

How to configure caller recognition and screen-pop for:

Sage CRM

Supported versions: Sage CRM 2017

Contact replication method: Sage SOAP Web Service

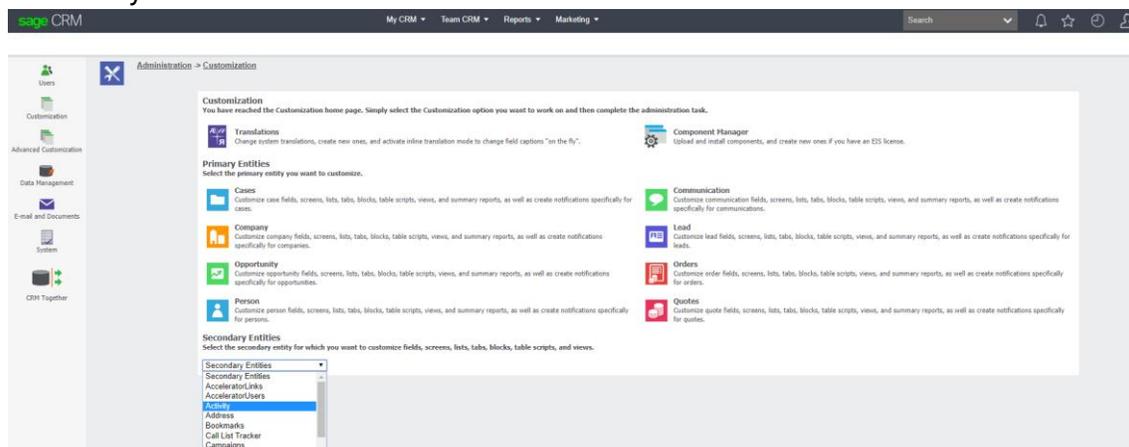
Screen pop method: URL

Prerequisites

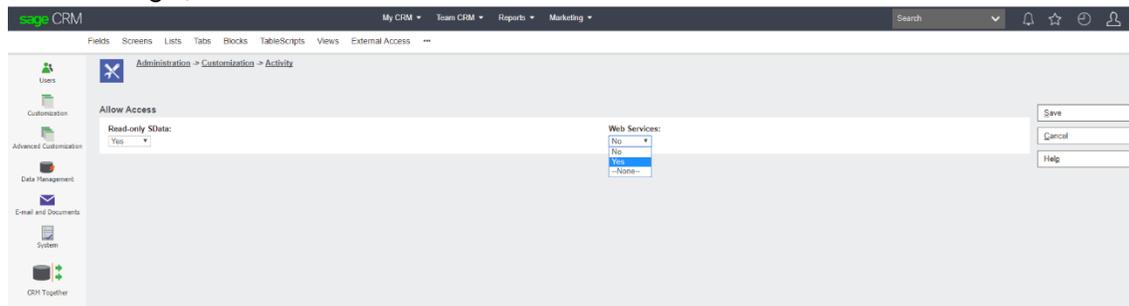
The Sage CRM integration uses SOAP web services for phone number replication. In addition, the screen pop function uses SOAP web services to detect active user sessions. Therefore, the integration requires one user account with web services enabled (see Sage CRM help on how to set this up:

http://help.sagecrm.com/on_premise/en/2017R2/dev/Content/Developer/WS_WebServicesUserSetup.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.



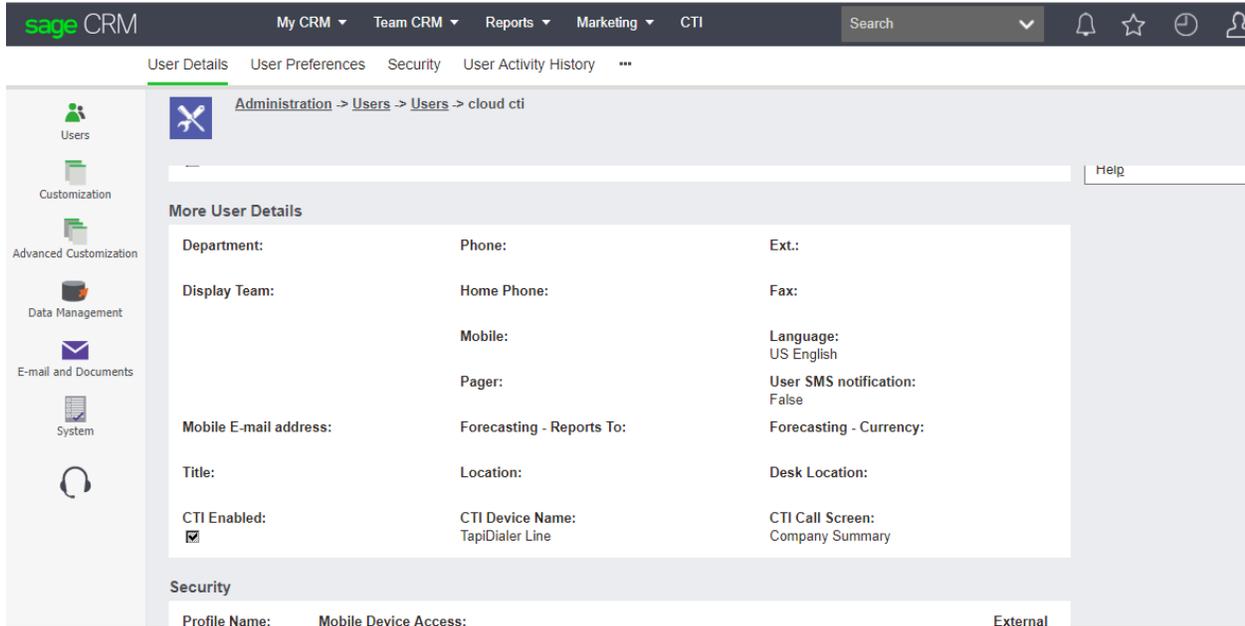
- 2) Click 'change', select 'Yes' for the Web Service and click 'Save'



Notes

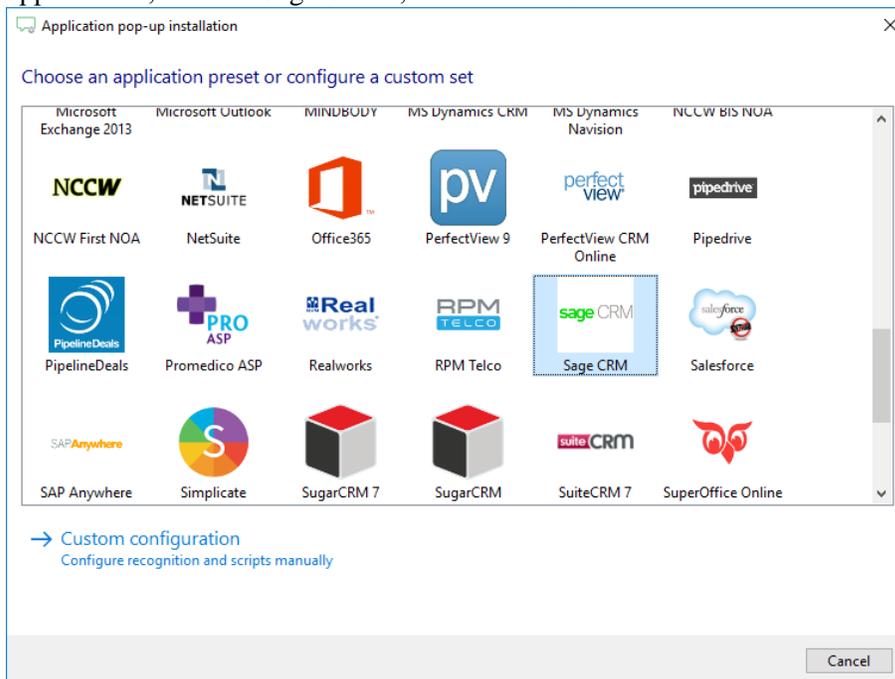
Dialing via with Click-to-dial is supported by Sage CRM with Internet Explorer (using a flash plugin). Otherwise, dial from Sage CRM by selecting the phone number and then press the keyboard hotkey (default: PAUSE).

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.

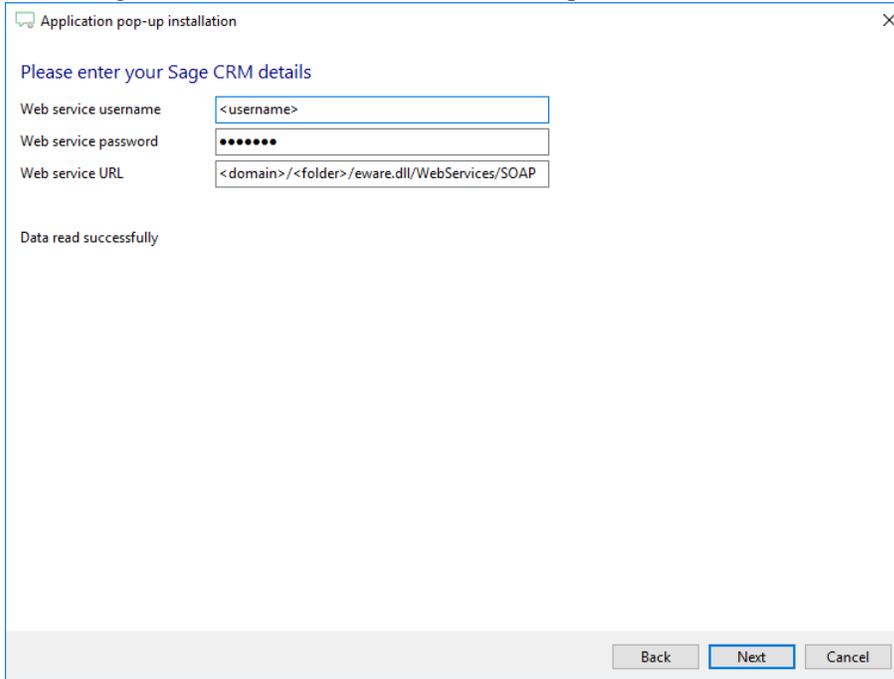


Configuration steps

- 1) Start by clicking 'add application' in the [Recognition Configuration Tool](#). From the list of applications, choose 'Sage CRM', as shown below.



- 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 installation

Please enter your Sage CRM details

Web service username: <username>

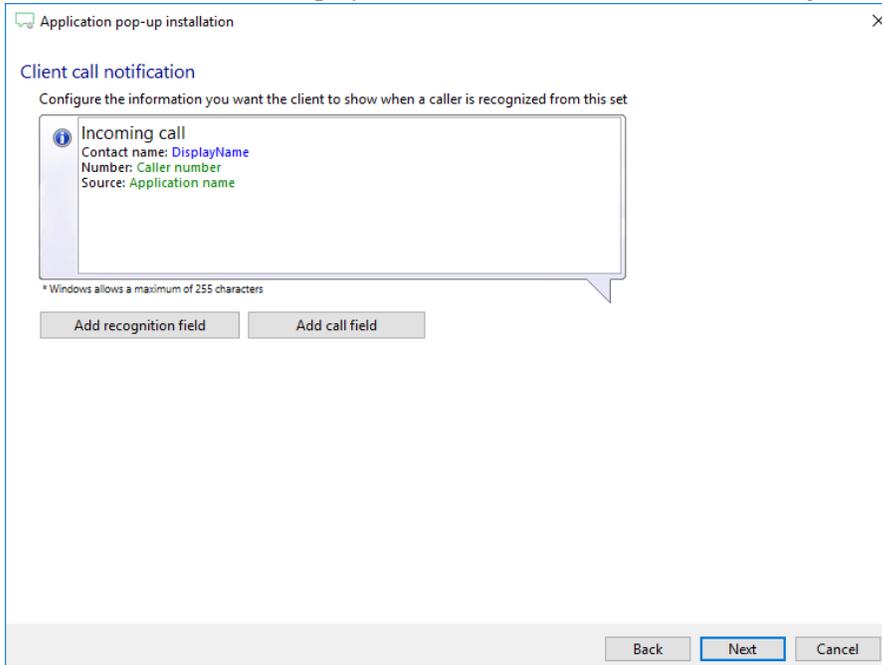
Web service password: ●●●●●●

Web service URL: <domain>/<folder>/eware.dll/WebServices/SOAP

Data read successfully

Back Next Cancel

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



Application pop-up installation

Client call notification

Configure the information you want the client to show when a caller is recognized from this set

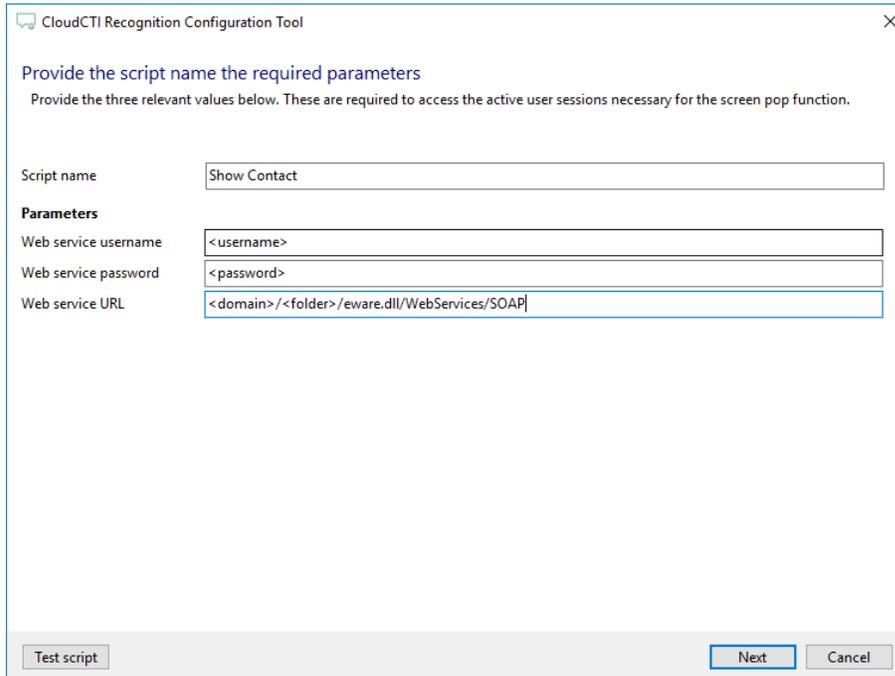
Incoming call
 Contact name: DisplayName
 Number: Caller number
 Source: Application name

* 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.



CloudCTI Recognition Configuration Tool

Provide the script name the required parameters
Provide the three relevant values below. These are required to access the active user sessions necessary for the screen pop function.

Script name:

Parameters

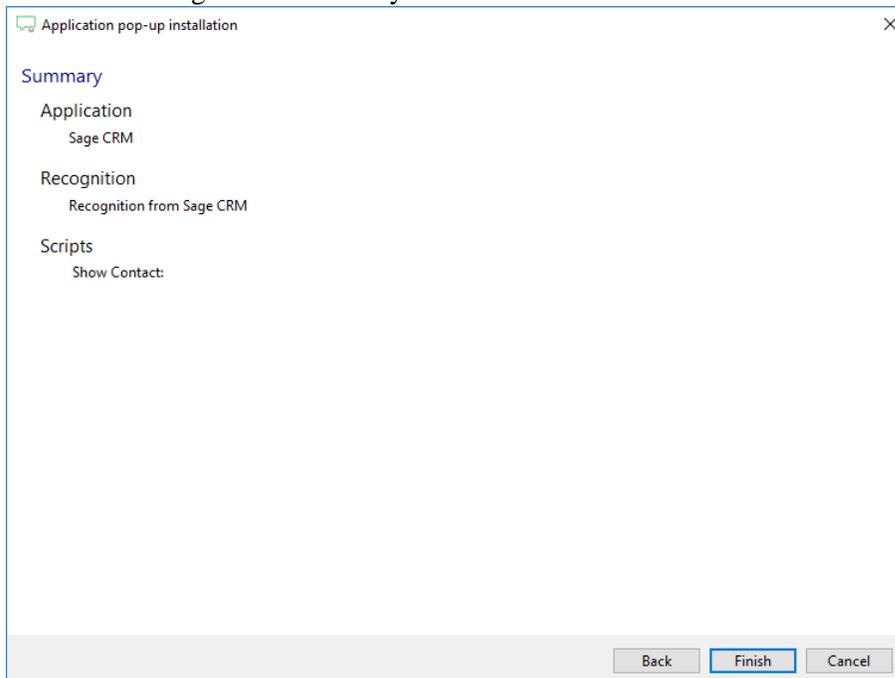
Web service username:

Web service password:

Web service URL:

Buttons: Test script, Next, Cancel

- 5) Check the configuration summary and click finish.



Application pop-up installation

Summary

Application
Sage CRM

Recognition
Recognition from Sage CRM

Scripts
Show Contact:

Buttons: Back, Finish, Cancel