



MyPBX with SugarCRM Integration Configuration Guide

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1. Introduction

SugarCRM enables businesses to create extraordinary customer relationships with the most innovative, flexible and affordable CRM solution in the market.

MyPBX could work perfectly with SugarCRM and help you to achieve the following features:

- Click to call.
- Incoming call popup.
- Take a note during a call, transfer a call and hung up the call with SugarCRM.
- Check call log in SugarCRM.

This document provides a step-by-step guide for integration with MyPBX and SugarCRM. In this guide, we tested with MyPBX U100 and SugarCRM 6.5.20.

Note:

Before installing SugarCRM, you should set up AMP (Apache+MySQL+Php) on your PC (Windows or Linux).

Click the following link to get a detailed SugarCRM Installation Guide:

http://support.sugarcrm.com/02_Documentation/01_Sugar_Editions/05_Sugar_Community_Edition/Sugar_Community_Edition_6.5/Sugar_Community_Edition_Installation_Guide_6.5.0/

For any problem occurred during the SugarCRM installation, please contact Sugar support.

2. Connection with SugarCRM and MyPBX

An Asterisk module is required to be installed in SugarCRM for connecting the CRM and MyPBX. Many 3rd party companies provide the add-on, such as:

- **Tech Exten:** <http://www.techextension.com>
- **Callinize:** <http://www.callinize.com>
- **Github:** <http://github.com>

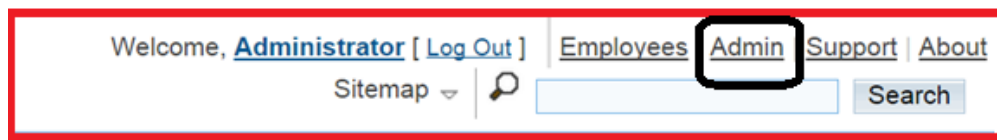
2.1 Install and Activate Asterisk Module

Usually, the engineer from 3rd party company will help you to install and activate the Asterisk module. We take Asterisk module from Tech Exten company as an example and introduce the details below.

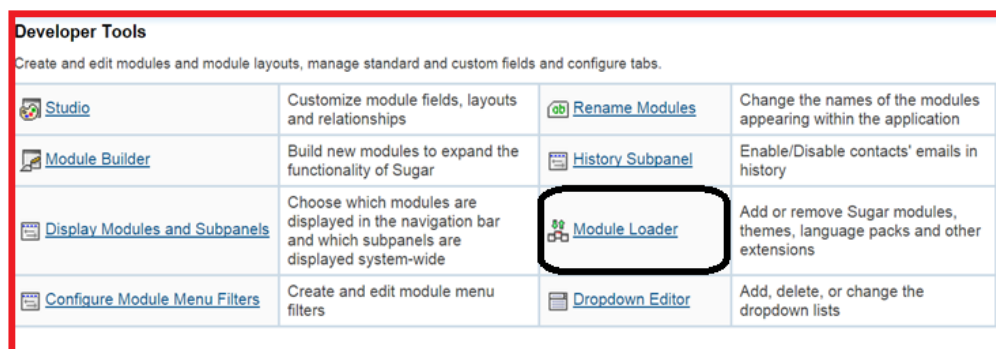
2.1.1 How to Install Asterisk Module Using Module Loader

After receiving the file that you would like to install, you must first upload it to your Sugar instance. To upload a file, follow the following steps:

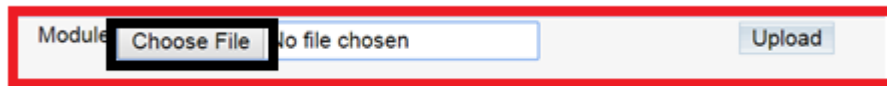
Step 1: Go to Admin Panel



Step 2: Navigate to Admin → Module Loader

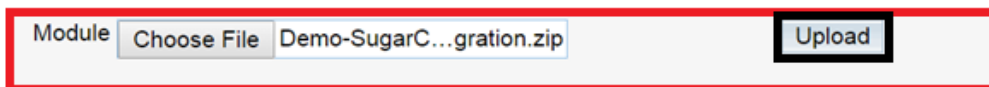


Step 3: Click the "Choose File" button in the Module Upload panel to open a file selection window from your browser.



Step 4: Select the file from your local computer.

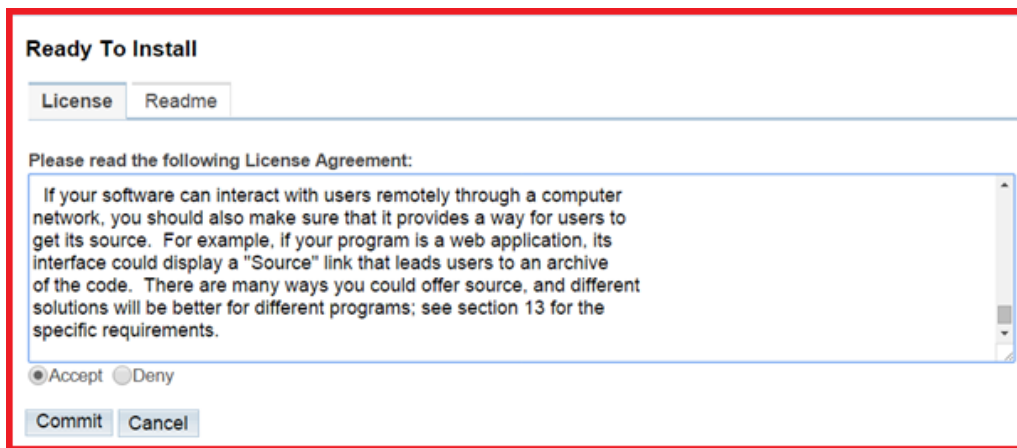
Step 5: After you select your file, click the "Upload" button to complete the process



Step 6: After it has been uploaded, the package will show in the Uploaded Packages panel

Name	Install	Delete	Type	Version
Demo : SugarCRM Asterisk Integration	Install	Delete Package	Module	1.0

Step 7: You will be brought to the installation screen to confirm that the packages should be installed, and to read and accept any license or read me documentation as needed. Click "Commit" when ready to run the installation.



Step 8: The next page will show a progress bar and a completion notice. If there are any errors, they will be displayed with a verbose explanation of what went wrong. If not, click "Display Log" to show what happened during the installation process.

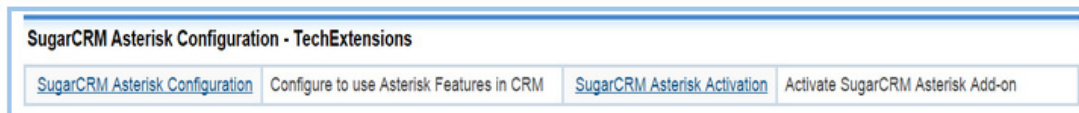
Step 9: Click Back to Module Loader when complete to return to Module Loader. If you do not need to install any further packages, you can navigate to any other section of Sugar as need be.

2.2.2 How to Activate SugarCRM Asterisk Module

After Successfully installation of Module, you need to Activate Module. The following steps describe the activation process.

Step 1: Go to Admin Panel.

Step 2: Go to SugarCRM Asterisk Activation.



Step 3: Fill the details And Click on update.

User Activation Form

Name

Company Name

Email

Phone Number

Step 4: Sent Email to support@techextension.com and ask for activation key.

Step 5: Enter Activation Key.

License Key Detail

Serial ID

Activation Key Note : User have to Fill Above User Activation Form to get Activation key from our Support,if you need any help you can ask us @ support@techextension.com

2.3. MyPBX Configuration

Step1: Enable AMI on MyPBX.

Before connecting MyPBX and SugarCRM, please make sure AMI settings are configured correctly.

Login in MyPBX Web User Interface, and go to **System**→**Security Settings**→**AMI Settings** to configure AMI.

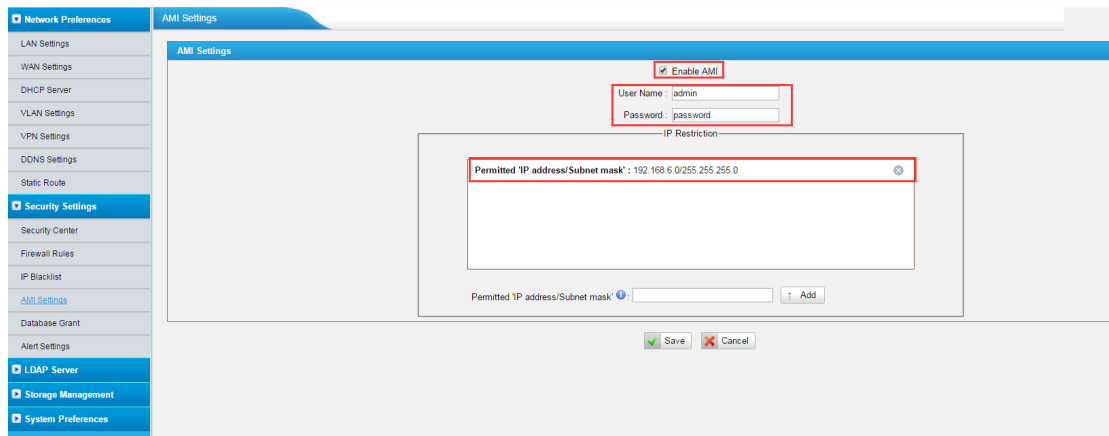


Figure 3-1 Enable AMI on MyPBX

Enable AMI: Checked //Enable AMI, the default AMI port is 5038
User Name: admin // Enter the user name according to your preference
Password: password //Enter the password according to your preference
Permitted 'IP address/Subnet mask': 192.168.6.0/255.255.255.0
 // Only the input IP address range can connect MyPBX via AMI

Step 2: Create an extension for SugarCRM.

Note:

Due to a limit of the add-on, the calls from same length digits are considered as internal calls and the add-on will not display popup in SugarCRM for such calls.

In this case, we will create one different-digit extension on MyPBX. For example, the range of extension is 500-599, here we change the range to 500-9999, and create an extension 2000.

- 1) Go to **PBX->Basic Settings->General Preferences->Extension Preferences**, Change User Extensions Range on MyPBX

User Extensions : 500 to 9999

Ring Group Extensions : 620 to 629

Paging Group Extensions : 630 to 639

Conference Extensions : 640 to 659

IVR Extensions : 660 to 679

Queue Extensions : 680 to 689

Reset to Defaults

Save Cancel

Figure 3-2 Change User Extensions Range on MyPBX

- Go to **PBX->Extensions->FXS/VoIP Extensions->Add Extension**, create a new extension 2000 for SugarCRM.

Add VoIP Extension

General Other Settings

General

Type: SIP Extension: 2000 Password: Dsuafk920

Name: 2000 Caller ID: 2000 Register Name: 2000

Voicemail

Enable Voicemail Voicemail Access PIN #: 2000

Mail Setting

Enable Send Voicemail

Email Address:

Note: Please ensure that the section 'SMTP Settings for Voicemail'(in the 'Voicemail Settings') have been properly configured before using this feature.

Group

Pickup Group: ---

Call Duration Setting

Max Call Duration: 0 s

VoIP Settings

NAT: Qualify: Enable SRTP:

Transport: UDP DTMF Mode: RFC2833 Register Remotely:

Save Cancel

Figure 3-3 Create a new extension 2000 for SugarCRM

3.3 SugarCRM Configuration

After successful activation of Module, you need to configure “Admin” Module settings and “User” Module settings.

Step 1: Go to **Admin Panel**.

Step 2: Go to **SugarCRM Asterisk Configuration**.

SugarCRM Asterisk Configuration - TechExtensions	
SugarCRM Asterisk Configuration	Configure to use Asterisk Features in CRM

Step 3: Enter the URL of SugarCRM and click “Save”. Here we input 192.168.6.29/SugarCE-Full-6.5.20.

SugarCRM Asterisk Configuration :

Warning: Invalid argument supplied for foreach() in /var/www/SugarCE-Full-6.5.20/custom/modules/Configurator/c/configurator.php on line 247

Configuration to add Asterisk Server

*Enter SugarCRM URL

NOTE : Enter CRM URL Without http://

Step 4: Enter the details of MyPBX AMI settings.

- **Asterisk IP:** 192.168.6.133 //MyPBX IP address
- **UserName:** admin //MyPBX AMI user name
- **Password:** password //MyPBX AMI password
- **Internal Channel:** SIP
- **External Channel:** DAHDI

Asterisk Configuration	
*Enter Asterisk IP	<input type="text" value="192.168.6.133"/>
*Asterisk Manager Username	<input type="text" value="admin"/>
*Asterisk Manager Password	<input type="password" value="password"/>
*Asterisk Internal Channel	<input type="text" value="SIP"/>
*Asterisk External Channel	<input type="text" value="DAHDI"/>
* Indicate mandatory fields	
<input type="button" value="Save"/> <input type="button" value="Clear"/>	

Step 5: Click “Save”.

Step 6: Go to **User Panel**

Step 7: Fill in appropriate details as below:

Asterisk Extension: 2000

Asterisk IP: 192.168.6.133

Context: DLPN_DialPlan2000

Channel: SIP/2000

Asterisk User Configuration Panel			
Asterisk Extension:	<input type="text" value="2000"/>	Asterisk IP:	<input type="text" value="192.168.6.133"/>
Show dial icon for calling:	<input checked="" type="checkbox"/>	Channel:	<input type="text" value="SIP/2000"/>
Context:	<input type="text" value="DLPN_DialPlan2000"/>	Need Notification:	<input checked="" type="checkbox"/>
Show Previous Call:	<input checked="" type="checkbox"/>	Relate Contact:	<input checked="" type="checkbox"/>
Call Schedule:	<input checked="" type="checkbox"/>	Create Task:	<input checked="" type="checkbox"/>
Relate Account:	<input checked="" type="checkbox"/>	Create Account:	<input checked="" type="checkbox"/>
Create Lead:	<input checked="" type="checkbox"/>	Create Contact:	<input checked="" type="checkbox"/>
Call Transfer:	<input checked="" type="checkbox"/>	Call Hangup:	<input checked="" type="checkbox"/>
Create Case:	<input checked="" type="checkbox"/>		

Step 8: Click “Save”.


4. Handling Calls on Sugar CRM

4.1 Click to call


Go to **Marketing->Contacts**, select one contact and click it.

The screenshot shows the SugarCRM interface. The top navigation bar includes 'Sales', 'Marketing', 'Support', 'Activities', 'Collaboration', and 'All'. The 'Marketing' tab is selected. Below the navigation bar, there are tabs for 'Home', 'Accounts', 'Contacts', 'Leads', 'Campaigns', 'Targets', and 'Target Lists'. The 'Contacts' tab is selected. The main content area shows a search bar with the name 'catherine' entered and highlighted with a red box. Below the search bar is a table of search results with columns: Name, Title, Account Name, Email, Office Phone, User, and Date Created. The contact 'catherine' is highlighted with a red box in the table.

Name	Title	Account Name	Email	Office Phone	User	Date Created
Ding CK				500	Simeon Administrator	06/07/2015 08:14pm
Jason				503	Simeon Administrator	06/07/2015 08:14pm
Ms. cathe vi				200012	Simeon Administrator	05/26/2015 03:47am
lia21				203	Simeon Administrator	05/05/2015 02:51am
catherine				510	Simeon Administrator	04/29/2015 07:37pm

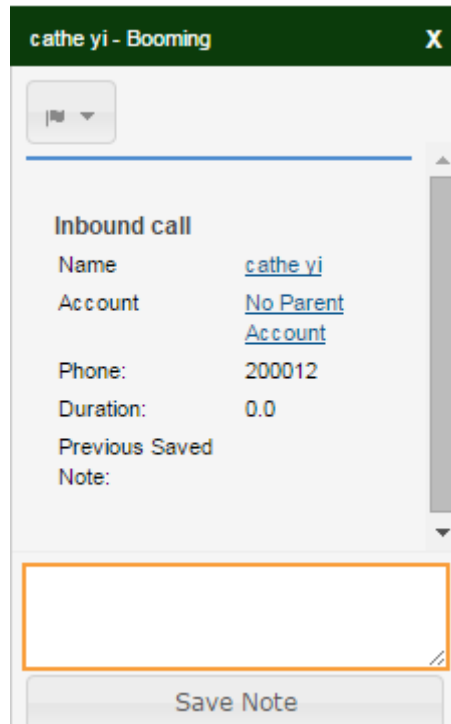
To make an outgoing call, please click on the icon  near the number. Your phone which is registered extension 2000 will ring first. Pick up your phone, then a call to the contact will be established.

The screenshot shows the contact detail page for 'catherine'. The page has a header with the name 'catherine' and an 'Edit' button. Below the header is an 'Overview' section with a table of contact information.


Name:	catherine	Office Phone:	510 
Title:		Mobile:	
Department:		Fax:	
Account Name:		Other Address:	
Primary Address:			
Email Address:	-none-		
Description:			

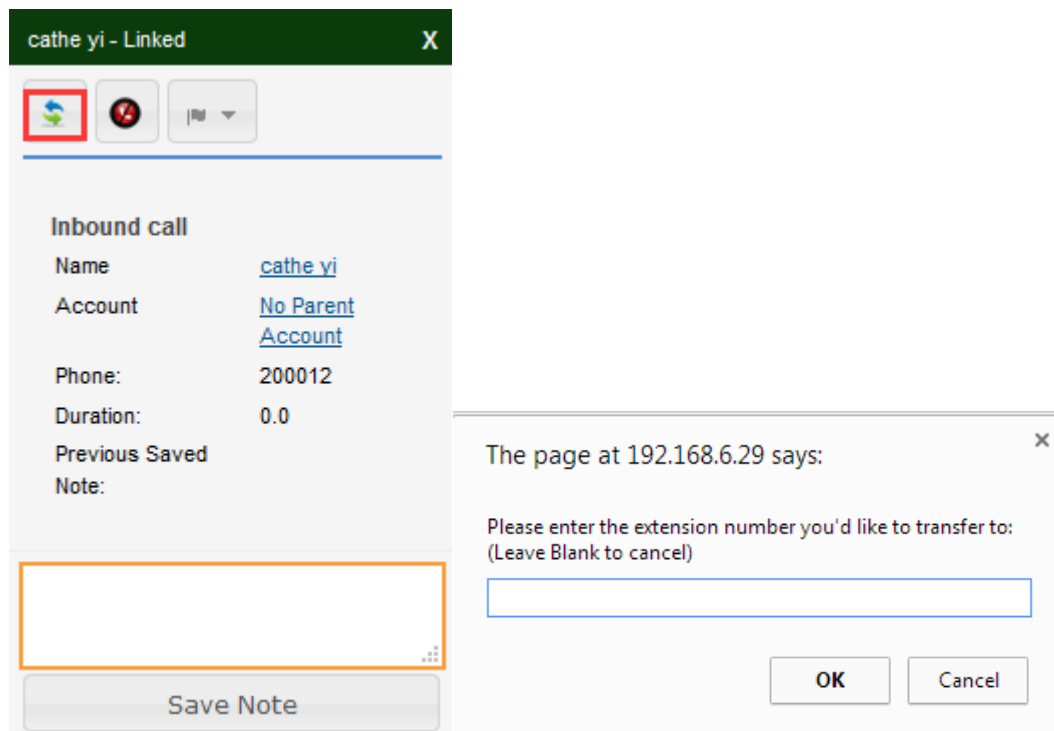
4.2 Incoming Call Popup

When a call comes to the user on Sugar CRM, a window will pop up, showing the caller's information if the caller is listed in Sugar CRM contacts.



4.3 Transfer a call

Click  to transfer the call, a window pops up, notifying you to enter the number you'd like to transfer to. After entering the extension number, click "OK" to transfer the call.



4.4 Take Notes during a Call

You can make notes during a call, click “Save Note” when the call is finished. This note will be automatically added to a file that is generated and stored in Sugar CRM after every call.

To view the notes, go to Activities->Calls, you will see all the call logs.

The screenshot shows the SugarCRM interface with the 'Calls' tab selected. The 'Search Calls' section is visible, and a list of call records is displayed. The records are as follows:

Close	Direction	Subject	Contact	Related to	Start Date	Assigned to	Date Created
<input type="checkbox"/>	Inbound	Incoming Call from:200012 to: 2000	-	-	06/07/2015 05:30pm	Simeon Administrator	06/07/2015 08:18am
<input type="checkbox"/>	Inbound	Incoming Call from:200012 to: 2000	-	-	06/07/2015 05:17pm	Simeon Administrator	06/07/2015 08:17am
<input type="checkbox"/>	Inbound	Incoming Call from:200012 to: 2000	-	-	06/07/2015 04:59pm	Simeon Administrator	06/07/2015 07:59am
<input type="checkbox"/>	Outbound	Outgoing Call to:200012 from: 2000	-	-	06/07/2015 04:35pm	Simeon Administrator	06/07/2015 07:36am

Choose one record and click, you will see the call status, and the auto generated note.

The screenshot shows the details of a call record titled 'Incoming Call from:200012 to: 2000'. The details are as follows:

- Subject:** Incoming Call from:200012 to: 2000
- Start Date & Time:** 06/07/2015 05:30pm
- Duration:** 1h 15m
- Description:** Sugar CRM test call.
- Status:** Inbound Held
- Assigned to:** Simeon Administrator
- Date Modified:** 06/07/2015 11:02pm by Simeon Administrator
- Date Created:** 06/07/2015 08:18am by Simeon Administrator
- TechExtension : Call Information**
 - Source Number: 200012
 - Call Source: Asterisk
 - Call Recording: Recordlink
 - Destination Number: 2000
 - Call Duration: 00:07

<The End>