CRM INFO

How to configure caller recognition and screen-pop for:

Sage CRM

Supported versions: Sage CRM 2017 Contact replication method: Sage SOAP Web Service Screen pop method: URL

Prerequisites

The Sage CRM integration uses SOAP web services for phone number replication. In addition, the screen pop function uses SOAP web services to detect active user sessions. Therefore, the integration requires <u>one user account</u> with web services enabled (see Sage CRM help on how to set this up:

http://help.sagecrm.com/on_premise/en/2017R2/dev/Content/Developer/WS_WebSer vicesUserSetup.htm). By default, the 'Activity' data is not available via web services. Do this with the following steps:

1) Go to <My Profile> | Administration | Customization and select 'Activity' from the secondary entities.

sage CRM	My CRM + Team CRM + Reports + Marketing +	Search 🗸 🗘 🕁 🕑
Libers	Administration - Customization	
Customization	Customization You have reached the Customization home page. Simply select the Customization option you want to work on and then complete the admini	stration task.
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2) Click 'change', select 'Yes' for the Web Service and click 'Save'

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	Fields Screens Lists Tabs Blocks TableScripts Views External Access					
Users	Administration -> Customization -> Activity					
Customization	Allow Access			[Save	
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Notes

Dialing via with Click-to-dial is supported by Sage CRM with Internet Explorer (using a flash plugin). Otherwise, dial from Sage CRM by selecting the phone number and then press the keyboard hotkey (default: PAUSE).



To use the outbound dialing in Internet Explorer go to <My Profile> | Administration | Users | <user> and tick the 'CTI Enabled:' checkbox. Fill in "TapiDialer Line" for the CTI Device Name. This is the same for each user. This is the Tapi Dialer TSP that is automatically installed with the CTI client.

sage CRM	My CRM 🔻 Team CF	RM ▼ Reports ▼ Marketing ▼ CTI	Search	~	众 ☆	ල දු
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Customization	More User Details					
Advanced Customization	Department:	Phone:	Ext.:			
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Data Management		Mobile:	Language: US English			
E-mail and Documents		Pager:	User SMS notification: False			
System	Mobile E-mail address:	Forecasting - Reports To:	Forecasting - Currency:			
0	Title:	Location:	Desk Location:			
	CTI Enabled: ☑	CTI Device Name: TapiDialer Line	CTI Call Screen: Company Summary			
	Security					
	Profile Name: Mobile Device A	ccess:		External		

Configuration steps

1) Start by clicking 'add application' in the <u>Recognition Configuration Tool</u>. From the list of applications, choose 'Sage CRM', as shown below.

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2) Specify the URL of the Sage CRM web service plus the credentials of an account with access. Please note that the SOAP interface may be slow. It is best if the Recognition Configuration Tool is installed on the Sage CRM server and the URL set to 'http://localhost/<folder>/eware.dll/WebServices/SOAP.

🤜 Application pop-up insta	llation	×
Please enter your Sag	e CRM details	
Web service username	<username></username>	
Web service password	•••••]
Web service URL	<domain>/<folder>/eware.dll/WebServices/SOAP</folder></domain>]
Data read successfully		
		Back Next Cancel

3) Choose which fields to display in the call notification on an incoming call.

1 2	\mathcal{O}
🖵 Application pop-up installation	×
Client call notification	
Configure the information you want the client to show when a caller is recognized from this set	
Incoming call Contact name: DisplayName Number: Caller number Source: Application name	
* Windows allows a maximum of 255 characters	
Add recognition field Add call field	
Back Next	Cancel



4) Again, for the screen pop function, specify the URL of the Sage CRM web service plus the credentials of an account with access.

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CloudCTI Recognition C	Configuration Tool	Х
Provide the script na Provide the three relevant	me the required parameters values below. These are required to access the active user sessions necessary for the screen pop function.	
Script name	Show Contact	
Parameters		
Web service username	<username></username>	
Web service password	<pre><password></password></pre>	
Web service URL	<domain>/<folder>/eware.dll/WebServices/SOAP</folder></domain>	
Test script	Next Cance	el

5) Check the configuration summary and click finish.

C Application pop-up installation	×
Summary	
Application	
Sage CRM	
Recognition	
Recognition from Sage CRM	
Scripts	
Show Contact:	
	Back Finish Cancel