



## **FIBERME Communications LLC.**

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FCM630A Series IP PBX – SugarCRM Integration Guide

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## INTRODUCTION

Customer relationship management (CRM) is a set of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers.

The FCM630A series support SugarCRM, allowing users to get full information about their contacts, customers and leads, and save call information details to specific table history for further usage.

This guide contains step-by-step configuration needed to set up SugarCRM with the FCM630A.



# FCM630A CONFIGURATION

The FCM630A series allows the following feature on SugarCRM:

- Querying
- Updating
- Adding CDR records through SugarCRM
- Click-to-Dial from SugarCRM

Two steps are required to configure FCM630A with SugarCRM:

1. **Admin Configuration.**
2. **User Configuration.**

## Admin Configuration

This step is required to provide SugarCRM Server Address, Contact Lookups... These settings will apply to all users on this FCM630A using SugarCRM platform.

SugarCRM configuration page can be accessed using admin login at “Web GUI→**Value-Added Features**→**CRM**”.

CRM

Save Cancel

CRM System: SugarCRM

\* CRM Server Address:

\* Add Unknown Number: Contacts

Contact Lookups:

0 item Available

3 items Selected


- Look up in Contacts table
- Look up in Leads table
- Look up in Accounts table

Figure 1: SugarCRM Basic Settings


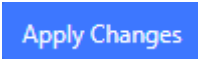
1. Select **SugarCRM** from the CRM System Dropdown to use SugarCRM.



**Table 1: SugarCRM Settings**

<b>CRM System</b>	Allows users to select a CRM system from the drop-down list, choose SugarCRM to use SugarCRM system.
<b>CRM Server Address</b>	Specifies the IP address of SugarCRM server.
<b>Add Unknown Number</b>	Allows to automatically save received calls from numbers not previously logged in SugarCRM and add contact phone number to specific table (Contacts, Leads...).
<b>Contact Lookups</b>	Selects from the “ <b>Available</b> ” list of lookups and press  to select where the FCM can perform the lookups on the CRM tables, Leads, Accounts, and Contacts.

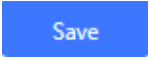
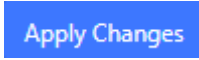
Once users finish configuring above settings using admin access:

2. Click on  and .
3. Logout from admin access.

## User Configuration

This configuration is per user, it will allow users to authenticate and sync up with SugarCRM platform.

**Note:** Admin Configuration needs to be set before enabling CRM for users.

1. Login to the FCM as user and navigate to “User Portal→**Value-added Feature**→**CRM User Settings**”.
2. Click on “**Enable CRM**” and enter the username/password associated with the CRM account then click on  and .

The status will change from “Logged Out” to “Logged In”. User can start then using SugarCRM features.



The screenshot shows a 'CRM User Settings' window. It contains the following elements:

- Enable CRM:** A checkbox that is checked with a blue checkmark.
- \* Username:** A text input field containing the value 'GStest'.
- \* Password:** A text input field containing the value 'password@123'.
- Login Status:** A label indicating the user is 'Logged In' in green text.

**Figure 2: CRM User Settings**

**Table 2: CRM user settings**

<b>Username</b>	Enter SugarCRM username to login.
<b>Password</b>	Enter SugarCRM Password to login.

## SUGARCRM INTERFACE

We assume that SugarCRM desktop application is installed, or users have access to SugarCRM web account.

Please refer to following steps:

1. Access SugarCRM web page.
2. Navigate to All→Calls, users will find list of all inbound/outbound calls made to/by the user registered extension as shown on figure below.



**SUGARCRM** Welcome, Bitnami [Log Out] [Employees](#) | [Admin](#) | [Support](#) | [About](#)

Sitemap

Sales Marketing Support Activities Collaboration **All**

Home Accounts Contacts Opportunities Leads Calendar **Calls** >>

Recently Viewed: Mhammed Bitnami | UCM6202 2002 | Call from 20... | Mr. Mhammed ... | Call from 10... | Call from 06... | 06554400002001

Actions: Log Call | View Calls | Import Calls

**Search Calls** [+](#) Create

Subject  My Items  Open Items    [Advanced Search](#) ?

Delete		(1 - 17 of 17)											
Close	Direction	Subject	Contact	Related to	Start Date	Assigned to	Date Created						
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Outbound	<a href="#">Call from 1000 to 2002</a>	2002	-	02/20/2017 08:57am	<a href="#">Doe Bitnami</a>	02/20/2017 08:57am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Outbound	<a href="#">Call from 1000 to 2003</a>	2003	-	02/20/2017 08:57am	<a href="#">Doe Bitnami</a>	02/20/2017 08:57am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 2000 to 1000</a>	2000	-	02/16/2017 08:09am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 2000 to 1000</a>	2000	-	02/16/2017 08:02am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 2001 to 1000</a>	2001	-	02/14/2017 07:07am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 2001 to 1000</a>	2001	-	02/14/2017 07:06am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 0655443322 to 1000</a>	0655443322	-	02/14/2017 07:07am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 06554400002001 to 1000</a>	06554400002001	-	02/14/2017 07:02am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 0655443322 to 1000</a>	0655443322	-	02/14/2017 07:03am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	<a href="#">Call from 0655443322 to 1000</a>	0655443322	-	02/14/2017 07:03am	<a href="#">Doe Bitnami</a>	02/20/2017 08:56am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 3: Call Log Page

