

Integration Go4Clients V3.0

With



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Integration Go4Clients to SugarCrm

Introduction





In the following manual you will find how to install the Go4Clients module in SugarCrm. This module allows you to send personalized voice messages and text messages; it also allows your Go4Clients account to register new contacts in the SugarCrm platform through the Go4Clients Landing Page service.

Installation of Go4clients module:

In this part you will find how to install the Go4Clients module in SugarCrm.

1-Go to the top of SugarCrm in Admin → Module Loader



 Rename Modules	Change the names of the modules appearing within the application
 History Subpanel	Enable/Disable contacts' emails in history
 Module Loader	Add or remove Sugar modules, themes, language packs and other extensions
 Dropdown Editor	Add, delete, or change the dropdown lists

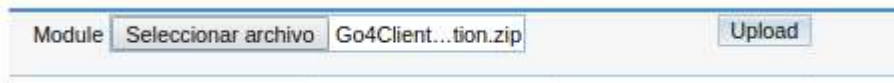
2- You will find all the modules that you have installed in SugarCrm

Module Loader

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type
test	Uninstall	Disable	module

3- Select the file Go4Clients.zip and press upload to upload the file to SugarCrm in Module Loader



4- The module Go4Clients appears at the bottom of the Module Loader

Name	Install	Delete	Type
Go4Clients	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module

Click on install, the following window will be displayed:

Ready To Install

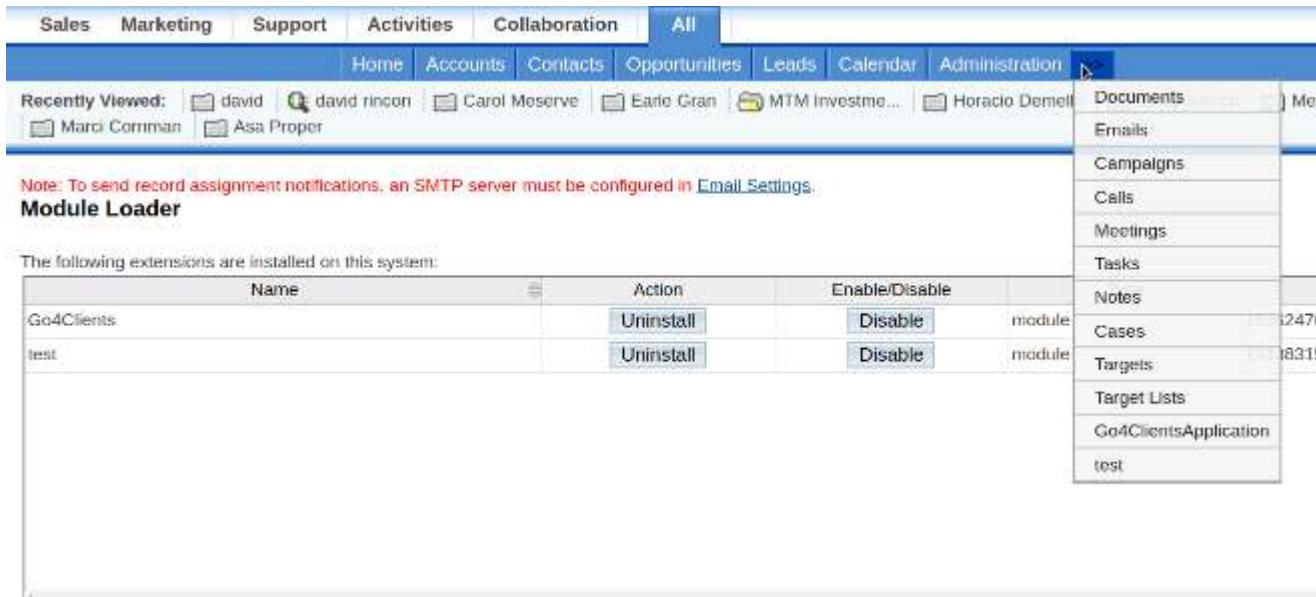
Please read the following License Agreement:

PLEASE READ THIS MASTER SUBSCRIPTION AGREEMENT CAREFULLY BEFORE ACCEPTING. THE TERMS AND CONDITIONS OF THIS MASTER SUBSCRIPTION AGREEMENT, ANY ADDITIONAL TERMS AND ANY ORDER FORMS ENTERED INTO BY YOU AND SUGARCRM ARE COLLECTIVELY REFERRED TO AS THE "AGREEMENT." UNLESS OTHERWISE DEFINED HEREIN, CAPITALIZED TERMS SHALL HAVE THE MEANINGS SET FORTH IN SECTION 11

Accept Deny

Click on Accept terms and Commit.

5- The module will appear in the top bar menu on "All" section as Go4ClientsApplication.



The screenshot shows the SugarCRM interface with the 'All' menu section selected. The top navigation bar includes 'Sales', 'Marketing', 'Support', 'Activities', 'Collaboration', and 'All'. Below the navigation bar, there is a 'Recently Viewed' section with several contact cards. A note states: 'Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).' Below the note is the 'Module Loader' section, which displays a table of installed extensions:

Name	Action	Enable/Disable	Type
Go4Clients	<input type="button" value="Uninstall"/>	<input type="button" value="Disable"/>	module
test	<input type="button" value="Uninstall"/>	<input type="button" value="Disable"/>	module

The 'All' menu dropdown is open, showing a list of items including 'Documents', 'Emails', 'Campaigns', 'Calls', 'Meetings', 'Tasks', 'Notes', 'Cases', 'Targets', 'Target Lists', 'Go4ClientsApplication', and 'test'.

Installation of landing pages in SugarCrm

In this part you will find how to configure the necessary folders and files so you can register leads from Go4Clients landing pages into SugarCrm.

1-Verify that the EntryPointRegistry folder exists in / custom / Extension / application / Ext /. If it exists, please verify that the customEntryPoint.php file exists as well and insert the following code on this file:

```
<?php
$entry_point_registry ['customEntryPoint'] = array (
    'file' => 'modules/go4_Go4ClientsApplication/go4Receive.php',
    'auth' => false
);
?>
```

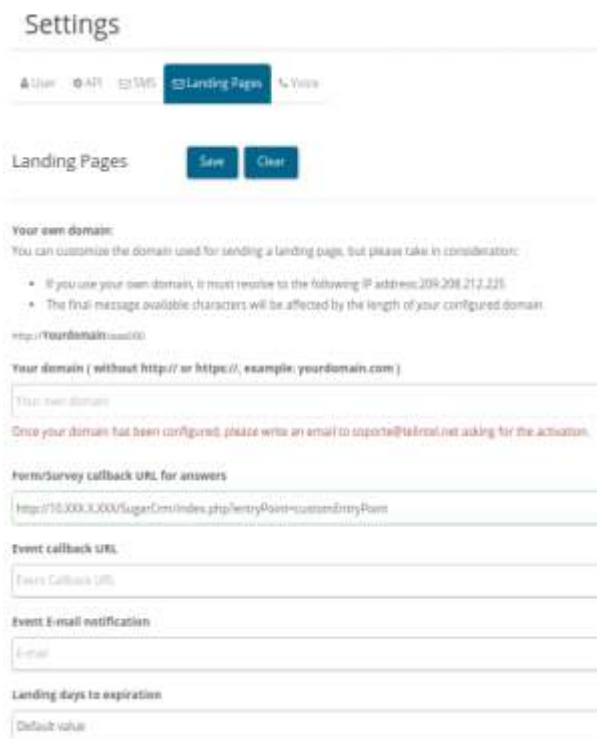
Warning: if the EntryPointRegistry folder or the custom EntryPoint.php file does not exist please create it.

2- Finally, go to Admin> Repair> Quick Repair and Rebuild. The system will generate the following file.

```
/custom/application/Ext/EntryPointRegistry/entry_point_registry.ext.php
```

3- Now, with the provided Callback URL `http: // {sugar url}/index.php?entryPoint=customEntryPoint` login into Go4Clients platform and then go to Setting→Landing Pages and there insert in Form / Survey Callback URL and the answers will be sent to that URL `http: // {sugar url} /index.php?entryPoint=customEntryPoint`

Note: {sugar url} is the ip domain. Example below:



Settings

User API SMS **Landing Pages** Voice

Landing Pages **Save** **Clear**

Your own domain:
You can customize the domain used for sending a landing page, but please take in consideration:

- If you use your own domain, it must resolve to the following IP address:209.208.212.225
- The final message available characters will be affected by the length of your configured domain

http://YourDomain.com

Your domain (without http:// or https://, example: yourdomain.com)

Your own domain

Once your domain has been configured, please write an email to support@telreal.net asking for the activation.

Form/Survey callback URL for answers

http://10.000.X.000/SugarCrm/index.php/entryPoint=customEntryPoint

Event callback URL

Event Callback URL

Event E-mail notification

E-mail

Landing days to expiration

Default value

Warning: if in the url `http:// {sugar url} /index.php?entryPoint=customEntryPoint` you find the following problem on sugar:

 Parse error: syntax error, unexpected 'Sentry_point_registry' (T_VARIABLE) in /opt/lampp/htdocs/SugarCE-Full-6.5.26/custom/application/Ext/EntryPointRegistry/entry_point_registry.ext.php on line 6

Please go to the following route:

/ custom / application / Ext / EntryPointRegistry /

Select the file `entry_point_reistry.ext.php` and you will find the following code:

```
<?php
//WARNING: The contents of this file are auto-generated

$entry_point_registry ['customEntryPoint'] = array (
    'file' => 'modules/go4_Go4ClientsApplication/go4Receive.php',
    'auth' => false
);
?>
```

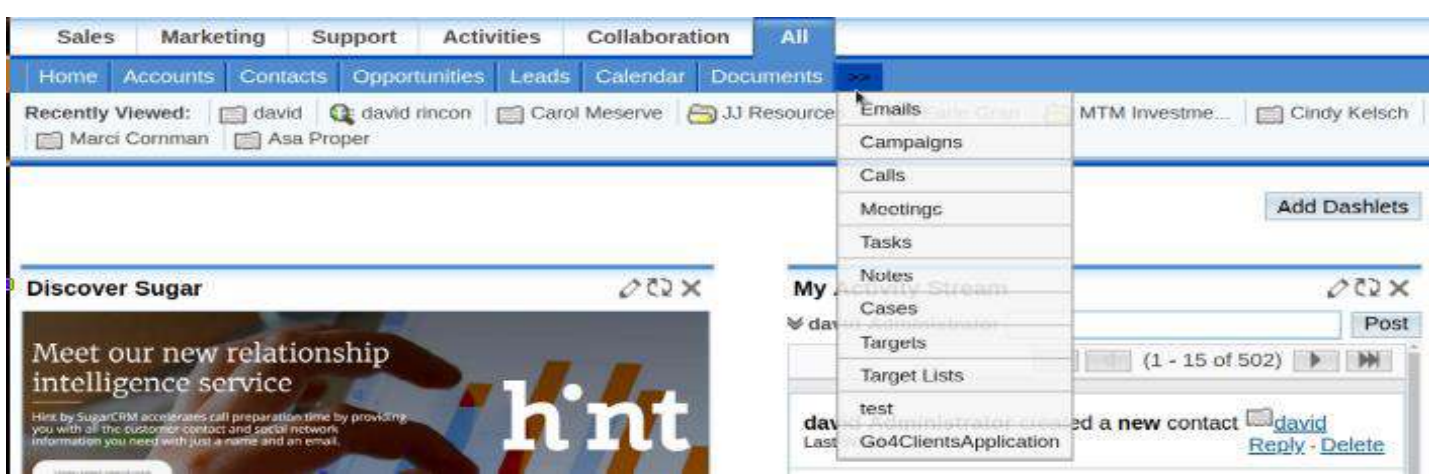
Please remove the spaces you have from the code and it will look like this:

```
<?php
//WARNING: The contents of this file are auto-generated

sentry_point_registry ['customEntryPoint'] = array ('file' => 'modules/go4_Go4ClientsApplication/go4Receive.php', 'auth' => false);
?>
```

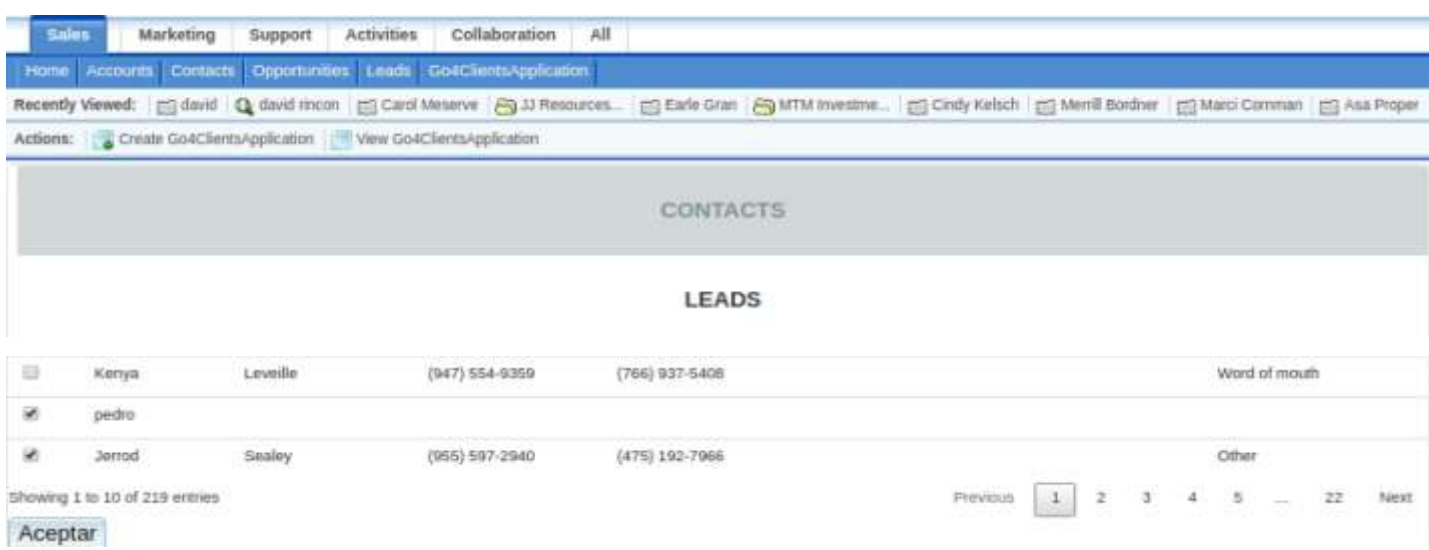
How to use the Go4Clients Application Module?

Go to the top bar of SugarCrm and there look for “All” section and then click on Go4ClientsApplication.



And the following frame will be displayed

This will take you to the next view where you can select contacts or leads which will be used to send either sms or voice messages.



In Settings you should configure ApiKey and ApiSecret which are mandatory in order to send the sms and Voice messages.



VOICE BROADCAST **SMS** **SETTINGS**

Enter your Apikey and Apisecret

APIkey *

APISecret *

Save

Where do I get the ApiKey and ApiSecret?

Just login into Go4clients platform, then go to Settings → Api and there you will find ApiKey and ApiSecret for your account.

Settings

User **API** SMS Landing Pages Voice

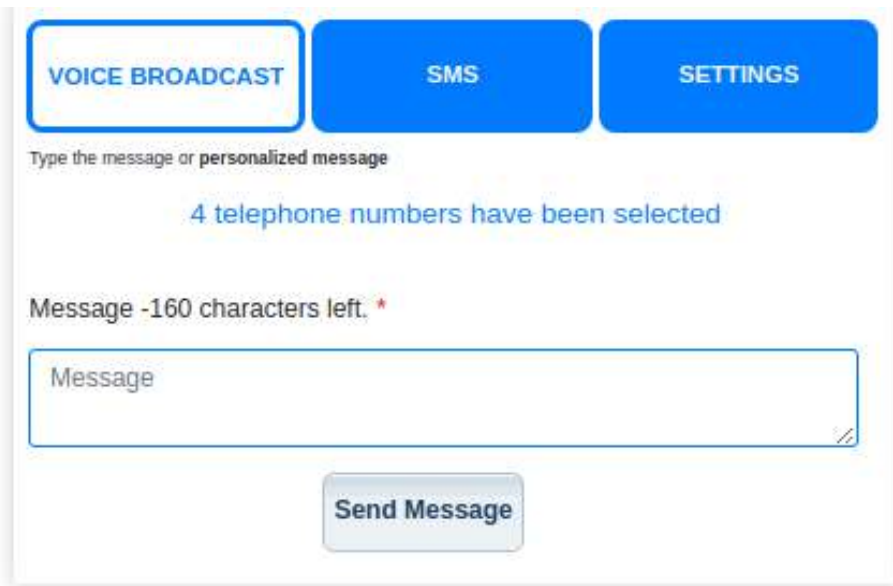
API **Save** **Clear**

Take note of your API credentials. Please keep them in a safe place.

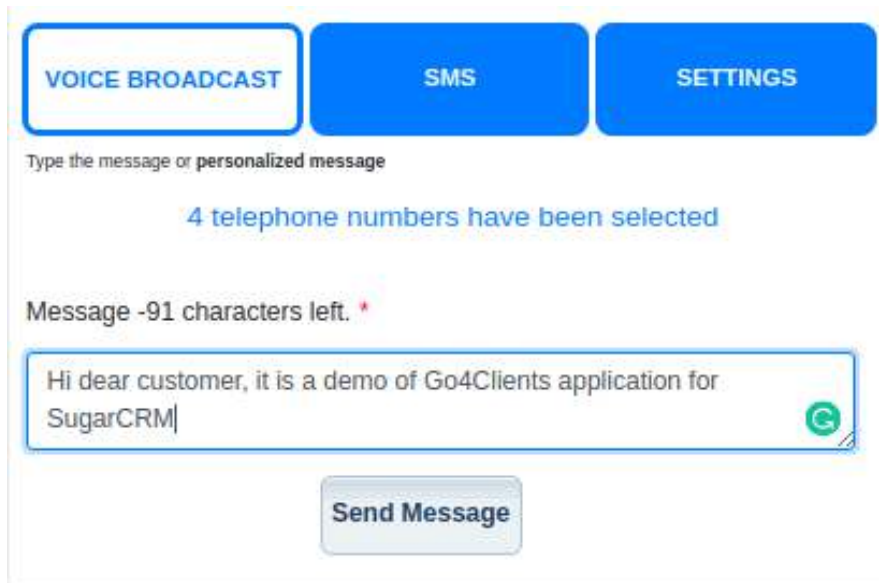
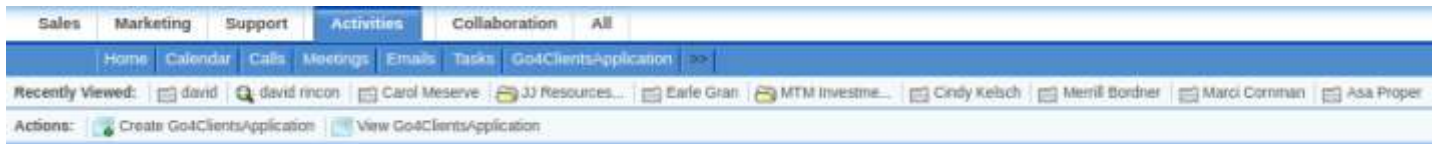
API key

API secret

In Voice Broadcast and SMS tabs you will see the selected contacts or leads and a field called (Message)

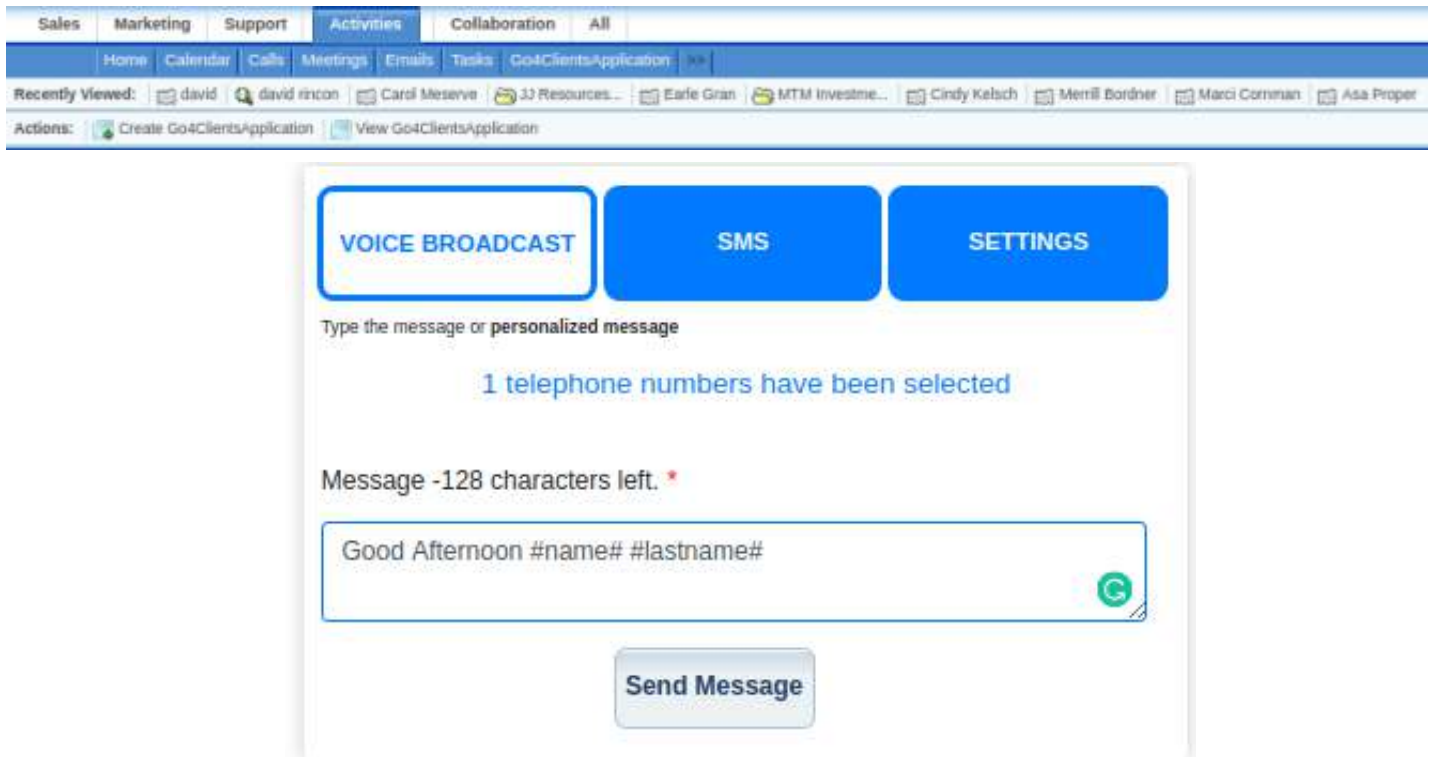


On message field you insert the content of the message you want to send. Example:



You can customize the message for each selected person. This is done through the use of Tags and keywords.

Example:



Personalized an SMS

Here is the list of keywords that can be used in order to personalize your messages.

TAG	DEFINITION
#name#	This field will bring the Name of the previously selected person
#lastname#	This field will bring the last name of the previously selected person
#number#	This keyword brings the phone number of the selected person
#text#	This keyword brings the text of the person who has filled out the landing page form
#email#	This keyword brings the email of the selected person
#url#	This keyword brings the url that the user has put in the form of the landing page

How can I integrate a form to SugarCrm with Go4Clients?

Now that you have the url set in Setting → landing Pages, create a landing page in Go4Clients <https://go4clients.com/cas/loginservice=https://go4clients.com/telintel>



Attributes & Actions Gallery

In this part you can modify the ids of the allowed SugarCrm fields.



Attributes & Actions Gallery Advanced

Id (Name that will be displayed in analytics)
First_Name

Placeholder
First Name

Max length
Insert component max length

Required

On error message
Input error message

Next you will find a table with the allowed fields in SugarCrm with its respective id

ALLOWED FIELDS IN SUGARCRM

DESCRIPTION	ID	SUGARCRM DATABASE FIELD
Fist Name	Fist_Name	first_name
Last Name	Last_Name	last_name
Phone	Phone_Number	phone_mobile
Text	Text	description
Url	Url	website
Email	Email_Address	lead_source_description

Note: This process is necessary in order to insert the leads on the SugarCRM properly.