

Connector 365 CTI for STARFACE

The user guide for the CTI for STARFACE App

Version 1.0.0.1 for Microsoft Dynamics 365 Business
Central

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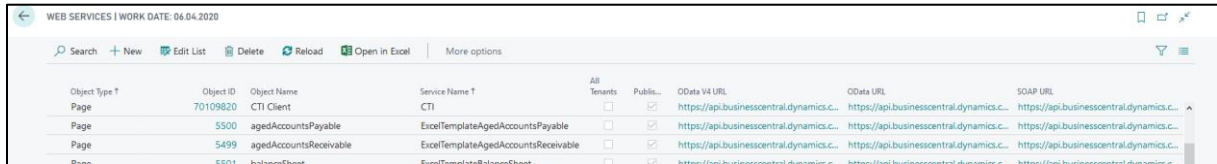
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Setup

Microsoft Dynamics 365 Business Central

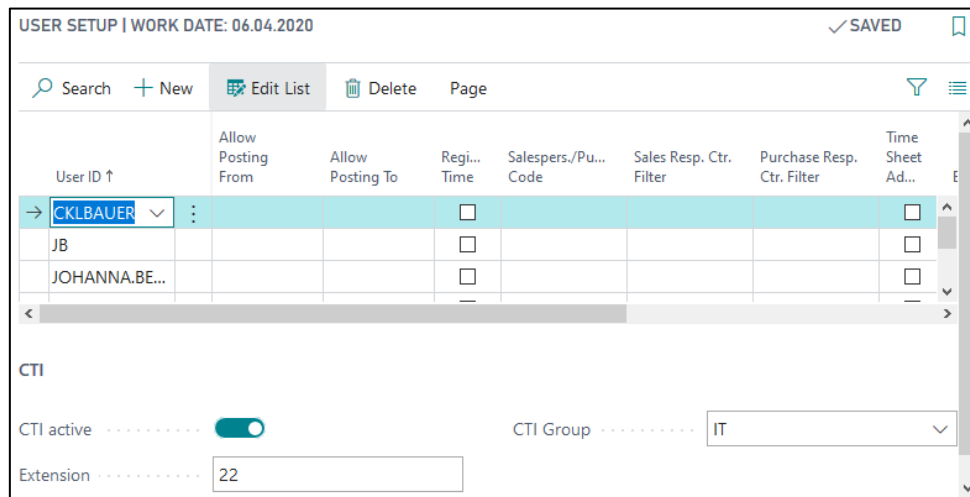
Once the app has been successfully published within your solution, it needs to be set up correctly. Via the search function search for **Web Services**. A new entry will have to be created. The necessary data can be taken from the screenshot seen below



Object Type ↑	Object ID	Object Name	Service Name ↑	All Tenants	Public	OData V4 URL	OData URL	SOAP URL
Page	70109820	CTI Client	CTI	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...
Page	5500	agedAccountsPayable	ExcelTemplateAgedAccountsPayable	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...
Page	5499	agedAccountsReceivable	ExcelTemplateAgedAccountsReceivable	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...
Page	5501	balanceSheet	ExcelTemplateBalanceSheet	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...	https://api.businesscentral.dynamics.c...

Fig. 1: configuration of the web services interface

After the basic setup within Dynamics 365 Business Central is done, you can start adding CTI users to the system. Switch to the **User Setup**, which again can be found via the search function. Select a user, activate the CTI functions, add their **extension** and **add them to a CTI group**. The process of setting up groups is explained in the next step.



User ID ↑	Allow Posting From	Allow Posting To	Regi... Time	Salespers./Pu... Code	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Time Sheet Ad...
→ CKLBAUER			<input type="checkbox"/>				<input type="checkbox"/>
JB			<input type="checkbox"/>				<input type="checkbox"/>
JOHANNA.BE...			<input type="checkbox"/>				<input type="checkbox"/>

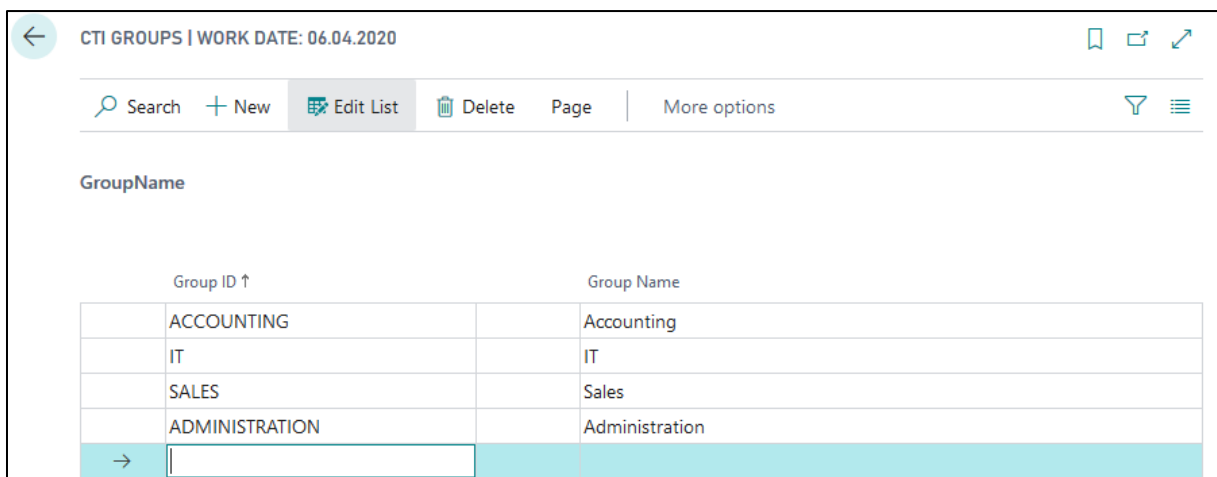
CTI

CTI active ☒ CTI Group

Extension

Fig. 2: Business Central User Setup

Switch to the page for **CTI groups** and create the groups that you need, these can be anything. We recommend creating groups per department.



Group ID ↑	Group Name
ACCOUNTING	Accounting
IT	IT
SALES	Sales
ADMINISTRATION	Administration
→	

Fig. 3: CTI Groups

Starface Telephone System

To allow communication between Business Central and the STARFACE telephone system another setup needs to be completed. This requires an additional module which can be [downloaded](#) on our website.

Add the module via the admin portal and then configure it. Click the pen-symbol to do so

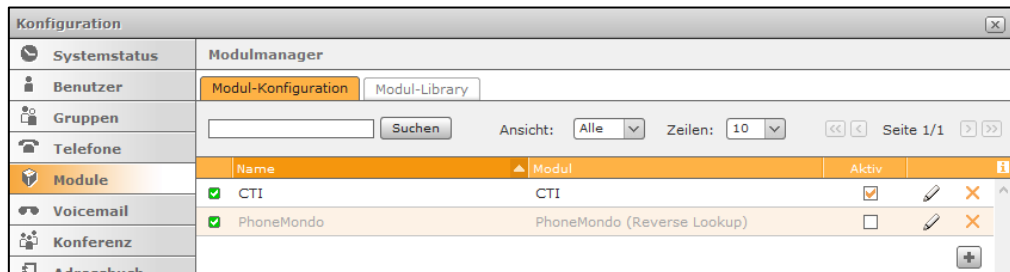


Fig. 4 Module configuration STARFACE

In the setup tab add the STARFACE Login-ID of all users that are going to use the app.

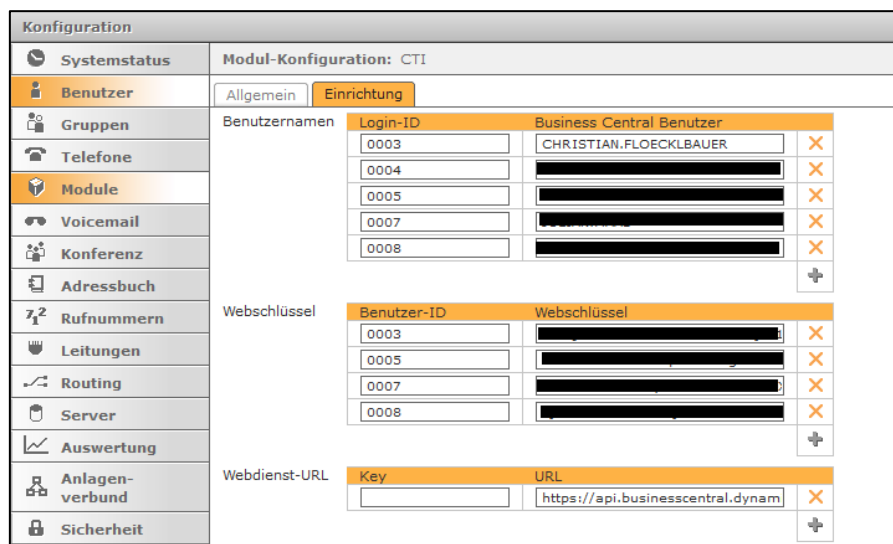


Fig. 5 Module setup STARFACE

The name of each user and their web key can be found in your business central environment. Open **Users** and open the respective **User Card** and copy the **User Name** and their **Web Service Access Key**; OData V4-URL (see [Fig. 1](#))

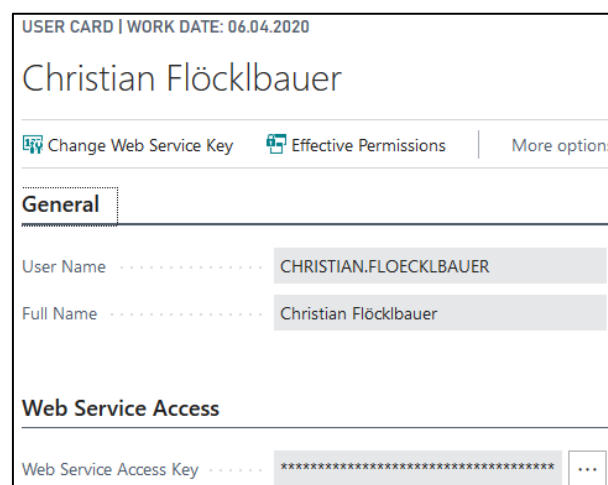


Fig. 6 User Page Business Central

Using the CTI solution

After the setup has been completed, the CTI can be used fully. Calls will be logged automatically. You can view all logged calls via the CTI Entries. The list is pre-filtered to users of the same group.

CTI ENTRIES WORK DATE: 06.04.2020						
Search	+ New	Edit List	Delete	Page	More options	
Time of Call ↓	User ID	Contact No.	Contact Name	Contact Phone No.	Call Direction	Call Duration
03.06.2020 10:28	JOHANNA.B...			20	IN	44 seconds
03.06.2020 10:27	JULIAN.MAAS			004923158...	IN	1 minute 25 sec...

Fig 7. CTI Entries

The CTI client

In the CTI client you can see all currently ongoing calls of the current CTI Users. This view is again pre-filtered, so users only see other users of the same group.

While the client is open, incoming calls automatically trigger the contact card of the caller in a new window - if the number was previously added to the contact.

CTI CLIENT WORK DATE: 06.04.2020						
Search	Page					
User Name ↑	Ring	Con...	Direction	Caller No.	Contact No.	Contact Name
Christian Flöckbauer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	IN	004916388...	KT000026	Julian Maas

Fig. 8 CTI Client

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