CRM INFO

How to configure caller recognition and screen-pop for:

Vtiger

Supported versions: Vtiger Contact replication method: API Screen pop method: URI

Prerequisites

To replicate data from Vtiger via the API, an Access Key is required.

Sign in to Vtiger as administrator and generate the key via "My preferences > User Advanced Options". There you will find the Access Key:

	vanced Options	
Access Key		

Besides the Access Key, the permission to retrieve data from a number of modules has to be given. Sign in to Vtiger as administrator and go to settings (click the user icon in the top right corner and select 'settings'). From there scroll to the bottom to the section 'module management'. Select 'modules'. On the module management page make sure that permission is given to the modules: Leads, Contacts and Vendors.

Notes

For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.



Configuration steps

1) Start by clicking 'add application' in the Recognition Configuration Tool. From the list of applications, choose 'Vtiger', as shown below.



2) Enter your Vtiger website *https://yourdomain.vtiger.com* and API key to access the data from your account. Click 'Next' to continue.

Q Application pop-up ins	stallation		\times
Please enter your V	tiger details 📷		
URL	https://mydomain.od2.vtiger.com/		
Username	user@domain.com		
Access key	BsL67eJr7fg89ui		
Requests per minute	Leave empty for maximum		
		Back Next Cancel	
			-



3) Check the configuration summary and click 'Finish' to add the recognition from Vtiger.

🧔 CloudCTI Recognition Configuration Tool	×
Summary	
Application	
Vtiger	
Recognition	
Recognition from vtiger	
Scripts	
Popup from export: Open webpage \$(PopUpUri)	
Back	Finish Cancel