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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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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

WEB SERVICES WORK DA	ATE: 06.04.2020							Π ,
	📴 Edit List 🛛 🗎 D	Delete 💋 Reload 🚺 Open in Excel	More options					Y 1
Object Type †	Object ID	Object Name	Service Name †	All Tenants	Publis	OData V4 URL	OData URI.	SOAP URL
Page	70109820	CTI Client	СТІ			https://api.businesscentral.dynamics.c	https://api.businesscentral.dynamics.c	https://api.businesscentral.dynamics.c
Page	5500	agedAccountsPayable	ExcelTemplateAgedAccountsPayable			https://api.businesscentral.dynamics.c	https://api.businesscentral.dynamics.c	https://api.businesscentral.dynamics.c
Page	5499	agedAccountsReceivable	ExcelTemplateAgedAccountsReceivable			https://api.businesscentral.dynamics.c	https://api.businesscentral.dynamics.c	https://api.businesscentral.dynamics.c
Page	5501	halanceSheet	ExcelTemplateBalanceSheet			https://ani.businesscentral.dynamics.c.	https://api.businesscentral.dvnamics.c.	https://ani.husinesscentral.dvpamics.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.

US	USER SETUP WORK DATE: 06.04.2020								
۶	Search + New	🐯 Edit List	间 Delete	Page				Y	≣
	User ID 1	Allow Posting From	Allow Posting To	Regi Time	Salespers./Pu Code	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Time Sheet Ad	E
\rightarrow	CKLBAUER 🗸 🗄								^
	JB								
	JOHANNA.BE								
<								_	>
СТІ									
CTI	active				CTI Group	· · · · · · · IT			~
Exte	ension	22							~

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.

CIIGR	ROUPS WORK DAT				
و م			📋 Delete	Page More options	∀ ≡
Group	oName				
	Group ID ↑			Group Name	
	Group ID ↑	;		Group Name Accounting	
	Group ID ↑ ACCOUNTING IT	;		Group Name Accounting IT	
	Group ID ↑ ACCOUNTING IT SALES	;		Group Name Accounting IT Sales	
	Group ID ↑ ACCOUNTING IT SALES ADMINISTRAT	ion		Group Name Accounting IT Sales Administration	



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 <u>downloaded</u> on our website.

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

Kon	figuration					D	×
0	Systemstatus	Мо	dulmanager				
	Benutzer	Mo	dul-Konfiguration	Modul-Library			
ĉ	Gruppen			Suchen Angight: Alle V Zeilen: 10 V (C) S	Seite 1/1		5
\mathbf{T}	Telefone	Ľ			Sente 1/1		2
- 1	Madula		Name	🔺 Modul 🛛 🗛 Aktiv			i
	Module		CTI	СТІ	Ì	×	
••	Voicemail		PhoneMondo	PhoneMondo (Reverse Lookup)	1	×	
ŝ	Konferenz				2		
1	Adressbuch					-	

Fig. 4 Module configuration STARFACE

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

Kon	figuration										
0	Systemstatus	Modul-Konfigur	Modul-Konfiguration: CTI								
8	Benutzer	Allgemein	richtung								
ĉ	Gruppen	Benutzernamen	Login-ID	Business Central Benutzer							
1	Telefone		0003	CHRISTIAN.FLOECKLBAUER	×						
Ŷ	Module		0004		×						
-	Voicemail		0007		×						
Č,	Konferenz		0008		×						
1	Adressbuch				+						
7,2	Rufnummern	Webschlüssel	Benutzer-ID	Webschlüssel							
	Leitungen		0003		×						
./:	Routing		0007		x						
•	Server		0008		X						
~	Auswertung				+						
品	Anlagen- verbund	Webdienst-URL	Key	URL https://api.businesscentral.dynam	×						
8	Sicherheit				+						

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)

USER CARD WORK DATE: 06.04.2020								
Christian Flöcklbauer								
🛱 Change Web Service Key 🛛 🖶 Effective Permissions 🛛 More options								
General								
User Name	CHRISTIAN.FLOECKLBAUER							
Full Name	Christian Flöcklbauer							
Web Service Access								
Web Service Access Key	**********							

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 DAT	E: 06.04.2020					
	🐯 Edit List	📋 Delete 🛛 Page	More options			7 ≣ 0
Time of Call ↓	User ID	Contact No.	Contact Name	Contact Phone No.	Call Direction	Call Duration
03.06.2020 10:28	JOHANNA	A.B		20	IN	44 seconds
03.06.2020 10:27	JULIAN.M	IAAS		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								7	≣
User Name 1		Ring	Con	Direction	Caller No.	Contact No.	Contact Name		
Christian Flöcklbauer	÷			IN	004916388	KT000026	Julian Maas		

Fig. 8 CTI Client

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We are glad to answer your questions and are thankful for suggestions of improvement.

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