



3CX TAPI Integration Setup

3CX/TAPI Notes

The primary device needs to be Windows client or it will not answer the call.

If the user has a handset, they can click the button to pop the record and pick up the handset. Clicking the IS button will not answer the handset only the windows client so a mic and headphone/speaker are required to take the call.

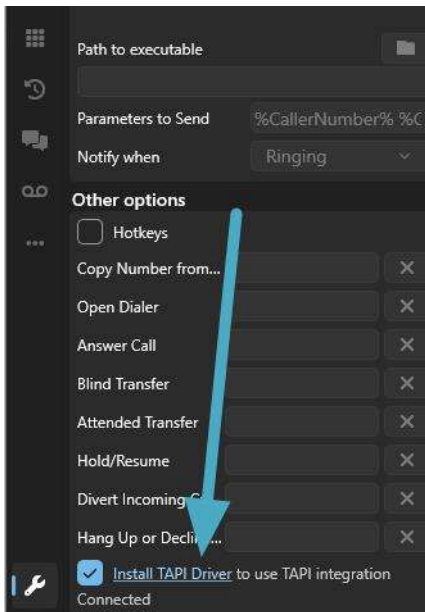
On the server, after installing the TAPI plugin on Interprise, install the PhoneLib plugin also. Without this, Ext Activity and Ext Outbound will not be able to dial when the number is double clicked.

Client Install:

Each PC needs to have the 3CX windows client installed.

We assume the 3CX client will be installed and provisioned by the IT/3CXprovider.

Also, Install the Multi Line TAPI client/driver.

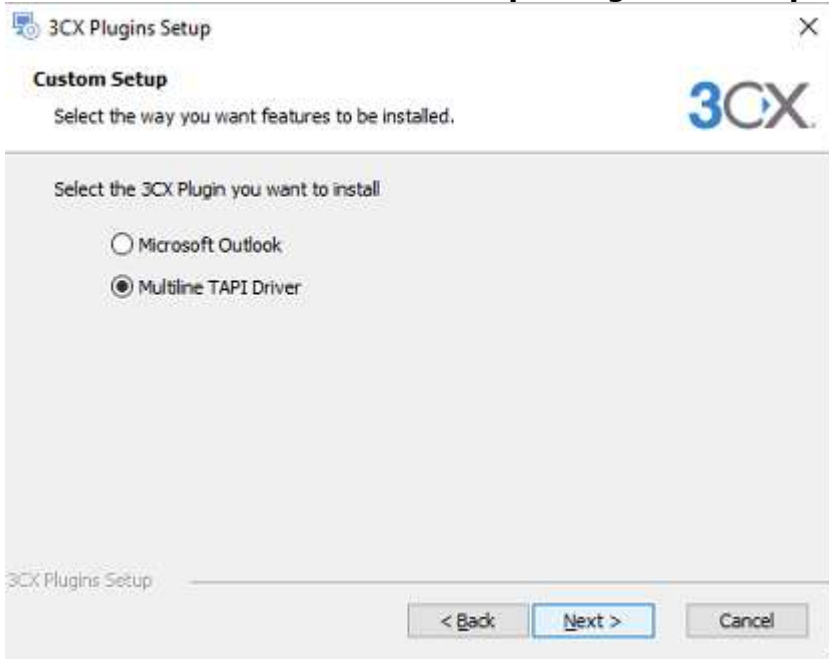


Before installing the driver, close Outlook.

When installing the TAPI driver, select TAPI not Outlook as the install component.



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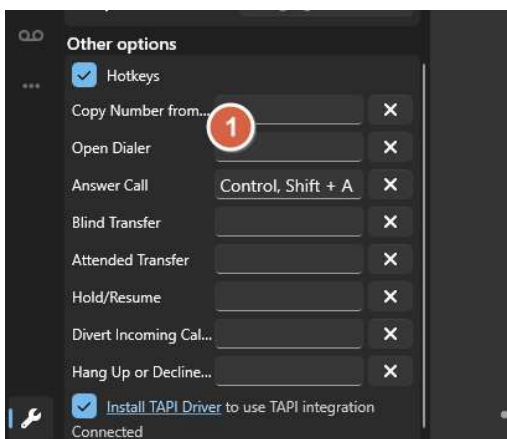


A grid will then be presented. Enter the extension number (02 for example) and the person’s name into the grid.

To be able to answer the call and pop the record within Interprise, the hot keys in 3CX need to correspond to the hot keys in the TAPI plugin.

NB – This is a system wide hot key setting and cannot be specified per user. Therefore, a hot key sequence needs to be selected which suits all users.

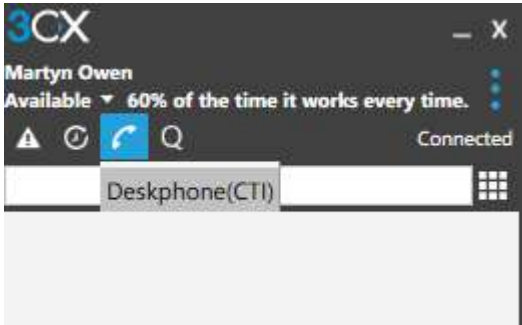
When assigning the hot keys (1) to use in Windows client, make sure to exit the client (2) and open again to save it. Sometimes the hot keys are not saved if the client is not exited and re-opened. To exit client in the newer version click at the bottom right in the system tray (near clock) and then right click 3CX and exit.





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In the 3CX client, if using a physical handset (desk phone) then click the little telephone icon at the top of the 3CX window and ensure that Deskphone CTI is selected. If the PC is going to be used to answer calls (via a USB headset) then this should be left as Softphone.

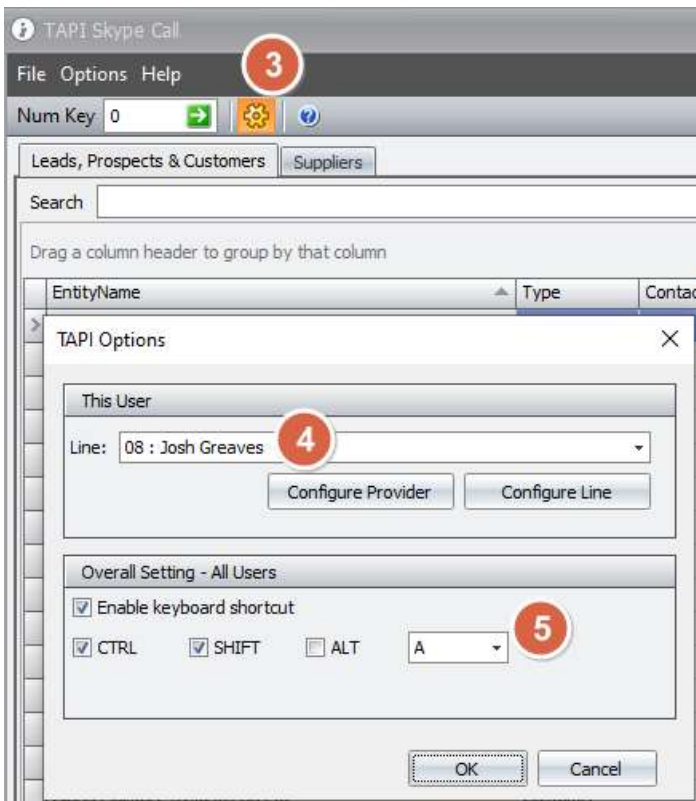


Within Interprise, run the TAPI list option (usually within customer) and click the cog (3) to open the settings.

Specify the extension (4) within Interprise. This can be selected from the drop-down list as it has already been configured when the driver was installed.

The default Hot key setup (5) is Control+Shift+A which should remain unchanged unless there are conflicts with other products.

This needs to correspond to the hot keys setup within the 3cx windows client as detailed earlier in this guide.



Once the above is setup, exit Interprise and log back in. Go back to the TAPI settings and ensure that the settings have saved.



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Double click on load TAPI plugin from (usually within CRM) menu and the plugin will open and initialise. Initialisation will take around 60 seconds. Once initialised, incoming calls should show in the window and the relevant button can be clicked to answer calls and open customer, case, quote or order.

