CloudCTI Client Manual

2017 – v2.0

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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 or website. 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, the application offers a one click shortcut to that caller's info screen within your own CRM application, i.e. a 'screen pop'. This document describes how to use these functionalities.

First time sign in

The first time the CloudCTI Client starts, you need to sign in using your CloudCTI user credentials. If you choose to keep the setting 'Remember my credentials' checked, this is only required once. If you do not have valid CloudCTI user credentials, please inquire with your telephony provider. Or, if you have an Android device, a TAPI device or valid Broadsoft credentials, you may create a trial account at https://www.cloudcti.nl/SignUp (see Connecting to your communication system below for further information about setting up the connector to your communications platform). Otherwise, please send a mail to info@cloudcti.nl with information about your communications platform and we will contact you.

Once you have signed in, the CloudCTI Client will show the main configuration screen. If you select 'Telephony connector'on the left, you can verify the status of the appropriate connector, which should be green. If not, follow the provider specific instructions or see the section Connecting to your communication system). If the connector has successfully been setup, 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 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.
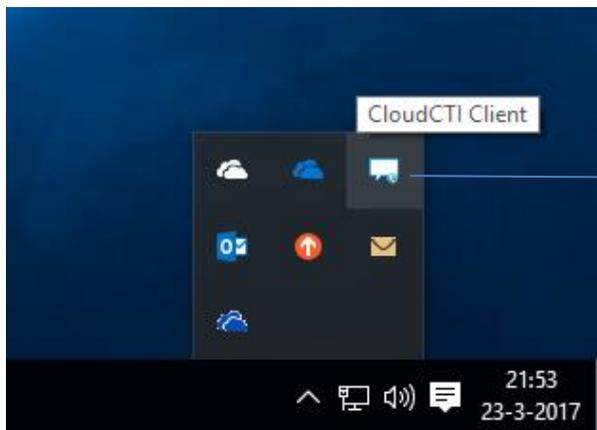
Screenshot of the CloudCTI trayicon
the CloudCTI icon resides in the system tray of your desktop.

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.

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www.cloudcti.nl   *make the connection*

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.

Common tasks

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'.
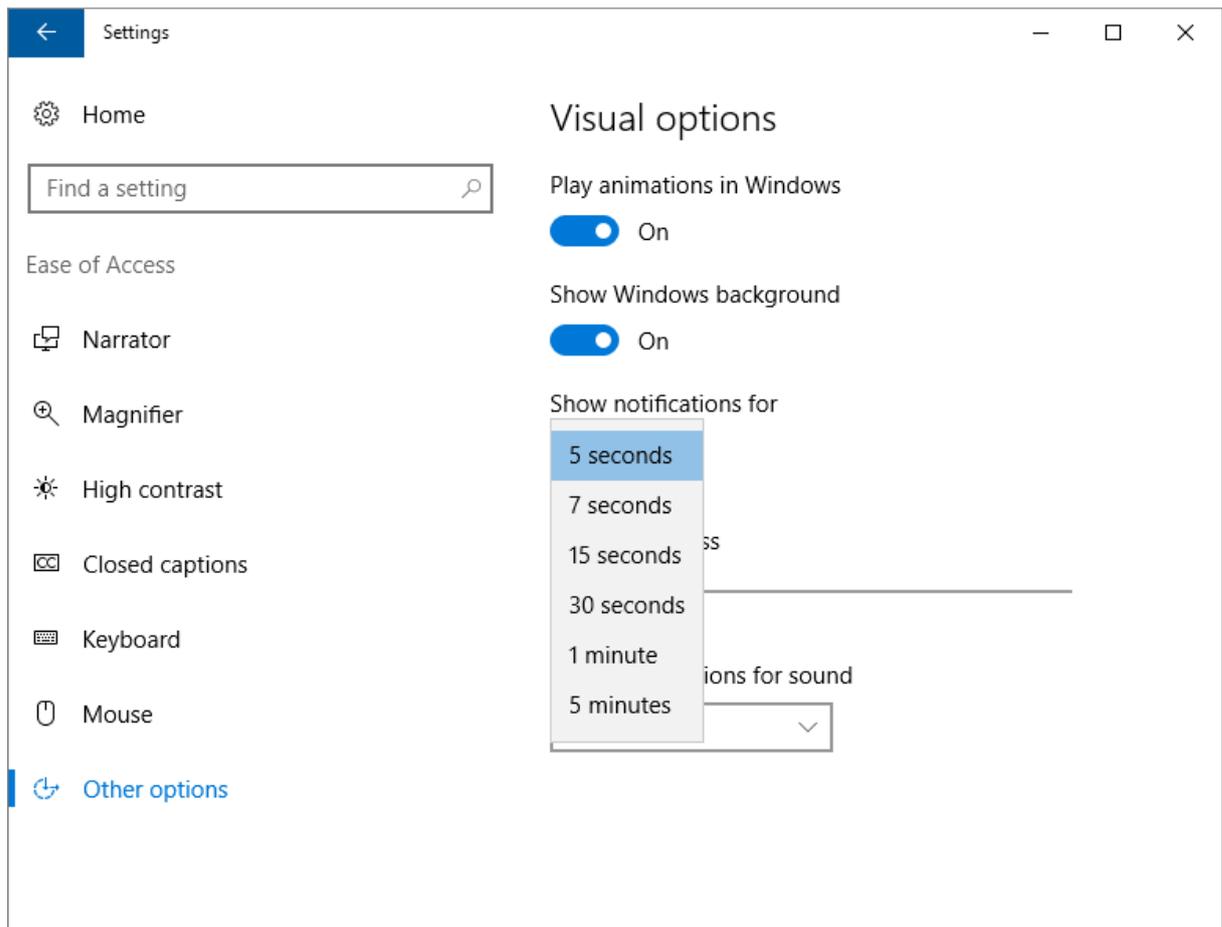
How to call a contact from Outlook

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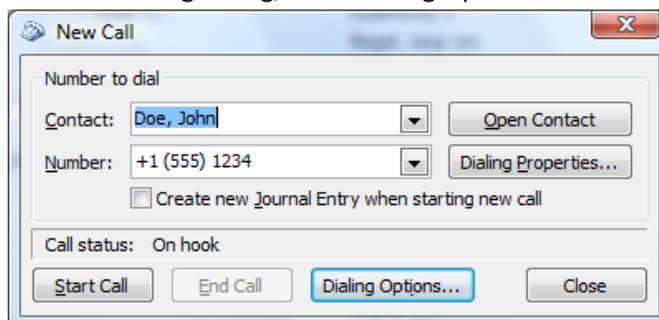
3) In the Dialing Options for 'Connect using line' choose 'TapiDialer Line' and press OK

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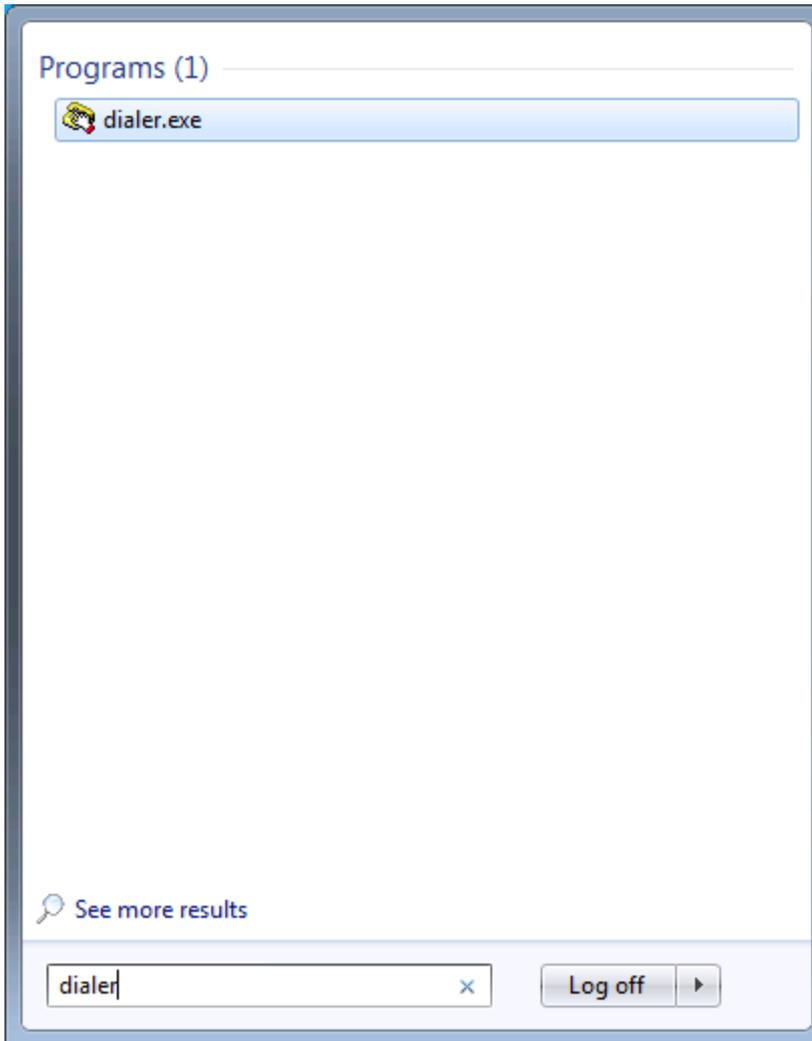
2) From the 'Tools' pull down menu select 'Connect Using...'.

3) In the Connect Using dialog for the Line property choose TapiDialer Line and press OK
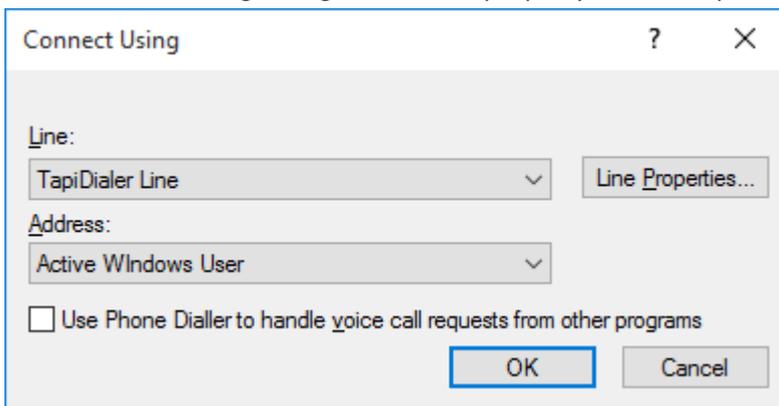
4) Back in the Phone Dialer type a number and press Dial

How to choose another device to use when dialing

1) Right click the CloudCTI Client tray icon and move the 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.
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 get more licenses

1) Contact your provider, or if you have created the account through the www.cloudcti.nl website go to www.cloudcti.nl/Licence.
2) Click 'Purchase more user licenses'.

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.

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 Connector
1) Install the TAPI software from your vendor. Info for a number of popular vendors is available here:
    - Alcatel OmniPCX: http://enterprise.alcatel-lucent.com/?product=PIMphony&page=overview
    - Avaya IPOffice: http://www.ipofficeinfo.com/pdf/CTI_Link_Installation_Manual.pdf
    - Cisco Unified Communications Manager: http://www.cisco.com/en/US/docs/voice_ip_comm/cucm/tapi_dev/9_0_1/installation.html
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 Connector
Follow the instructions on http://www.cloudcti.nl/android