

VTIGER QUADRO INTEGRATION DOCUMENT (Version 1.0)

vTiger is a open-source CRM solution. Quadro is a voice based IP telephony system from epygi systems which allows users to make and receive calls from software phones (softphones) using their computer. The vtiger-quadro integration will allow users to use vtiger to create calls and receive notifications on incoming calls using the Third Party Call Control (3pcc) feature provided by Quadro. This document describes how to configure vTigerCRM to be able to use Quadro with it.

Purpose of the patch

The purpose of the patch is to integrate quadro within vtiger. This patch will enable you to:

1. Make calls by clicking on phone numbers (links) within vtiger.
2. Parse any incoming call and give you a notification within vtiger giving details of the caller.

Requirements

- vTigerCRM 5.0.4 should be installed on your system
- You should have a Quadro system running
- You should have the 3pcc license key activated for Quadro.
- The servers running vTiger and Quadro should be visible to each other
- You have a valid quadro user extension and a softphone configured to that extension.
- PHP Configurations:
 1. You need to have the php_sockets extension enabled for php
 2. You need to have the xmlrpc extension for php installed and enabled

Installation

Install a version of vTigerCRM 5.0.4 (if it is not already installed). You can get it here:

http://www.vtiger.com/index.php?Itemid=57&id=30&option=com_content&task=view.

Extract the Quadro patch and extract the files. Overwrite the files in the vTiger installed version with the ones in the Quadro patch. Run the migration file for the integration by launching the file migration_quadro.php present in the root folder of the vTiger installation. You can do this as:

<server-path>/<vtigercrm-installation-path>/migration_quadro.php
where

- <server-path> is the path of the server where vtiger is installed (for e.g. localhost)
- <vtigercrm-installation-path> is the name of the vtiger installation you have

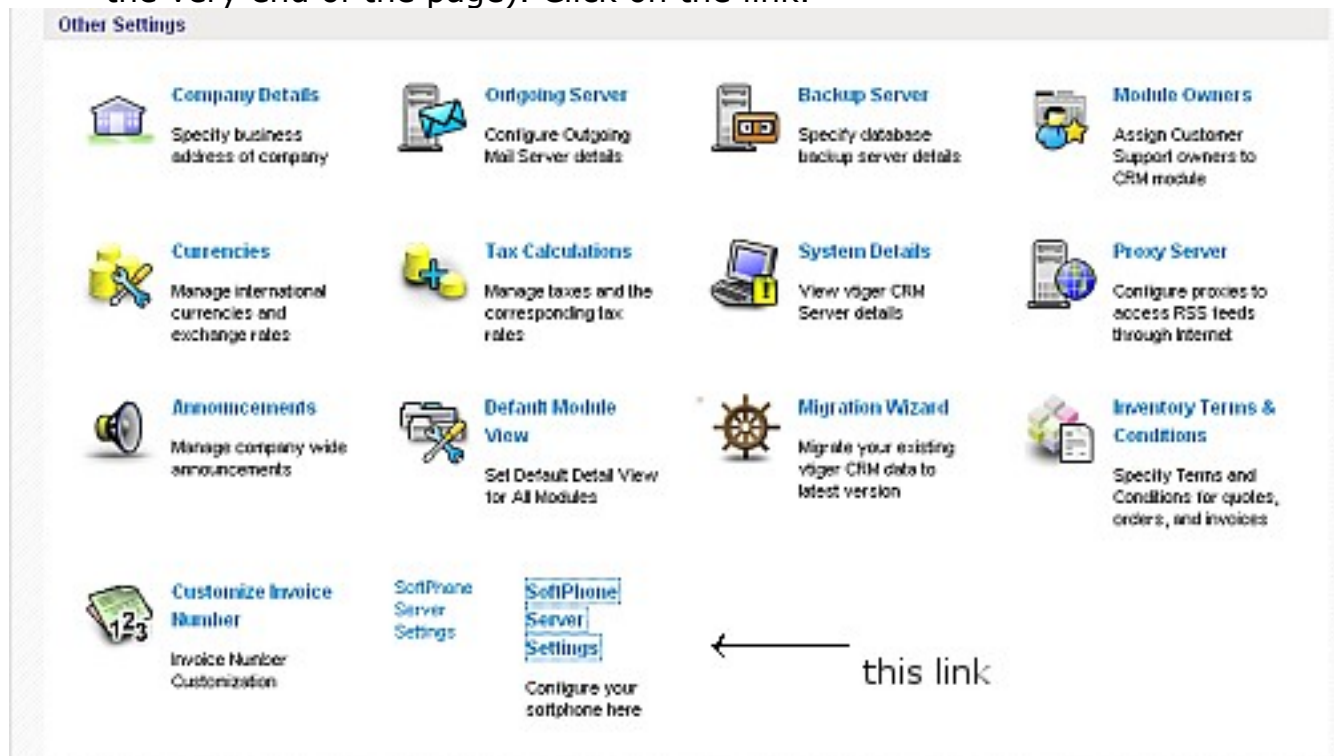
Changes required for php:

- You need to have the php_sockets extension enabled for php
- You need to have the xmlrpc extension for php installed and enabled

Configuring vTigerCRM

To configure vTiger with Quadro you will need to do the following:

- Login vTiger as admin user
- Go to the Settings page
- There you will find the Softphone Server Settings link as shown below (at the very end of the page). Click on the link.



- You should be taken to the page shown below. Here you would need to enter the Quadro configuration settings.
 1. **Quadro server IP** is the IP of the server where you are running Quadro (for e.g. 192.168.52.57)

2. **Quadro user name** is the name of the user you would use to log in to the quadro server (for e.g. admin)
3. **Quadro password** is the password for the Quadro user.

SoftPhone Server Settings > **Settings** > **SoftPhone Server Settings**
 Configure your softphone here

Quadro Customization

Quadro server IP	<input type="text" value="192.168.54.57"/>
Quadro user name	<input type="text" value="admin"/>
Quadro password	<input type="text" value="19"/>

- Click on the update button to save the Quadro settings to vtiger database.
- After this is done all users will have set up their respective Quadro extensions in the User Preferences. To do this login as any user and click on the "User Preferences" link on the top right of the page (beside the Help link on Top). On the User Preferences page you will find a block labeled Quadro Configuration as shown below.

3. User Address		
Street Address	<input type="text"/>	Country
City	<input type="text"/>	Postal Code
State	<input type="text"/>	

4. User Photograph	
Upload Photograph	<input type="text"/>

5. Quadro Configuration	
Quadro Extension	311

Fill up the quadro extension for your user here (in editview or ajax edit) and save the page.

- Now that all user are set and the quadro configuration is set you need to

run the script which will connect to the Quadro server. To do this go to the cron/ folder in vtiger installation (from command prompt) and run the script QuadroCron.php. It is very simple to do this. Just run php5 QuadroCron.php to execute the file. You should see something like the following image after running the script.

```
crm@vtiger:/var/www/quadro/cron$ php5 QuadroCron.php
Connecting to quadro server.....
Connected to server 192.168.54.57 successfully
Authorization to quadro server successful

Subscribe extension: 311
<?xml version="1.0" encoding="iso-8859-1"?>
<methodCall>
<methodName>Services.CallProcessingService.incomingcallhandling</methodName>
<params>
  <param>
    <value>
      <string>311</string>
    </value>
  </param>
  <param>
    <value>
      <boolean>1</boolean>
    </value>
  </param>
</params>
</methodCall>

XML_begin
<?xml version="1.0"?>
<methodResponse>
<params>
<param>
<value><string>0</string></value>
</param>
</params>
</methodResponse>
XML_end
```

Note: This script must be kept running to enable the integration as this provides vTiger with the socket connection to quadro server.

- After running the script login to vtiger as any user whose extension has been configured (in user preferences). All the phone numbers in the vTigerCRM will show up as links in listview and detailview. Clicking on any of these links will initiate a call as shown below.



<input type="checkbox"/>	First Name	Last Name ▼	Title	Account Name	Email	Office Phone
<input type="checkbox"/>	Elizabeth	Brown	VP Sales	demovtiger	elizabeth_brown@company.com	pbx313
<input type="checkbox"/>	Jennifer	Davis	IT Developer	demovtiger	jennifer_davis@company.com	00019916936554
<input type="checkbox"/>	Patricia	Johnson	President			(737) 530-3822
<input type="checkbox"/>	Barbara	Jones	IT Developer			(259) 763-0217
<input type="checkbox"/>	Maria	Miller	Director Operations			(892) 366-6314

Showing 1 - 10 of 10 Filters: All

Outgoing Call [X]

Pick up the extensions receiver to dial the number

A popup notifying the outgoing call is displayed and the call is made. First the extension saved in "User Preferences" will start getting a call from the attendant (00 extension). Once this call is picked up, the number clicked in vtiger will be connected to the users' extension.

- In case of incoming call the user gets a popup notifying the caller name (if the number is present in vTiger) and his link. If the number is not present in vTiger, then a **Unknown Caller** message is displayed in the popup.

Note: While it is possible to save the number (in vTiger) in any format and create the call, vTiger would not recognize the caller. It is required to save the number (in vTiger) with the extension specified for the system (for e.g. pbx:311); for vTiger to recognize the user.

Use the following format for saving the numbers in vTiger:

1. For SIP calls it is necessary to write the **sip:** prefix before the sip address.
2. For PSTN calls it is necessary to write the **pstn:** prefix before the number.
3. For PBX calls it is necessary to write the **pbx:** prefix before the extension.
4. Routing calls can go with the prefix **tel:**.

This happens as the 3pcc sends the caller information as **extension:<phone_number>** format (refer to the developers manual for more information on this).