

Widget, Dialshree Integration with elision CRM

Document Revision History

This table holds record of signification changes made to the document.

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| --- | --- | --- | --- |
| **Module** | **Date** | **Author** | **Description of change** |
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1. User will be create in CRM and it should get created in Dialshree

* When we create user in elision CRM and click on save button this feature automatically create same user in Dialshree with same username and password.
* When we edit user in elision CRM then also using this feature we are able to update the edited information into Dialshree.

**Development Steps : -**

* First Of all put elision\_api.php file in admin folder of Dialshree.
* Add vtiger\_vici\_config table in vtiger CRM database and change server ip according to server in vtiger\_vici\_config table
* Create api user and agent user group in Dialshree
* Now do custom code in elisioncrm/modules/Users/actions/Save.php

// -------------------- Start ------------------------------

$current\_mode = $recordModel->get('mode');

$function = '';

if( !strlen(trim($current\_mode)) ) {

$function = 'add\_user';

}else if( trim($current\_mode) == 'edit' ) {

$function = 'update\_user';

}

if( $function ) {

file\_put\_contents("/var/www/html/elisioncrm/UserSync.log", "User Sync Started at: " . date("Y-m-d H:i:s") . PHP\_EOL, FILE\_APPEND); $user\_name = $request->get('user\_name');

$first\_name = $request->get('first\_name');

$last\_name = $request->get('last\_name');

$full\_name = ($first\_name == '' ? $last\_name : $first\_name.' '.$last\_name);

$listno = $request->get('list\_no');

$roleid = $request->get('roleid');

$user\_password = $request->get('user\_password');

$phone\_crm\_extension = $request->get('phone\_crm\_extension');

$campaign\_name = $request->get('campagin\_name');

$email1 = $request->get('email1');

$email2 = $request->get('email2');

global $adb,$current\_user;

$result = $adb->query("select `field\_name`,`field\_value` from vtiger\_vici\_config where `field\_name` IN ('mass\_lead\_create','list\_api','username','password')");

$noOfRows = $adb->num\_rows($result);

if($noOfRows > 0){

for($i=0;$i<$noOfRows;$i++){

$data[$adb->query\_result($result, $i, 'field\_name')] = $adb->query\_result($result, $i, 'field\_value');

}

}

$lead\_api = $data['mass\_lead\_create'];

$api\_user = $data['username'];

$api\_pass = $data['password'];

$source = 'crm';

file\_put\_contents("/var/www/html/elisioncrm/UserSync.log", "Non-Agent API URL: " . $user\_api . PHP\_EOL, FILE\_APPEND);

$uservalue = explode('@', $user\_name);

$user = $uservalue[0];

$email = '';

if( strlen($email1) ) {

$email = $email1;

}else if( strlen($email2) ) {

$email = $email2;

}

$user\_postData = array(

'function' => $function,

'user' => $api\_user,

'pass' => $api\_pass,

'source' => $source,

'agent\_user' => $user, 'agent\_pass' => $user\_password,

'agent\_user\_level' => 1,

'agent\_full\_name' => $full\_name,

'agent\_user\_group' => 'AGENTS',

'email' => $email

);

file\_put\_contents("/var/www/html/elisioncrm/UserSync.log", "Posted Data: " . json\_encode($user\_postData) . PHP\_EOL, FILE\_APPEND);

$user = curl\_init();

curl\_setopt($user,CURLOPT\_URL,$lead\_api);

curl\_setopt($user,CURLOPT\_RETURNTRANSFER,true);

curl\_setopt($user,CURLOPT\_POST,true);

curl\_setopt($user,CURLOPT\_POSTFIELDS,$user\_postData);

curl\_setopt($user, CURLOPT\_SSL\_VERIFYHOST, 0);

curl\_setopt($user, CURLOPT\_SSL\_VERIFYPEER, 0);

$user\_output = curl\_exec($user);

$user\_created = false;

file\_put\_contents("/var/www/html/elisioncrm/UserSync.log", "API Response(".date("Y-m-d H:i:s")."): " . json\_encode($user\_output) . "\n" . PHP\_EOL, FILE\_APPEND);

if(curl\_errno($user)) {

$user\_created = false;

}else{

//Log Manager Code

$json = json\_decode($user\_output, true);

if($json[0] == 'SUCCESS'){

$user\_created = true;

}

/\*elseif($json[0] == 'ERROR'){

if($json[1] == 'add\_user USER ALREADY EXISTS'){

$user\_created = true;

}

}\*/

}

curl\_close($user);}

2. Campaign &List will be created in CRM & it should get created in Dialshree

* This feature is used when we want to export data from vtiger to Dialshree into any particular list. So, using this feature we can create list from vtiger and upload data into that list.

**Development Steps: -**

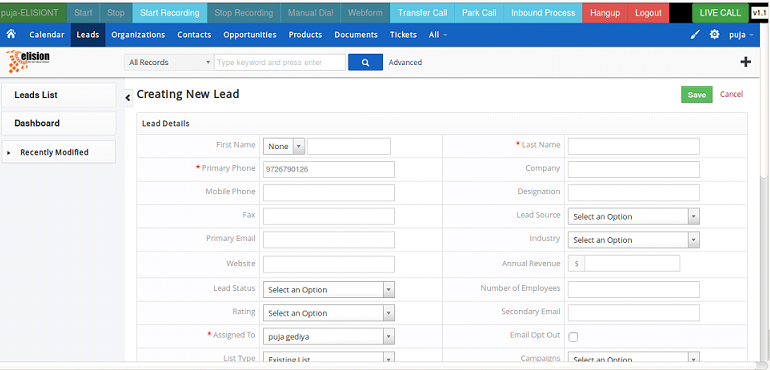
* Add custom code in elisioncrm/modules/Leads/actions/campaigns.php and

elisioncrm/modules/Leads/actions/campaigns.php (you can see it in 209 servers)

* Add custom code in elisioncrm/layouts/vlayout/modules/Vtiger/Export.tpl
* Add Custom code in elisioncrm/layouts/vlayout/modules/Import/ImportdialerDetails.tpl , exportdialer.tpl , importdialer.tpl
* Add custom code in elisioncrm/layouts/vlayout/modules/Vtiger/resources/Popup.js
* Add Files importdialerdata.php , importdialer.php , exportdialerdata.php , exportdialer.php , Listdialer.php on path elisioncrm/modules/Import/views/

3. At LIVE call of Inbound or Outbound, CRM screen will pop up with the customer details

* When we dial inbound or outbound call from widget relevant lead of that customer should open in elision CRM screen.
* In this feature when we dial any number from widget if any information related to that number is already available in CRM then lead information page of that number is open in edit mode or if there is no information of that number in CRM then new lead page is open in edit mode.

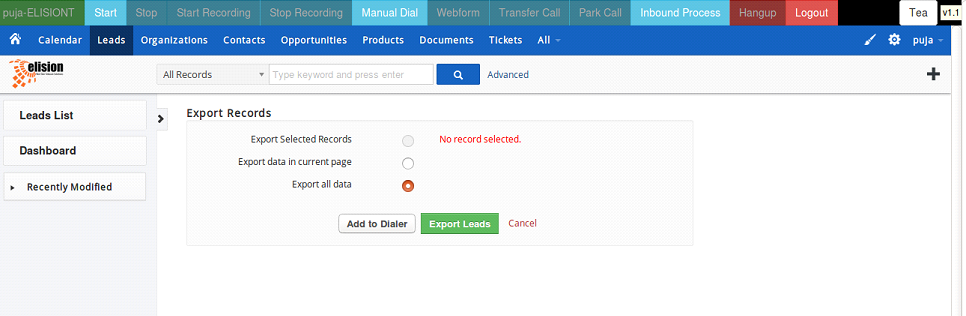


**Development Steps : -**

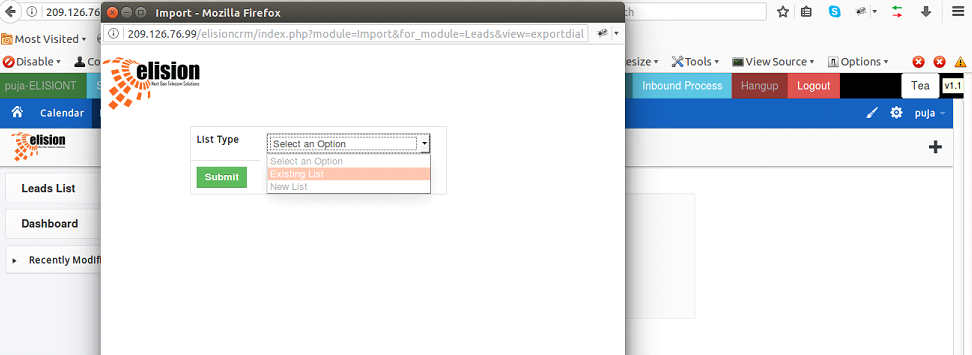
* Add Custom code in elisioncrm/modules/Vtiger/views/Edit.php

4. Export to dialer from CRM to Dialshree

* When data to be uploaded in CRM screen and then it can be pushed to Dialer via Export to Dialer function.
* We can select data from CRM which we want to export to Dialshree using Export to Dialer functionality.
* For that we have to go into lead menu into CRM then go into action and click on export to dialer. You will get below screen ,



* Now click on Add to Dialer Button you will get below given screen ,



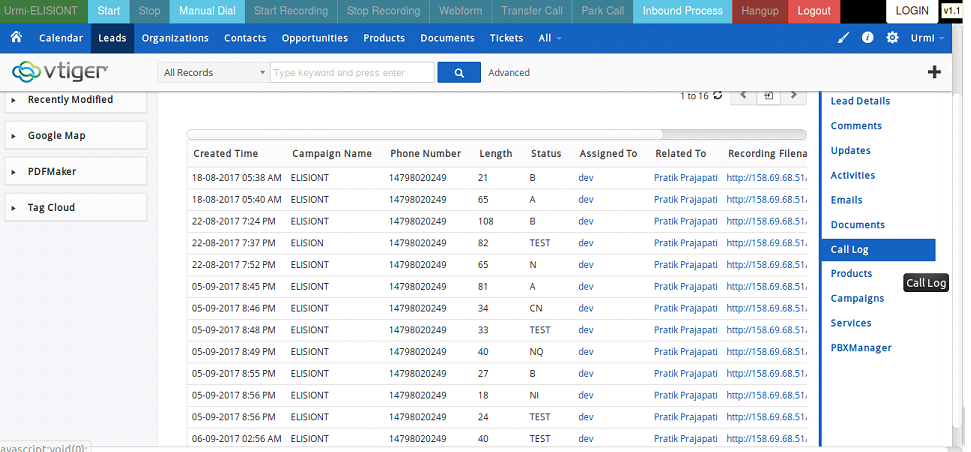
* Now click on Submit button

**Development Steps: -**

* Same as point 2

5. Call log Status will be updated in the CRM dialed from Dialshree

* When we dial call from widget and we want log of all calls dialed from widget then using this feature we are able to get logs.
* For logs click on lead whose logs you want to check. Now click on call log you will get below screen ,

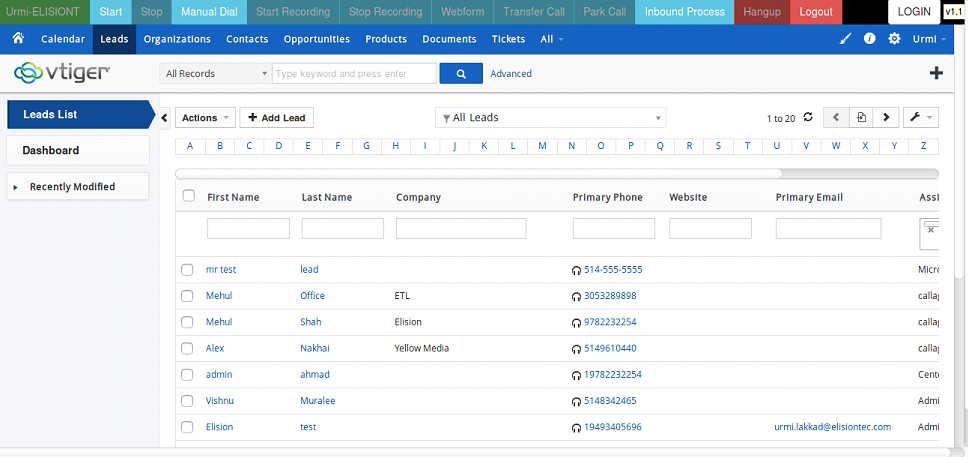


**Development Steps: -**

* Add file elisioncrm/createlog.php now change $endpointUrl as per server and also change $userName and $userAccessKey of user.
* Add /admin/crm\_status.php file and change $recording and $url as per server.
* Now upload call log.zip in crmsetting/module manager
* Now go to vtiger db and then vtiger\_relatedlists\_seq table and increase field value by 1
* Now upload Net, Zend and HTTP folder in elisioncrm.
* Now set URL <http://209.126.76.99/elision-dialer/admin/crm_status.php?phone=--A--phone_number--B--&leadstatus=--A--dispo--B--&leadid=--A--lead_id--B--&recording=--A--recording_filename--B--&campaign=--A--campaign--B--&sec=--A--talk_time--B--&dialer_id=--A--lead_id--B--> In Dispo call URL in campaign.(For example we have taken 209 server URL)

6. Click2Call

* This feature is used to do call directly from vtiger CRM.
* For click 2 call you have to open lead page and then click on Headphone button as shown below ,



* By clicking that one call will lent to widget and other call will generate on customer number.

**Development Steps: -**

* Add custom code in elisioncrm/layouts/vlayout/module s/Vtiger/ListViewContents.tpl and replace elisioncrm/layouts/vlayout/module s/Vtiger/resources/Vtiger.js

7. Dialer Widget in the CRM

* In this you will get widget which has all the feature of agent panel on the top of Vtiger CRM screen.

**Development Steps: -**

* First of all put widget folder on server
* Now put widget.ini file in /etc directory and give 777 permission to widget.ini file
* Now in go in browser and open <http://209.126.76.99/widget/dialshree/magic.php>

And fill all the details and click on submit.

* Now add custom code in elisioncrm/modules/Users/actions/Login.php and Logout.php file.
* Now add Index\_for\_widget.php file in agent or agc folder
* Now add header ('Access-Control-Allow-Origin: \*'); line in Index\_for\_widget.php, api.php, non\_agent\_api.php and main.php files.

**I-Frame Issue: -**

* When we are setting Vtiger CRM Link in static page’s I frame, we have faced an issue of Page Redirection.
* When you see the code file for this, you will find global variable which set as ‘true’ for breaking the I frame in Vtiger CRM.
* We have set both Dialer Widget & Vtiger CRM in one static page but due to this issue the page was being to redirect when we tried to access that static page url.
* This issue has been resolved in below file path of Vtiger CRM.
* File Path: elisioncrm/libraries/csrf-magic/csrf-magic.php
* Set $GLOBALS['csrf']['frame-breaker'] = false;

8. Create Widget of Dialshree Agent Screen which will be placed on the top portion of the CRM screen as a frame

* Same as Point 7.

9. All functions of the Dialshree agent panel will be available in this widget

* All the feature of Dialshree agent panel like manual dial, auto dial, pause/resume, Park, transfer, hang up disposition selection are available in dialer widget.

10. Whenever an agent will do manual call or auto calls relevant lead will be opened in the CRM screen so that the agent will come to know to whom he is speaking with

* Same as Point 3.

11. Recording start / stop button

* Using recording start and stop button we can record the conversation.
* If you want to record any conversation set Campaign Recording parameter in campaign to ONDEMAND.
* Now when you got live call and you want to record conversation click on Start recording button and when you want to stop recording click on stop recording button.

12. Web form button to open external Form and pass details on it

* When we want to open an external form from widget this feature is used
* Firstly set web form URL into campaign.
* Now when we get live call click on web form button new tab will open based on web form URL you set in campaign

