

Using SugarCRM with Quadro



Revision: 1.1

Abstract: This document describes how to remotely initiate and receive calls through Quadro using SugarCRM.

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Document Revision History

Revision	Date	Revision	Valid for SW	Valid for models
1.0	20-Feb-08	Initial version	5.0.x and higher	Quadro IP PBXs
1.1	09-Sep-10	Revised	5.0.x and higher	Quadro IP PBXs

1 Introduction

The SugarCRM is a web application which allows Quadro users to make inbound and outbound calls from the SugarCRM using their extensions on the Quadro. This functionality is based on the Third Party Call Control feature of the Quadro.

This document describes how to configure the SugarCRM to be able to make and receive calls from the Quadro.

Please Note: This is a sample configuration and Epygi does not take any responsibility for its correct functionality.

2 Requirements and Prerequisites

- SugarCRM is installed on a server and is in its default “Sugar” theme
The following SugarCRM versions are supported:
 - SugarCRM Community Edition v5.5.3
 - SugarCRM Community Edition v5.5.2
 - SugarCRM Community Edition v5.5.0
 - SugarCRM Community Edition v5.2.0
- The following PHP extensions are installed on the server:
 - php_sockets.dll
 - php_xmlrpc.dll
- The 3PCC Activation key is installed on the Quadro
- The Quadro and host running the SugarCRM server are “visible” to each other

Please Note: If SugarCRM clients are connected on the WAN side of the Quadro, ensure that the filtering rules for the hosts running those clients are created on the Quadro. Creating a rule is not required if the Quadro firewall is disabled or if its security level is set to “Low”. For more information on creating the filtering rules, see the Quadro on-line help of the **Internet Uplink->Filtering Rules** page.

3 Installing SugarCRM plug-in for Quadro

To install the SugarCRM plug-in for Quadro, apply the corresponding patch following the steps below:

1. Login to SugarCRM and access the Admin menu.
2. Run the Upgrade Wizard in the System section.
3. On the Upload Upgrade page, access the Install from local file tab and browse for the patch sugar-quadro-xxx.zip (where xxx corresponds to the version of your SugarCRM).
4. Follow the instructions of the wizard.

Currently the patches for the following SugarCRM versions are available:

- “sugar-quadro-5.5.3.zip” for SugarCRM v. 5.5.3
- “sugar-quadro-5.5.2.zip” for SugarCRM v. 5.5.2
- “sugar-quadro-5.5.0.zip” for SugarCRM v. 5.5.0
- “sugar-quadro-5.2.0.zip” for SugarCRM v. 5.2.0

4 Configuring SugarCRM

To configure SugarCRM, follow the steps described below:

1. Login to SugarCRM as administrator and open the **Admin->System Settings**. There you will find the section for the Quadro integration - fill out all the required fields (see Figure 1 below) with the Quadro details.

Epygi's Quadro IP PBX Integration

Enable Quadro Integration: *Allows the users to initiate outgoing calls and get notifications on incoming calls from SurarCRM.*

Quadro IP: *IP address of Quadro.*

Quadro Port: *Call Control port (3pcc port)of Quadro*

Quadro Username: *Quadro admin username.*

Quadro Password: *Quadro admin password.*

Enable Phone Icon: *Places the phone icon next to the phone number.*

Figure 1 – Quadro Integration form

2. Login as a user, open **My Account->User Settings** and select the Quadro extension to be used by SugarCRM (see Figure 2 below).

User Settings

Quadro Extension:

Figure 2 – Quadro extension

This step should be repeated for every SugarCRM user having a PBX extension.

3. If the SugarCRM server runs on a Windows machine then run the following file:
<dir>/themes/Sugar/start.bat
 where **<dir>** is the installation directory of SugarCRM.


If the SugarCRM server runs on UNIX machine then enter the following from the shell:


php<dir>/themes/Sugar/cli_server.php

where **<dir>** is the installation directory of SugarCRM.

Please Note: Any Quadro configuration change described in Step 1 shall be followed by running the procedure described in Step 3; otherwise, the configuration changes will not take effect.

5 Using SugarCRM for Controlling the Calls

For placing the call from SugarCRM open the **Contact List, Accounts** or **Leads tab** and click on the phone icon  next to the selected contact. Upon clicking, the following notification line indicating the call progress appears on the top of the SugarCRM window (see Figure 3 below).

 SUGARCRM. THE CLOUD IS OPEN

Welcome, admin [Logout] | [My Account](#) | [Employees](#) | [Admin](#) | [Get Help](#) | [About](#) | [Page Style](#)


Outgoing call from: 111To: pbx:00 Sitemap 

Figure 3 - Outgoing call notification

After that the Quadro extension assigned to the SugarCRM user starts ringing and when the user picks up the handset, the Quadro automatically dials the phone number of the selected contact. Signaling tones indicate the call setup progress.

Please Note: When the user selects a contact from the SugarCRM database to make a call, the contact's phone number without any modification is being sent to the Quadro. The Quadro checks that phone number against the "Destination Number Patterns" of the Call Routing records and makes the call via the matching record. Therefore, the "Destination Number Patterns" in Call Routing records on the Quadro have to be built in accordance with the phone numbering used in SugarCRM.

When the call is received on the extension assigned to SugarCRM user, the incoming call notification window pops up, indicating the Caller ID of the call along with the calling person details retrieved from the SugarCRM database (see the Figure 4 below). The **Accept** and **Decline** buttons allow the user to accept or reject the call. If the call is not accepted within the timeout specified in Quadro 3PCC settings, the Quadro extension assigned to the SugarCRM user starts ringing. Otherwise, if the user presses the **Accept** button, the phone starts ringing immediately.

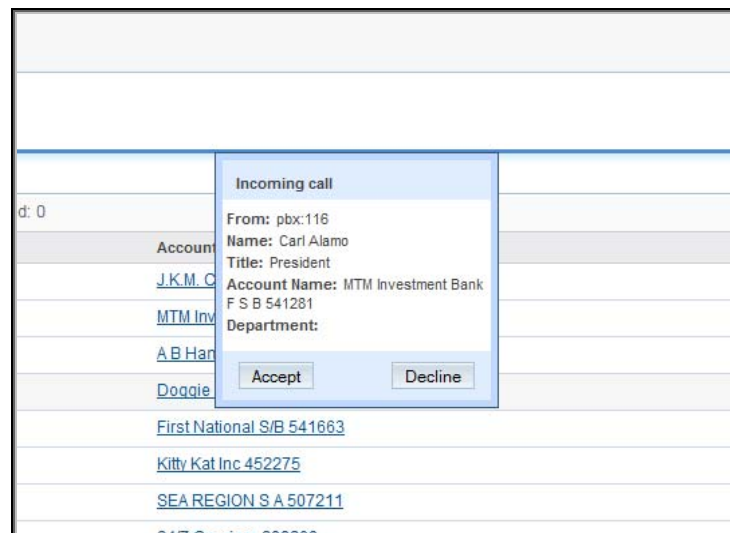


Figure 4 - Incoming call notification window

If the caller information is not found in the SugarCRM database then the **"not registered in the SugarCRM"** message is being displayed in the notification window.

Please Note: When a call is received on a Quadro extension assigned to the SugarCRM user, the Quadro sends without any modification the caller ID of the calling party to SugarCRM to check against the phone numbers of the contacts stored in the database. Therefore, formatting of the phone number in the SugarCRM database has to be compatible with the formatting of the caller IDs of the calling parties.

When the user finishes the SugarCRM session, they need to logout before closing the browser window. Logout is needed in order to notify the SugarCRM server to release control over the Quadro user extension. Otherwise, if the browser window is closed without logout, the SugarCRM server will continue to control the extension and any ring signal received on the controlled extension will be delayed for the amount of time specified in the Quadro 3PCC settings (by 10 seconds by default).

6 Troubleshooting

The start.bat file gives an error indicating that the PHP executable is not found

Sometimes the SugarCRM plug-in is not able to determine the PHP installation path correctly due to the custom system setup. In that case the **start.bat** file needs to be manually edited by the correct path.

The start.bat fails on line 83, on function creating the socket

This means that the **php_sockets** PHP extension is not installed. Refer to the PHP manual for more information about installing that extension.

The start.bat file is running without errors but clicking on the “phone” icon did not initiate the outgoing calls

This happens when the browser cannot communicate with the server due to the security issues. To fix this, please make sure that the SugarCRM installation URL matches with URL you entered into the address bar to access SugarCRM. For example if SugarCRM was setup at www.somedomain.com and you access it using the local address like 127.0.0.1, this will trigger a security issue and the calls will not be handled. Also pay attention to the “www” prefix, www.somedomain.com differs from somedomain.com.

7 References

The following documents can be useful for your reference:

- Manual II – Administrator’s Guide
- Using Quadro Call Control Interface
- Quadro Call Control Interface
- Sugar Open Source Installation Guide
- Sugar Offline Client Installation Guide

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