

Communicator – VTiger CRM

Vtiger

1. Login to Vtiger and copy the domain portion of your Vtiger instance up to the .com. **Example:**
`https://examplecompany2197.od2.vtiger.com/`

Configuring the PBX

1. Log into your PBX by browsing to `https://ux.firelinecommunications.com` or your PBX domain.
2. Once logged in select the Home tab > CRM > Integrations.

CRM Integration Service

1. **Enable:** Toggle On
2. **CRM Type:** Vtiger
3. **Page URL:** Enter your Vtiger CRM Page URL which you copied from earlier.
4. **Full match phone number:** Select Yes
5. Click Save

Once you click Save the Test Button will be enabled.

6. Click Test

When you click Test, a pop-up window will open where you can enter your CRM account information to verify the connection.

CRM Integration

Integration Service

Enable: ☒

CRM type:

Page URL:

Full match phone number:

Log options

Log inbound calls:

Log outbound calls:

Log answered calls:

Log unanswered calls:

Upload call record:

Default call record type:

CRM Behavior options

Default module:

Create a new item if it doesn't exist:

CRM Test

CRM account

Username:

Password:

Caller Id:

Log Call:

Test Message Status

Fill required fields and press Run. Setting "log call" to yes will create log inside CRM!

7. Enter the Authentication information from the CRM.
 1. **Username:** Enter the Vtiger email.
 2. **Password:** Enter the Vtiger access key.
 1. This can be found in your Vtiger preferences section.

Vtiger

Dashboard

History

Tag Cloud

My Preferences

My Preferences

Viewing preferences of

User information

User Name	ime@gmail.com	Access key	20x19
Language	US English	Reports to	
Role	CEO	Primary Group	
Admin	Yes		

Employee information

8. Return to you PBX
9. After entering the required information, click **Run** to

start the integration test.

10. You should see a successful test message.

CRM Test

CRM account

Username:

Password:

Caller Id:

Caller ID to search customer

Log Call:

Yes

No

▶ Run

Test	Message	Status
Details	Vtiger ver: 7	✓
Authenticate	Tokenid: xxxf60b0c8c040345caf75737bf11dxx	✓
Search	Account: Jocab LLC	✓
Overall	Success	✓

11. You can also test a query by entering the following and clicking Test again

1. **Caller ID:** (Optional) Enter a Caller ID to search for an existing customer.
2. **Log Call:** Choose whether to create a call log entry inside Vtiger.
(e.g., Yes/No)

Log Options

Users can configure default call logging options for Communicator. These settings define what call data is sent to Vtiger CRM. Each Communicator user can override these defaults if needed.

Default log options include:

- Log inbound calls – (Yes/No/Not Set)
- Log outbound calls – (Yes/No/Not Set)
- Log answered calls – (Yes/No/Not Set)
- Log unanswered calls – (Yes/No/Not Set)

Upload Call Record

This option determines whether a call record is uploaded after each call:

- **Yes:** Uploads the call record to Vtiger, based on the selected record type.
- **No:** The call record will not be uploaded.
- **Not Set:** No action is taken.

Default Call Record Type

When **Upload Call Record** is set to “Yes,” choose one of the following options:

- **Recording File:** Uploads the actual call recording file to the CRM. It can be accessed directly from the call details section.
- **Link to Call Record:** Provides a link to the call record stored in the Online Self Care (OSC) portal. Users must log in to access it.

CRM Behavior Options

These options control how new records are created when a call comes in from an unknown number.

- **Default Module:** Select the default Vtiger module to open when creating a new record.
(*e.g., Leads*)
- **Create a new item if it doesn't exist:**
 - **Yes:** Automatically creates a new record (e.g., Lead) when the caller ID is not recognized.
 - **No:** Does not open or create a record for unknown

caller IDs.

- **Not Set:** Leaves the behavior undefined.