

vTiger Asterisk® Integration Documentation

vtiger Asterisk Integration Documentation (Version 1.0)

vtiger is a open-source CRM solution. Asterisk® is an open source PBX, telephony engine, and telephony applications toolkit which allows users to make and receive calls from software phones (softphones) using their computer. The vtiger-asterisk integration will allow users to use vtiger to create calls and receive notifications on incoming calls using the Asterisk Call Manager API provided by Asterisk. This document describes how to configure vTigerCRM to be able to use Asterisk with it.

Features

The following features are provided:

1. Make calls by clicking on phone numbers (links) within vtiger.
2. Provides notification within vtiger giving details of the caller when a call comes to the user. Notification appears on the bottom right-corner of the screen.
3. View all past calls under PBX Manager module (Tools > PBX Manager)
4. Associates the call with the Contact/Account/Lead record in Activity History section (in the More Information tab).
5. Setup user extension through My Preferences.

Requirements

- vtigerCRM 5.1.0 should be installed on your system
- You should have a Asterisk system running
- The servers running vtiger and Asterisk should be visible to each other
- You have a valid asterisk user extension and a softphone configured to that extension.

Configuring Asterisk

You need to have at least one user listed in the manager.conf file present on the asterisk server (generally found in /etc/asterisk/ folder). The extension would be added in the following format:

```
[<EXTENSION>]
secret=<PASSWORD>
deny=0.0.0.0/0.0.0.0
permit=<IP's TO PERMIT>/255.255.255.0
read=system,call,log,verbose,command,agent,user
write=system,call,log,verbose,command,agent,user
```

where

- <EXTENSION> is the user extension (say 205)
- <PASSWORD> is the password for that extension (say abcdef)

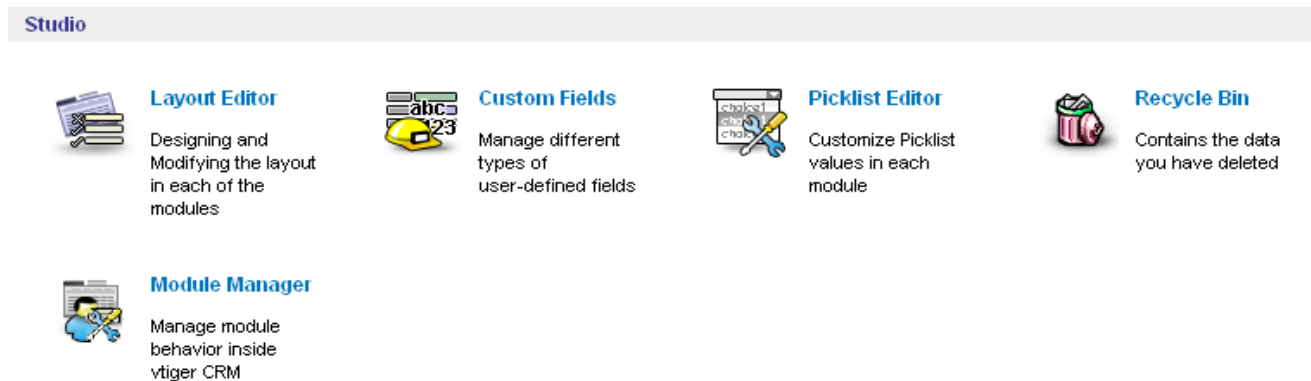
- <IP's TO PERMIT> are the list of IP's that you want to be able to access the extension separated by "/" (for e.g. 192.168.0.57/192.168.0.58)

Note: Usually the administrator user is already added to this file (manager.conf) and you may not need to add it.

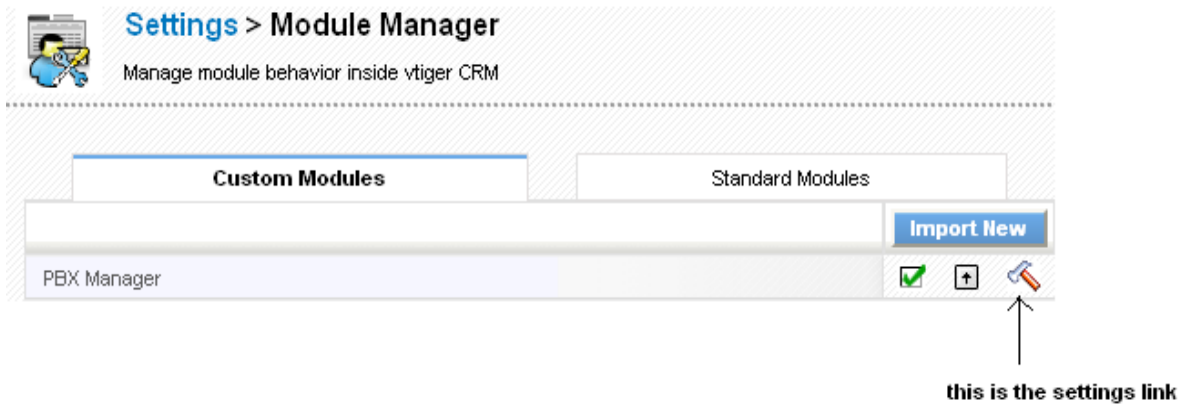
Configuring vtigerCRM

To configure vtiger with asterisk you will need to do the following:

- Login vtiger as admin user
- Go to the Settings page
- There you will find the Module Manager link as shown below (in the Studio section) Click on the link.



- You will be re-directed to the following page.



- Click on the Settings icon next to the PBXManager module (as shown in image).

- You should be taken to the page shown below.

Asterisk Configuration	
Asterisk server IP	<input type="text"/>
Asterisk server port	<input type="text"/>
Asterisk username	<input type="text"/>
Asterisk password	<input type="text"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

- Here you would need to enter the Asterisk configuration settings.
 1. **Asterisk server IP** is the IP of the server where you are running asterisk (for e.g. 192.168.52.57)
 2. **Asterisk server port** is the port on which vtiger should connect to asterisk (default is 5038)
 3. **Asterisk username** is the name of the user who has his entry in the manager.conf file (usually the asterisk admin)
 4. **Asterisk Password** is the password of the asterisk user.
- Click on the update button to save the Asterisk settings to vtiger database.

After this is done all users will have set up their respective Asterisk 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 Asterisk Configuration.
- You will find two fields here – **asterisk extension** and **use asterisk**. The asterisk extension is the extension of the user and the use asterisk field is a way to enable and disable.
- Fill up the **asterisk extension** for your user here and check the **use asterisk** checkbox and save the page.

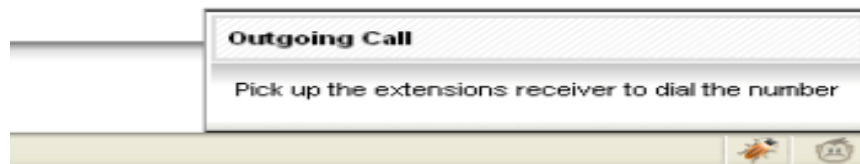
Now that all user are set and the asterisk configuration is set you need to run the script which will connect to the asterisk server. To do this go to the cron/modules/PBXManager folder in vtiger installation (from command prompt) and run the script AsteriskClient.php. It is very simple to do this. Just run **php5 AsteriskClient.php** to execute the file.

Note: This script must be kept running to enable the integration as this provides vTiger with the events from the asterisk 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.
- 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. Once this call is picked up, the number clicked in vtiger will be connected to the users' extension.

	(941) 453-0089	admin	edit del
	(331) 004-7829	admin	edit del
	(531) 325-7923	admin	edit del
	(991) 937-4169	admin	edit del
	(193) 088-0523	admin	edit del
	(545) 723-9565	admin	edit del

[Create Mail Merge templates](#)



- 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 and options are provided to create records (as shown in image below). Clicking on any of the create links takes to the create view of that module with the phone fields automatically filled up with the incoming call number.

Filters : All New | Edit | Delete

	Office Phone	Assigned To	Action
th_brown@company.com	214	admin	edit del
r_davis@company.com	(688) 617-9046		
s_johnson@company.com	(825) 008-8369		
a_jones@company.com	(656) 770-9464		
miller@company.com	(941) 453-0089		
et_moore@company.com	(331) 004-7829		
smith@company.com	(531) 325-7923		
y_taylor@company.com	(991) 937-4169		
williams@company.com	(193) 088-0523		
_wilson@company.com	(545) 723-9565		

Incoming Call

Caller Information
Number: 214
Name: abcdef

Information from vtigerCRM
Elizabeth Brown (Contacts)

Incoming Call

Caller Information
Number: 211
Name: ghijkl

Information from vtigerCRM

[Create Lead](#)
[Create Contact](#)
[Create Account](#)

click here to create records

It is possible to save the number (in vTiger) in any format (with or without extensions like **SIP, PSTN** etc.) and create the call. vTiger should recognize the caller in case of incoming call as long as there is a separator ":" between the prefix and the number i.e. like SIP:211.

It is recommended not to use any special chars or spaces in the phone number field.