

How to configure caller recognition and screen-pop for:

## SuiteCRM 7

Supported versions: SuiteCRM 7.2 / Sugar Version 6.5.20 (Build 1001) or up

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

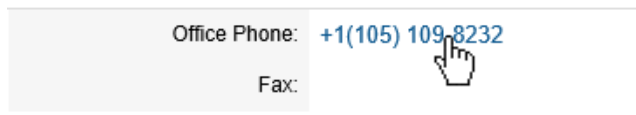
Configure a 32-bit System DSN datasource, which can be accessed by the Recognition Update service.

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

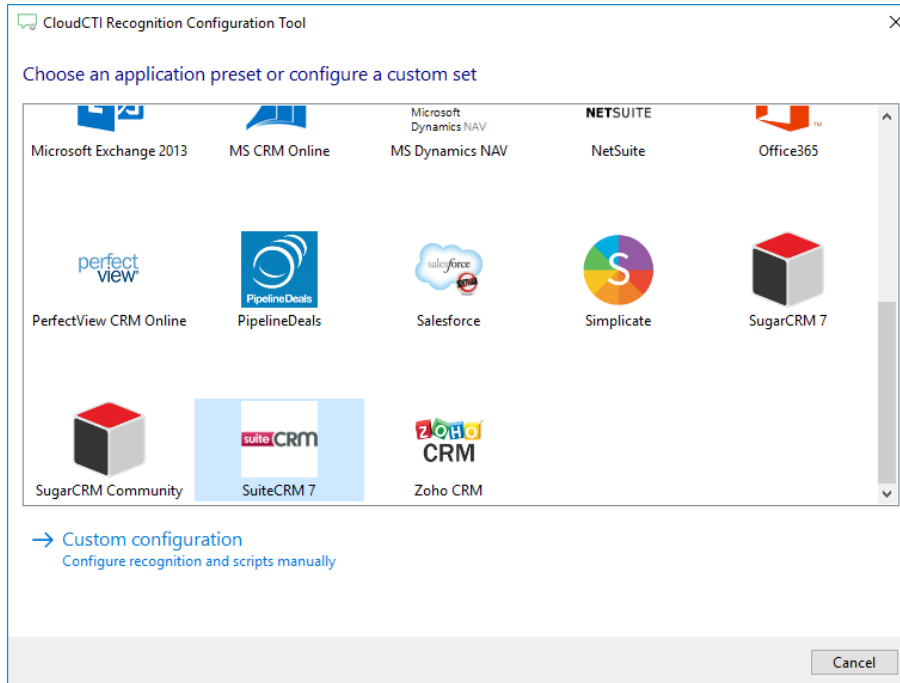
In the SuiteCRM 7 edition, you can click on a phone number hyperlink to dial.

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

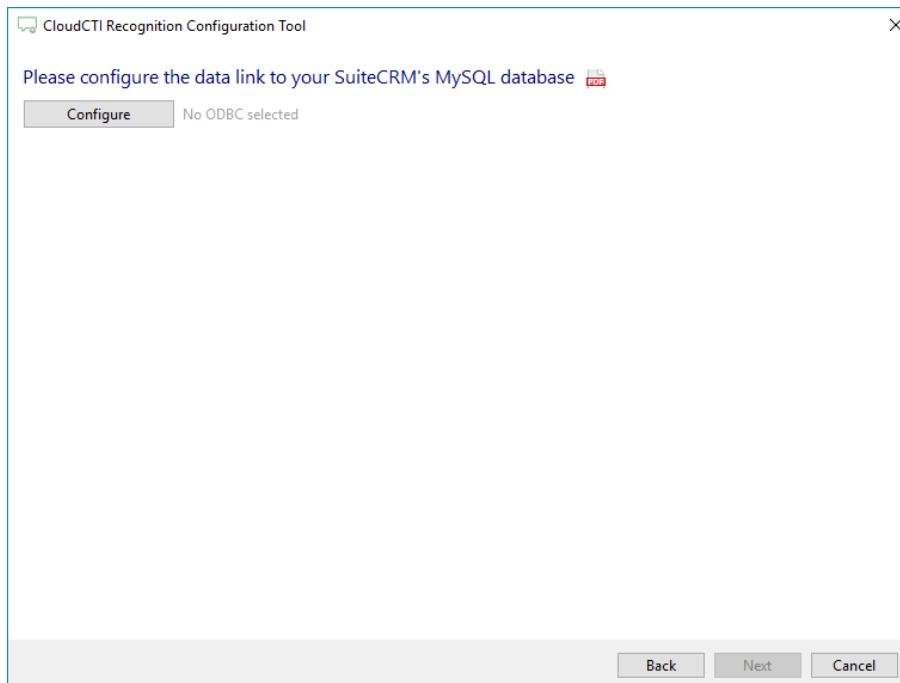


## Configuration steps

- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) From the list of applications, choose 'SuiteCRM 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 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.

The screenshot shows the 'Data Link-eigenschappen' dialog box with the 'Verbinding' tab selected. The instructions at the top read: 'Geef het volgende op om een verbinding met ODBC-gegevens te maken:'. There are three main sections:
 

- 1. Geef de bron van de gegevens op:** The radio button 'Gegevensbronnaam gebruiken' is selected. The dropdown menu shows 'SuiteCRM' and a 'Vernieuwen' button is next to it. The 'Verbindingsreeks gebruiken' option is unselected.
- 2. Geef de gegevens voor aanmelding bij de server op:** The 'Gebruikersnaam' field contains 'user'. The 'Wachtwoord' field is masked with dots. The 'Leeg wachtwoord' checkbox is unselected, and the 'Opslaan van wachtwoord toestaan' checkbox is selected.
- 3. Geef de catalogus op die aanvankelijk moet worden gebruikt:** The dropdown menu shows 'bitnami\_suitecrm'.

 At the bottom, there are buttons for 'OK', 'Annuleren', and 'Help', and a 'Verbinding testen' button is located above the 'OK' button.

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

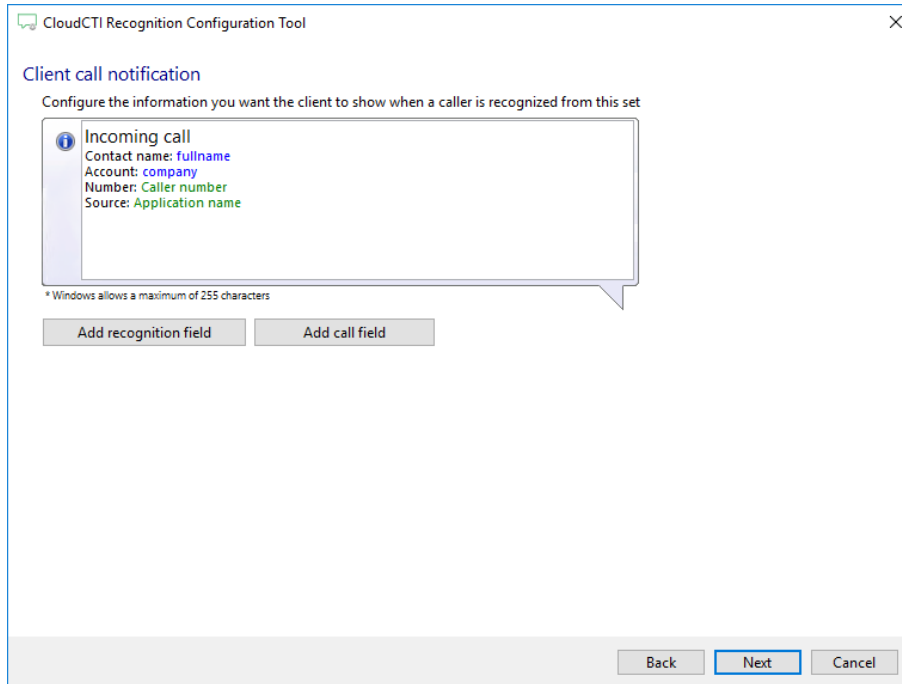
The screenshot shows the 'CloudCTI Recognition Configuration Tool' dialog box. At the top, it says 'Please configure the data link to your SuiteCRM's MySQL database'. Below this is a 'Configure' button and a status bar showing 'Provider=MSDASQL.1;Persist Security Info=False;Data Source=SuiteCRM;Initial Catalog=bitnami\_suitecrm'. There are two main options:
 

- Use an existing table from an existing database:** This option is unselected. It shows a tree view of the 'bitnami\_suitecrm' database with tables like 'accounts', 'accounts\_audit', 'accounts\_bugs', etc.
- Use an ODBC query:** This option is selected. It shows a text area with the following SQL query:
 

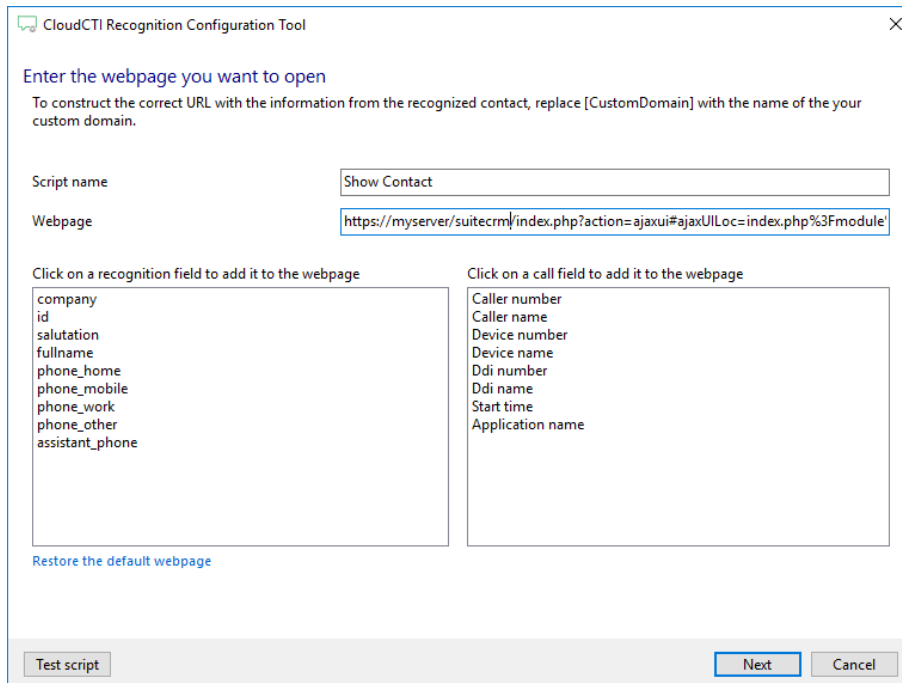
```
select a.name AS company, c.id, c.salutation, concat(c.first_name, ' ', c.last_name) as fullname, c.phone_home, c.phone_mobile, c.phone_work, c.phone_other, c.assistant_phone from contacts as c join accounts_contacts as ac on c.id = ac.contact_id join accounts as a on a.id = ac.account_id
```

 At the bottom, there are 'Back', 'Next', and 'Cancel' buttons, and a 'Test query' link is visible above the text area.

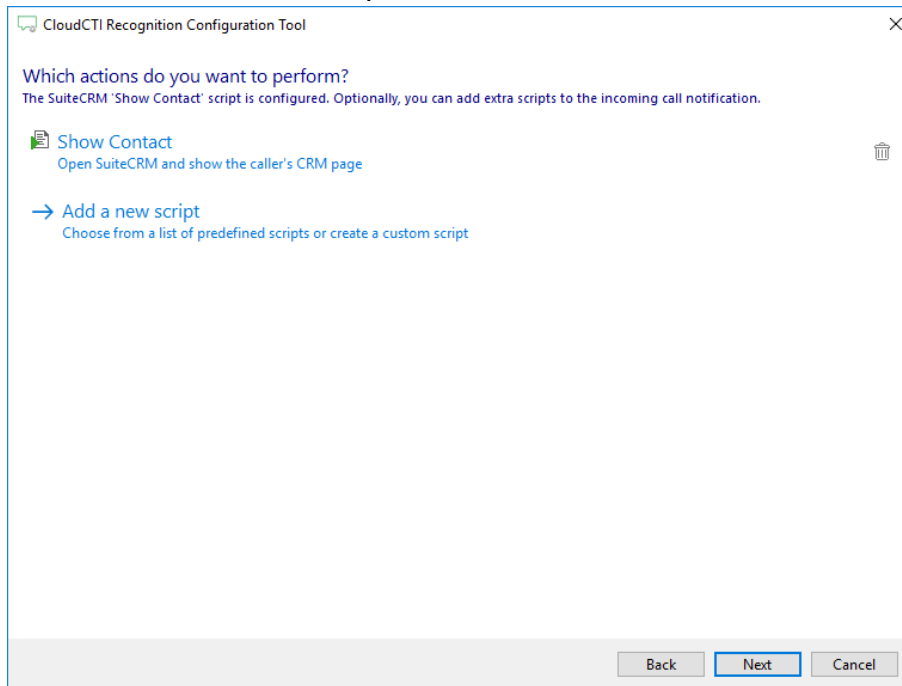
5) Choose which fields to display in the call notification on an incoming call.



6) By default, the popup is configured to open the CRM Contact 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



8) Check the configuration summary and click finish to add the recognition from SuiteCRM 7

