checkbox"/>	Inbound	Call from 0655443322 to 1000	0655443322	-	02/14/2017 07:03am	Doe Bitnami	02/20/2017 08:56am
<input type="checkbox"/>	Inbound	Call from 0655443322 to 1000	0655443322	-	02/14/2017 07:03am	Doe Bitnami	02/20/2017 08:56am

Figure 3: Call Log Page

CLICK-TO-DIAL FEATURE

The feature “Click to dial” allows users to initiate calls from the web page of the SugarCRM with a single click by interacting with the Grandstream Affinity CTI application.

The following steps illustrate how to install Click to dial plugin and Grandstream Affinity CTI application which integrate with the UCM6xxx to allow users making calls from SugarCRM web page.

Installing Click-to-dial Plugin

Please refer to following steps illustrating the Click-to dial plugin installation:

1. Download Click to dial plugin from the following link:

<http://www.grandstream.com/sites/default/files/Resources/UCM%20SugarCRM%20plug-in%20package.zip>

2. Click on “Admin” on the right top corner.



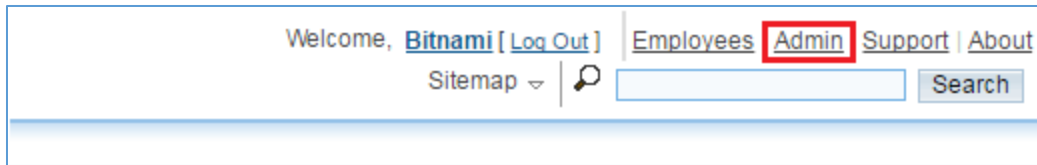


Figure 4: Admin Page Configuration

3. Click on “Module Loader” under “Developer Tools”

Developer Tools			
Create and edit modules and module layouts, manage standard and custom fields and configure tabs.			
Studio	Customize module fields, layouts and relationships	Rename Modules	Change the names of the modules appearing within the application
Module Builder	Build new modules to expand the functionality of Sugar	History Subpanel	Enable/Disable contacts' emails in history
Display Modules and Subpanels	Choose which modules are displayed in the navigation bar and which subpanels are displayed system-wide	Module Loader	Add or remove Sugar modules, themes, language packs and other extensions
Configure Module Menu Filters	Create and edit module menu filters	Dropdown Editor	Add, delete, or change the dropdown lists

Figure 5: Module Loader

4. Upload UCM SugarCRM plug-in package.zip to load the module.

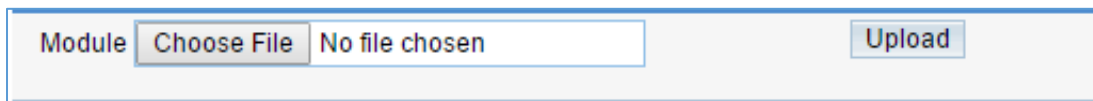


Figure 6: SugarCRM – Upload Plugin

5. Click on “Install” to complete the installation.

Module <input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>						
Name	Install	Delete	Type	Version	Date Published	
UCM SugarCRM plug-in package	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module	1281969124	2010-08-16 14:32:04	

Figure 7: SugarCRM – Install Plugin

6. Create a new account or choose an existing test account under Sales/Marketing/... → Accounts. Configure the “Office Phone” to the corresponding UCM extension number.



Mr. John Doe + Create

Edit (5 of 7)

Overview

Name:	Mr. John Doe	Mobile:	1000
Title:		Office Phone:	1000
Department:		Fax:	1000
Account Name:		Other Address:	
Primary Address:			
Email Address:	-none-		
Description:			

More Information

Reports To:	Sync to Outlook®:	<input type="checkbox"/>
Lead Source:	Do Not Call:	<input type="checkbox"/>
Campaign:		

Call with UCM

Call work with UCM: http://localhost:43210?type=contact&phone_type=phone_work&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_work=1000	Call home with UCM: http://localhost:43210?type=contact&phone_type=phone_home&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_home=
Call mobile with UCM: http://localhost:43210?type=contact&phone_type=phone_mobile&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_mobile=1000	Call other with UCM: http://localhost:43210?type=contact&phone_type=phone_other&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_other=
Call assistant with UCM: http://localhost:43210?type=contact&phone_type=assistant_phone&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&assistant_phone=	Call fax with UCM: http://localhost:43210?type=contact&phone_type=phone_fax&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_fax=1000

Figure 8: SugarCRM - User Page

Installing Grandstream Affinity CTI App

Please refer to following steps illustrating the Grandstream Affinity CTI App installation:

1. Download Grandstream Affinity from the following link (version 1.0.1.5):
http://www.grandstream.com/sites/default/files/Resources/GrandstreamAffinitySetup_R1_0_1_5.zip
2. Follow the default settings to finish setup.



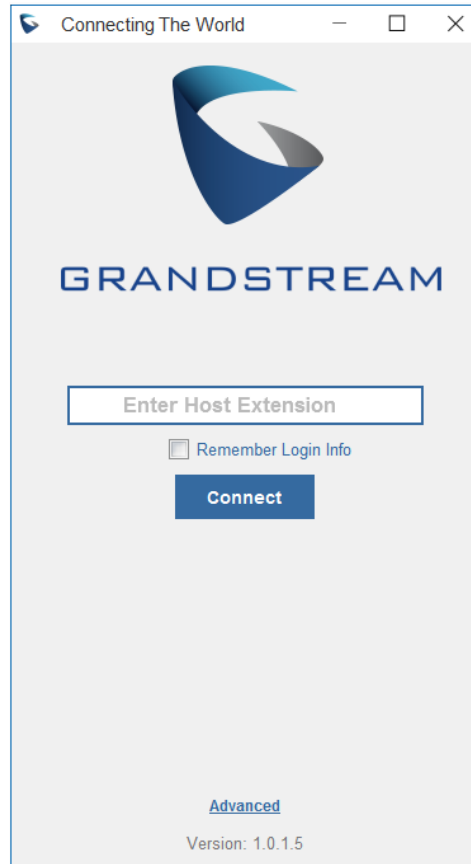


Figure 9: Grandstream CTI APP

3. On the GXP phone registered on the UCM, navigate to **“Network→Affinity Settings”** then click on “Enable” and select the “Preferred Account” then click on “Save and Apply” and reboot the phone.

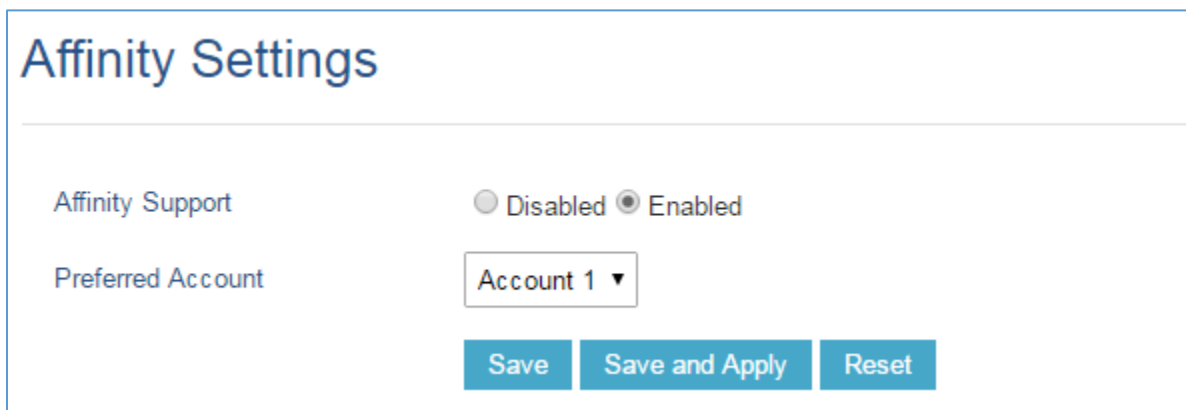


Figure 10: Affinity Settings

4. In GS Affinity, enter the extension number and click “Connect” button.
5. Enter PIN code shown on the phone and click “OK”.



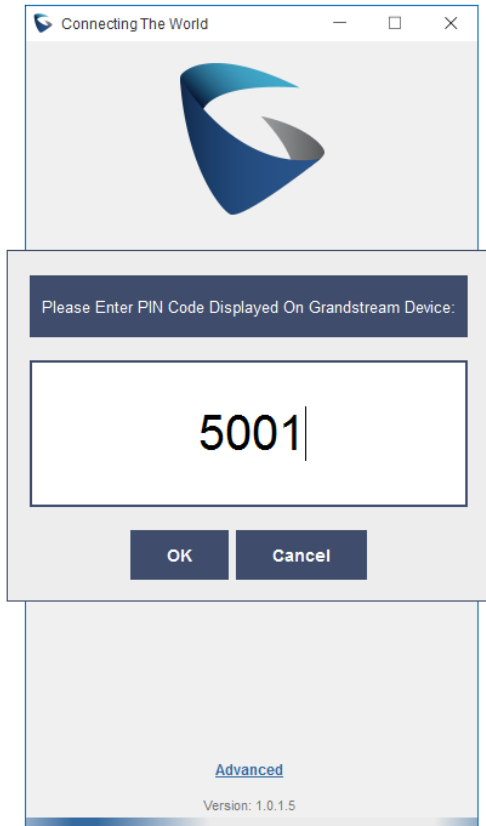


Figure 11: GS Affinity - Authentication

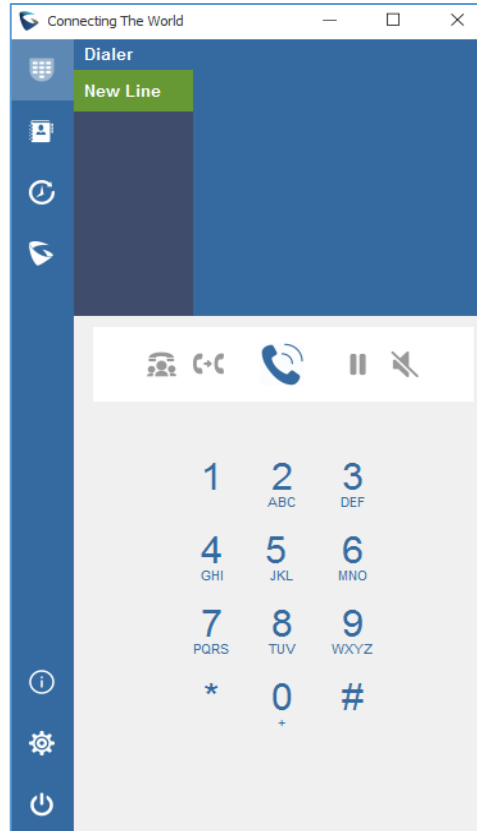


Figure 12: CTI App Home Page

For more details, about Grandstream Affinity CTI app, refer to online user manual available in this link:
http://www.grandstream.com/sites/default/files/Resources/GS_Affinity_Guide.pdf

6. On SugarCRM dashboard, go to detailed information page of specific account.

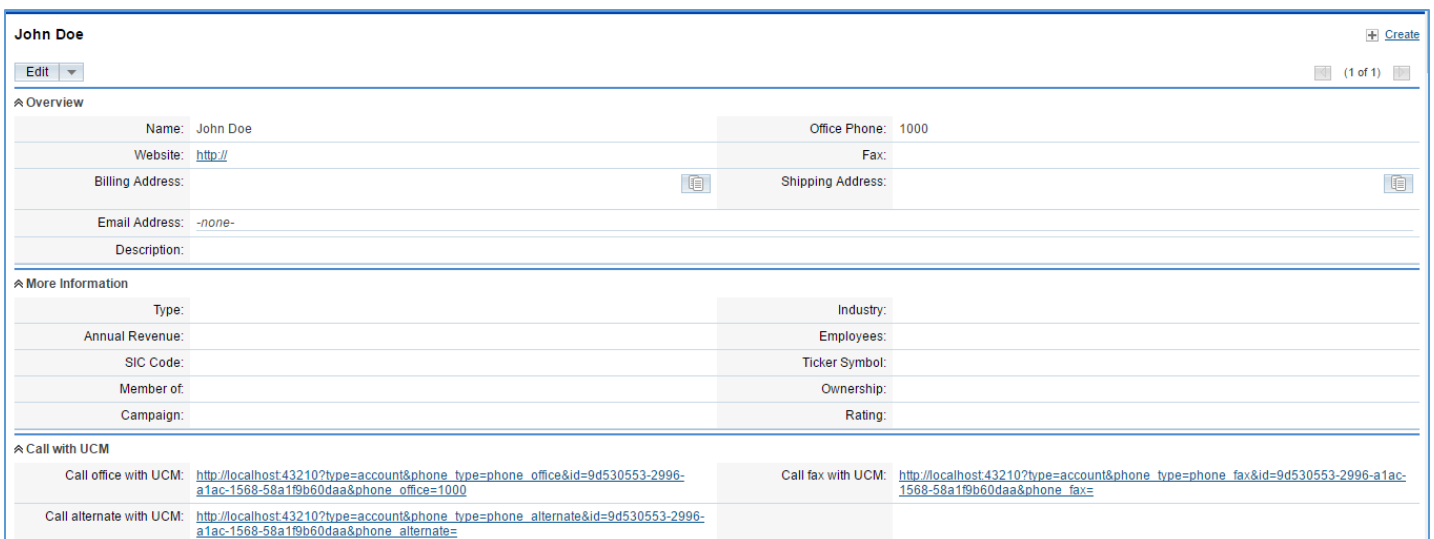
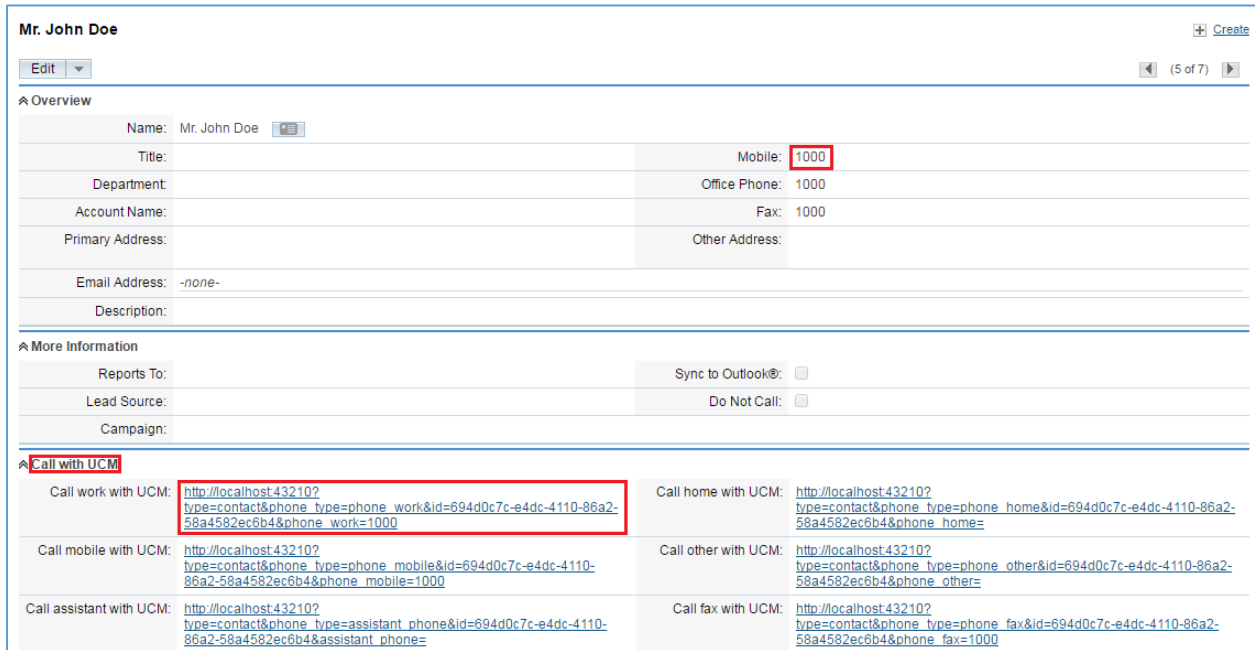


Figure 13: SugarCRM dashboard



- Under **Call with UCM**, click on the URL of **“Click office with UCM”** to make a call to extension 1000.



Mr. John Doe Create

Edit (5 of 7)

Overview

Name:	Mr. John Doe	Mobile:	1000
Title:		Office Phone:	1000
Department:		Fax:	1000
Account Name:		Other Address:	
Primary Address:			
Email Address:	-none-		
Description:			

More Information

Reports To:	Sync to Outlook@:	<input type="checkbox"/>
Lead Source:	Do Not Call:	<input type="checkbox"/>
Campaign:		

Call with UCM

Call work with UCM:	http://localhost:43210?type=contact&phone_type=phone_work&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_work=1000	Call home with UCM:	http://localhost:43210?type=contact&phone_type=phone_home&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_home=
Call mobile with UCM:	http://localhost:43210?type=contact&phone_type=phone_mobile&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_mobile=1000	Call other with UCM:	http://localhost:43210?type=contact&phone_type=phone_other&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_other=
Call assistant with UCM:	http://localhost:43210?type=contact&phone_type=assistant_phone&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&assistant_phone=	Call fax with UCM:	http://localhost:43210?type=contact&phone_type=phone_fax&id=694d0c7c-e4dc-4110-86a2-58a4582ec6b4&phone_fax=1000

Figure 14: SugarCRM - Call with UCM

- Grandstream Affinity CTI app will initiate the call to extension 1000.

