

# Integrating SugarCRM with IPBRICK Products

**IPBRICK**

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# 1 Introduction

This document endeavors to assist you in the procedure of setting up the necessary applications for the integration of SugarCRM with IPBRICK products.

## 2 Requirements

The following software must be installed in the presented order.

1. IPBRICK version 5.2 (update 6) or later versions
2. MySQL Server 5.0.32
3. UCoIP for iPortalDoc version 2.1 or later versions. After installing this package you should update iPortalDoc to 3.1.7 or to a later version.

**NOTE:** Please don't forget to Apply Configurations!

### 2.1 Packages Download

The latest SugarCRM and ADM packages are available at:

<http://eshop.ipbrick.com/>

Downloads » Software » IPBRICK Related Software » IPBRICK 5.3

The MySQL Server 5.0.32 package is available at:

<http://eshop.ipbrick.com/>

Downloads » Software » IPBRICK Related Software » IPBRICK 5.3 or 5.2

*Note: Please bear in mind that you need to register at our eshop for the downloads section to be available.*

## 3 IPBRICK Configuration

When all IPBRICK configurations are done, please don't forget to Apply Configurations.

### 3.1 Registering IP Phones

At the IPBRICK's web interface access:

Advanced Configurations > Telephony > Registered Phones

At the Registered Phones page follow these steps:

1. Click on the Insert link. At the new page please fill the Telephone (login), Password and Confirm Password fields accordingly;
2. Repeat the procedure if you wish to insert more phones.

### **3.2 IP PBX Remote Manager Configuration**

Access Advanced Configurations > Telephony > Configurations and execute the following steps:

1. At IP PBX remote manager tab click on Modify;
2. At the new interface click on Modify, select Yes and click on Modify;
3. Click on Insert PBX IP Remote Manager;
4. Insert the username and password for the manager, as well as the network information (workstation network with ADM installed).

### **3.3 Call Recording Configuration**

This feature enables you to record calls, to activate it you should access the IPBRICK web interface:

IPBRICK.C > VoIP > Monitoring > Call Recording

and complete the presented page with the following information:

- Recording Format;
- iPortalDoc's URL.

Afterwards, it will be necessary to indicate which phones will be recorded. To do so, access the IPBRICK.GT > VoIP > Phones Management page and for each phone select one of these options: Incoming, Outgoing or All).

The recordings are available via iPortalDoc (see figure 3).

### **3.4 myIPBRICK Configuration**

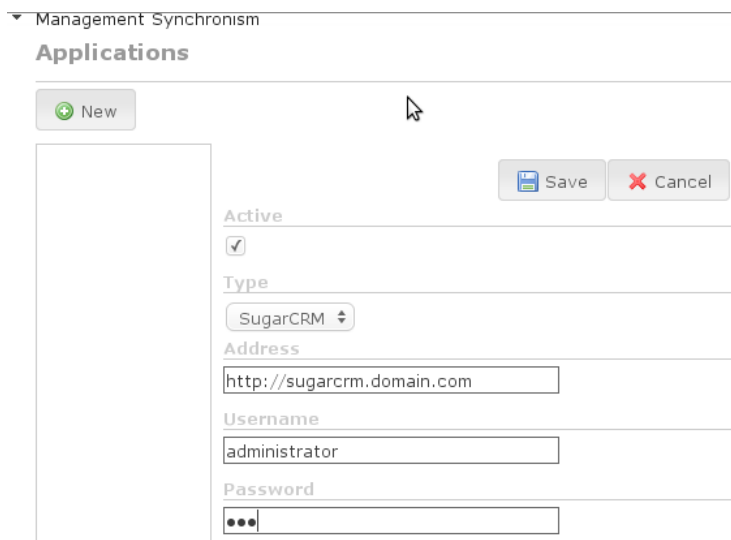
Users must have their phone configured at myIPBRICK in order to make calls via Sugar-CRM.

## 4 IPBRICK Contacts Configuration

This configuration will allow the synchronization between IPBRICK Contacts and SugarCRM. When a record of an entity/contact is created at IPBRICK Contacts this data will be synchronized with SugarCRM.

At IPBRICK Contacs please access Administration > Sync Management and add an application (see figure 1):

- Active: When selected, operations over entities/contacts are replicated to the selected app;
- Type: The app type should be SugarCRM;
- Address: The app's address;
- Username: The username of a user with edit permissions;
- Password: User password.



The screenshot shows a web interface for configuring synchronization. At the top, there is a dropdown menu labeled 'Management Synchronism'. Below it, the section is titled 'Applications'. A 'New' button with a plus icon is visible. To the right of the form are 'Save' and 'Cancel' buttons. The form fields are: 'Active' with a checked checkbox, 'Type' with a dropdown menu set to 'SugarCRM', 'Address' with a text input containing 'http://sugarcrm.domain.com', 'Username' with a text input containing 'administrator', and 'Password' with a text input containing three dots.

Figure 1: IPBRICK Contacts Configuration

## 5 iPortalDoc Configuration

With iPortalDoc it's possible to synchronize emails and opportunities to SugarCRM as long as the document is classified with the entity.

To synchronize emails it's necessary to configure and activate the SugarCRM's sync by accessing at tiportalDoc's web interface at:

Definitions > Configuration Interface

You will then have to select the External Applications option on the top right hand corner of the screen.

On the presented interface you should activate SugarCRM and fill the presented form (see figure 2):

- Address: SugarCRM's address (you will need to have configured IPBRICK Contacts)
- Activate email filter: When selected all emails arriving at iPortalDoc will be analyzed;
- Acronym: In this field you should type an acronym to identify the email to be synchronized (i.e.: If in the email's subject or text there's a <SugarCRM> tag, the email will be synchronized with SugarCRM)
- Groups: Select the groups o have access to the email in iPortalDoc. At SugarCRM there will be a link to access the stored email in iPortalDoc.

This emails are to be associated to the respective acconts or contacts in SugarCRM.

Regarding Opportunities it will be necessary to configure a workflow with a synchronization action (task to Synchronize opportunity to SugarCRM).

- When an Opportunity document is inserted in iPortalDoc an Opportunity is also created in SugarCRM with the info regarding the document's classification (e.g.: Entity, Contact, Title, Code, Value, etc.);
- In the course of the workflow the Sale state ewill be permanently updated in SugarCRM as well as any change in document's classification.

The screenshot shows a configuration form for SugarCRM. The form is titled "SugarCRM" and contains the following fields:

- Enable:** A checkbox that is checked.
- Address:** A dropdown menu showing "SugarCRM - http://sugarcrm.domain.com".
- Enable email filter:** A checkbox that is checked.
- Acronym:** A text input field containing "SugarCRM".
- Groups:** A list box containing three options: "Permitir todos", "Domain Admins", and "Domain Users".

Figure 2: iPortalDoc Configuration

In figure 3 you can see how the directory of emails and recorded calls will look like.

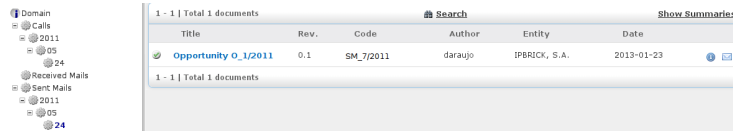


Figure 3: Calls and Emails folder hierarchy

## 6 SugarCRM Configuration

At SugarCRM go to:

Admin > IPBRICK Telephony. In this interface state the access parameters to IPBRICK.GT and iPortalDoc (see figure 4):

- IPBRICK.GT: User address and credentials (with an administrative profile);
- iPortalDoc: User address and credentials (with a reader profile)

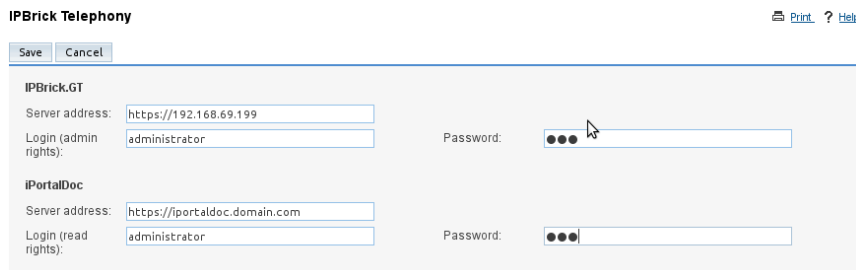





Figure 4: SugarCRM Configuration

### 6.1 Notes

SugarCRM suffered minor changes to respond to the need for integration. Next, we present some of what's new:

- Accounts and Contacts: A button will be displayed next to the phone number enabling you to call it;
- Calls and Opportunities: A panel, denominated IPBRICK, with a set of fields that are auto-filled (see figure 5):
  - Document code in iPortalDoc
  - Link to +info and to iPortalDoc's

 » **Opportunity O\_1/2010**  [Print](#)  [Help](#)

[Edit](#) [Duplicate](#) [Delete](#) [Find Duplicates](#) [View Change Log](#)

Opportunity Name:	Opportunity O_1/2010	Account Name:	<a href="#">IPBrick</a>
Opportunity Amount: (EUR €):	1,000.00	Expected Close Date:	
Sales Stage:	Prospecting	Type:	
Probability (%):	10	Lead Source:	
Next Step:		Campaign:	
Description:			

**Other**

Assigned to:	Administrator	Date Modified:	2010-05-14 10:30 by Administrator
Date Created:	2010-05-14 10:26 by Administrator		

**IPBrick**

iPortalDoc doc. code:	O_1/2010
iPortalDoc doc. link:	<a href="#">Opportunity O_1/2010</a>
iPortalDoc doc. link info:	<a href="#">+info</a>

Figure 5: Opportunity

## 7 ADM Configuration

This software must be installed in workstations where you want to monitor incoming calls. This software will open a browser with the call's form in the Account or Contact's page, according to the defined phone number.

To configure this software follow these steps:

1. Open the software and click on Configurations > Edit Current
2. At the Asterisk Manager set the following parameters:
  - Hostname: IPBRICK server's IP
  - Port: By default - 5038;
  - Username: The manager's login inserted at IPBRICK;
  - Password: The manager's password inserted at IPBRICK.
3. In Asterisk Extensions:
  - Priority: 1
  - Context: local\_processing
  - Source: SIP/telephone (replace telephone by the phone number you wish to monitor e.g.: SIP/222)
  - External Prefix:
  - My Channels: SIP/telephone (replace telephone by the phone number you wish to monitor e.g.: SIP/222)
4. Browser Popup activate Enable Incoming Records URL to open on new calls:

- If you wish to open a web window, type here the url:

```
http://sugarcrm.domain.com/index.php?module=IPBrick&action=index&IPBrickmodule=
Telephony&IPBrickmoduleaction=InboundCall&custom=%custom%&cid=%number%
```

If the next line is blank, the default browser will be opened.

- If you wish to execute an app, place here the parameters to be passed to the application. Possible Parameters:
  - %name%: The caller name;
  - %number%: The caller number;
  - %uniqueid%: The call ID.