

# 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.

Home
Settings

Dashboard
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Apps

### CRM Integration

#### Integration Service

Enable:

CRM type:
Vtiger
▼

Page URL:
https://yourcompany.vtiger.com
▼

Full match phone number:
 Yes
 No
 Not Set

Test

#### Log options

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:
 Yes
 No
 Not Set

Default call record type:
Recording File
▼

#### CRM Behavior options

Default module:
Leads
▼

Create a new item if it doesn't exist:
 Yes
 No
 Not Set

Save

## CRM Test

CRM account

**Username:** CRM Account user name

**Password:** CRM Integration password/token

**Caller Id:** Caller ID to search customer

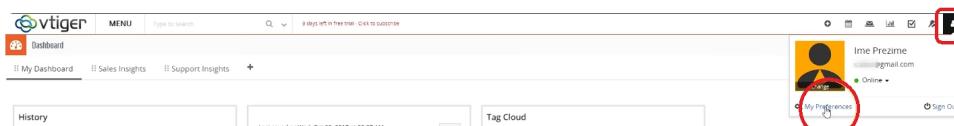
**Log Call:**  Yes  No

▶ Run

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.



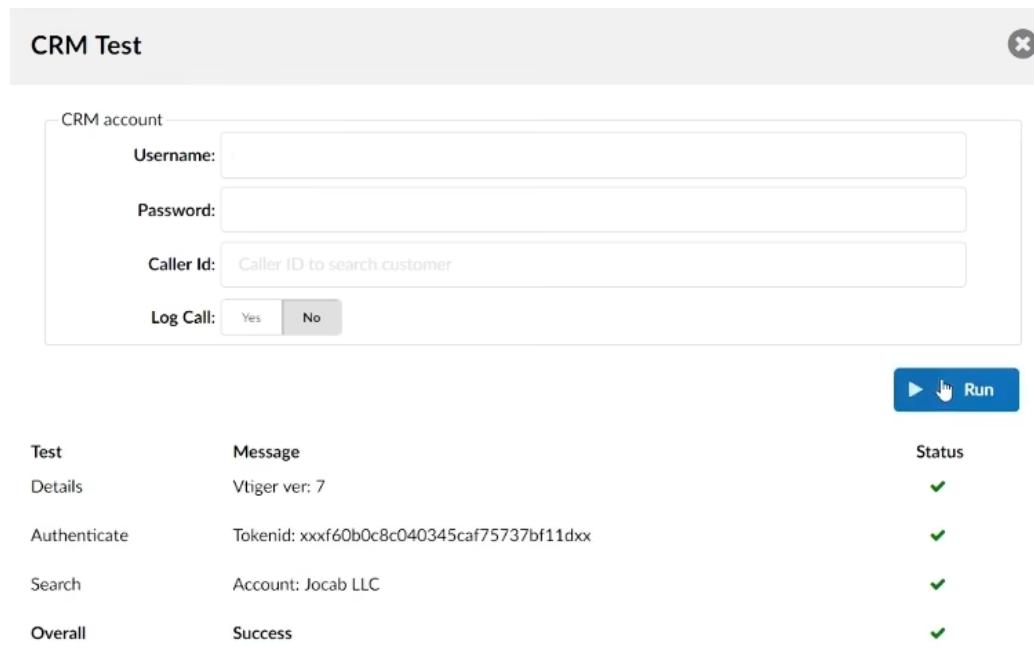
The screenshot shows the vtiger CRM interface. At the top, there is a navigation bar with 'vtiger' logo, 'MENU', and search bar. Below the navigation bar, there are tabs for 'Dashboard', 'Sales Insights', and 'Support Insights'. On the right side, there is a user profile box for 'Iime Prezime' with an email 'agmail.com' and status 'Online'. A red circle highlights the 'My Preferences' link. Below the profile, there is a 'Tag Cloud' section. The main content area shows 'History' with 'My History' and a note 'Last saved on Wed, Oct 25, 2017 at 08:27 AM'. There is an 'Edit' button. The URL in the browser is 'HOME > My Preferences > Iime Prezime'. On the right, there are 'Edit' and 'More' buttons. The bottom section shows 'User information' and 'Employee information' tables.

## 8. Return to your PBX

9. After entering the required information, click **Run** to

start the integration test.

10. You should see a sucessfull test message.



The screenshot shows a 'CRM Test' interface. At the top, there is a 'CRM account' section with fields for 'Username' and 'Password', and a 'Caller Id' field containing 'Caller ID to search customer'. Below this is a 'Log Call' section with 'Yes' and 'No' buttons. A 'Run' button is located at the bottom right. Below the interface, a table displays the test results:

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.