8x8 Virtual Office Click2Pop for SugarCRM Setup Guide

May 2012
Table of Contents

8x8 Click2Pop for SugarCRM ........................................ 3
Requirements ..................................................... 3
   Server Requirements .............................................. 3
   Client Requirements ............................................ 3
Installation .......................................................... 3
   Installation of Client Software .................................. 4
   Start the Application and Integrate with SugarCRM ........ 5
   SugarCRM Settings ................................................ 8
   SugarCRM Server Plug-in Installation .......................... 9
Using the Application ................................................. 12
   Inbound Call Screen Pop ......................................... 12
   Easy Outbound Dialing from SugarCRM Web Browser ......... 13
8x8 Click2Pop for SugarCRM

8x8 Click2Pop provides SugarCRM with inbound and outbound calling features:

- Inbound Caller ID telephone number matches found in SugarCRM are displayed in a small screen pop with the name on record. You can click to expand the screen pop to open the full contact record, or let the call go to voice mail.
- Outbound click-to-dial convenience is enabled on every telephone number stored in SugarCRM and any web browser window. Telephone numbers have hyphens or bracket and hyphen format for recognition.

Your 8x8 telephone is linked to SugarCRM and all web browsers from the 8x8 Click2Pop application.

Requirements

SugarCRM has two components; Server side and Client side.

Server Requirements

The SugarCRM integration functionality has been tested with SugarCRM installations on a local, on-premises or co-located server. It is not for use with Hosted SugarCRM. 8x8 developed and tested this plug-in on Sugar Community Edition Version 6.4.2 (build 7513).

- Server module searches the following record types: Contacts, Leads, Accounts, Prospects and Users.
- Within each record, the module only searches for a telephone number matching phone number fields such as Office, Work, Home, Mobile and Alternate.

Client Requirements

- Operates on Windows XP, Vista and Windows 7 and 8.
- Must have supported browser: Google Chrome 22.x and higher, Internet Explorer version 6.0 and higher, and/or Firefox version 3.0 and higher.
  Note: Safari, and Opera are not supported.
- Installer must have Administrator rights to the PC to install the plug-in.

Installation

1. Download and install the SugarCRM Click2Pop MS Windows client installer from:  
   http://www.8x8.com/Support/BusinessSupport/PluginsandAPIs.aspx
2. Download and install the SugarCRM server plug-in from:  
Installation of Client Software

1. At Windows warning about unsigned program, press the Run Anyway option.

   **Note:** The installer will now create a shortcut in Start Menu > Programs > Startup so that Click2Pop will start whenever the user logs in to Windows. If the user does not want this behavior, they can delete the shortcut from Start Menu > Programs > Startup.

2. Follow the 8x8 Click2Pop setup wizard.

3. Select and click on Install Now.

4. You will see a message indicating that 8x8 Click2Pop is successfully installed.
Start the Application and Integrate with SugarCRM

1. Restart your computer or start 8x8 Click2Pop from the Windows Start > All Programs > 8x8 Click2Pop.

2. The dialog box will open for you to enter your 8x8 Virtual Office extension login, User ID and Password.
3. Click **Log In** button.

When log in is completed, a notification is sent from Windows saying you are ready to handle calls, as shown below.

4. Enable automatic telephone number lookup and browser-pop in SugarCRM by checking the box next to **Automatically open the URL in my web browser**.

5. Choose which action will trigger the browser pop: **when I receive a call**, or when I **answer a call** in the drop-down list.

6. Select checkbox to **Display a desktop alert when I receive a call**.
7. Manually close the dialog box by clicking the red X in the upper right corner. Closing the dialog box keeps the SugarCRM plug-in running in the background and you will see the SugarCRM plug-in in your Microsoft Windows system tray.

8. Place a test call to your 8x8 Virtual Office telephone number from another phone. If you checked Display a desktop alert when I receive a call, you will see the desktop alert in addition to the internal Click2Pop dialog box.

![Desktop Alert](image)

9. The SugarCRM plug-in runs in the background and restarts when your computer is turned off or restarted. You can verify the plug-in is running by looking in the Microsoft Windows system tray in the bottom right corner of the computer desktop. The plug-in will run in the background as shown below.

![System tray for Windows 7](image)

![System tray for Windows XP - Service Pack 3](image)
Installation of SugarCRM Server Plug-in

SugarCRM Settings

1. Please login to SugarCRM and click on Admin in the top right of screen.

2. Find the System section and click on System Settings
3. In the Advanced Section check the box to activate Developer Mode. Press the Save button at the top left corner of the page.

SugarCRM Server Plug-in Installation

Identify the location of the plug-in on your computer.

1. Please login to SugarCRM and click on Admin in the top right of screen. Scroll to the bottom of the screen to the Developer Tools section. Click on Module Loader.
2. In Module Loader, click Browse and find the server plug-in file (see Installation on page 3) per the screen shot below. Next click the Upload button.

Module Loader should now look like the screen shot below. Click the Install button.
3. Click the **Commit** button on the Ready to Install screen.

4. You should now see the status as **Module Installed Successfully**. Click the **Back to Module Loader** button to return to the loader.

You can now see the 8x8 Click2Pop extension is installed in the Module Loader. Version, Date Installed, and Description are displayed. In addition, you have the option to disable and uninstall the module on this page.
Using the Application

Inbound Call Screen Pop

Inbound calls to your 8x8 extension are received as normal. You will hear the telephone ring. Simultaneously, the inbound caller ID phone number is searched inside SugarCRM. If a match is found, the contact with the matching telephone number pops up in your default Internet browser. Even if your browser is closed, SugarCRM will open in a new browser window. Example browser pop is shown below.

Clicking **Open Profile** reveals the entire contact record.
Easy Outbound Dialing from SugarCRM Web Browser

8x8 Click2Pop places a telephone icon 📞 next to each telephone number that is displayed in one of these two formats:

- xxx-xxx-xxxx
- (xxx) xxx-xxxx

The screen shot shown below illustrates the green telephone icon for outbound calling. Simply click on the telephone icon and your 8x8 desktop or softphone will ring. Answer the 8x8 phone and your call is connected.

Outbound screen pop with Cancel button

8x8 Click2Pop plugin also places a telephone icon next to phone numbers on web pages so you can make calls right from your browser.