



Grandstream Networks, Inc.

UCM6xxx IP PBX Series

vTiger CRM Integration Guide



Table of Content

INTRODUCTION	4
REQUIRMENTS	5
VTIGER CRM ARCHITECTURE	6
UCM6XXX CONFIGURATION	7
Admin Configuration	7
User Configuration.....	8
CONTACTS LOOKUP	11
CALL REPORTING	12

Table of Figures

Figure 1 : vTiger CRM integration with UCM.....	6
Figure 2: vTiger CRM Settings.....	7
Figure 3: CRM User Settings.....	9
Figure 4: vTiger CRM → My Preferences.....	9
Figure 5: vTiger CRM User Name.....	10
Figure 6: vTiger CRM Access Key	10
Figure 7: Call popup on Grandstream Affinity.....	11
Figure 8 : View Contact Details.....	11
Figure 9 : vTiger Call reporting	12

Table of Tables

Table 1: Device Requirements.....	5
Table 2 : vTiger CRM Settings	8
Table 3: CRM User Settings	9

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 integration with four CRM platforms, which are:

- SugarCRM
- Salesforce CRM
- ZOHO CRM
- vTiger 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.

This guide contains a step-by-step configuration needed to set up **vTiger CRM** with the UCM6XXX IP-PBX series.

REQUIRMENTS

Following table shows Grandstream products and solutions that are required and have been used during this guide in order to have UCM and vTiger Integration:

Table 1: Device Requirements

PBX	Firmware
UCM61XX, UCM62XX, UCM6510	1.0.16.18 or higher
UCM63xx	1.0.2.25 or higher
IP Phones	Firmware
GXP21XX	1.0.9.26 or higher
GXP17XX	1.0.1.30 or higher
GRP2614/2615/2616	1.0.0.16 or higher
GRP2603/2604	1.0.1.18 or higher



VTIGER CRM ARCHITECTURE

During Our Deployment, we will try to achieve the following architecture:



Figure 1 : vTiger CRM integration with UCM

In this case, each of the architecture components will have its own role:

- **vTiger CRM:** It will save the database of all contacts.
- **UCM:** It will send a HTTP requests to the vTiger CRM once it receives an inbound call through the trunk, then add unknown numbers to contacts table in the CRM database as well as request the contact information if the contact exist on the database.
- **IP Phone:** Will receive the incoming call and display contact information as well as synchronization with desktop CTI application.
- **Grandstream Affinity:** It will display all the details of the contact who is calling and give CTI control over IP phone (Answer call, Hangup, transfer, hold/UnHoldetc).



UCM6XXX CONFIGURATION

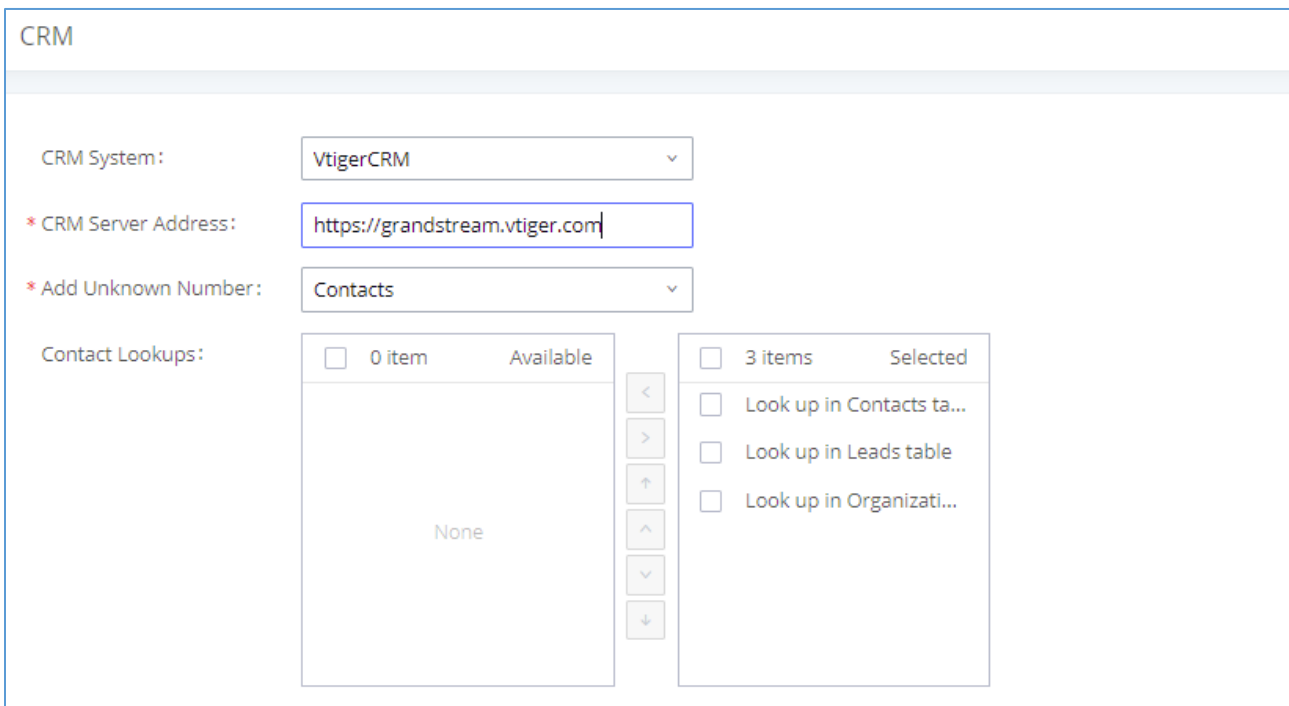
Two steps are required to configure UCM6xxx with vTiger CRM:

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

Admin Configuration

This step is required to configure general settings regarding received calls, in order add unknown numbers to contacts table, do Lookups...etc. These settings will apply to all UCM6XXX users that will be using vTiger CRM.

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



The screenshot shows the 'CRM' configuration page. It includes the following fields and options:


- CRM System:** A dropdown menu set to 'VtigerCRM'.
- * CRM Server Address:** A text input field containing 'https://grandstream.vtiger.com'.
- * Add Unknown Number:** A dropdown menu set to 'Contacts'.
- Contact Lookups:** A section with two columns:
 - Available:** A list box currently showing 'None' and '0 item'.
 - Selected:** A list box containing three items: 'Look up in Contacts ta...', 'Look up in Leads table', and 'Look up in Organizati...'. It shows '3 items'.

Figure 2: vTiger CRM Settings

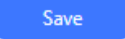
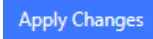
1. Select **vTigerCRM** from the “CRM System” dropdown list to use the vTiger CRM and make similar configuration to the above screenshot, below are the details:



Table 2 : vTiger CRM Settings

CRM System	Allows users to select a CRM system from the drop-down list, choose vTigerCRM to use vTiger CRM.
CRM Server Address	Set the CRM Server address as the domain name or IP address of the vTiger CRM. Example: https://grandstream.vtiger.com
Add Unknown Number	Allows to automatically save received calls from numbers not previously logged in vTiger CRM and add contact phone number to specific table (Contacts, Leads...).
Contact Lookups	Selects CRM tables that will be used to lookup for contact details when making/receiving calls. Press  to select where the UCM can perform the lookups on the CRM tables


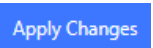
Once users finish configuring above settings using admin access:

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 vTiger CRM platform.

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

1. Login to the UCM as user (using your user portal access account) and navigate to “**Value-added Features**→**CRM User Settings**”.
2. Click on “**Enable CRM**”.
3. Enter the username/access key associated with the CRM account.
4. Click on  and 

The status will change from “**Logged Out**” to “**Logged In**” and users can start using vTiger CRM.



CRM User Settings

Enable CRM:

* Username:

* Access Key:

Login Status: Logged In

Figure 3: CRM User Settings

Table 3: CRM User Settings

Username	Enter vTiger CRM username to login.
Access Key	Enter vTiger CRM Access Key to login.

In order to get the “Username” and “Access Key”, access to vTiger CRM server web UI → My Preferences.

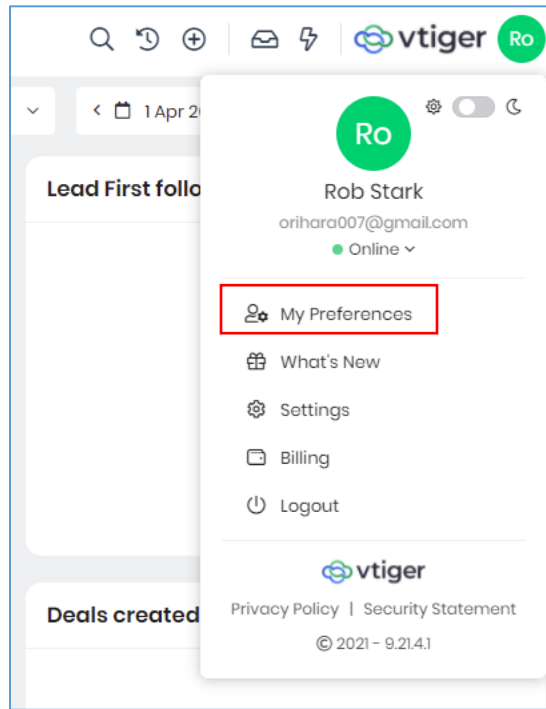


Figure 4: vTiger CRM → My Preferences

The **User Name** and **Access Key** are located under “User information” section:



Ro My Preferences
Viewing preferences of "Rob Stark"

User information

Username	orihara007@gmail.com	User Type	Admin
Role	CEO	Reports To	
Primary Group		Language	US English
Access Key	NBxBFyWEmMtc09t		

Figure 5: vTiger CRM User Name

Ro My Preferences
Viewing preferences of "Rob Stark"

User information

Username	orihara007@gmail.com	User Type	Admin
Role	CEO	Reports To	
Primary Group		Language	US English
Access Key	NBxBFyWEmMtc09t		

Figure 6: vTiger CRM Access Key



CONTACTS LOOKUP

Using Grandstream Affinity software, users can receive incoming calls to their GXP21xx/GXP17xx/GRP261x IP Phones in their PC as well, the following link explains how to install and configure Grandstream Affinity software.

http://www.grandstream.com/sites/default/files/Resources/GS_Affinity_Guide.pdf

When receiving an incoming call from an existing contact on vTiger CRM, the contact's name will be displayed on the phone's LCD and more data will be shown on Grandstream Affinity application. The following figure shows an example of the result.

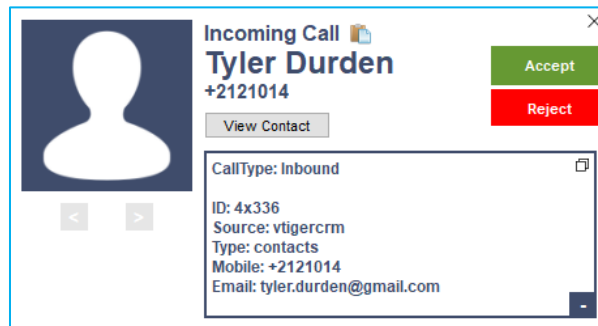
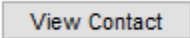


Figure 7: Call popup on Grandstream Affinity

Users can click on the button  to be redirected to contact's page for more details about the calling contact or to edit specific data.

New contacts will be automatically added to the CRM and it's up to the user to specify where add them depending on the settings on admin page as shown on **Admin Configuration**

Following screenshot shows the contact details page after clicking on the view contact button.

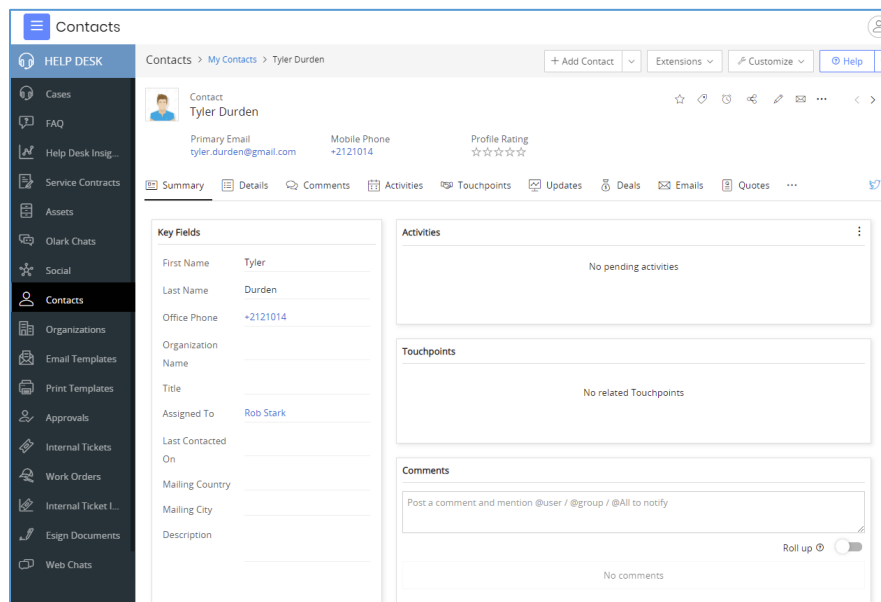


Figure 8 : View Contact Details



CALL REPORTING

Finally, users can see reports of the calls on vTiger CRM from **All → PBX Manager → Records List:**

<input type="checkbox"/>	Call Status	Customer Number	Customer	User	Recording	Duration (sec)	Start Time
<input type="checkbox"/>	ANSWERED	00212658133010	00212658133010	test		1	02-06-2018 06:31 AM
<input type="checkbox"/>	ANSWERED	212621175203	Kris Marrier	test		2	02-06-2018 06:30 AM
<input type="checkbox"/>	ANSWERED	212621175203	Kris Marrier	test		1	02-06-2018 06:26 AM
<input type="checkbox"/>	ANSWERED	00212707199024	Kris Marrier	test		1	02-06-2018 06:22 AM
<input type="checkbox"/>	ANSWERED	00212707199024	Kris Marrier	test		102	02-06-2018 05:51 AM
<input type="checkbox"/>	ANSWERED	00212707199024	Kris Marrier	test		0	02-06-2018 05:51 AM
<input type="checkbox"/>	ANSWERED	00212707199024	Kris Marrier	test		0	02-06-2018 05:45 AM
<input type="checkbox"/>	ANSWERED	00212707199024	Kris Marrier	test		98	02-06-2018 05:43 AM
<input type="checkbox"/>	NO ANSWER	00212707199024	Kris Marrier	test		0	02-06-2018 05:42 AM
<input type="checkbox"/>	NO ANSWER	00212707199024	Kris Marrier	test		0	02-06-2018 05:41 AM
<input type="checkbox"/>	NO ANSWER	00212707199024	Kris Marrier	test		0	02-06-2018 05:38 AM
<input type="checkbox"/>	ANSWERED	96846541651	Ken Woo	Administrator		0	02-01-2018 11:12 AM
<input type="checkbox"/>	ANSWERED	96846541651	Ken Woo	Administrator		2	02-01-2018 11:09 AM
<input type="checkbox"/>	ANSWERED	96846541651	Ken Woo	Administrator		3	02-01-2018 11:08 AM
<input type="checkbox"/>	ANSWERED	96846541651	Ken Woo	Administrator		166	02-01-2018 11:06 AM
<input type="checkbox"/>	BUSY	96846541651	Ken Woo	Administrator		0	02-01-2018 11:05 AM
<input type="checkbox"/>	ANSWERED	96846541651	Ken Woo	Administrator		26	01-31-2018 5:44 PM
<input type="checkbox"/>	ANSWERED	96846541651	Ken Woo	Administrator		4	01-31-2018 5:44 PM
<input type="checkbox"/>	BUSY	96846541651	Ken Woo	Administrator		0	01-31-2018 5:43 PM
<input type="checkbox"/>	ANSWERED	96846541651	Ken Woo	Administrator		13	01-31-2018 4:11 PM

Figure 9 : vTiger Call reporting

