

Getting Started with CTI on the Amiba Cloud PBX.

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Introduction

The Amiba Cloud CTI allows users to click-to-dial a phone number in a web page or an open application. It notifies the user of incoming calls and screen-pops the calling number. It can also recognise the calling number and screen pop a customer file from a CRM application.

The Amiba Cloud PBX uses a cloud based CTI middleware which is administered separately from the PBX. The Cloud CTI administrator must authorise new Cloud CTI client users and provide them with login details to the service.

In addition, the administrator must configure the PBX separately to communicate with the Cloud CTI middleware.

Configuring the Cloud PBX for CTI from the Installer portal.

Login to the PBX installer portal and go to System Settings/CTI Services.

- Enable the CTI over HTTP API as shown below.
- Enter the address of the CTI over HTTP Server: webapi.cloudcti.nl

Press SAVE.

28/09/2017 14:49:33 System Programming (Revision: 19.225) Logout (mdsinstall)

System Settings / CTI Services

SOAP Port:	Enabled
Soap uses https (Encryption):	Enabled
Soap requests require Authentication:	Enabled
TAPI Port:	Disabled
CSTA Port:	Disabled
CSTA Requires Authentication:	Enabled
xHTML API:	Enabled
xHTML uses https (Encryption):	Enabled
CTI over HTTP API:	Enabled
CTI over HTTP Server	webapi.cloudcti.nl
Server Port	15106

Help

CTI Services

CTI (Computer Telephony Integration) services connect the PBX to external third party CRM applications. The three interfaces commonly used for this purpose are SOAP (Simple Object Access Protocol), TAPI and CSTA and these can be activated on this page.

The SOAP interface is used to communicate with external applications such as the PC based 'Communicator' application which is used to synchronise Outlook and Gmail Contacts with the PBX.

The TAPI & CSTA interfaces are typically used by third party 'call-control' applications.

Click [SAVE] to accept new settings.

User manuals Save English

Go to the System Settings/Firewall page

28/09/2017 14:58:47 System Programming (Revision: 19.225) Logout (mdsinstall)

System Settings / Firewall

Http Port (TCP 443):	Unrestricted
Installer Access:	Unrestricted
Admin Access:	Unrestricted
User Access:	Unrestricted
CTI over HTTP API:	Unrestricted
SOAP Port (TCP 10073):	Whitelist only
Installer Access:	Whitelist only
Admin Access:	Whitelist only
User Access:	Whitelist only

Help

Firewall

Select the level of protection from the drop-down menus for each of the services/ports listed.

- Blocked = no access on this port
- Whitelist only = access allowed only from local addresses and from addresses entered on the Whitelist (RAS) IP addresses page
- Unrestricted = packets on this port are not checked.

Click [SAVE] to apply the selection.

User manuals Save English

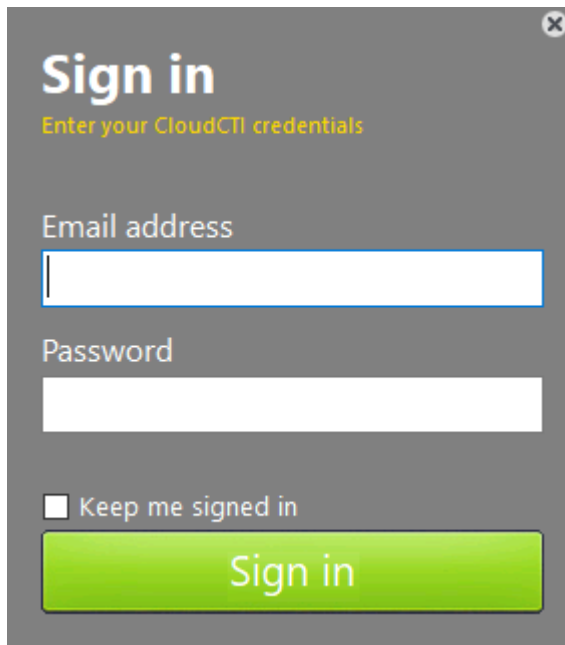
Set the CTI over HTTP API to Unrestricted as shown.

Alternatively, set it to Whitelist Only and enter the IP address of the server in System Settings/Whitelist (RAS) IP Addresses page.

Getting started with a CloudCTI client.

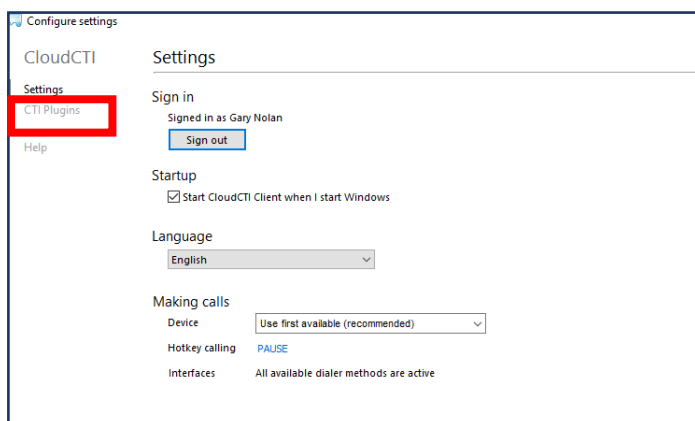
When a new Cloud CTI user is set up by the CloudCTI administrator, the user will receive a link to download the Cloud CTI client and the necessary login details for the service.

Install the CloudCTI client and run it. Login using your email address and the PIN provided by the administrator:

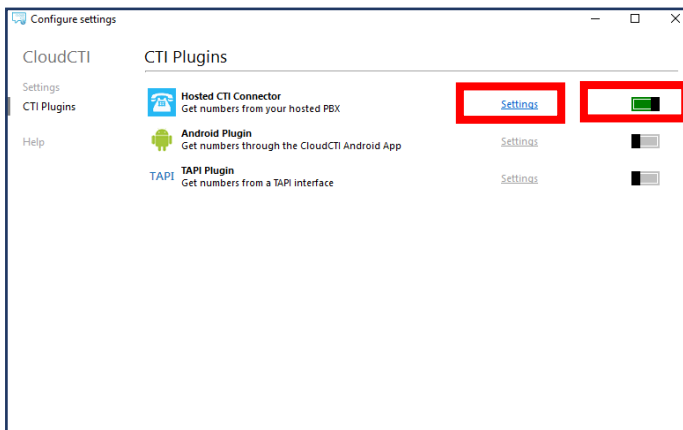


A sign-in dialog box with a dark gray background and a close button (X) in the top right corner. The title is "Sign in" in large white font, with the subtitle "Enter your CloudCTI credentials" in smaller yellow font below it. There are two input fields: "Email address" and "Password", both with white backgrounds and blue borders. Below the password field is a checkbox labeled "Keep me signed in". At the bottom is a large green button with the text "Sign in" in white.

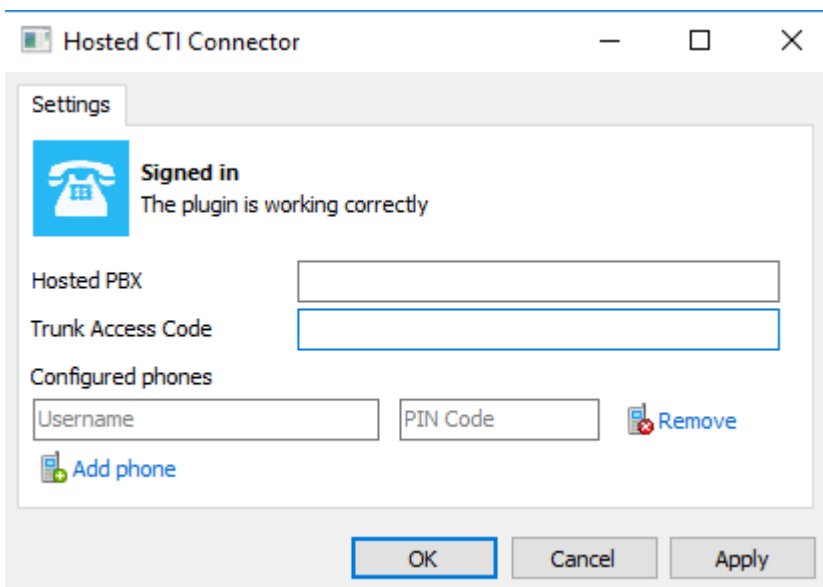
Go to the CTI Plugins page:



Turn on the button for Hosted CTI Connector and press Settings:



In the box Hosted PBX enter the URL of your cloud PBX in the format: mypbx.provider.com:



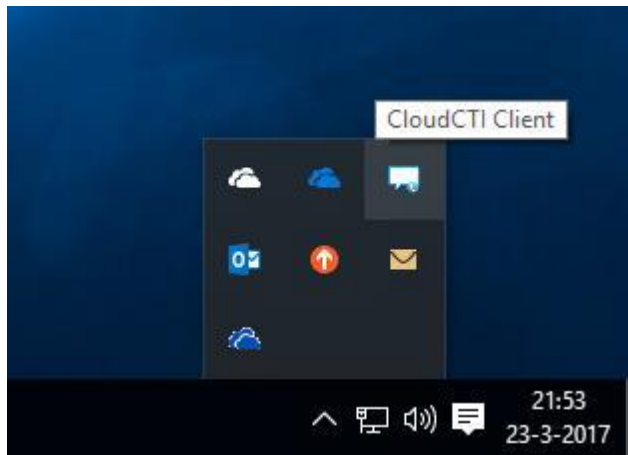
In the box trunk Access Code enter a 9 or 0 appropriate. (However, if the PBX uses Explicit External Dialling leave the space blank as the PBX will insert it automatically).

Under Configured phones enter your PBX User Name and PIN Code. These are the credentials that you use to login to your PBX user portal (not the IP Registration Name and PIN used for registering a phone).

Once you are registered, you will receive screen pops for incoming call alerts showing the calling line identity. You may also receive a screen pop of a customer record from a CRM, if this has been enabled by the administrator.

You can also click-to dial a phone number on any web page or open application or click to dial from Outlook as described below.

The CloudCTI Client can be minimized to your system tray. Since Windows7 newly installed system tray icons are by default hidden from view. That's okay, it will show up if the client has relevant information, such as when a new call arrives.



The CloudCTI icon resides in the system tray of your desktop.

Using 'Click-to-call'

There are several methods to start a new call using the CloudCTI Client. The easiest method, that is available to anybody, is the highlight-to-call method. Any number you can highlight with your mouse cursor can be dialed by simply pressing the 'Pause' key on your keyboard (you can configure another hotkey for dialing). Don't worry if a few extra characters are highlighted. The CloudCTI Client translates the number into a dialable format, automatically excluding accidental letter characters.

In addition to 'select-to-call' the CloudCTI Client provides several additional methods to easily initiate a new call. These are:

- the `callto://` URL – a standard (e.g. also used by Skype) that enables the initiation of a phone call from HTML pages with a single click. In addition, the CloudCTI also handles `tel:`, `dial:`, `skype:` and `lync:` URL's.
- the TAPI interface – used by many CRM applications to make a phone call to contacts. See for example [How to call a contact from Outlook](#) or [How to call a number from the Windows Dialer](#).
- a COM interface – for easy access from scripting languages such as JavaScript and Visual Basic.
- calling '`MakeCall.exe /number=<destination>`' from the command line.
- The Assisted Telephony interface.

If you have enabled multiple CTI connections you can specify your 'dialer device'. This is the communication device that will be used for initiating new calls. By default this setting shows 'the first available device'. With this setting you can change devices easily and if there is only one active at one time the CloudCTI Client will always use that one. However, if you have multiple devices and you can also choose one from the listed available devices. This choice is also available from the tray icon's context menu so the it is easily changed on per call.

Using 'Caller recognition' and 'screen pop'

On an incoming call the CTI connector signals the CloudCTI Client to show a notification balloon. In Windows 10 such a notification is by default shown for 5 seconds (although this system setting can be changed). If you want to click a button on the notification you are not required to do so immediately. If you click the tray icon, it simply repeats the last notification. If a caller's number is not recognized the standard balloon is used as shown with the 'copy' button. This button copies the caller's number to the clipboard which can be convenient if you decide to add the caller to your CRM application so the number will be recognized the next time.

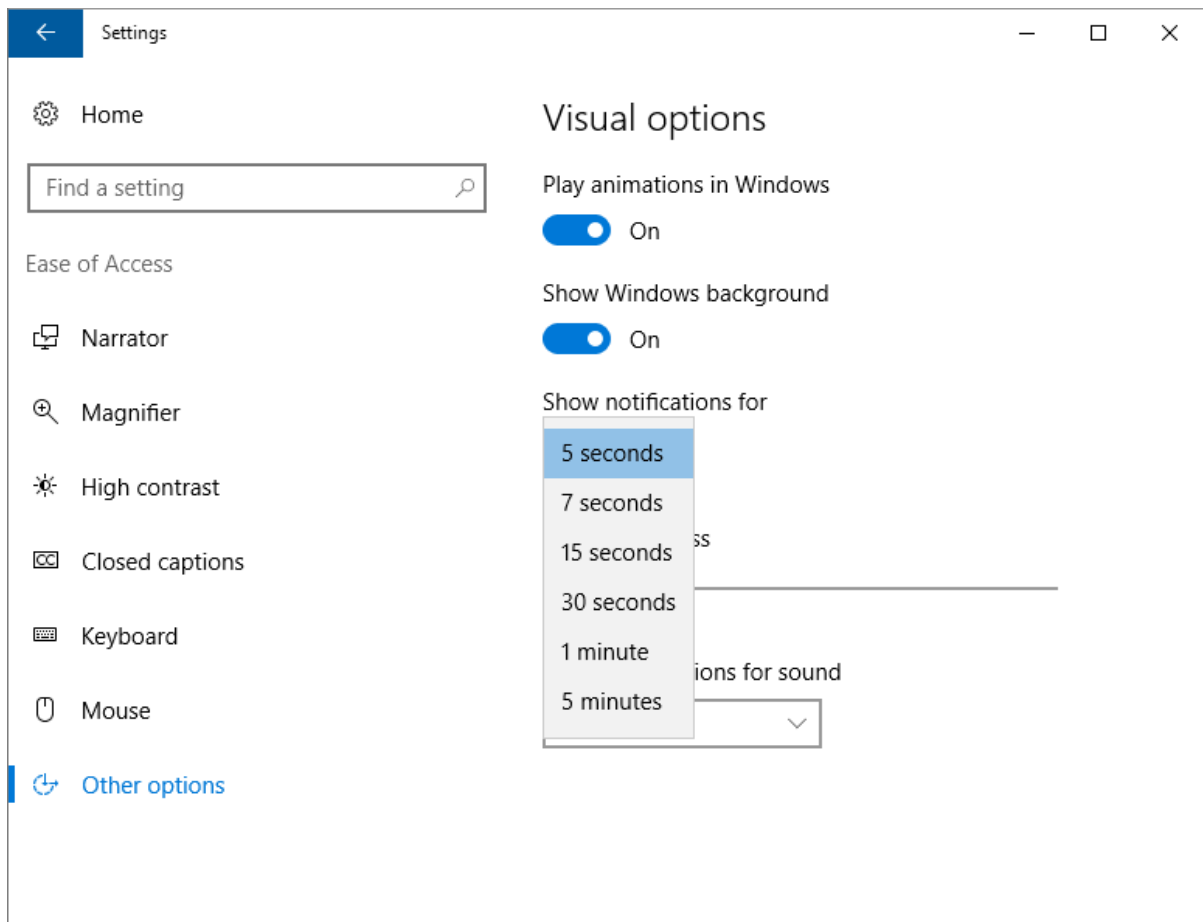
Caller recognition is configured by a system administrator using the Recognition Configuration Tool. This tool can be used to configure what contact information should be shown in the notification balloon. The tool allow the configuration of multiple 'screen pop' scripts, and with most pre-configured CRM applications the notifications have a 'Show Contact' button which activates the caller's info page within the specific CRM application.

How to configure another hotkey for dialing

- 1) In the tray icon context menu click 'Configure'.
- 2) In the 'Making calls' section click the currently selected hotkey link.
- 3) Press the key combination you want to use.

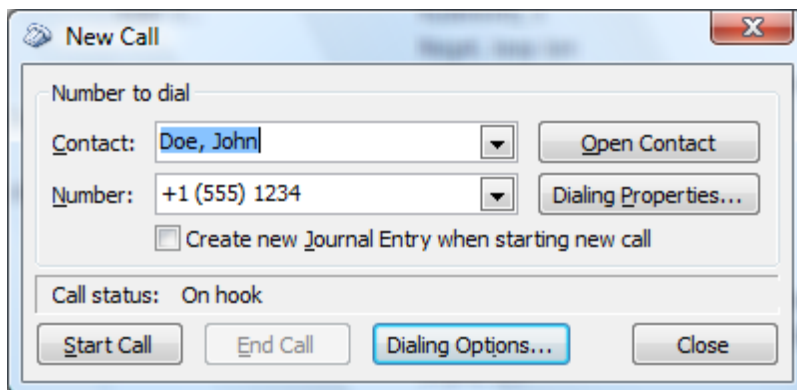
How to increase the time a notification is displayed

- 1) With Windows 10 go to Setting/Ease of Access/Other options
- 2) Change the setting for 'Show notifications for'.

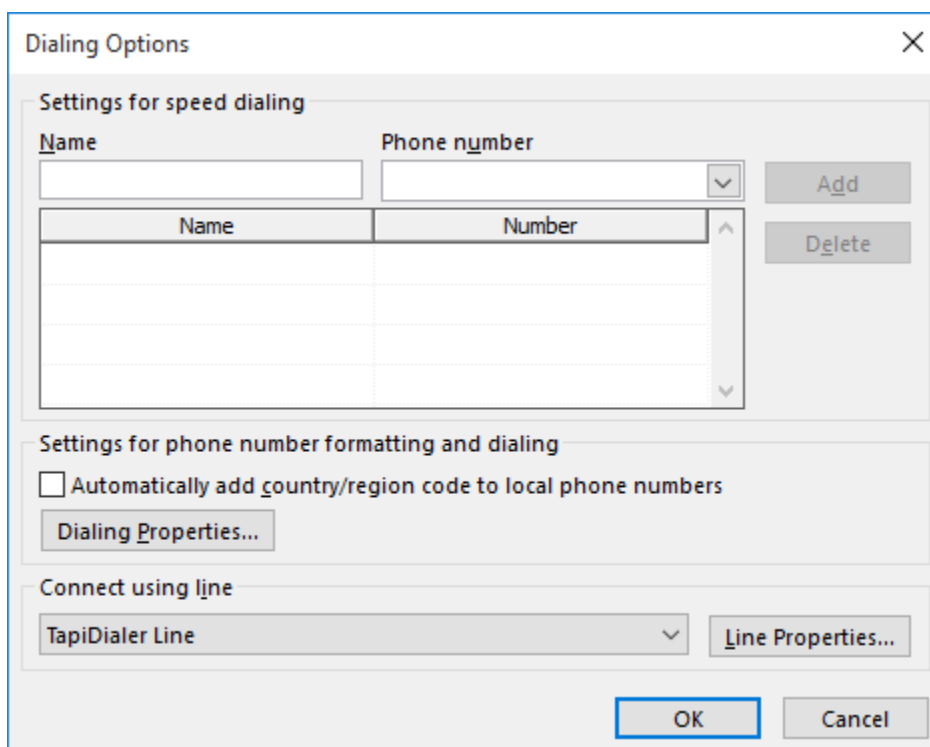


How to call a contact from Outlook

- 1) Select a contact and press the 'Call' button in the ribbon, or click the contact with the right mouse button and select 'Call' in the context menu.
- 2) In the following dialog, click 'Dialing Options...' if this is the first time.



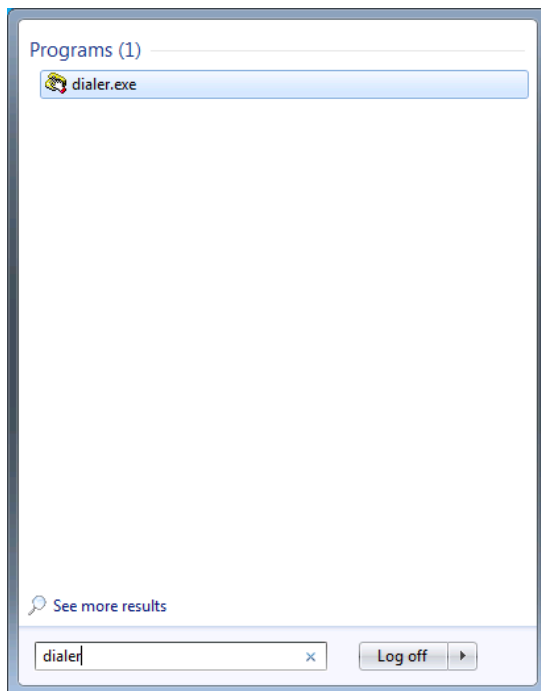
- 3) In the Dialing Options for 'Connect using line' choose 'TapiDialer Line' and press OK



the New Call dialog press Start Call.

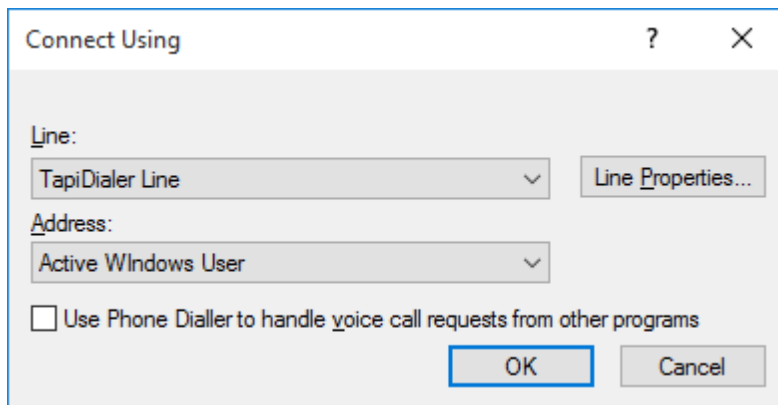
How to call a number from the Windows Dialer

1) In the Start Menu search box type 'dialer' and start dialer.exe.

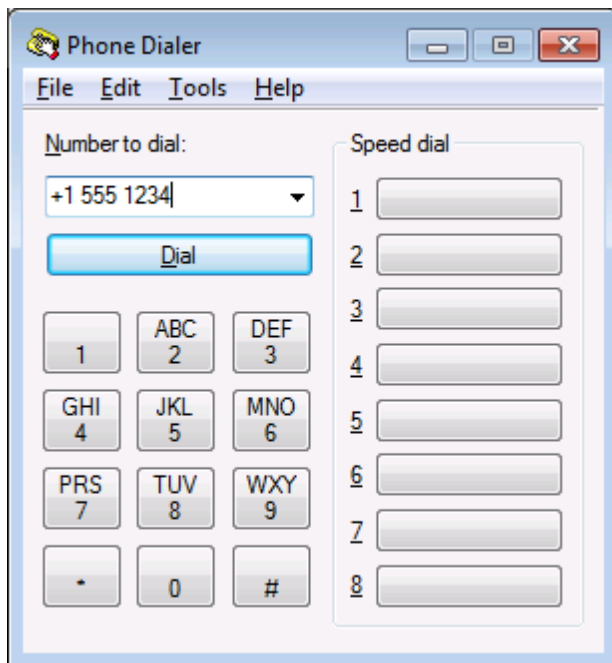


2) From the 'Tools' pull down menu select 'Connect Using...'.

3) In the Connect Using dialog for the Line property choose TapiDialer Line and press OK



4) Back in the Phone Dialer type a number and press Dial



[How to choose another device to use when dialing](#)

- 1) Right click the CloudCTI Client tray icon and move the mouse over the 'Dialer device' item.
- 2) From the sub-menu choose the device you want to use.

[How to copy the number of the last call if the number was not recognized](#)

- 1) Click the CloudCTI Client tray icon to bring back the last notification.
- 2) Click the 'Copy' button. The caller's number is now copied to the clipboard.
- 3) To test, open notepad and press CTRL-V.

[How to log in with a different user](#)

- 1) Right click the CloudCTI Client tray icon and select 'Configure'.
- 2) In the top right, click 'Sign out'
- 3) Enter the different user credentials and press 'sign in'.

[How to use another display language](#)

- 1) Right click the CloudCTI Client tray icon and select 'Configure'.
- 2) In the General section choose another language.