

TAPI

Set up integration with TAPI

Version 7.18



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Set up integration with TAPI

PRODUCTS: [ALL CREATIO PRODUCTS](#)

To set up a TAPI integration, take the following steps:

1. Set up Creatio Messaging Service. [Read more >>>](#)
2. Set up the message exchange library. [Read more >>>](#)
3. Set up the TAPI parameters. [Read more >>>](#)

In Creatio, the TAPI integration functionality requires a separate license. You need to generate a license request, send it to our service team, upload the received license file into the system, and distribute the licenses among the users. Read more: [Creatio licensing](#) and [Manage user licenses](#).

The integration is only possible if complete preliminary TAPI driver setup was performed by the phone integration administrator.

Attention. If you set up the telephony for a Creatio production environment, deploy Creatio Messaging Service on a separate node rather than on the Creatio application server. To ensure the fault tolerance of your phone integration, we recommend setting up at least two nodes with Creatio Messaging Service, as well as a balancer that would redirect users in case of lost connection with one of the nodes.

1. Set up Creatio Messaging Service (formerly Terrasoft Messaging Service)

The messaging service allows you to connect Creatio to TAPI via the integration protocol and distribute the call events between Creatio users.

Attention. Install Creatio Messaging Service on a .NET Framework Windows server to integrate TAPI PBX.

1. Before installing Creatio Messaging Service (CMS), make sure that your computer runtime environment has:
 - A .NET Framework package version 4.7.2 or later on the server where you are going to install Creatio Messaging Service.
 - At least 2 Gb of RAM and 20 Gb of free drive space.
2. Contact Creatio support to receive the messaging service installation files or download the files via the URL: [Download Creatio Messaging Service](#). Unpack the archive to a folder to ensure a smooth installation. If you run the installation directly from the archive, the archiver application may interfere with the install wizard.


Attention. Deploy CMS on the server connected to both the Creatio application server and the PBX. Read more: [Telephony integration basics](#).

3. Run the Creatio Messaging Service Install.msi file on the machine intended as the message exchange server and proceed with the installation. The TAPI driver must be installed and configured on the same computer by the phone integration administrator. To ensure that the TAPI driver runs correctly, use the “Conference.exe” utility you can receive from the support team.
4. Test the phone integration.

Note. Follow this [instruction](#) if you need to update the Creatio Messaging Service.

2. Set up the message exchange library

Message exchange library selection and setup is performed once by the system administrator.

1. Open the system designer by clicking  in the top right corner of the application window.
2. Click “System settings” in the “System setup” block.
3. In the “Default messages exchange library” (“SysMsgLib” code) system setting, set the default value to “Telephony integration library based on Tapi protocol.”
4. In the “Message exchange server” (“SysMsgServerNode” code) system setting, select the connection parameters of the system messages service. In the [*Default value*] field, specify the message exchange network address in the following format: “ws://0.0.0.0:2013” if your website is served over HTTP or “wss://0.0.0.0:2013” if your website is served over HTTPS, where:
 - “0.0.0.0” – IP address that your Creatio users use to access your message exchange server.
 - “2013” – the port used by default for connecting to the messaging service. You can change the port number in the “Terrasoft.Messaging.Service.exe.config” file.

Note. If your website is served via HTTPS and secure (WSS) connection is used for WebSockets, you will need to install a security certificate on the message exchange server and specify it in the configuration files of the message service. For more information about the setup process, contact Creatio technical support at support@creatio.com.

5. Click [*Save*].

3. Set up the TAPI parameters

These settings should be applied for each Creatio user who received TAPI integration license. Use the user login credentials to access the system.

1. Open the user profile page by clicking the [*Profile*] image button on the main page of the application.
2. Click the [*Call Center parameters setup*] button.
3. On the opened page, fill out the required values:
 - a. [*Disable Call Center integration*] – this checkbox allows you to disable Creatio integration with the phone integration. The call button will not be displayed on the communication panel of the application.
 - b. [*Line*] – user line number in TAPI.

Attention. A separate line is used for each user. It is not recommended to specify the same line for several users, as it may cause errors.

- c. [*Enable debugging*] - this checkbox allows you to display troubleshooting information within the browser console. This troubleshooting information can be used when the phone integration runs into problems and the customer addresses the service team.
4. Click [*Save*].
5. Refresh the browser page to apply the changes.