



# Integrating Cliniko with 3CX v16 and higher

## INDEX

INTRODUCTION	2
PRE-REQUISITES	3
UPLOADING THE CRM TEMPLATE	4
3CX CRM SERVER SIDE CONFIGURATION	4

# INTRODUCTION

The Mr.VoIP for 3CX App enables Cliniko integration with 3CX v16+. The configuration is based on a 3CX server-side template. Additionally, Mr.VoIP Tools must be configured on the 3CX Server (Linux / Windows).

The screenshot shows the Cliniko interface for a patient named Mr Richard J. The page is titled "Mr Richard J / Patient details" and includes a navigation menu on the left with options like Dashboard, Appointments, Patients, Invoices, Payments, Products, Expenses, Contacts, Communications, Reports, Settings, and Help. The main content area is divided into several sections: "Contact information" with fields for Phone number (masked as 9842423233 (Mobile) with a "Send SMS Message" link), Address (India), and Time zone (Use account time zone); "Related patients" with a message "There are no related patients to Richard. Would you like to [add one](#)?"; and "General information" with fields for Title (Mr), First name (Richard), and Last name (J). A "Next appointment" section on the right states "There are no upcoming appointments scheduled. Would you like to [book a new appointment](#)?". At the top right, there are buttons for Edit, History, Merge, Archive, and Book appt. A "+ Add medical alert" button is located at the top left of the main content area.

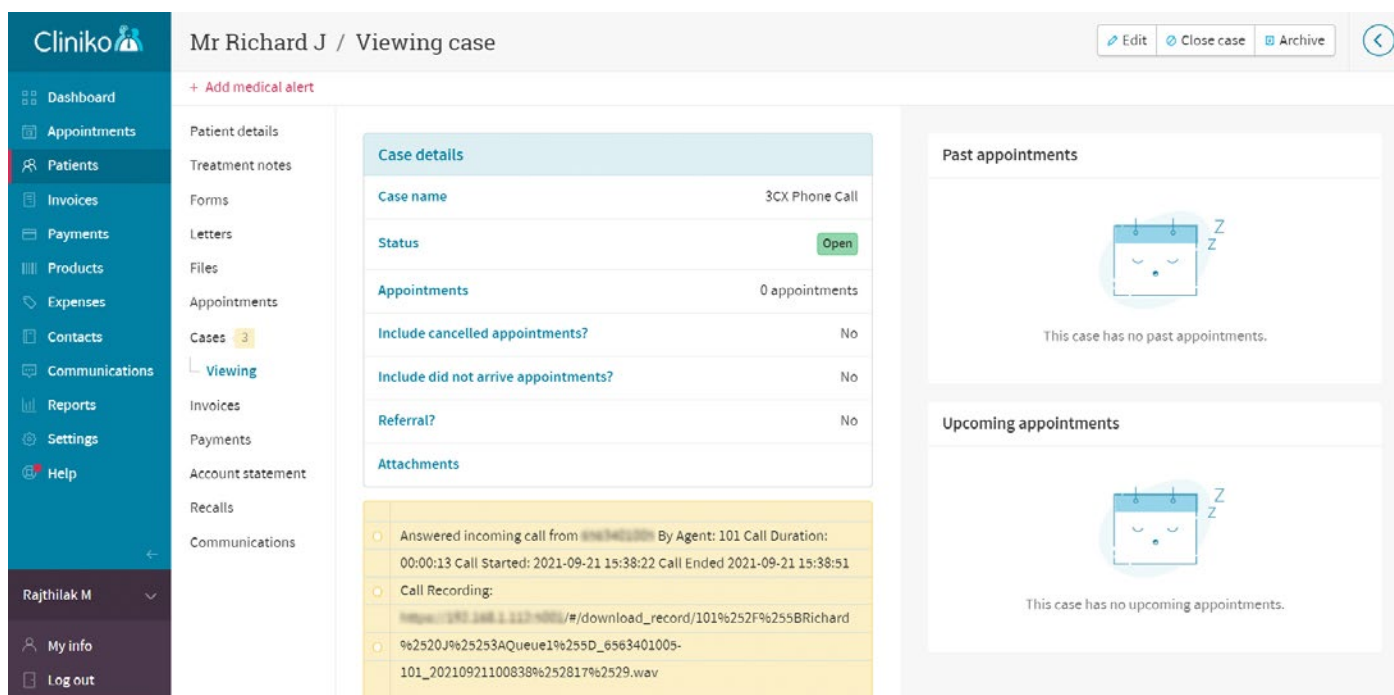
## What it does

The screenshot shows the Cliniko interface for a patient named Mr Richard J, specifically the "Cases" page. The page is titled "Mr Richard J / Cases" and includes a navigation menu on the left with options like Dashboard, Appointments, Patients, Invoices, Payments, Products, Expenses, Contacts, Communications, Reports, Settings, and Help. The main content area features a table of cases with columns for Case, Issue date, and Status. The table contains three rows: "3CX Phone Call" with 0 appointments and an "Open" status, "Test case2" with 0 appointments and an "Open" status, and "Test case1" with 0 appointments and an "Open" status. At the top right, there is a "+ Add case" button and a back arrow. A "+ Add medical alert" button is located at the top left of the main content area.

Case	Issue date	Status
3CX Phone Call	0 appointments	Open
Test case2	0 appointments	Open
Test case1	0 appointments	Open

**Contact Synchronization** – Inbound calls from external numbers are matched against the CRM, and contact details are added to your 3CX Contacts. Based on this the caller's name will be displayed on the agent's 3CX web client.

**Screen Pop-up** – When an inbound call occurs, the patient details will be retrieved from Cliniko and a pop-up with the patient's details will appear in the agent's browser.



**Call Journals** – On call hang-up, a new case will be created in the patient's record along with the logged call and a call recording path in the notes section.

**Create a new patient record** automatically when a call is received from an unknown number.

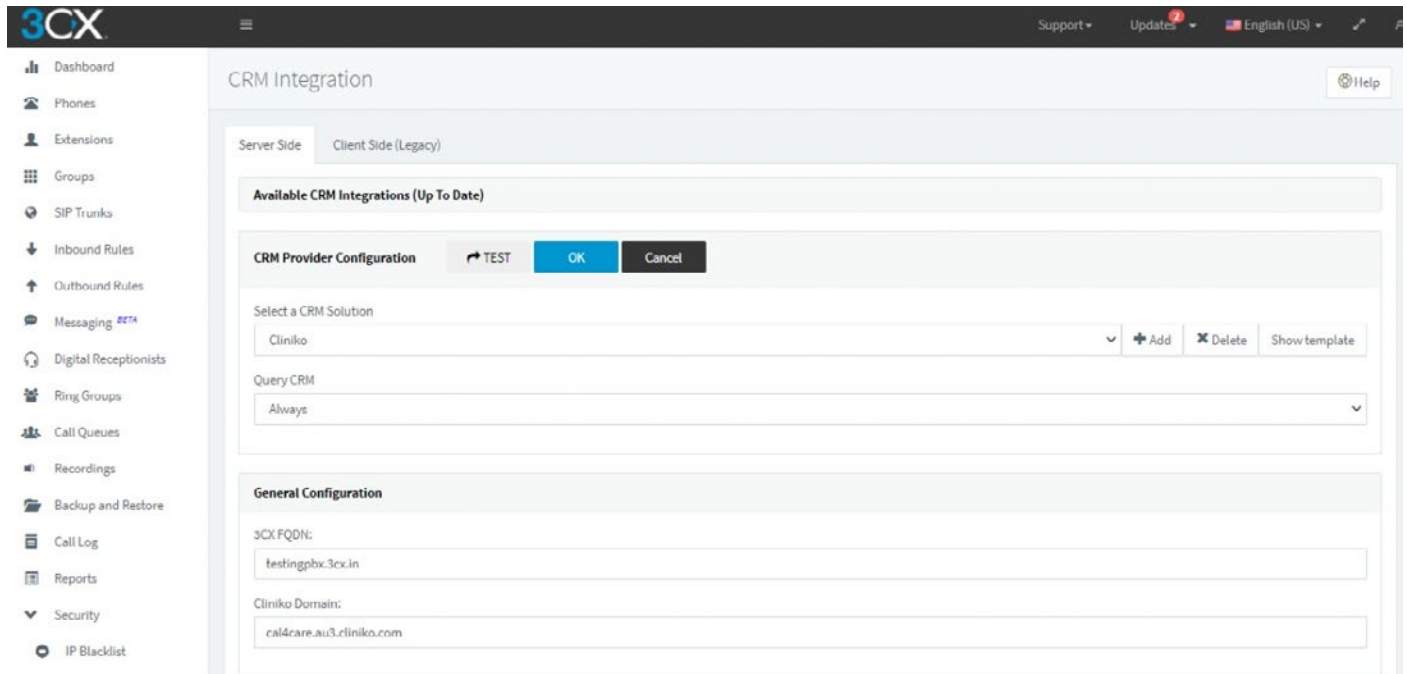
## PREREQUISITES

- Mr.VoIP middleware application (License based)
- Mr.VoIP server-side template
- 3CX web client for agent
- 3CX V16+

# UPLOADING THE CRM TEMPLATE

Go to the 3CX Management Console and navigate to “Settings” > “CRM Integration” > “Server side” and click on “Add” to upload Mr.VoIP Cliniko template. Download the template from here.

## 3CX CRM SERVER SIDE CONFIGURATION



- a. Login to the 3CX Management Console and go to “Settings” > “CRM Integration” > “Server side”.
- b. Select “Cliniko” from the dropdown list.
- c. Fill the General Configuration of your 3CX FQDN and your Cliniko Domain, Click “OK” to save template.