Instructions for setting up from Asterisk

1. <mark>Information for those customers who are already using the add-on to the Asterisk connector as of 10/12/2022 (Asterisk Call Sync for Creatio)</mark>

In the **save_call_records_for_creatio** folder *(attached with the instructions),* in the **cdr_sync_class.php** file, replace the data:

1) $xml = $this->GetXMLDocument('AprCallViewCollection', $filter);

Change on

$xml = $this->GetXMLDocument('BtcCallViewCollection', $filter);

2) $xml = $this->GetXMLDocument('AprLeadViewCollection', $filter);

Change on

$xml = $this->GetXMLDocument('BtcLeadViewCollection', $filter);

Afterwards, execute SQL query:

Update "SysPackage" set "InstallType" = 0, "Maintainer" = <Maintainer> where Name = 'AprAsteriskCDRSync'

where Maintainer – value of the "Maintainer" system setting in Creatio.

Afterwards, you have to open configuration, and comment out all code and diff values in schemas CallPageV2, CtiPanel in the AprAsteriskCDRSync package.

2. <mark>If this is your first time setting up, then follow the steps below</mark>

Follow these steps:

1. Create a directory in the root of the web server **save_call_records_for_creatio**.

2. Place files from the archive in a new directory **save_call_records_for_creatio.zip.**

3. Give the rights to the owner to the directory and to the files to the web server user.

4. Make changes to the **conf.php file** to connect to the **Asterisk PBX** database.

Parameters :

   define("DBNAME", "");

   define("DBUSER", "");

   define("DBPASS", "");

   define("DBHOST", "localhost");

5. Edit the conf.php file to connect to Creatio

   define("BPM_UserName", " User name ");

   define("BPM_UserPassword", " Password ");

   define("BPM_Url", " Link to Creatio ");

6. Depending on Asterisk settings, destination number may be stored either in dst field or in dstchannel field of table cdr. Table must be analysed and corresponding value should be set.

define("PARSE_DST_FROM_DSTCHANNEL", TRUE);   // TRUE - parse dst from dstchannel, FALSE – don't parse, take value from dst as is

7. Call audio recordings storage parameters.

        define("EXPORT_CALL_FILE", FALSE); // Defines whether files or links will be exported to Creatio

        define("FILE_EXTENSION", ".wav"); // Extension of recording file

        define("FILE_DIR", "/var/spool/asterisk/monitor"); // Asterisk folder with files

        define("FILE_NAME_IN_CDR_TABLE", FALSE);   // TRUE – file name is taken from field recordingfile, FALSE – file name is generated from uniqueid

        define("FILES_DIVIDED_INTO_FOLDERS", TRUE);   // TRUE – files are divided into folders based on the date (/var/spool/asterisk/monitor/2019/11/01), FALSE – files are situated in a root folder (/var/spool/asterisk/monitor)

        If calls should be connected to leads:

        define("SEARCH_LEAD", TRUE);

8. Make changes to the .htaccess file. You need to write the full path to the .htpasswd file:

9. Open access to the web server from outside for the IP address of the Creatio web server (CRM will request the call log files via the link), as well as temporarily for the IP address 176.113.165.197 (for testing and analysis). Provide an external link to access the web server.

10. It is important that the Creatio web server is accessible from the Asterisk server.

11. Testing.

        Execute a command with required path:

        php /var/www/html/save_call_records_for_creatio/index.php print display_errors

        It displays the cdr table for current date. Any errors during php code exexution will be displayed.

        Scripts can be tested from browser:

        http://domen_or_ip/save_call_records_for_creatio/?print&display_errors

        If there are no errors, proceed to the next step.

12. Test the execution of the synchronization script:

        php /var/www/html/save_call_records_for_creatio/index.php display_errors

        Or use browser:

        http://domen_or_ip/save_call_records_for_creatio/?display_errors

        Command synchronizes the calls for the last hour.

        If there are no errors and the calls have appeared in Creatio, check the "Start date" of the calls. If the time differs with the actual call time (for example call was made at 2:00 PM, but in Creatio it is recorded as being made at 3:00 PM), a parameter in the conf.php must be modified:

define("CALL_DATE_OFFSET", 0);

Parameter takes both positive and negative integers. After changing the parameter, execute the script again. If everything is correct, proceed to the next step.

13. Add a cron task with required path in the third line:

#Call synchronization

SHELL="/bin/bash"

*/10 * * * * cd /var/www/html/save_call_records_for_creatio && php index.php > /dev/null 2>&1

Script will run every 10 minutes and synchronize the calls for the last hour.

14. If you need to manually synchronize the calls for a specific date (for example, December 13th, 2022), you need to run the following command (with required path):

php /var/www/html/save_call_records_for_creatio/index.php 2022-12-13

It can also be done through the browser:

http://domen_or_ip/save_call_records_for_creatio/?date=2022-12-13