How to configure caller recognition and screen-pop for:

# SugarCRM Community

Supported versions: SugarCRM Community 6.5.X
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"
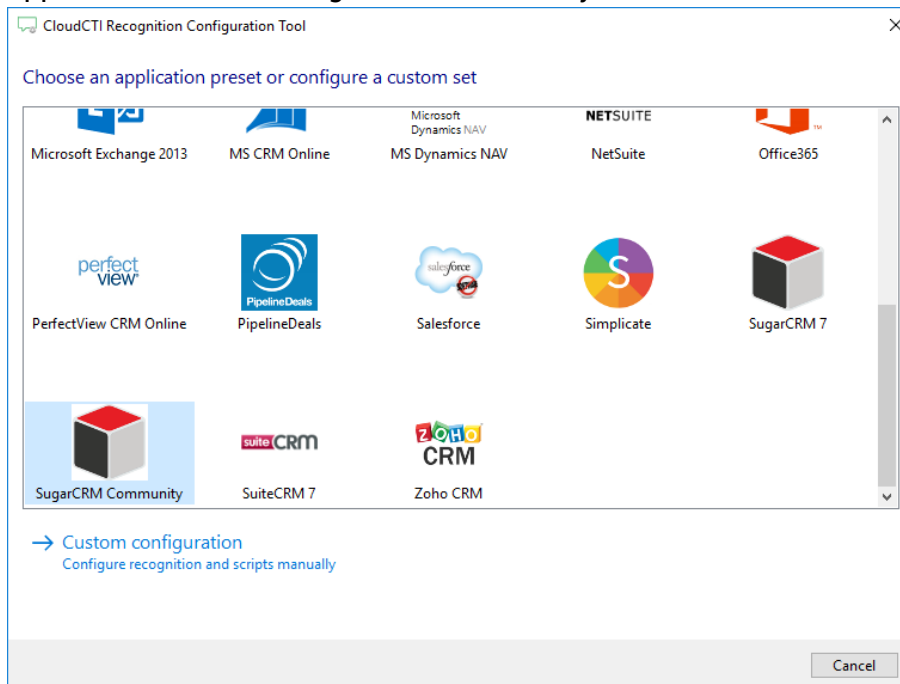
## Notes

In the SugarCRM Community 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
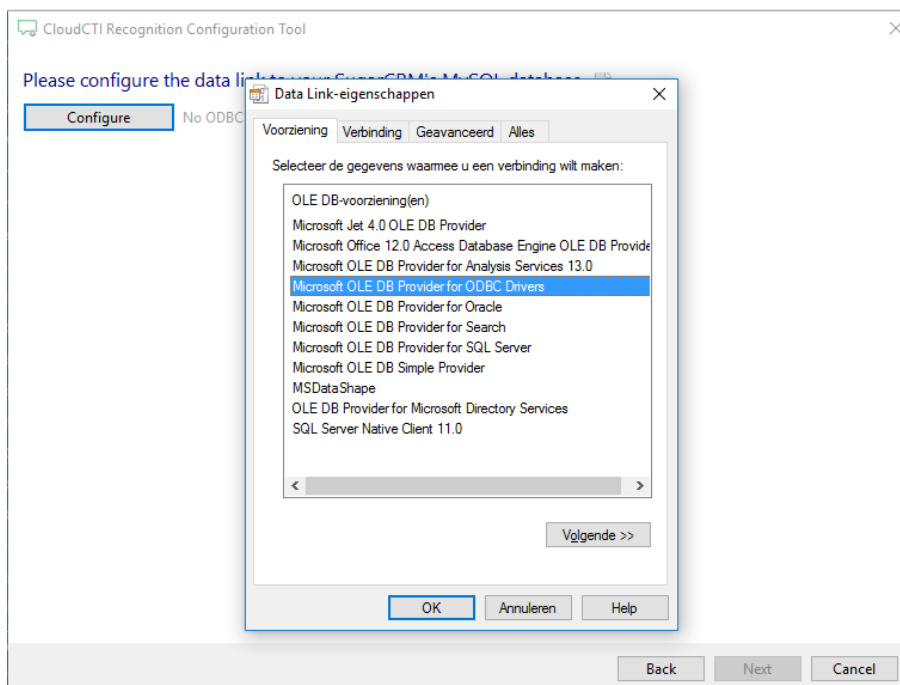
| Office Phone: | +1 555 555 55 |
| --- | --- |
| Fax: | +1 555 555 55 |
| Shipping Address: | |

## Configuration steps

1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) From the list of applications, choose 'SugarCRM Community', 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.
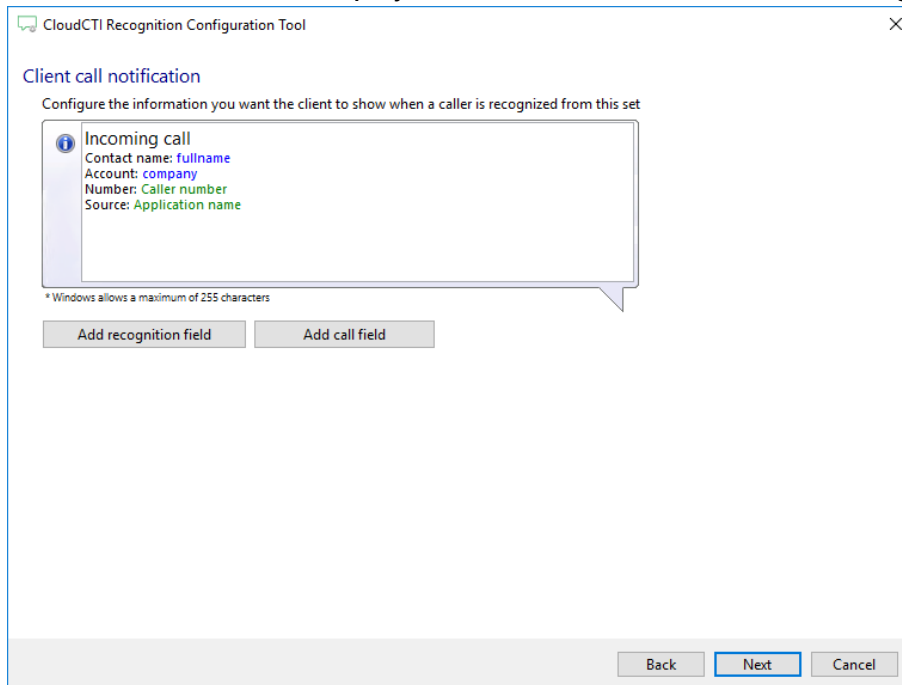
3) Select your Database and enter read access level credentials. Check 'Allow saving password' to make automatic replication possible. Press the 'Test Connection' button to ensure the credentials are valid. Then press 'OK' to continue.
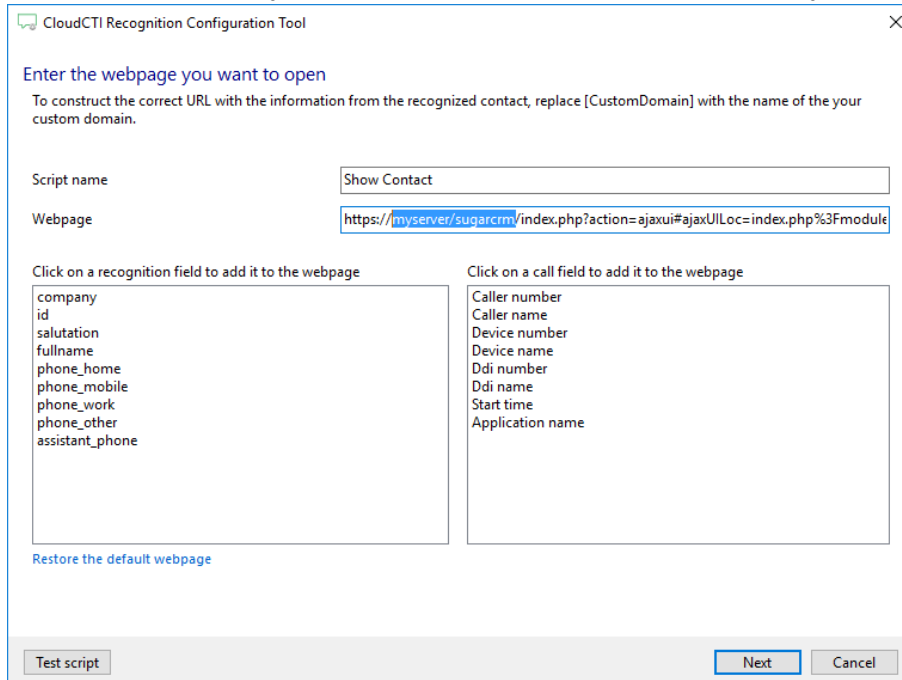


4) Once the ODBC connection is made, the wizard show available tables/views and an example query for SugarCRM Community.
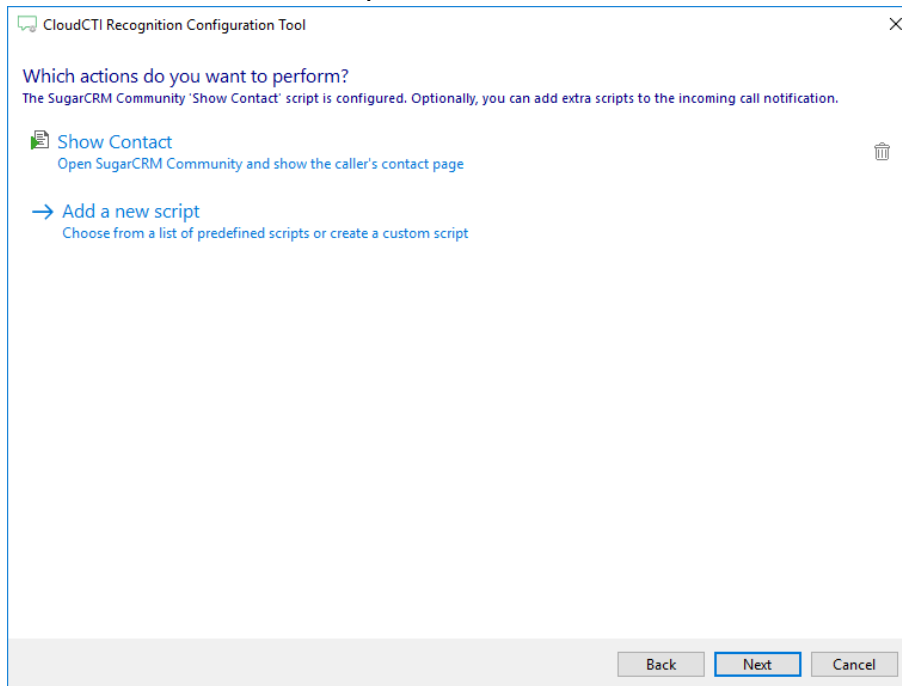
5) Choose which fields to display in the call notification on an incoming call.



6) By default, the popup is configured to open the CRM account card. Change the [CustomDomain] 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 Community 'Show Contact' script is configured. Optionally, you can add extra scripts to the incoming call notification.

📄 Show Contact             🗑
      Open SugarCRM Community and show the caller's contact 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 Community

CloudCTI Recognition Configuration Tool     ✕

**Summary**

    Application
       SugarCRM Community

    Recognition
       Recognition from ODBC by custom query

    Scripts
       Show Contact: Open webpage
       https://[CustomDomain]/index.php?action=ajaxui#ajaxUILoc=index.php%3Fmodule%3DContacts%26action%3DDetailView%26re

Back     Finish     Cancel