

Setup for SugarCRM/SuiteCRM

Before you select SuiteCRM as your CRM on the PBX, you should install the module on SuiteCRM following [this guide](#)

- Navigate the the CRM module from within your PBX under the settings section

Settings

Advanced Settings
Asterisk IAX Settings
Asterisk Logfile Settings
Asterisk Manager Users
Asterisk SIP Settings

CRM Settings

- **CRM Type** - From the drop down pick the Sugar/Suite CRM option

CRM Type ?

SuiteCRM/SugarCRM

- **PBX URL** - Provide the URL for your PBX. This is a IP Address or FQDN of your PBX that the CRM will need to communicate with.

PBX URL ?

https://10.4.0.102

- **CRM URL** - Provide the URL for your CRM Server. This is a IP Address or FQDN of your CRM that the PBX will need to communicate with.

CRM URL ?

https://10.4.0.104

- **CRM Username and Password Fields** - You will need to create a admin user with full permissions in your CRM and provide the username and password here.

CRM Username ?

admin

CRM Password ?

.....

- **Recording Storage** - Here you can pick from 2 modes on how you want to handle linking Call Recordings from the PBX
 - **CRM** - In CRM mode anytime a call recordings is made on the PBX after the call is completed a copy of the recording will be sent to the CRM and stored on the CRM and from within the CRM when viewing call records you can listen to the call recording. If the call recordings is deleted from the PBX a copy will still exist on your CRM. Requires enough storage on your CRM to handle the call recording volume that you will be sending it.
 - **PBX** - In PBX mode a copy of a call recordings will not be sent to the CRM but you will still be able to listen to any call recordings from within the call records on your CRM. The downside is if the call recordings is deleted from the PBX you will no longer be able to listen to the recording.

Recording Storage ?

CRM

PBX

- If you choose CRM mode above you will need to provide more information as outlined below.
 - SSH Username & Public Key** - You will need to create a SSH user on your CRM server and setup the Public key below on the server ([instructions](#)).
 - Remote Storage Path** - Path where the SSH user has access to store the Call recordings.
 - Copy Voicemail** - If set to yes a copy of every voicemail when left on the PBX will also be sent to the CRM and linked to the call records with the ability to listen to the voicemails in the CRM. If set to No voicemails will not be sent to the CRM.

SSH Username 

Public Key 

```
ssh-rsa
AAAAB3NzaC1yc2EAAAABIwAAQEA1YdcFxnvnX/wo1GfQ9hIHsVwv9IY9aO12APBM9Y2E1rDfDEDVenyA+0npcedw1-jjPWglNV
xbRIOwXvOx4pCzreeGRIEyXR6CzA55wjC+IIQJ9y4foqxJGY+Nbarzdlm6UBmFIG3IUhksROjd3wsdh7d+wOwpr7jW0gXQmoR
HIVRm/Rrgalw+BDylSggmrqZn4Na77HUvvnPQJryDuacQ79VQ/+pgp2VagHnwtlL+593s+pVp4hzW8PkPZs5HxMe8EppYnufHedY
o1mk4WfdVugtaFQUn/vBmaR8phjVZj31gjtWDM/zwS3evGDSAFp1rLW/ulYjsAgC2VomQgQ== crm@crm.sangoma.net
```

Remote Storage Path 

Copy Voicemails 

- Regular Expression Number Match** - Regular expression used to match and cleanup numbers coming from the PBX before being sent to the CRM for relationship matching. This helps to match numbers that come into the PBX such as '19991234567' and turns them into '991234567' since the number in your CRM may be stored as 10 digit versus 11 digit.

Regular Expression Number Match

- Regular Expression Digit Match** - Regular expression used PER digit for Accounts/Numbers/Leads lookups. %digit% is replaced with each digit of the inbound number. This expression is repeated for every digit of the number. This expression helps to match numbers that are in the CRM for relationship matching in various formats such as '+1 (444) 123-4567 '

Regular Expression Digit Match

- SugarCRM/SuiteCRM Module Download** - Link to download the module that has to be installed on your CRM to communicate with your PBX. Please download it here and follow your CRM manufacture instructions on how to install the module on your CRM

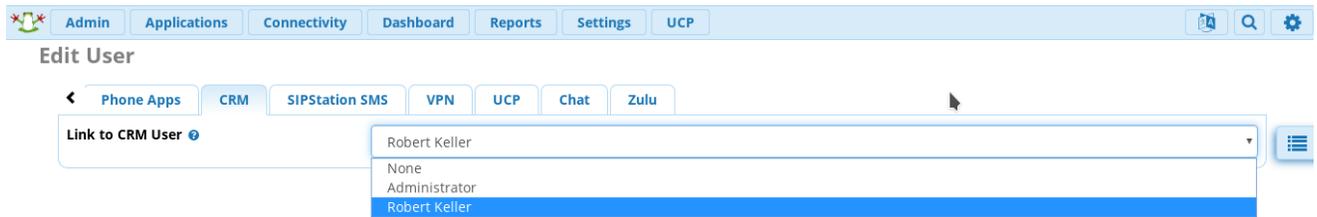
SugarCRM/SuiteCRM Module Download

 [Download](#)

- Submit your changes when done.

Now, you must match your users from the PBX to SugarCRM/SuiteCRM users.

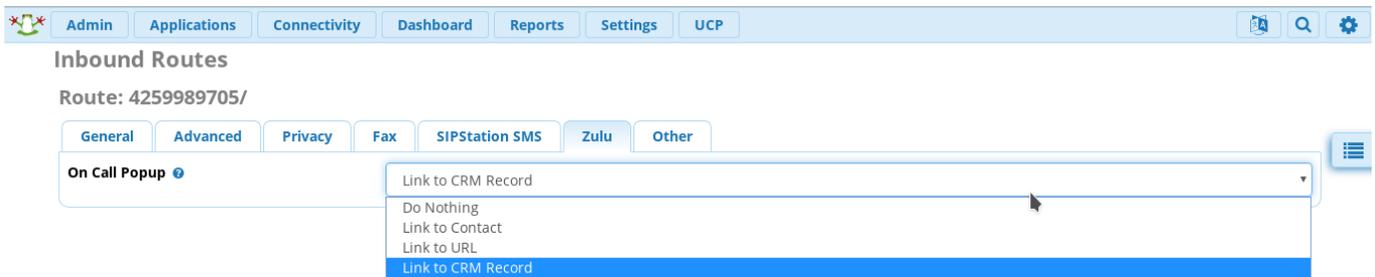
Go to Admin > User Management > Edit the user you want to match, go to CRM tab and match your PBX user with your SugarCRM /SuiteCRM user.



Additionally, if you use Zulu, you can choose to use "On Call Popup" option under your Inbound route or your queues.

Go to Connectivity > Inbound Routes > Select your route > Zulu Tab

Or Applications > Queues > Edit your Queue > Zulu Tab



- Creating SSH key on your SugarCRM server
- Installing PBX module in SugarCRM/SuiteCRM