

How to configure caller recognition and screen-pop for:

# SugarCRM 7

Supported versions: SugarCRM 7.6 Contact replication method: ODBC Screen pop method: URL

## Prerequisites

To replicate data via OLE/ODBC using a MySQL database, you'll have to install the <u>32-bit</u> <u>MySQL ODBC driver</u>. Please check the <u>MySQL website</u> for more information

Configure a 32-bit System DSN datasource, which can be accessed by the Recognition Update service.

On 64-bit operating systems, make sure you configure the 32-bit driver using the 32-bit ODBC data source administrator from "C:\Windows\SysWOW64\odbcad32.exe"

## Notes

In the SugarCRM 7 edition, you can click on a phone number hyperlink to dial.

The first time your browser may request your permission to associate 'callto://' URI links with MakeCall.exe. If no phone icon is present you can still select a phone number and dial with the client hotkey





## **Configuration steps**

1) Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> From the list of applications, choose 'SugarCRM 7', as shown below.



 Press 'Configure' to open the Windows Data Link Properties dialog to configure your ODBC connection string. Select "Microsoft OLE DB Provider for ODBC Drivers" and press the 'Next >>' button.

CloudCTI Recognition Configura	tion Tool	×
Please configure the data li	Data Link Properties X	
Configure No ODBC	Provider Connection Advanced All	
	OLE DB Provider(s)         Microsoft OLE DB Provider for Analysis Services 13.0         Microsoft OLE DB Provider for ODBC Drivers         Microsoft OLE DB Provider for ODBC Drivers         Microsoft OLE DB Provider for Oracle         Microsoft OLE DB Provider for Search         Microsoft OLE DB Provider for SOL Server         Microsoft OLE DB Simple Provider         MSDataShape         OLE DB Provider for Microsoft Directory Services         OLE DB Provider for SQL Server Integration Services         SQL Server Native Client 10.0         SQL Server Native Client 11.0	2
	Next >> OK Cancel Help	
	Back Next Cance	el



3) Select your system DSN (see prerequisites). Then press 'OK' to continue.

🗊 Data Link Properties >	<		
Provider Connection Advanced All			
Specify the following to connect to ODBC data:			
1. Specify the source of data:			
Use data source name			
My SugarCRM 32 bits System DSN V			
Use connection string			
Connection string:			
B <u>u</u> ild			
2. Enter information to log on to the server			
User name:			
Password:			
Blank password Allow saving password			
3. Enter the initial catalog to use:			
~ ·			
<u>T</u> est Connection			
OK Cancel Help			

4) Once the ODBC connection is made, the wizard shows available tables/views and an example query for SugarCRM 7.

CloudCTI Recognition Configuration Tool	Х
Please configure the data link to your SuiteCRM's MySQL database 🛗	
Configure Provider=MSDASQL.1;Persist Security Info=False;Data Source=SuiteCRM;Initial Catalog=bitnami_suitecrm	
○ Use an existing table from an existing database	
V bitnami_suitecrm	^
accounts	
accounts_audit	
] accounts_bugs	
] accounts_cases	
accounts_contacts	
accounts_cstm	
] accounts_opportunities	
	•
Use an ODBC query	
select a.name AS company, c.id, c.salutation, concat(c.first_name,' ',c.last_name) as fullname, c.phone_home, c.phone_mobile, c.phone_work, c.phone_other, c.assistant_phone from contacts as c join accounts_contacts as ac on c.id = ac.contact_id join accounts as a on a.id = ac.account_id	^
Test supp	$\sim$
Test query	
Back Next Canc	el



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

_	1		
0	Incoming Call Contact name: fullname Account: company Number: Caller number Source: Application name		
* Wind	lows allows a maximum of 255 characters		
	Add recognition field Add call field		

6) By default, the popup is configured to open the CRM account card. Change the [ServerName] to your server and alter the URL, if necessary. Click 'next' to continue.

🧔 CloudCTI Recognition Configuration Tool				×
Enter the webpage you want to oper	ı			
To construct the correct URL with the informa custom domain.	tion from the recogniz	ed contact, replace [CustomDomain] \	with the name of the your	
Script name Show Contact				
Webpage	bpage https://[CustomDomain]/index.php#Contacts/\$(id)			
Click on a recognition field to add it to the we id Name company first_name last_name fullname phone_home phone_mobile phone_work phone_work phone_other assistant_phone Restore the default webpage	bpage	Click on a call field to add it to the we Caller number Device number Device name Ddi number Ddi number Ddi name Start time Application name	:bpage	
Test script			Next Cance	I



## 7) You can add additional scripts. Click 'next' to continue.

CloudCTI Recognition Configuration Tool	×
Which actions do you want to perform? The SugarCRM 'Show Contact' script is configured. Optionally, you can add extra scripts to the incoming call notification.	
Show Contact Open SugarCRM and show the caller's CRM page	Ŵ
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next Ca	ncel

8) Check the configuration summary and click 'Finish' to add the recognition from SugarCRM.

CloudCTI Recognition Configuration Tool			×
Summary			
Application			
SugarCRM 7			
Recognition			
Recognition from ODBC by custom query			
Scripts			
Show Contact: Open webpage https://[CustomDomain]/index.php#Contacts/\$(id)			
	Back	Finish	Cancel