



Setup guide

Webitel call manager for Creatio

Webitel

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Introduction

The "Webitel call manager for Creatio" app is a native Webitel telephony connector that allows you to manage calls using Creatio's user interface without any transitions, additional software or devices.

The product allows you not only to make calls but also enables the possibility to link calls to other system elements, such as Leads, Cases, and Orders, as well as to create detailed reports on all call parameters.

Application setup

First steps

Install the app from Creatio marketplace.

Please contact Webitel technical support at support@webitel.com or via support portal support.webitel.com to get the main configuration parameters.

Open [System Designer] and navigate to [System Settings] > [Webitel].

In the field hinted with [Default Value] insert values you received from Webitel technical support:

- Webitel connection string
- Webitel Domain
- WebRTC connection string
- Webitel domain token

Return to [System Designer], navigate to [Lookups] > [Telephony] > [Webitel Users] and remove all records if any.

To do this, select all unnecessary records, and press the rubbish bin icon (Fig. 1).

Fig. 1 - Webitel user information



102	Email Supervisor	Administrator	
107	Henry Wayne	Administrator	

In the window that appeared, click [Yes] to confirm your action.

To create a new telephony user press [Add] on the current page. In the revealed [Contact] field start typing in username or click the magnifying lens icon to start searching for a user you need to set up telephony for (Fig. 2).

Fig. 2 - Webitel user page

Webitel users / 200

What can I do for you? > Creatio 7.15.2.501

SAVE CANCEL

Contact* Administrator

Webitel account [not connected] X Q

User login* 200

Password

Role* Administrator

It is generally recommended to create internal numbers and save customer numbers following the E.164 international standard. Detailed information is available [here](#).

Fill in the webitel account parameters:

- [Login] - user's internal number.
- [Password] - telephony user's password.
- [Role] - telephony user role.

Perform these actions with all users who require telephony.

After finishing the user setup, log out and log in Creatio again.

Setting up SIP lines

In order for a user to make external calls, it is necessary to connect a SIP line and configure inbound and outbound call routing.

To connect a SIP line, provide SIP account credentials to Webitel technical support or follow [the instruction](#).

Configuring call routing

In order to configure call routing, describe your expected results in detail in flowchart or in plain text.

Sample call routing flowcharts are provided below:

Fig. 3 - Call routing flowchart sample №1

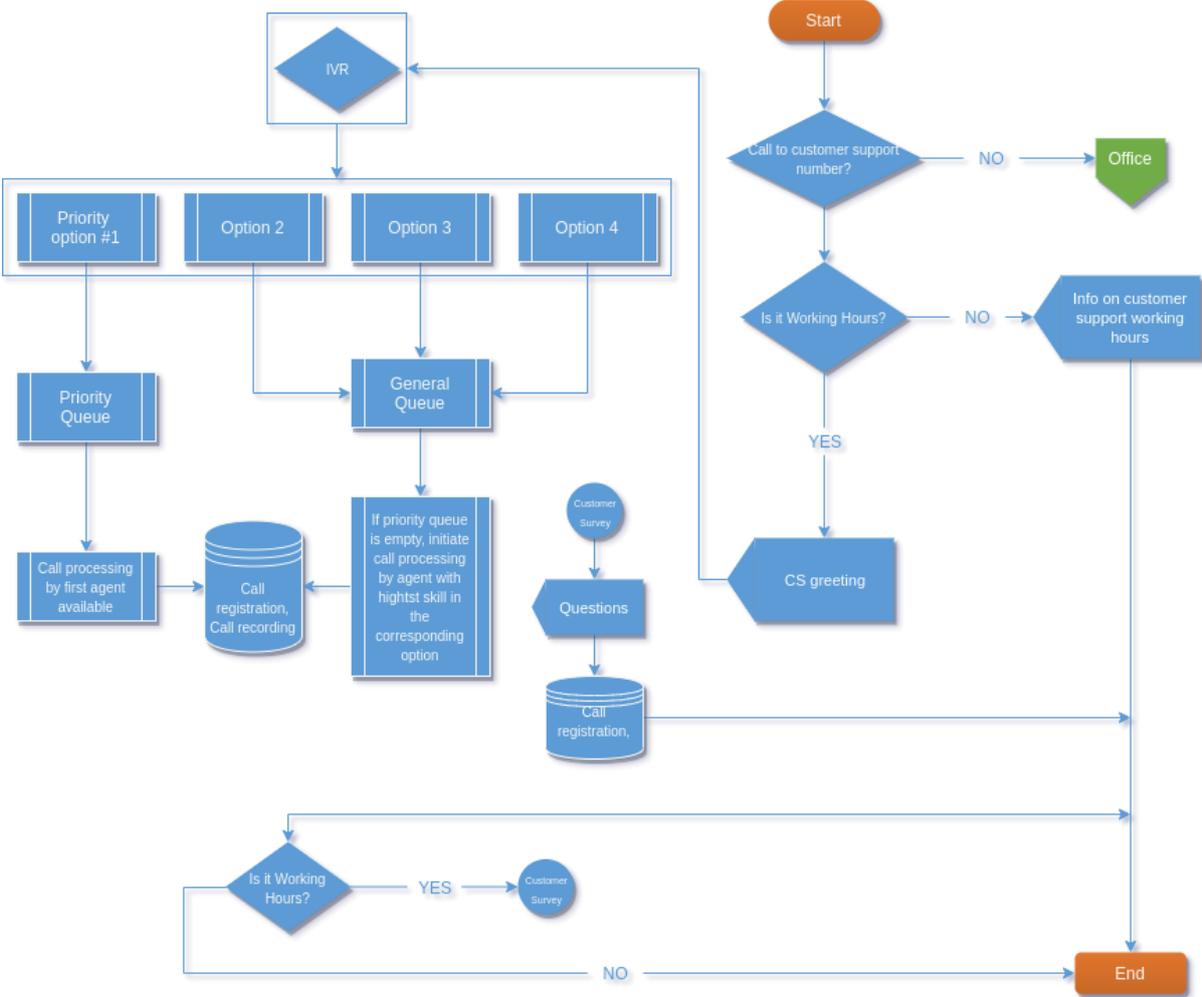
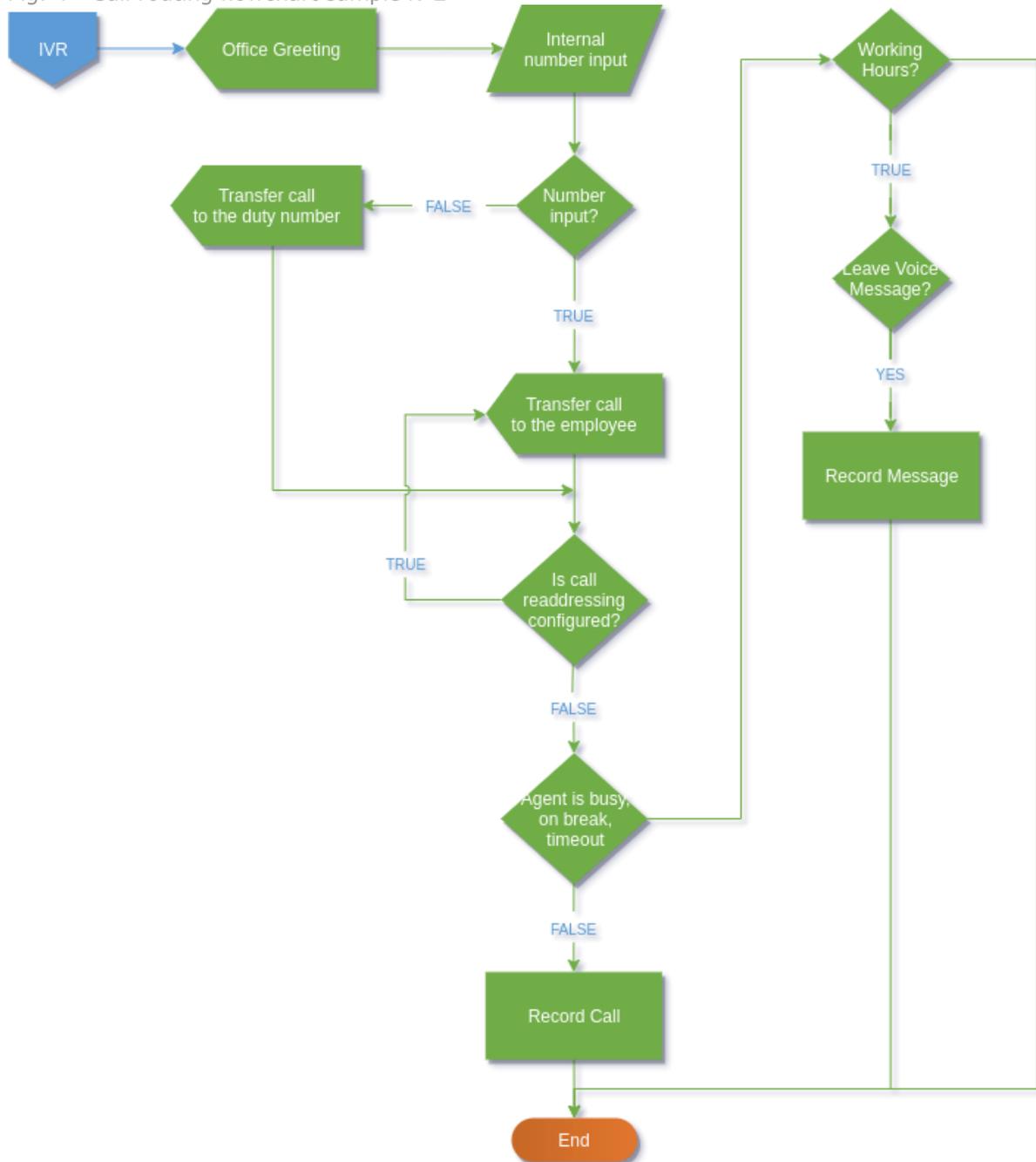


Fig. 4 - Call routing flowchart sample №2



Call routing flowchart may also be provided in text format.

Description of call routing flowchart sample №2 in plain text format is provided below:

Incoming Call

Is it working time now?

NO -->

Corresponding audio file playback (non-working hours / weekends / Christmas etc

YES -->

Record Call

-- Greeting (audio file playback / notifying the client the call is being recorded).

-- When greeting is being played, the client must have an option to enter employee's internal number

Internal number input --> Connect to the employee --> End.

Internal number input --> Employee is busy / not answering first 15 sec. --> Transfer to employee's mobile number --> End.

Client did not input internal number --> Transfer the call to the operator queue / to the number of a person on duty --> End.

Client did not input internal number --> All queue operators are busy / person on duty is busy --> playback audio file --> Repeat attempt to call the operator queue / the number of a person on duty --> Record voice message and send it to an email address --> End

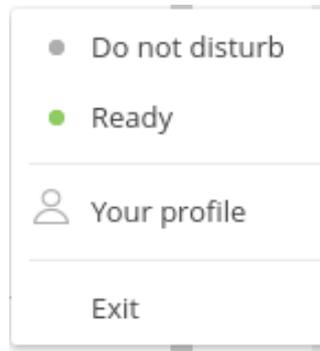
Please, provide this information to the Webitel technical support service at support@webitel.com or via support portal at support.webitel.com.

User parameters

In order to change the telephony settings of a given user, log in to Creatio using credentials of the corresponding user.

In the upper right corner, click the [Profile] icon and select [Your profile] (Fig. 5).

Fig. 5 - Profile popup menu.



In the revealed window, click the [Call Center Settings] button.

Fig. 6 - User telephony settings.

Webitel parameters setup

SAVE

CANCEL

- Disable Call Center integration
- Enable debugging
- Auto-connection
- Use web phone
- Sound notification on incoming call
- Use video
- Agent
- Available on demand

This menu contains the telephony user parameters (Fig. 6).

- Disable Call Center integration - this parameter allows you to disable the integration with Webitel telephony. The call making button will no longer appear on the communication panel of the application.
- Enable debugging - this parameter allows to display diagnostic information in the browser console. It may be used when telephony issues arise and when customer support service is contacted.
- Auto-connection - this parameter is responsible for automatically entering the Ready status (willingness to receive a call) when agent is logged in Creatio.
- Use web phone - if this option is enabled, the user will be able to make calls to creatio using a headset or internal computer audio devices. When disabling this parameter, the call will be made using the SIP phone, which should be registered using current user's credentials.
- Sound notification on incoming call - this parameter toggles the sound notification during an incoming call.
- Use video - this parameter allows you to make video calls to internal numbers.
- Agent - this parameter is responsible for automatically entering the Agent mode (for example, to receive calls from an incoming queue) during log in the Creatio system.
- Available on demand - if this checkbox is ticked, the user exits Operator mode after each call from the queue. In order to receive the next call from the queue, status need to be changed manually.

Additional features setup

Connecting caller with the responsible manager

This feature enables the possibility to automatically connect an inbound call from the indicated Lead number to the responsible manager.

In order to configure this functionality, you'll need to:

- Specify the responsible manager for the appropriate contacts (Fig. 7)

Fig. 7 - Example of configured responsible manager (Record Owner)

The screenshot shows a contact record with the following fields and values:

Field	Value
Type	Customer
Title	Mr.
Recipient's name	Barber
Owner	Sia Morton
Gender	Male
Preferred language	

The 'Owner' field, containing the name 'Sia Morton', is highlighted with a red rectangular box.

- Provide the Webitel technical support service login and password for your Creatio Supervisor account.

Please note, if Creatio user's password is changed, new password has to be provided to the Webitel technical support, so that the user can be added to the call routing, namely to the check for the responsible manager.

Client's queue priority management

Webitel allows to add certain numbers to a special list in order to alter the inbound call processing algorithm for numbers from that specific list.

For instance, it is possible to add important customers to a special list so that their calls will no longer get into the general queue and will instead connect to the manager directly, or will automatically become first in the operator call Queue.

In order for this functionality to work, the following steps have to be completed:

- Create a blacklist in Creatio according to the [instruction](#).
- Develop call processing algorithm.
- Provide technical support the name of the created list and the call processing algorithm for implementation.

After completing these steps, telephony users will be able to add numbers to a special list.

In order to do this, the following actions are needed:

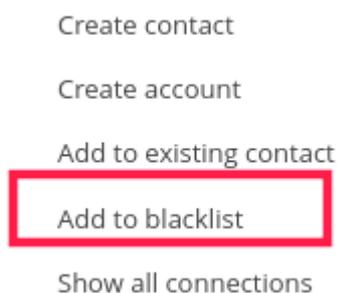
- In the CTI panel, select the desired number.
- Click on the [Link] button (Fig. 8).

Fig. 8 - The highlighted [Link] button



- In the context menu, select [Add to blacklist]. (Fig. 9).

Fig. 9 - Highlighted button [Add to blacklist]



- In the window that appears, select the list to which you want to add this number (Fig. 10).

Fig. 10 - List selection Window

Select: ×

SELECT CANCEL ACTIONS ▾ VIEW ▾

Name ▾ **SEARCH**

Name ^

Important Clients

Call from a website

This feature allows you to add a call widget to the website, which customers can use to directly call your company by clicking on the widget icon.

In order to set this feature up, the following steps need to be completed:

- Select SIP line, which will be used for routing widget calls.
- Develop call processing algorithm for calls made from a website.
- Provide Webitel technical support service the name of the created list and call processing algorithm.
- Add the widget's html-code you received from Webitel technical support service to your website.

Please note: Webitel technical support service does not administer customer's websites. To add widget's html-code to your website, please, contact your responsible person.

Configuring Skype Connect

This feature allows you to combine skype account with webitel system. Calls to skype account will be routed to the webitel telephony server and processed according to the call routing configured from the webitel's side.

In order to set this feature up, the following steps need to be completed:

- Create Skype account
- Configure Skype Connect service according to the [instruction](#).
- Develop call processing algorithm for calls made from a website.
- Provide Webitel technical support service your SIP profile parameters and call processing algorithm.