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”.

![SugarCRM Basic Settings](image)

**Figure 1: SugarCRM Basic Settings**

1. Select **SugarCRM** from the CRM System Dropdown to use SugarCRM.
### Table 1: SugarCRM Settings

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM System</td>
<td>Allows users to select a CRM system from the drop-down list, choose SugarCRM to use SugarCRM system.</td>
</tr>
<tr>
<td>CRM Server Address</td>
<td>Specifies the IP address of SugarCRM server.</td>
</tr>
<tr>
<td>Add Unknown Number</td>
<td>Allows to automatically save received calls from numbers not previously logged in SugarCRM and add contact phone number to specific table (Contacts, Leads...).</td>
</tr>
<tr>
<td>Contact Lookups</td>
<td>Selects from the &quot;Available&quot; list of lookups and press ( \rightarrow ) to select where the UCM can perform the lookups on the CRM tables, Leads, Accounts, and Contacts.</td>
</tr>
</tbody>
</table>

Once users finish configuring above settings using admin access:

1. Click on **Save** and **Apply Changes**.
2. Log out 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 **Save** and **Apply Changes**.

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

2. Click on “Admin” on the right top corner.
3. Click on “Module Loader” under “Developer Tools”

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

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

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.
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.
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.

![Affinity Settings](image)

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

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