CloudCTI Client Manual

2013 – v1.0

Contents
Getting Started with the CloudCTI Client ........................................................................... 2
  Welcome to the CloudCTI Client ...................................................................................... 2
  First log on ......................................................................................................................... 2
  Using ‘Click-to-call’ ........................................................................................................... 3
  Using ‘Caller recognition’ and ‘screen pop’ ...................................................................... 3
Common tasks ...................................................................................................................... 4
  How to configure another hotkey for dialing ................................................................. 4
  How to call a contact from Outlook .................................................................................. 4
  How to call a number from the Windows Dialer ............................................................. 5
  How to choose another device to use when dialing ......................................................... 6
  How to copy the number of the last call if the number was not recognized ................. 6
  How to log in with a different user ................................................................................ 6
  How to get more licenses ............................................................................................... 6
  How to use another display language ............................................................................. 6
  How to get support .......................................................................................................... 6
Connecting to your communication system ...................................................................... 7
  Setting up the CTI Tapi Plugin ....................................................................................... 7
  Setting up the CTI Android Plugin .................................................................................. 7
  Setting up the CTI Mitel PBX Plugin ............................................................................... 7
Getting Started with the CloudCTI Client

Welcome to the CloudCTI Client

The CloudCTI Client application aims to make communication a little bit more convenient, very often. With the CloudCTI Client you can set up a phone call with one click, i.e. ‘click-to-call’, from any Windows application. Moreover, it provides you with relevant information about a calling party from your own central customer database, i.e. ‘caller recognition’. And best of all, application offers a one click shortcut to that contact’s info screen within your own CRM application, i.e. a ‘screen pop’. This document describes how to use these functionalities.

First log on

When you first start the CloudCTI Client, you will need to log on using your CloudCTI user credentials. Each CloudCTI ‘tenant’ organization can register multiple users. The CloudCTI licenses are concurrent, i.e. multiple users can make use of the same license, although not at the same time. If you want your credentials to be used automatically on the current system, tick the ‘Keep me logged in’ checkbox.

Once you are logged on, the CloudCTI Client will show the settings dialog of your default CTI Plugin or if there is no default CTI Plugin set, it will show the CTI Plugin page where you can choose to activate one. The CloudCTI Client requires at least one correctly configured CTI Plugin (see for type specific information see the section Connecting to your communication system). Once the CTI Plugin is setup to monitor your phone, the ‘click-to-dial’ function can be used right away. The ‘caller recognition’ and ‘screen pop’ should be configured centrally for the whole organization by a system administrator.

Then, if everything is up and running, the CloudCTI Client will 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.
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 select-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.
- 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 as long as there is never more than 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 plugin signals the CloudCTI Client to show a notification balloon. Since Windows Vista such a notification is by default shown for 9 seconds (although this system setting can be changed). If a caller’s number is not recognized the standard balloon is used as shown by the following screenshot. If you click on the balloon the caller’s number will be copied to the clipboard so the caller’s number can easily, and without error, be added to your CRM application.

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. If the caller’s phone number matches to more than one contact record, clicking the
notification with your right mouse button will show the next match. To perform a screen pop, i.e. activate your CRM application and show the full contact info there, click the notification with the left mouse button.

Common tasks

How to configure another hotkey for dialing
1) In the tray icon context menu click ‘Configure’.
2) In the ‘Dialer’ section click the currently selected hotkey link.
3) Press the key combination you want to use.

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 ‘CloudCTI Dialer’ and press OK
4) Back in 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 CloudCTI Dialer 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 move 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 balloon.
2) Right click the balloon. 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 Settings section click ‘Log off’
3) Enter the different user credentials and press ‘Log on’.

How to get more licenses
1) Goto www.cloudcti.nl/Licence.
2) Click ‘Purchase more user licences’.

How to use another display language
1) Right click the CloudCTI Client tray icon and select ‘Configure’.
2) In the Settings section choose another language.

How to get support
1) Send an email to support@cloudcti.nl.
2) Try to be as detailed as possible.

Connecting to your communication system

Setting up the CTI Tapi Plugin

1) Install the TAPI software from your vendor. Info for a number of popular vendors is available here:

2) Right click the CloudCTI Client tray icon and select ‘Configure’.

3) In the CTI Plugins section activate the Tapi Plugin. The settings dialog will be shown.

4) Select your device from the combobox and click OK. The Tapi Plugin activation switch should turn green indicating a successful connection with your tapi device.

Setting up the CTI Android Plugin
Coming soon.

Setting up the CTI Mitel PBX Plugin
Coming soon.