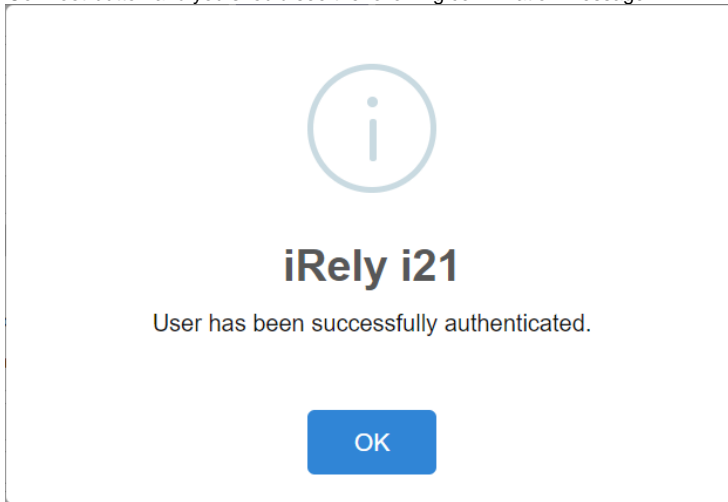


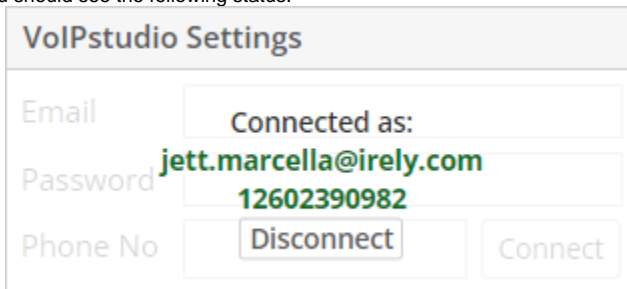
# How to use VoIPstudio and display the Customer screen in i21

## Configure the i21 User

1. Log into i21
2. Select **System Manager** and then the **Users** menu.
3. Find and open the user who will use the VoIPstudio integration.
  - a. Click the **User** tab.
4. In the VoIPstudio Settings, enter the email address, Password, and phone number of your VoIPstudio account.
  - a. Make sure you enter the phone number with the area code and no spaces or other characters (ex: 12602390982)
5. Click the **Connect** button and you should see the following confirmation message.



- a.
6. Then you should see the following status.

A screenshot of the 'VoIPstudio Settings' form. The title 'VoIPstudio Settings' is at the top in a bold, dark blue font. Below the title are three input fields: 'Email', 'Password', and 'Phone No'. The 'Email' field contains the text 'jett.marcella@irely.com' in green. The 'Password' field contains the text '12602390982' in green. The 'Phone No' field is empty. To the right of the 'Email' and 'Password' fields is a label 'Connected as:'. Below the 'Email' and 'Password' fields are two buttons: 'Disconnect' and 'Connect'. The 'Disconnect' button is highlighted with a green border.

a.

## Testing with a Customer Phone

1. To test the integration we will use the Customer screen as an example.
  - a. **Note**, VoIPstudio can use the **Phone** or **Mobile** fields on any entity screen such as Vendor, Employee, etc.
2. Open a test customer and make sure the Phone or Mobile number is a phone that you can call from.
3. Make a call from the test customer phone number to your VoIPstudio phone number.
  - a. **Note**: If you have the VoIPstudio Windows companion app installed, you should see a Windows notification appear with the number of the caller.
4. The Customer entity screen will automatically open based on the Caller ID of that customer.

5.

← → ↻ Not secure | qc2irely.com/DEV2010/#/AR/EntityCustomer?action=view&filters%5B0%5D%5Bcolumn%5D=intEntityId&filters%5B0%5D%...

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### Sales (AR)

Customer - [Browns Brothers Farms - test](#)

Entity Customer General Locations Contacts Split History Messages Activities Attachments Audit Log Entity Type Custom Crop Insurance

New Save Search Delete Undo Additional + Close

Quote  
Sales Orders  
Invoices  
Receive Payme  
Receive Multi  
Calculate Serv  
Service Charge  
Batch Posting  
Batch Printing  
Inquire Balance  
Rebuild

Create  
New Customer  
New Invoice  
New Quote  
New Receive P  
New Sales Ord

Name \* **Browns Brothers Farms - test** Phone **+1 (832) 802-0730** Entity No 0001005006  
Contact Name **Ben Brown** Suffix Email [ben.brown@brownsbrothers.com](mailto:ben.brown@brownsbrothers.com) Mobile +1 (832) 802-0730

Class Location Name **Browns Brothers Farms** Printed Name **Browns Brothers Farms** Contact Information  
Search Address Enter address to search... Address 123 Main Street  
City **Auburn** State **IN** Zip/Postal **46705** Country **United States** Time Zone **GMT-05:00 Eastern Time (UTC-5)** Language **English**

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