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 32-bit MySQL ODBC driver. Please check the MySQL website 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
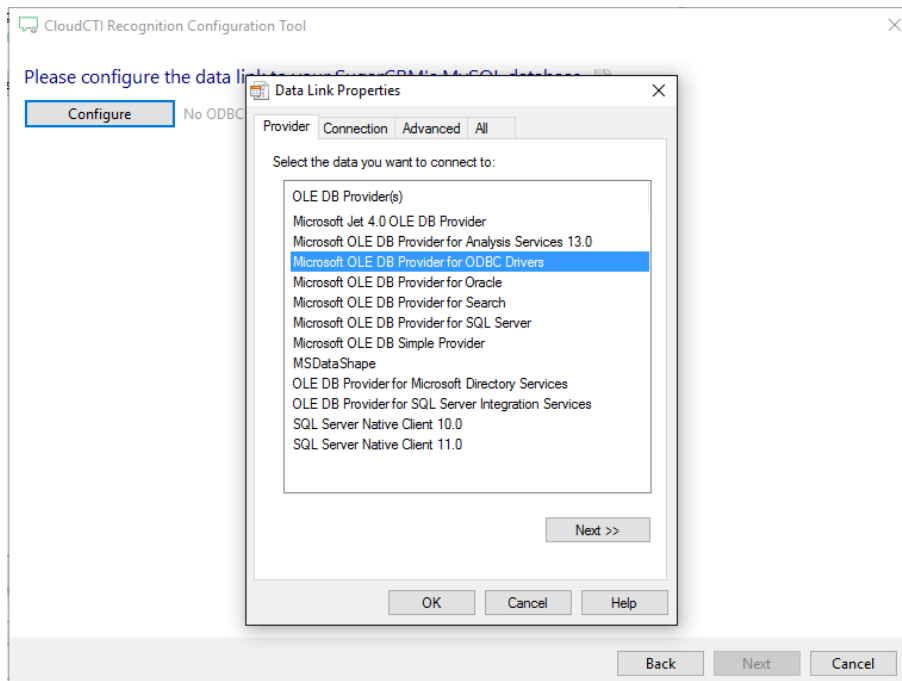
Configuration steps

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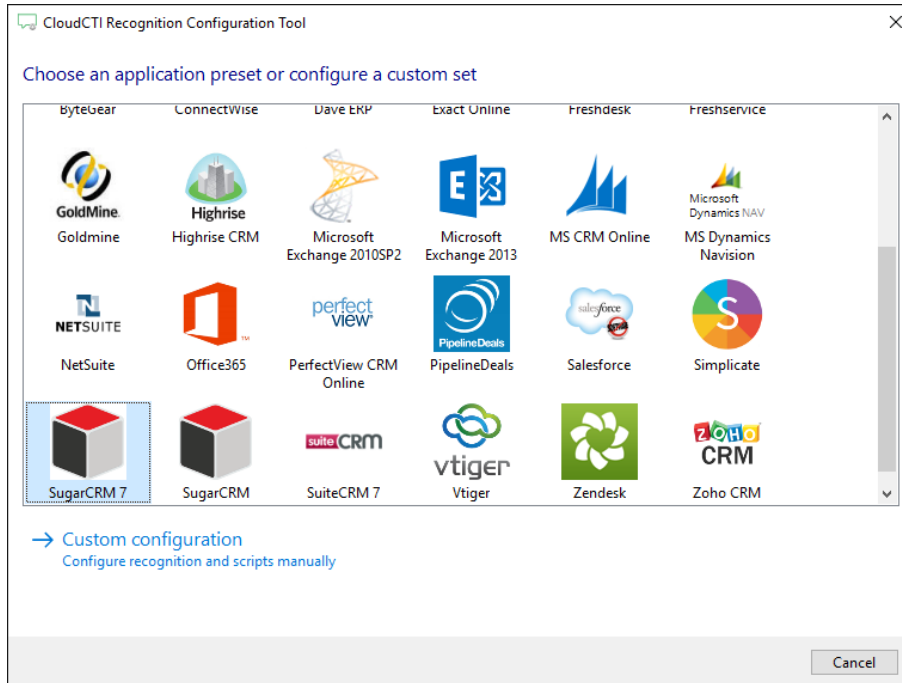

2) Press 'Configure' to open the Windows Data Link Properties dialog to configure your ODBC connection string. Select "Microsoft OLE DB Provider for ODBC Drivers" and press the 'Next >>' button.
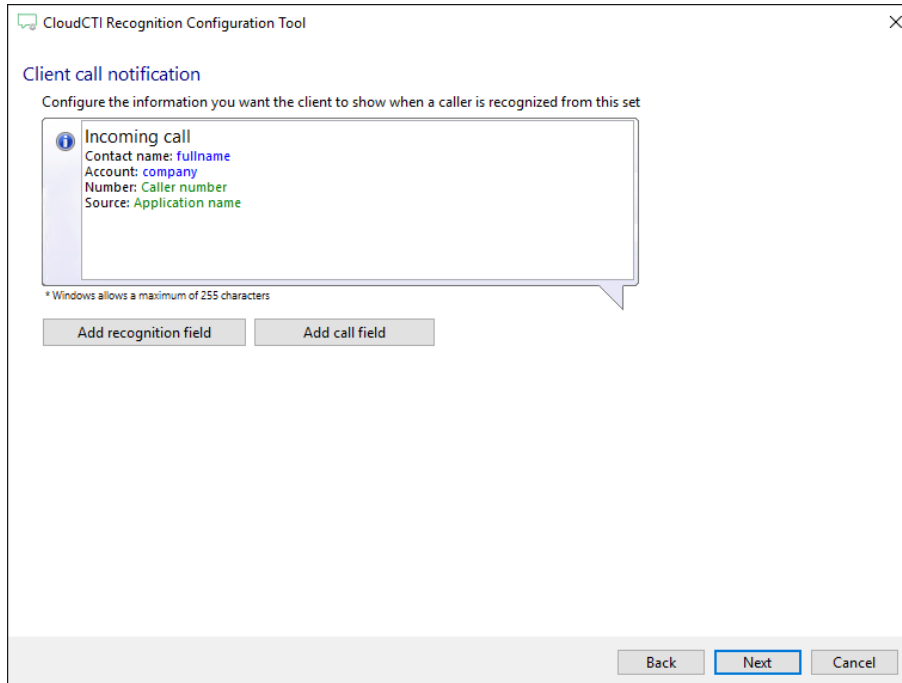
3) Select your system DSN (see prerequisites). Then press 'OK' to continue.
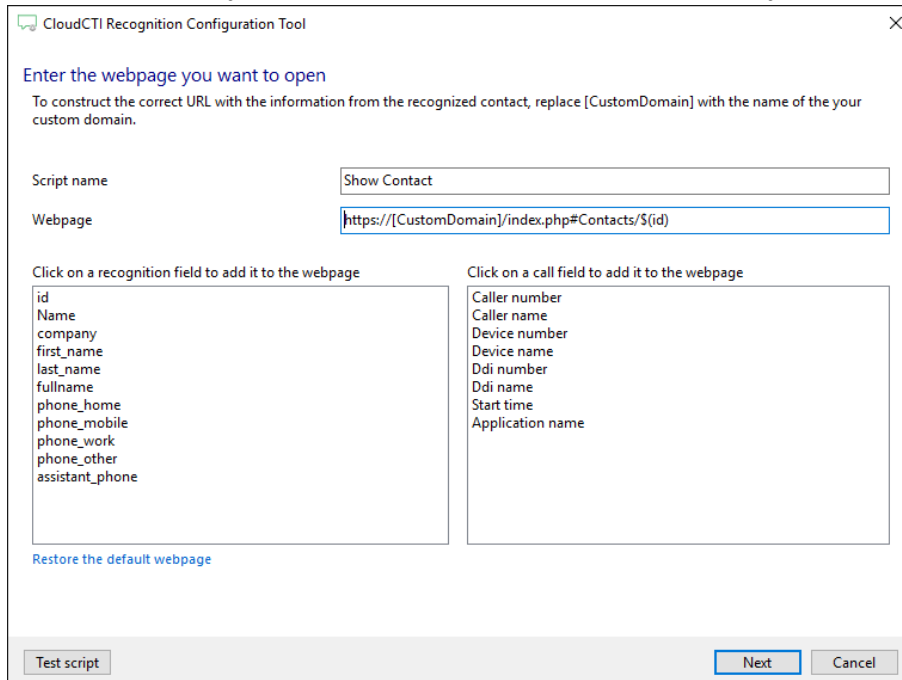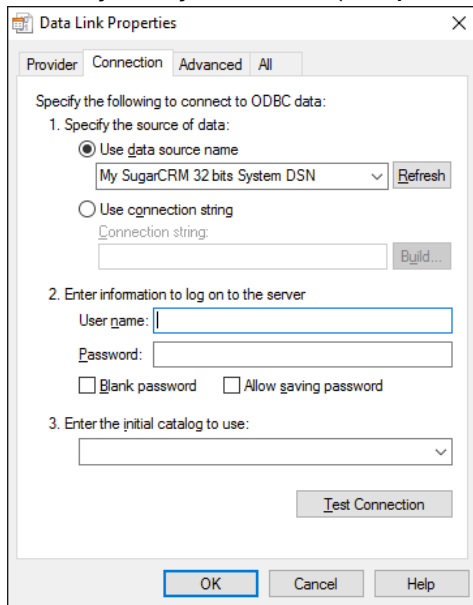

4) Once the ODBC connection is made, the wizard shows available tables/views and an example query for SugarCRM 7.
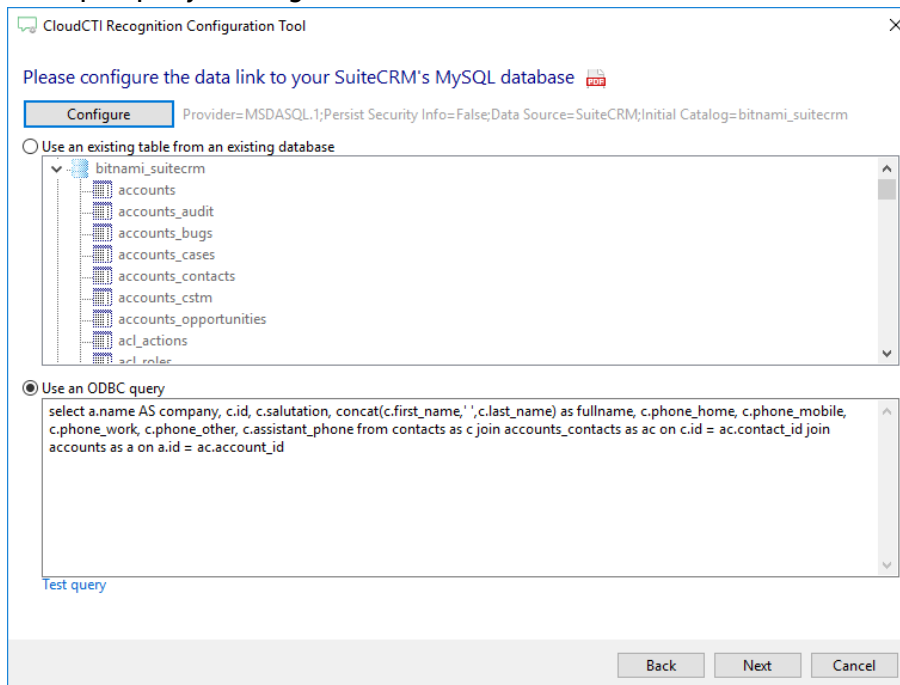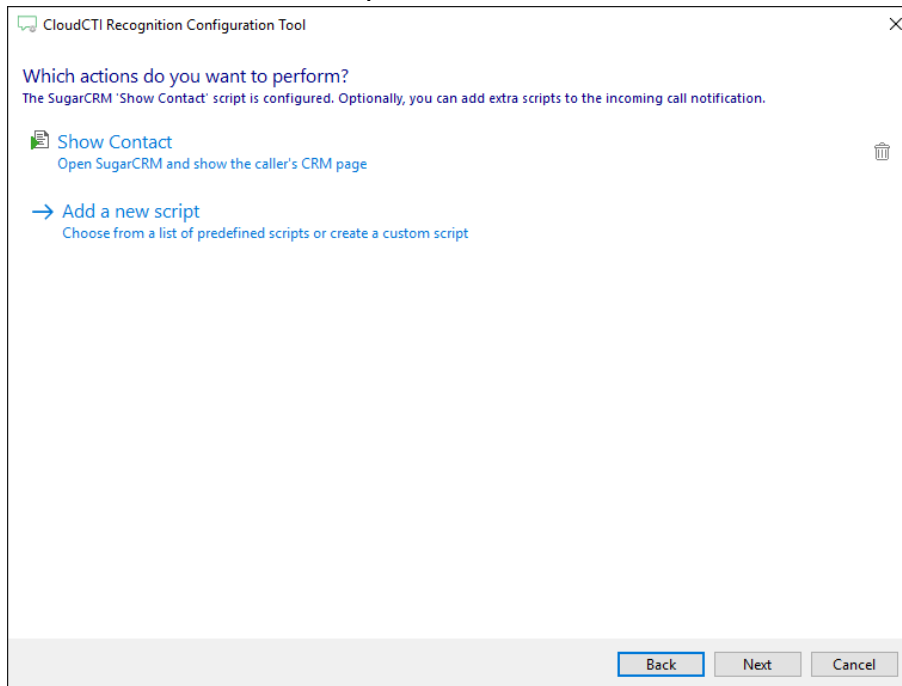
5) Choose which fields to display in the call notification on an incoming call.

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.

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

→ **Add a new script**
    Choose from a list of predefined scripts or create a custom script

Back   Next   Cancel

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