CloudCTI Webconfigurator Manual

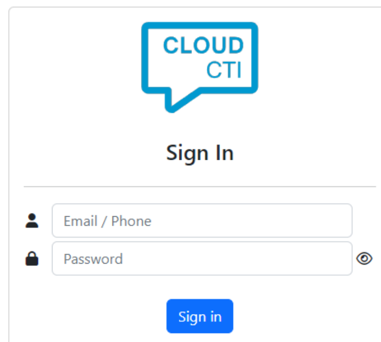
v1.0

Welcome to the CloudCTI Webconfigurator

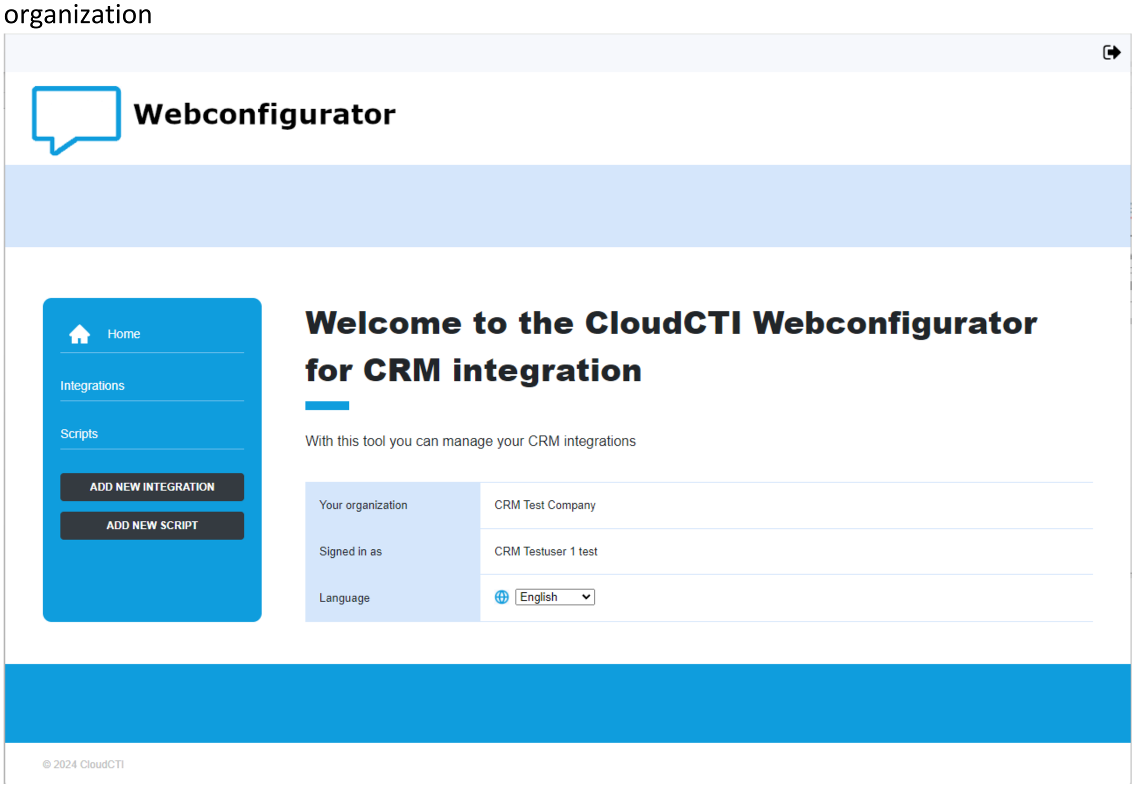
The Webconfigurator application aims to make integrating your CRM with your phone system possible in a very easy way. With the Webconfigurator you can configure access to your CRM's API to enable caller recognition and you can configure actions to 'pop' the caller's record within the CRM. It is also possible to configure multiple integration and/or actions. A wizard, guiding you through the steps, often lets you complete the process with only a few clicks. Integrations are always configured for a tenant organization, not for an individual user. Therefore, you only need to do the integration once.

First time sign-in

To access the configuration for your tenant organization, you need to sign in with a user with the appropriate administrative privilege. By default, this access is not granted to all users because changes impact the whole organization. You can use your CloudCTI credentials, or if supported, your credentials from the telephony system. If you do not have valid user credentials or the appropriate privilege, please inquire with your telephony provider.



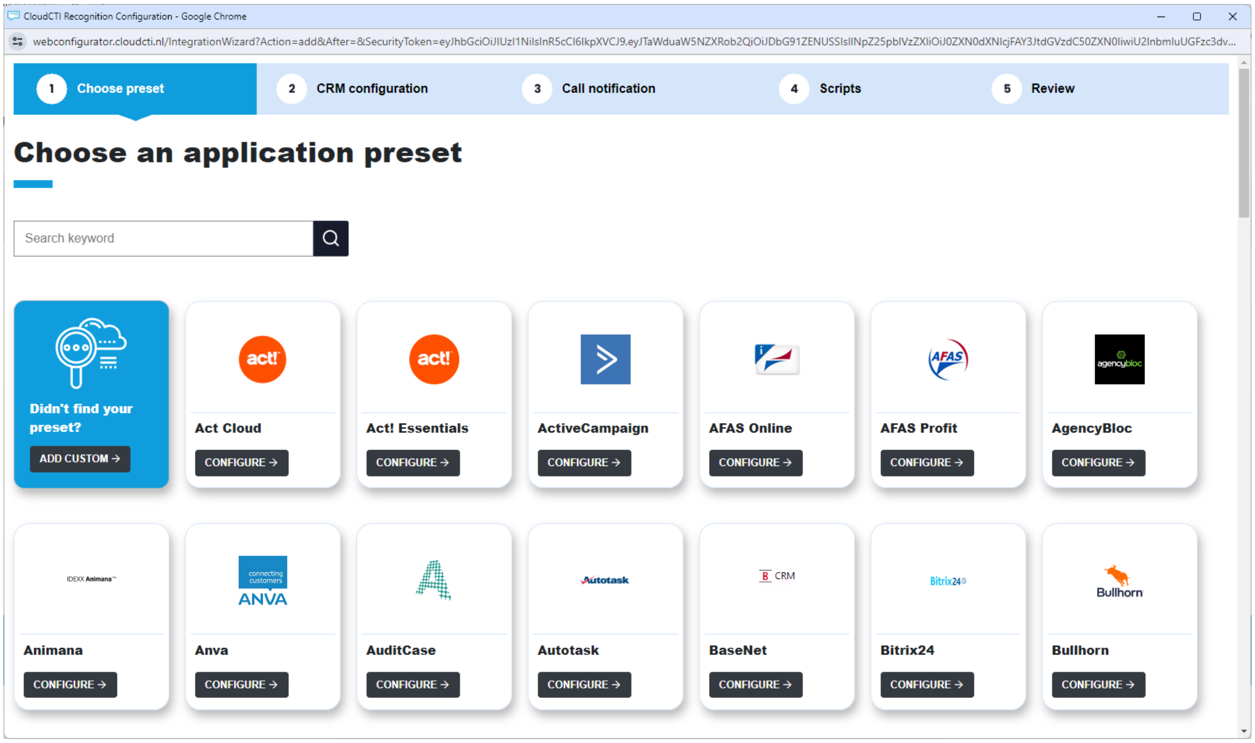
Once you are signed in, the Webconfigurator will show the main info screen with your name, your organization



To get started, click 'Add New Integration' or 'Add New Script' on the left.

Adding new integrations

Clicking 'Add New Integration' will open the wizard in a new window showing all the pre-configured CRM's.



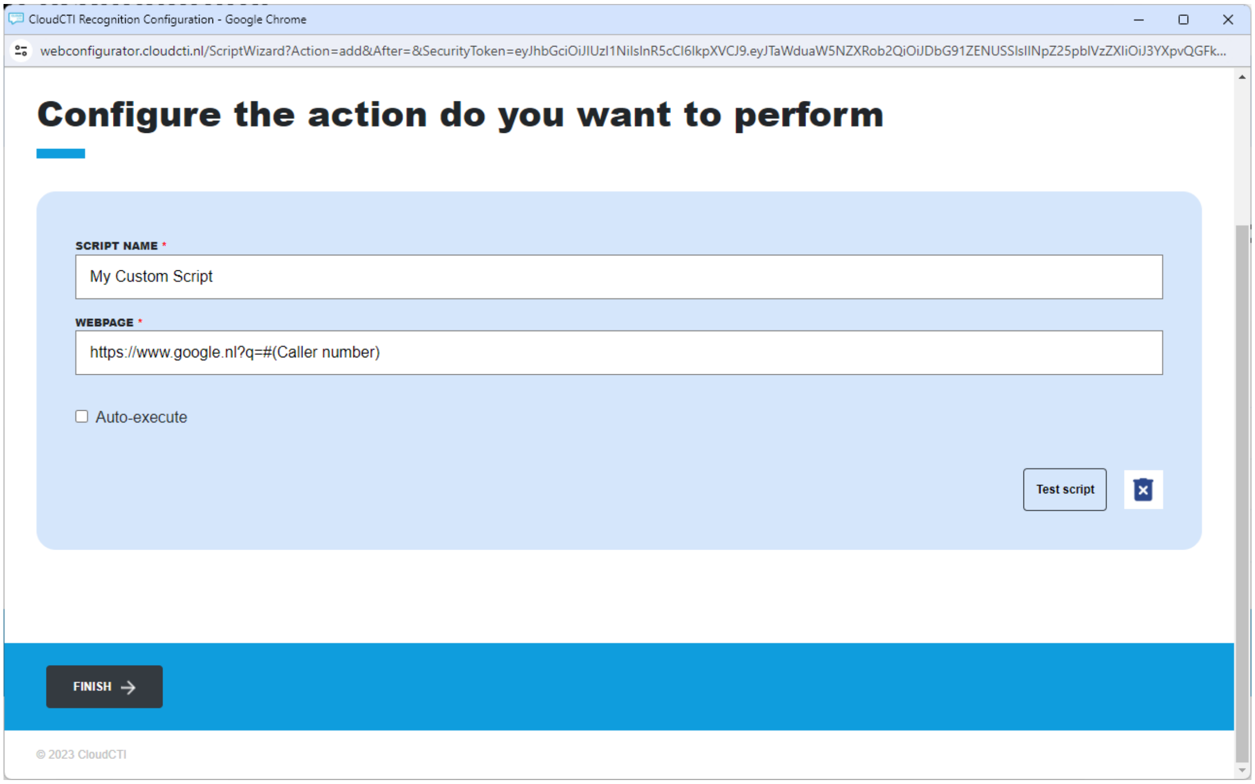
Scroll down to locate your CRM, or use the search bar at the top to easily find what you are looking for. The top ribbon of the wizard shows where you are in the process. The precise content of the steps are specific to each CRM. In general, they accomplish the following:

1) <u>Choose preset</u> You decide which CRM you want to integrate.
2) <u>CRM Configuration</u> Provide specifics like the CRM's domain and allow access to the phone number data.
3) <u>Call notification</u> Configure the fields displayed in the call notification. The most typically chosen fields for this CRM will have been preconfigured.
4) <u>Scripts</u> Add or edit the actions available with phone number matches from this CRM. A 'screen pop' script will always be pre-configured. Also see the next section 'Adding new scripts'.
5) <u>Review</u> Before finalizing the integration, review your choices and go back to change them if necessary.

With some CRM's, steps may be skipped. For example if a CRM does not have, or not allow access to, an API for matching phone numbers. Such CRM's will have a script pre-configured which passes on call realtime call information to the CRM with which the CRM themselves generate a call notification for the user. After finalizing the last step, the integration will be added for your organization and the Webconfigurator will automatically show the integration overwiew for this CRM.

Adding new scripts

Clicking 'Add New Script' will open the dialog shown in the screenshot below. A similar dialog is shown when 'Add Script' is clicked in the fourth step of adding a new integration.



As an example, the URL https://www.google.nl?q=#(Caller number) is filled in using #(Caller number) as the parameter with which the Google search is done. The available call properties are:

• #(Caller name	If available, the internal name, provided by the phone system
• #(Caller number)	The number of the caller
• #(Device name)	If available, the internal name, provided by the phone system
• #(Device number)	The number of the device from or to which the call is made
• #(Ddi name)	If available, the internal name, provided by the phone system
• #(Ddi number)	The number via which the external call came into the system
• #(Start time)	The time the call started

For the phone number formatting, the national full subscriber number is used. For device numbers, most telephony platforms use short internal numbers. With a few, this can be the unique subscriber number, if so then the national format is used again. The same rule applies for the ddi number. The ddi number can be used to distinguish between inbound calls that were made to support, or sales, or directly to a device for example.

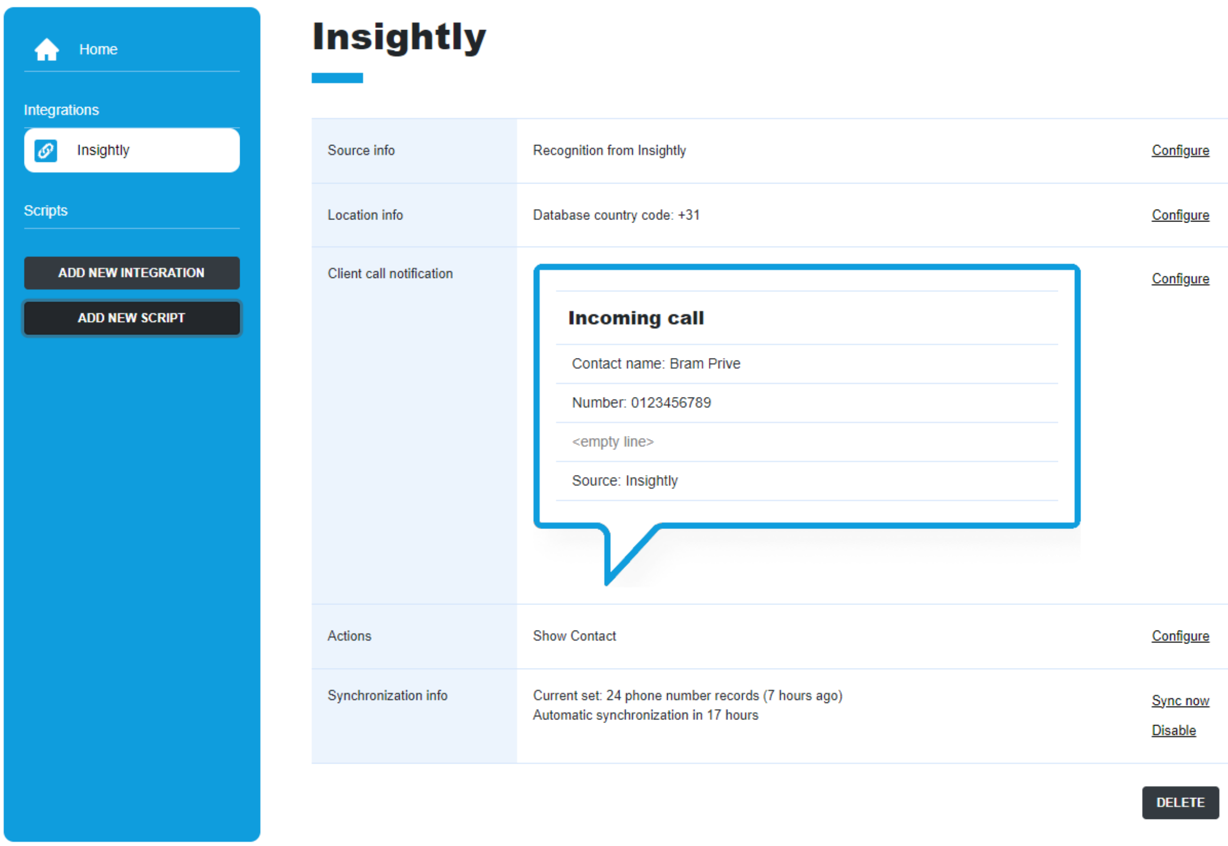
If a script is created as an extra script for an integration where access is granted to the phone number data (see step two in the previous section 'Adding new integrations') then the fields from the data associated with the phone numbers can also be used in the scripts (e.g., customer number or AccountID).

These are specific to each CRM, but their format is always the name of the CRM field between brackets with a $ prefix, e.g. $(DisplayName).

Many functions may be added constructing hyperlinks with variables. For example, an incoming call could show an 'mail callback message' button in addition to the screen pop button. The mail with the callback message can be opened and prefilled with information about the caller from the CRM. The link: mailto://?Subject=Callback%20request&Body=Dear%20colleague%2C%0A%0APlease%20call%20to%3A%0A%0AName%3A%20%24%28DisplayName%29%0AAccount%20number%3A%20%24%28Identifier%29%0APhone%3A%20%23%28Callernumber%29%0ADirect%20CRM%20link%20%24%28PopUpUri%29%0A%0AKind%20regards%2C%0A%0AName%20of%20sender%0A%0A will automatically create a new email for a callback request with the caller's name, number and the link to the caller's CRM page. Other examples could be opening a dialog in the CRM to add a new contact, in case a number is not matched.

Integration overview

The left side bar lists the currently integrated CRM applications. If a CRM is selected, the Webconfigurator shows the current settings and status. As an example, the screenshot below shows Insightly.



The status is shown with the synchronization info. It displays the number of cached phone numbers, the last time the cache was refreshed and the next time it will synchronize with the CRM. By default, that happens once every night.

When multiple CRM's are integrated, it can be useful to temporarily disable one of them by clicking 'Disable' on the bottom right. Matches from disabled integration are suppressed. No settings or cached data are removed. A disabled integration can be re-enabled to restore the previous state. Below that, clicking ‘Delete’ will completely erase all settings and cached data. Deletions cannot be undone.