18.5 Server SoftPhone Settings

vtenext can be integrated with Asterisk, an open source telephone PBX application that allows you to route phone calls. Asterisk is a free implementation of PBX software that offers the same features as other proprietary systems at a much lower cost and with greater flexibility.
Today it is a benchmark within the sector; the full range of its contents and its reliability make it an ideal platform for a wide range of applications: it is used as a supporting element to create RTG/IP switchboards (PBXs able to use both traditional telephone lines and IP channels), Centrex systems (Virtual and centralised PBXs), Call Centre management applications and more.

Features and objectives:

1. Make phone calls by clicking on phone numbers directly from vtenext.
2. Receive notifications within vtenext with caller information when a call comes to the user. Notifications appear in the lower right corner of the screen.
3. View call history in the PBX Manager Module (Call Manager Module)
4. Associate the phone calls with the Contact/Account/Lead in the Activity History.
5. Set user extensions through the User Preferences data sheet.
6. Phone numbers format: you can save the number in vtenext in any format, with or without prefixes and also with SIP and PSTN if you use the character, to separate this prefix from the number itself.

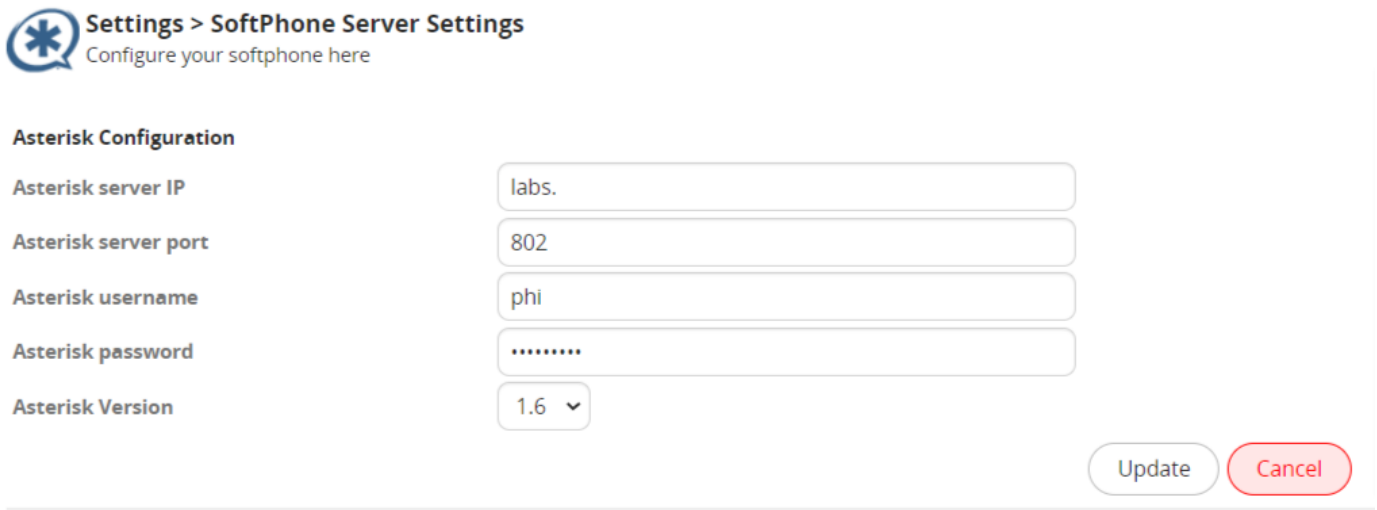
Note: We do not recommend using special characters or hyphens in the phone/cell phone field.

Requirements and configuration:

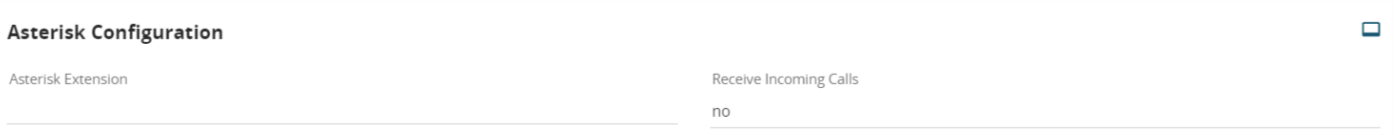
- vtenext installed on the system
- Asterisk installed on the system.
- The server containing Asterisk and the one containing vtenext must be able to see each other online.
- You must have a valid Asterisk user extension and a VoIP phone configured with that extension.

When the Asterisk server is configured to function with vtenext, you must configure the vtenext settings to connect to Asterisk.

To enter Asterisk server settings, choose SoftPhone Server Settings:



Within User Preferences, point 6. Asterisk Configuration, you can associate the extension (internal) for the user:



Receive Incoming Calls enables caller recognition for incoming calls. Once the incoming call has been answered, this option makes it possible to display a pop-up on the CRM screen, which appears at the bottom right with the caller's name and the link to access the details.
If the caller's number is not present in vtenext, the popup proposes the creation of a lead, a contact or an account.

Warning! SoftPhone Server Settings is only available in “on-premise” vtenext solutions.

Warning! In order for caller recognition to be active, it is also necessary to activate the relevant CRON on the vtenext installation server. See CRONJOB – Processes to be planned chapter.

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