

STARFACE SugarCRM Connector

USER MANUAL

This document addresses users of STARFACE- and SugarCRM, and covers the appliance of the STARFACE SugarCRM Connector.

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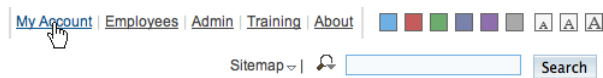
1 Appliance

This chapter contains useful information on applying the STARFACE SugarCRM Connector. The use of the STARFACE integration requires the login data of your STARFACE account and a login on SugarCRM. Logging in the STARFACE user interface or running STARFACE WinClient is not necessary.

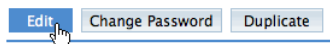
1.1 Registering the STARFACE Login Data in SugarCRM

Log into your SugarCRM as usual. To enter the login data for STARFACE telephony, please follow the steps described below:

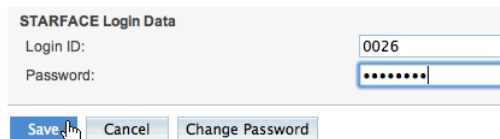
- System link „My Account“



- Button „Edit“.



- Input of STARFACE Login Data



A screenshot of the 'STARFACE Login Data' form. It contains two input fields: 'Login ID' with the value '0026' and 'Password' with masked characters '.....'. Below the fields are three buttons: 'Save', 'Cancel', and 'Change Password'. The 'Save' button is highlighted with a mouse cursor.

Information 1: Account settings in SugarCRM

As login data please enter the login ID and password which you use to log into the STARFACE user interface.

Save the changes.

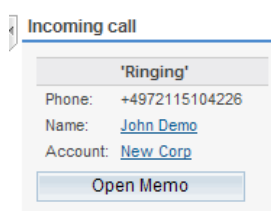
1.2 Calls in SugarCRM

This chapter covers both incoming and outgoing phone calls in SugarCRM.

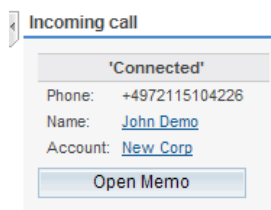
Please note: The call display requires the shortcuts menu on the left of the interface to be visible. If you have configured your SugarCRM interface in the way that the shortcuts are displayed horizontally under the module tabs – the call display will open by any means.

Incoming calls

On incoming calls the call display opens above the shortcuts menu on the left side. The state of yet unanswered calls is displayed by the caption “Ringing”.



- Call not answered



- Call received

Information 2: Display of incoming calls

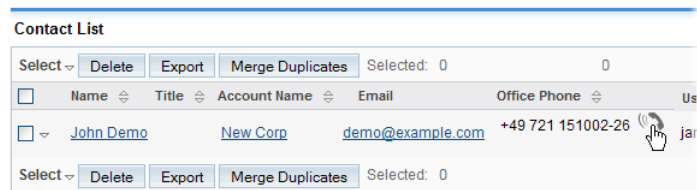
Answer the call on the telephone or softphone. Picking up calls in SugarCRM itself is not possible.

Outgoing calls

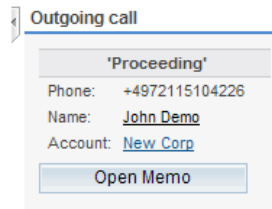
Outgoing calls of SugarCRM get placed over the submenu “Contacts”.

The STARFACE telephone icon is placed right next to each phone number in the Contact List and next to the detailed view of each listed contact. One click on the icon will initiate the call.

Please note: Depending on your telephone (e.g. a software phone) you have to pick up the call initiation actively on the phone before the call will be displayed in SugarCRM.



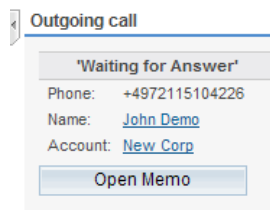
- Call from the Contact List



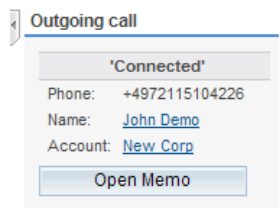
- Connection is being established

Information 3: Call initiation

On call initiation the call display is opened above the shortcuts menu on the left side. The state is initially notified with “Proceeding” until the connection to the other party is established (i.e. until the callee’s phone starts ringing.). Then, the state changes to „Waiting for Answer“.



- Waiting for the call to be answered



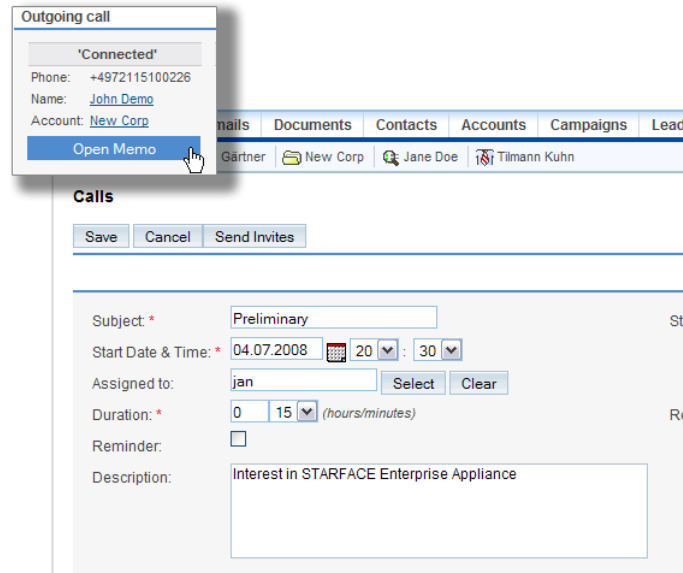
- Active Call

Information 4: The connection is established

The state „Connected“ is displayed as soon as the call gets answered. As with incoming calls it is not possible to end the call in SugarCRM itself. Cease the call on the telephone or, if opened, in the STARFACE Callmanager.

1.3 Call Memo

From the call display a new calendar entry can be created for reviewing or logging purposes. Simply click the button „Open Memo“.



Information 5: Memo in new calendar entry

A call memo can be created at each state of the connection. If a call connection can't be established (i.e. nobody takes the call), this circumstance can be recorded as well.

2 APPENDICES

Glossary

Abbreviation, acronym or term	Full term and/or term explanation
Callmanager	Part of the STARFACE web user interface used to display and process incoming and outgoing phone calls.
CRM	Customer Relationship Management. Application for management of contacts and customer data. Often integrated solution including e-mail, calendar, reporting etc.
STARFACE	Web-based voice over IP telephony system provided by vertico software GmbH
SugarCRM Inc.	Developer and Provider of the web-based CRM system SugarCRM http://www.sugarcrm.com/
SugarCRM	Web-based CRM system which is developed and provided by SugarCRM Inc. (Community Edition, Professional Edition, Enterprise Edition) http://www.sugarcrm.com/crm/
vertico software GmbH	Provider of the web-based IP telecommunications system STARFACE and related integration products like STARFACE SugarCRM Connector. vertico software GmbH Amalienstr. 81-87 76133 Karlsruhe Germany http://www.vertico-software.com/

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