

[v12.205 and above] CloudPBX Software - prerequisites & integration setup

682 [TDO KB](#) November 21, 2025 [Cloud PBX](#), [Site Configuration](#) 10.19K

Overview

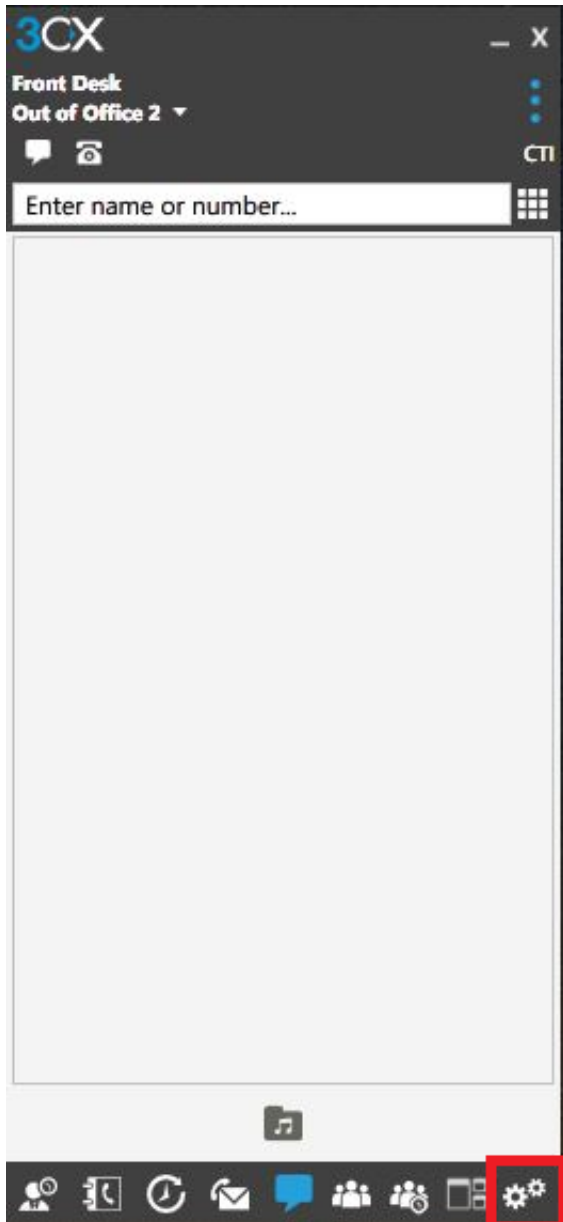
When the phone rings, a phone application window opens, allowing the user to select and see phone number data.

NOTE: To enable this integration, 3CX software or a similar product must be installed and working on the computer. This integration is available to offices using **TDO Version 12.205 or higher**.

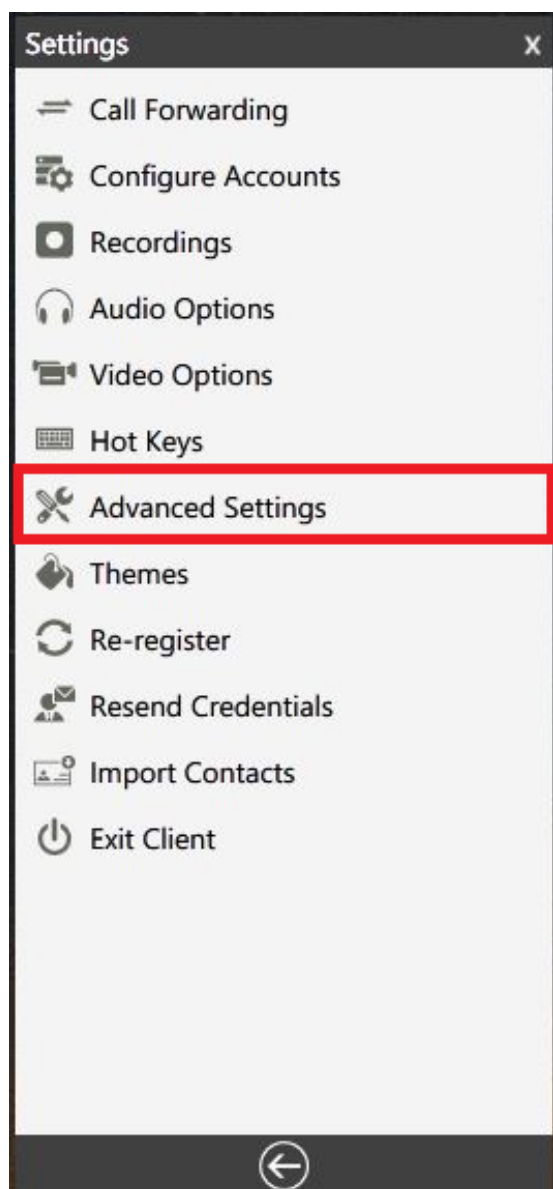
Detailed Instructions

NOTE: Please ensure that User Account Control is completely turned off on Windows. For your reference, please see our **Best Practices** article, available [HERE](#).

In 3CX, please go to **Configuration Settings**.



Select **Advanced Settings**.



Select **Behavior**.



Check the option to select **Launch application on incoming call**.

Behavior X

Focus

☐ Enabling this will bring application to front, and pressing Enter key will automatically answer call

Transfers using Drag and Drop

Select default transfer method when you drag and drop an active call. You can perform the other transfer method by pressing Ctrl key whilst dragging.

Blind transfer ▼

External Application

☒ Launch application on incoming call

Path to executable

C:\Program Files (x86)\TDOOffice\DotNet\T

Browse

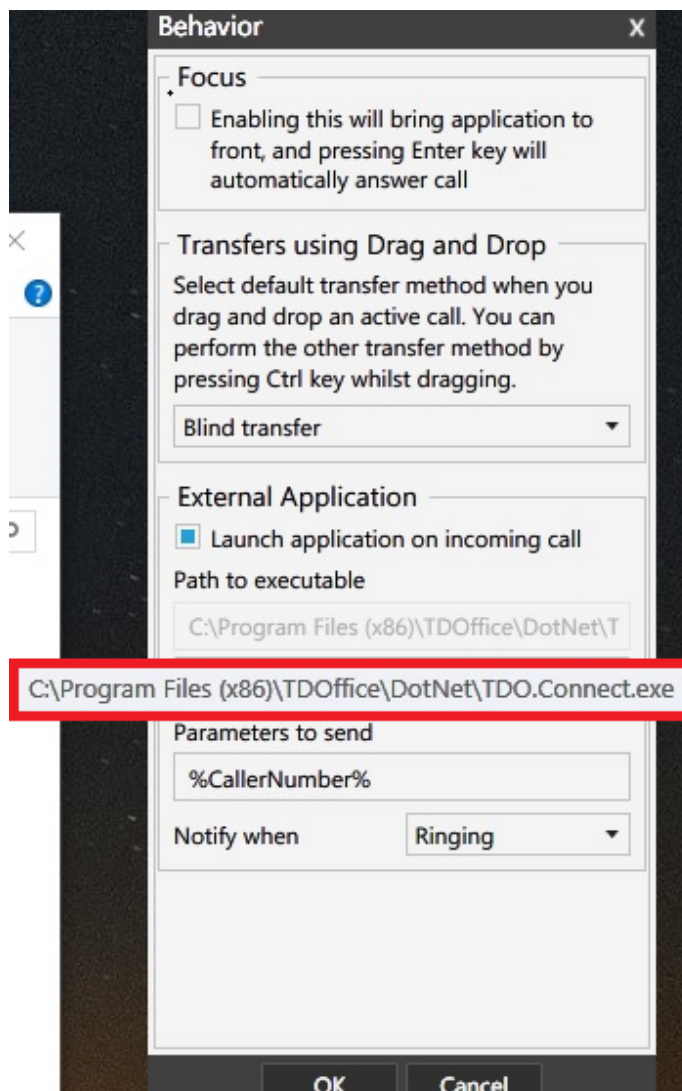
Parameters to send

%CallerNumber%

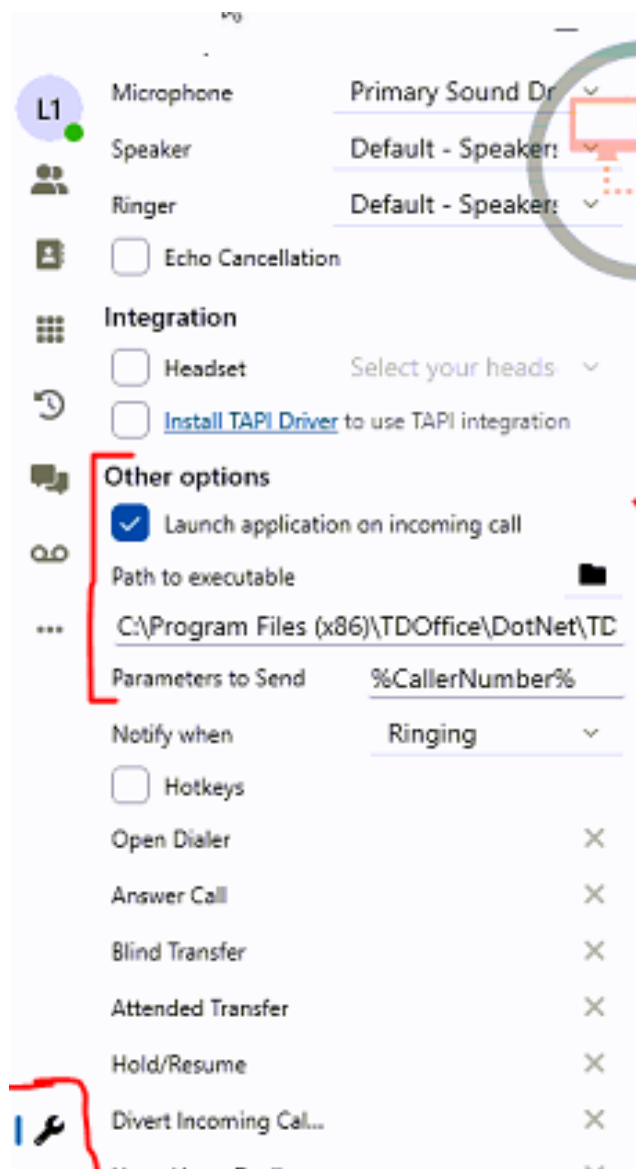
Notify when Ringing ▼

OK Cancel

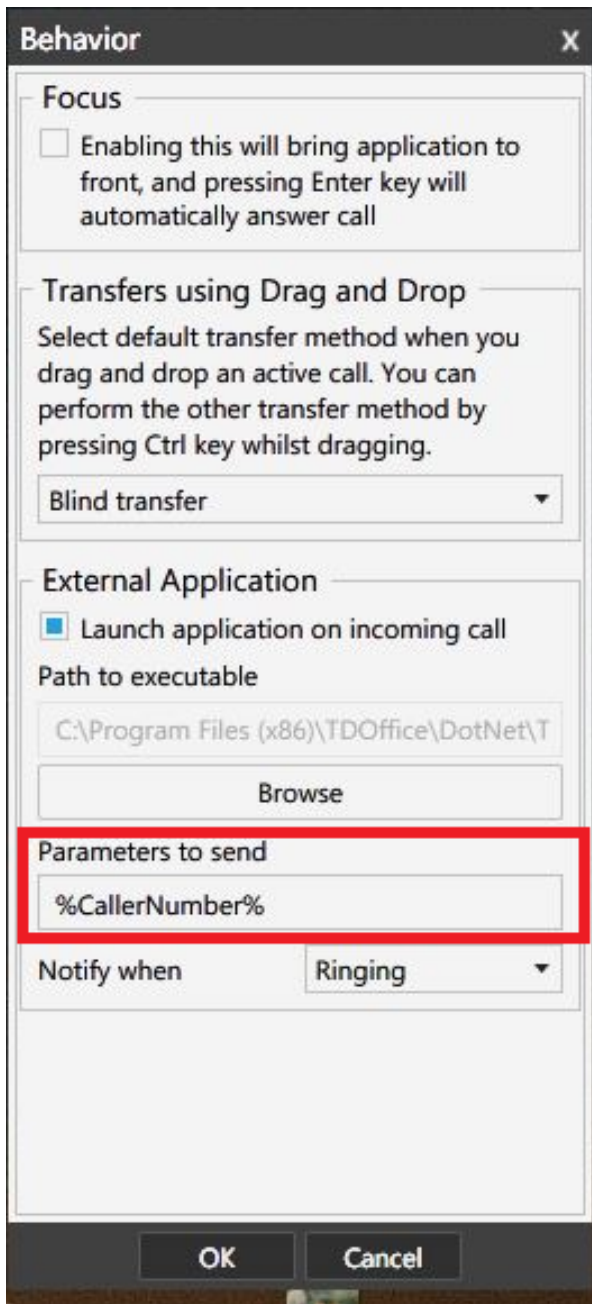
On the **Path to executable** window, make sure to have *C:\Program Files\TDOOffice\DotNet\TDO.Connect.exe* (if the computer is 32-Bit) or *C:\Program Files (x86)\TDOOffice\DotNet\TDO.Connect.exe* (if computer is 64-Bit) is added.



Newer version of the 3cX configuration view

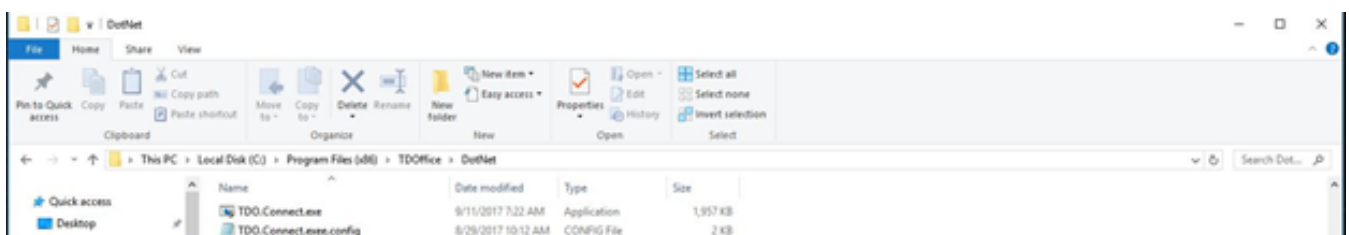


On **Parameters to Send** field, please type in: **%CallerNumber%**.



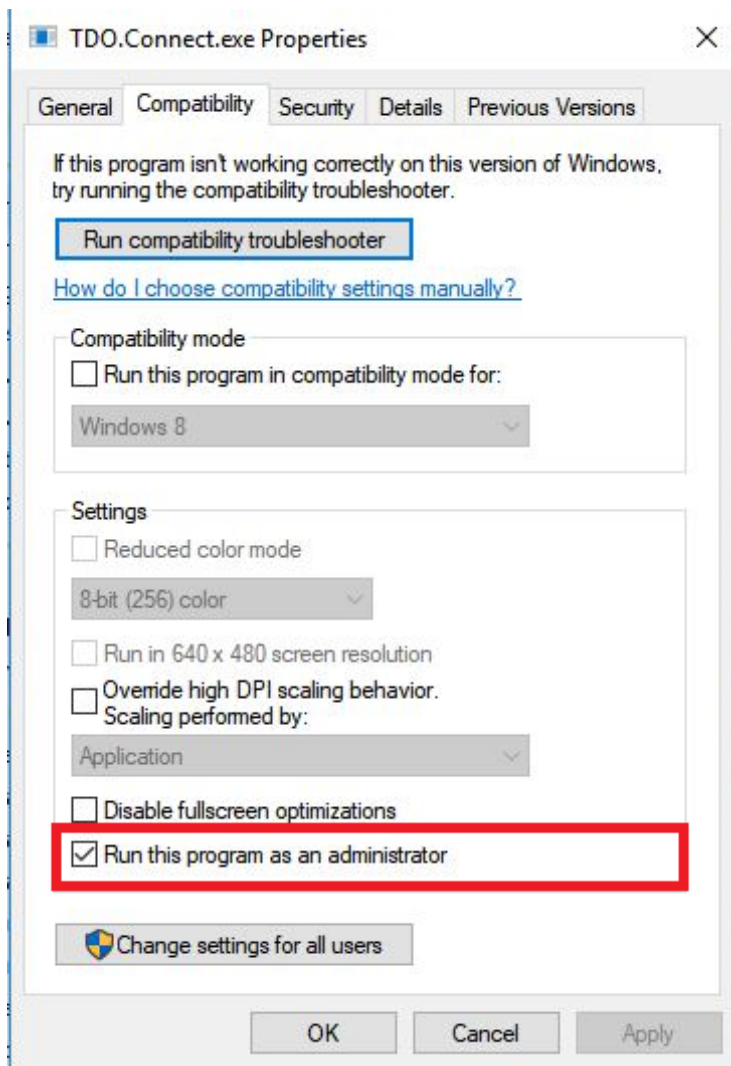
On the computer, go to **Start> Computer** (on Windows 7), or right-click on the **Start Menu>File Explorer** (on Windows 10) and follow the path:

- **C:\Program Files\TDOOffice\DotNet** (on 32-Bit), or **C:\Program Files (x86)\TDOOffice\DotNet** (on 64-bit)



Right-click on **TDO.Connect.exe** and select **Properties**. Then go to **Compatibility** tab and make sure

the **“Run this program as administrator”** box is checked then click OK.



Once the setup is complete, a window like the image below will pop up on the screen as incoming calls are received.

TDO Connect - 1.0.0.0

Incoming call: 8585682135. Possible matches:

PhoneNumber	EntityName	Contact	PhoneType	EntityType
555-123-4567	Patient	Outcomes. D. Test	Phone Home	Patient

Patient



Status

Tooth	Date	Status	Date
6	7/22/2008	Complete	7/23/2008
7	8/5/2008	Complete	4/9/2009
18	8/15/2008	NPP	10/13/2008
21	10/13/2008	NPP	10/2/2009

Appointments

Date	Time	Tooth	For
8/28/2009	9:00 AM	3	Cone Fit & X-...
9/11/2009	4:30 PM	4	Check
10/14/2009	1:00 PM	5	Buildup
11/19/2009	1:45 PM	2	Cancelled

Last Name: Test

First Name: Outcomes.

Phone: () -

Email: jennifer@tdo4endo.co

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