How to configure caller recognition and screen-pop for:
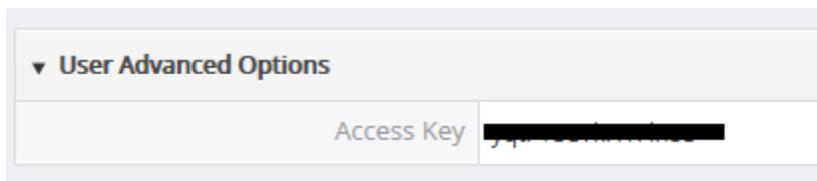
Vtiger

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:
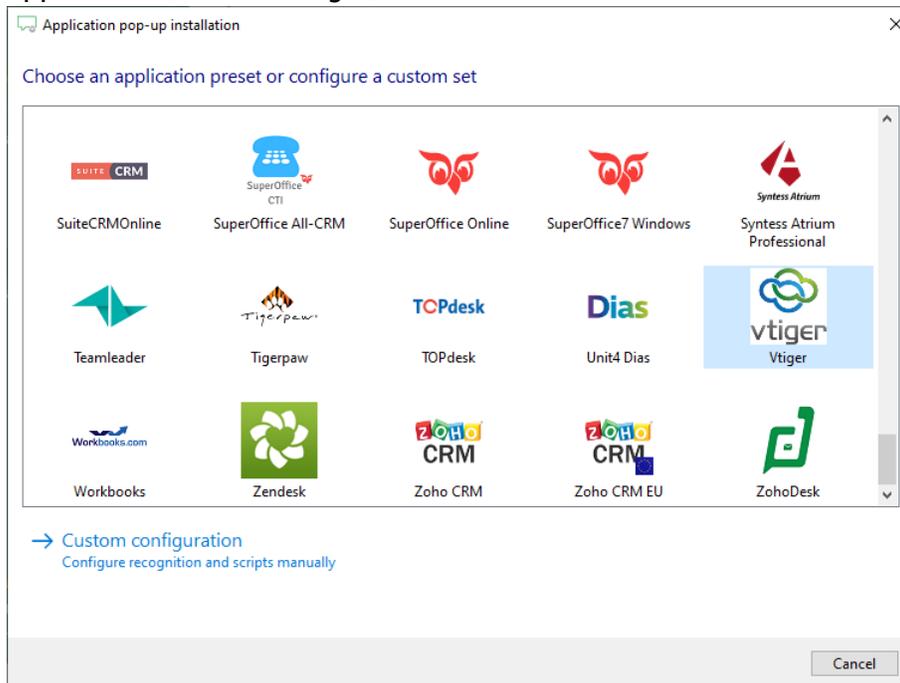

Besides the Access Key, the permission to retrieve data from a number of modules has to be given. Sign in to Vtiger as administrator and go to settings (click the user icon in the top right corner and select 'settings'). From there scroll to the bottom to the section 'module management'. Select 'modules'.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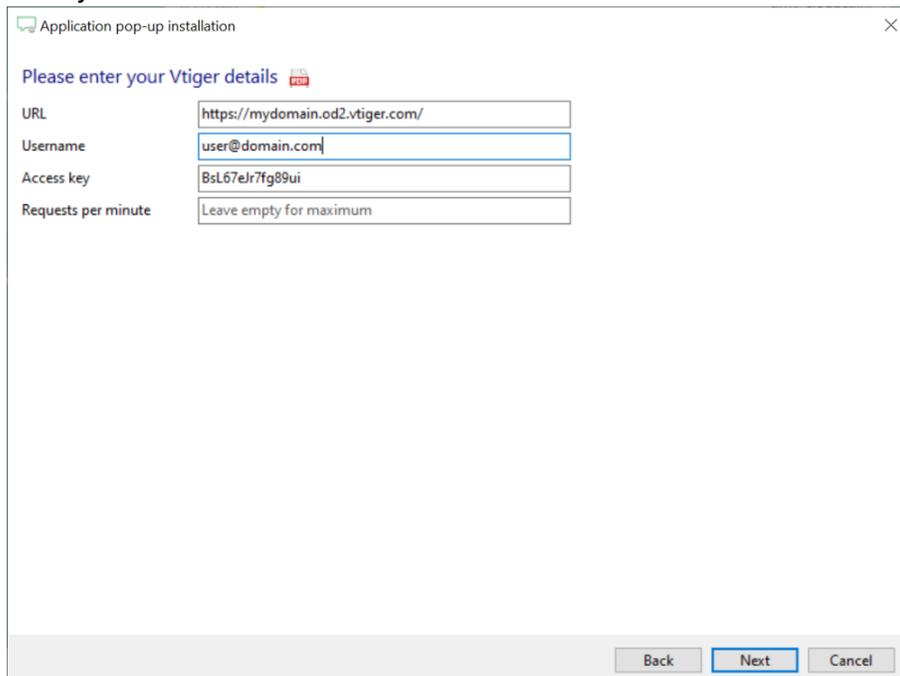
Notes

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.

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