

Phone Manager Application Support

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DOCUMENT RELEASE 4.2

APPLICATION SUPPORT



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SugarCRM

Overview

This describes the features that are available when integrating with SugarCRM.

Supported Versions

Version	On-premise deployment	Cloud
v6.4 - v7.1		

 The integration uses SugarCRM Web Services v4.1. Although SugarCRM tries to maintain backwards compatibility when they upgrade their cloud platform this is never guaranteed. This version of the plugin has been tested on the latest version that was available upon release.

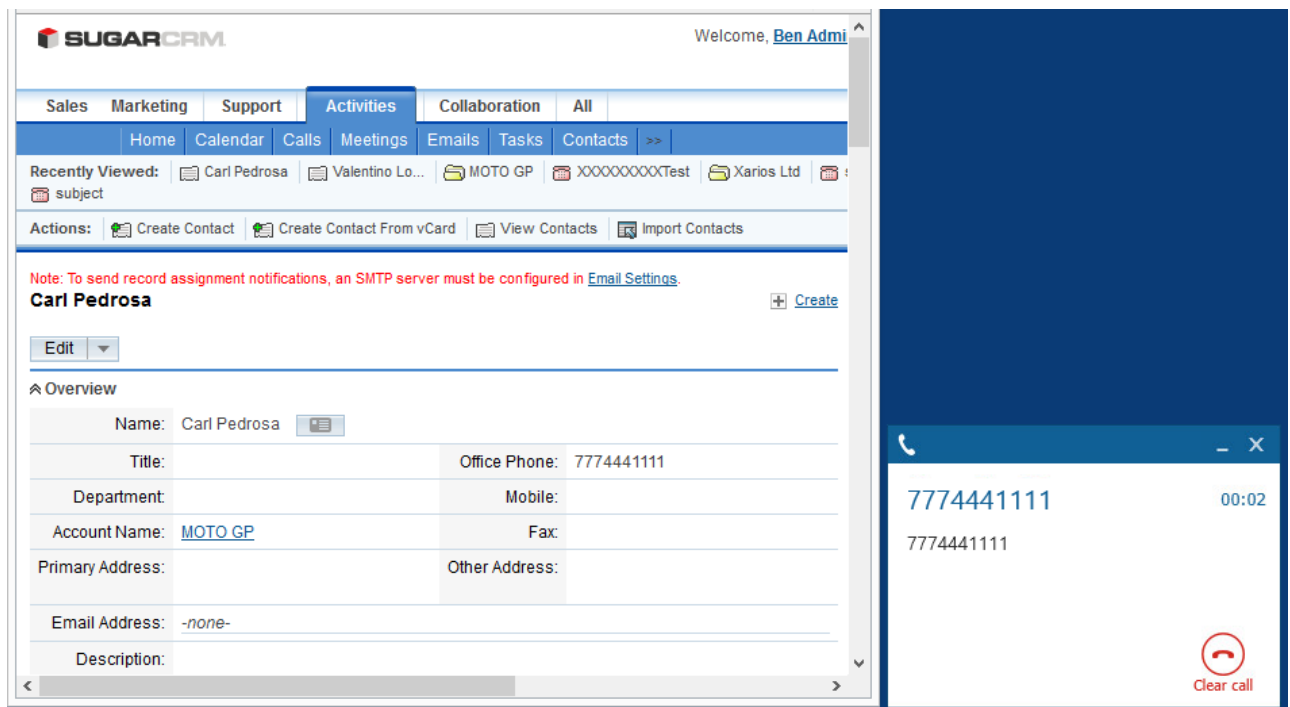
Features

Integration with SugarCRM supports the features listed below:

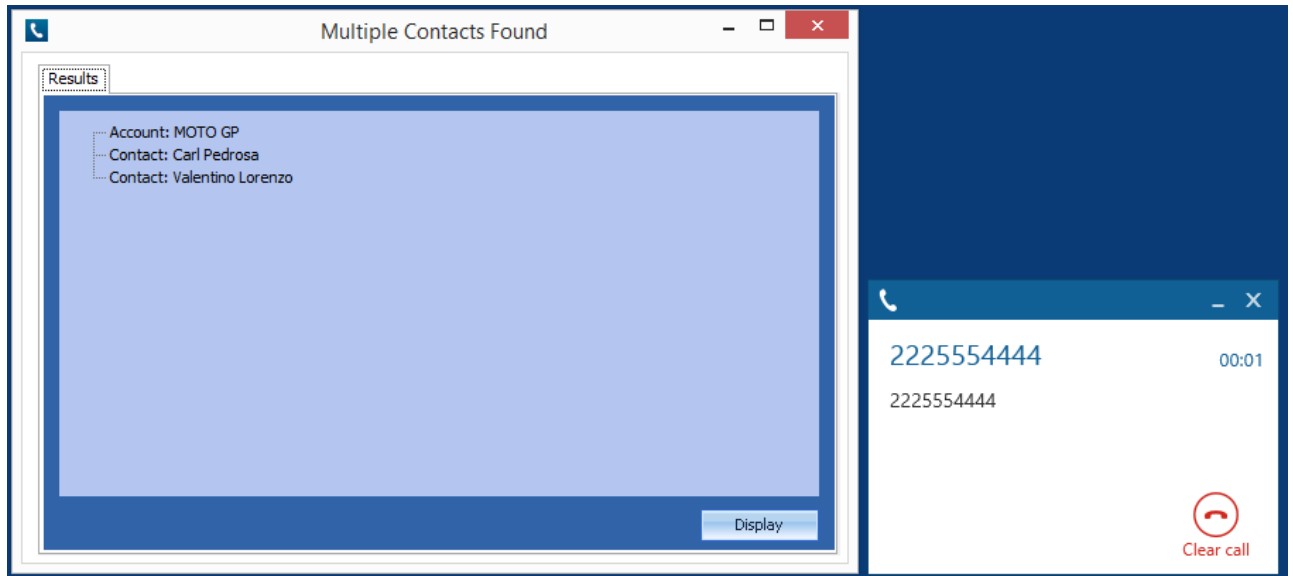
- [Screen pop for account, customer and lead records](#)
- [Automatic call activity entry](#)

Screen pop


CRM *Account*, *Contact* and/or *Lead* records can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching records that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* record was found and the record was automatically displayed using the Users default browser.



If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found 2 matching *Contact* records and 1 matching *Account* record that have this telephone number.

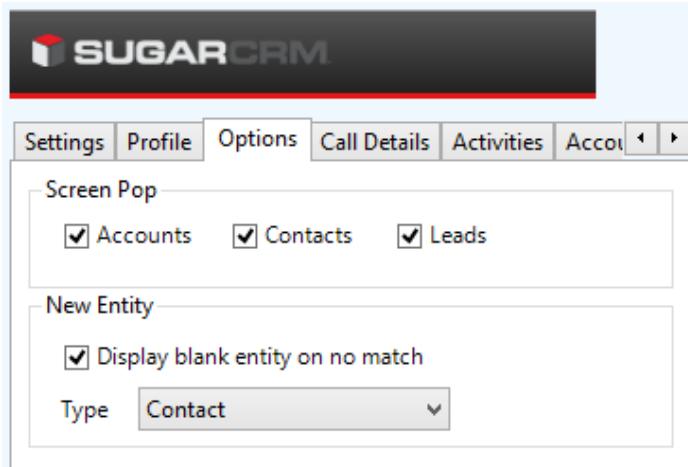


The correct record can then be highlighted and then clicking on the *Display* button or double clicking the entry will open this record.

 The plugin will only search for records that have not been *Deleted*. If any records have been marked as *Deleted* then they will not be displayed.

Record and matching options

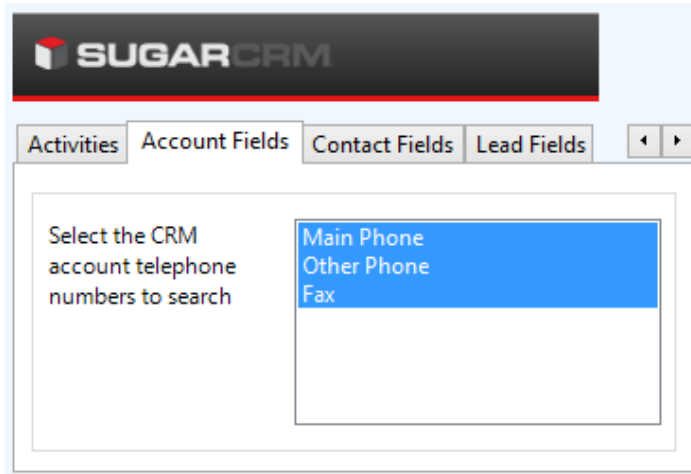
Configuration options are available on the plugin that allow the type of *Records* to be used in the searching to be set. For example it can be configured so that only the *Contact* records are searched. These options are set on the *Options* tab.



If no match is found when searching than a blank form can be automatically displayed to create a new record. The record type, *Account*, *Contact* or *Customer* that is created can be set here.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* records individually. By default the common telephone number fields are listed on the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.



These are the default field name and descriptions and may be different if they have been customised. Contact your Microsoft Dynamics CRM administrator for details.

Contact Records



Field name	Field description	Enabled?
Business Phone	phone_work	
Home Phone	phone_home	
Other Phone	phone_other	
Fax	phone_fax	
Mobile Telephone	phone_mobile	
Assistant phone	assistant_phone	

Account Records

Field name	Field description	Enabled?
Main Phone	phone_office	
Other Phone	phone_alternate	
Fax	phone_fax	

Lead Records

Field name	Field description	Enabled?
Business Phone	phone_work	
Home Phone	phone_home	
Other Phone	phone_other	
Fax	phone_fax	

Mobile Telephone	phone_mobile	
Assistant phone	assistant_phone	

Telephone number formats

SugarCRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

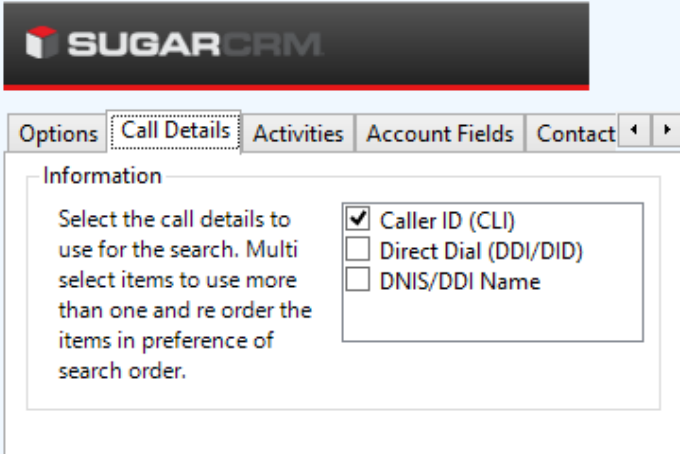
UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can be configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.




SUGARCRM

Options **Call Details** Activities Account Fields Contact

Information

Select the call details to use for the search. Multi select items to use more than one and re order the items in preference of search order.

Caller ID (CLI)
 Direct Dial (DDI/DID)
 DNIS/DDI Name

 Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

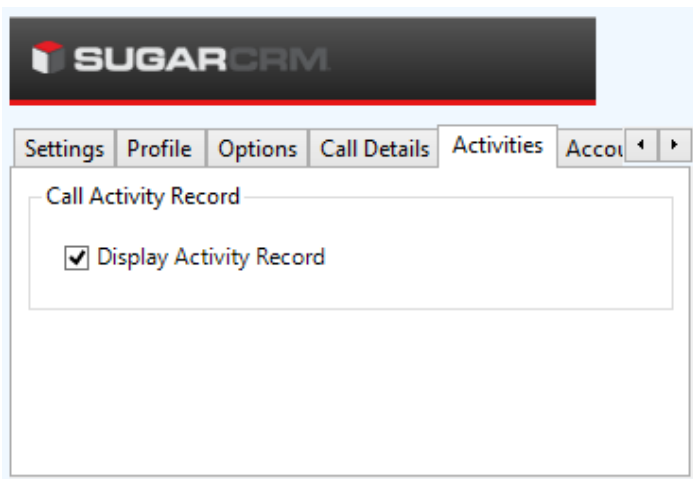
Automatic call history entry

The plugin supports the ability to be able to automatically create and display a SugarCRM Call Activity. The record to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the [screen popping](#).

The Activity record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.



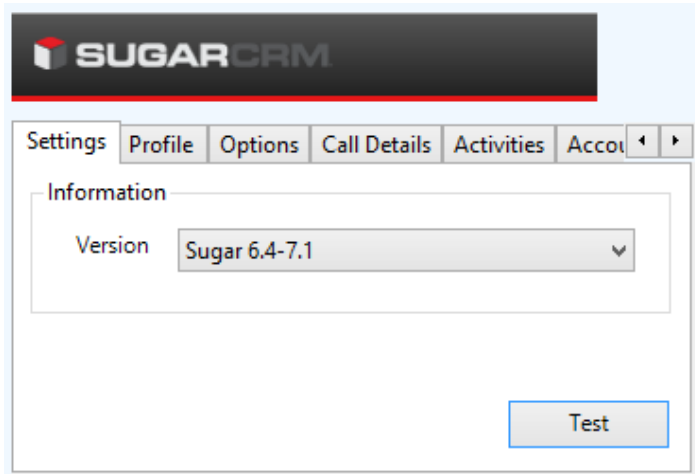
Display activity record: This will display the *Activity* form, if this is not set then the record will be created without the user seeing the form.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Dynamics CRM.

Settings and versions

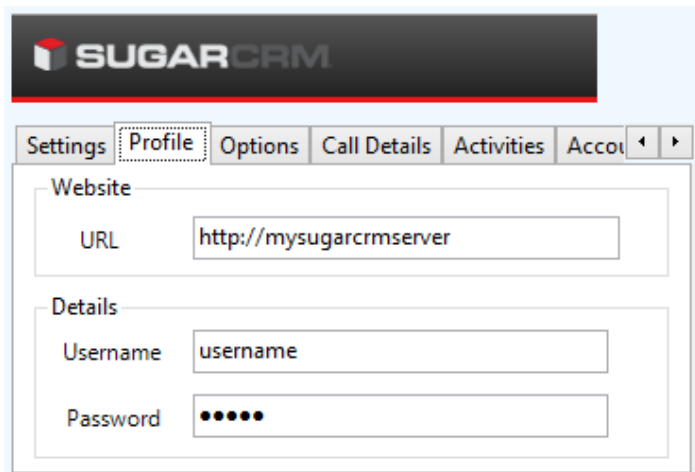
The supported version of SugarCRM can be seen on the *Settings* tab.



The screenshot shows the SugarCRM interface with the 'Settings' tab selected. The 'Information' section is visible, containing a 'Version' dropdown menu set to 'Sugar 6.4-7.1'. A 'Test' button is located at the bottom right of the form.

Profile details

The specific account details that will be used to connect to SugarCRM need to be set on the *Profile* tab.



The screenshot shows the SugarCRM interface with the 'Profile' tab selected. The 'Website' section contains a 'URL' field with the value 'http://mysugarcrmserver'. The 'Details' section contains 'Username' and 'Password' fields. The 'Username' field has the value 'username' and the 'Password' field is masked with five dots.

URL: This is the URL to the SugarCRM server.

Username: The username of the account used to login to SugarCRM for this user.

Password: The password used to access SugarCRM for this user.