intelli-CTi™

for Unified Service Desk

Version 4.1

intelli-CTi for Unified Service Desk - User Guide

Document Version 1.0

Table of contents

Copyright Information

This document and all subject matter outlined within this document remain the copyright of **QGate Software Limited**. It may not be reproduced in part or whole or any manner, digitised, transcribed, translated or mass distributed without written permission from QGate Software Limited.
© 2018 Copyright QGate Software Limited

Trademarks

intelli-CTi™ is a trademark of QGate Software Limited.
QGate Breeze™ is a trademark of QGate Software Limited.
QGate Virtual Telephony Server™ (VTS) is a trademark of QGate Software Limited.
Microsoft is a registered trademark of Microsoft Corporation.
All rights reserved.

Disclaimer

Although every effort has been made to ensure the processing performed by this software product will not damage or corrupt your data, we strongly recommend you perform appropriate actions to safeguard against such eventualities.

In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Overview

This document is a guide to using intelli-CTi™ for Unified Service Desk.

This guide outlines the following:
For additional reference information on intelli-CTi™ for Unified Service Desk, see the intelli-CTi™ Help Center at www.intellicti.com/help.
For up to date information on intelli-CTi™ for Unified Service Desk, please visit the product website at www.intellicti.com.

- What is intelli-CTi™ for Unified Service Desk?
- Using intelli-CTi™ for Unified Service Desk
- The QGate Virtual Telephony Server™

Other intelli-CTi For Unified Service Desk Reference Information

For additional reference information on *intelli-CTi™ for Unified Service Desk*, see the *intelli-CTi™* Help Center at www.intellicti.com/help.
For up to date information on *intelli-CTi™ for Unified Service Desk*, please visit the product website at www.intellicti.com.

What is intelli-CTi for Unified Service Desk

Automatic Caller Recognition

intelli-CTi™ for Unified Service Desk can provide the ability to recognise callers during inbound telephone calls and display relevant details automatically. This providing immediate access to your customer information, intelli-CTi saves both caller and user time, enhances customer service and increases business productivity.

Telephone Call Automation

intelli-CTi™ for Unified Service Desk provides the ability to control your telephone device from your computer. By connecting intelli-CTi™ to your customer information systems, intelli-CTi provides the ability to dial your customers quickly and efficiently from within Unified Service Desk.

intelli-CTi running within Unified Service Desk

intelli-CTi™ uses the Unified Service Desk framework as both the hosting container for the intelli-CTi™ services and the visual presentation of the call controls.

Leveraging the power of the Unified Service Desk, intelli-CTi™ is able to dynamically present telephone call information and call control during a telephone call.

Using intelli-CTi for Unified Service Desk

Starting intelli-CTi for Unified Service Desk

To start intelli-CTi™ for Unified Service Desk:

1. Click on the Windows Start button and select All Programs > Unified Service Desk

By Starting Unified Service Desk, this will do all the setup/startup of intelli-CTi™ without any interaction required.

Stopping intelli-CTi for Unified Service Desk

You can exist intelli-CTi™ for Unified Service Desk by closing the Unified Service Desk application, if the application is already closed then intelli-CTi™ is no longer running.

Unified Service Desk CTi Controls Overview
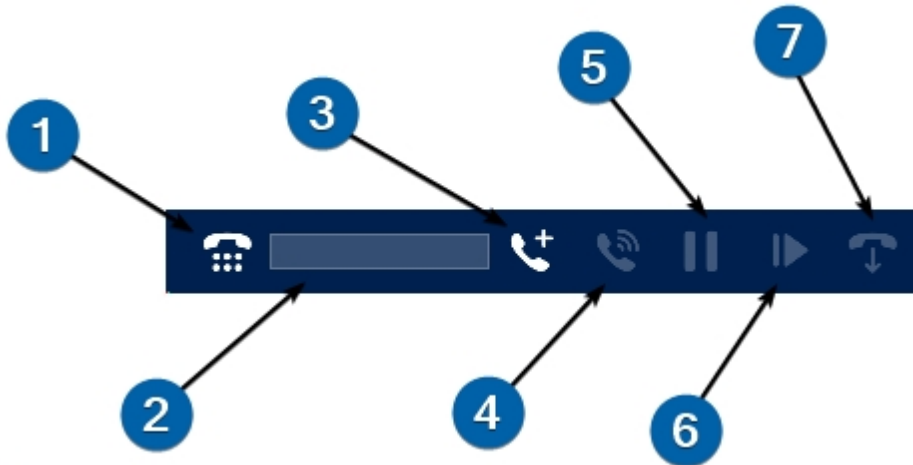
Some call controls are only active during certain states of a call, this can be seen within the brackets "[]" section below, anytime the call is not in the correct state for the corresponding action, the control will be grayed out.

1   Hide/Show the dialing panel

2   Number input to dial

3   [idle] Starts dialing the provided number in the number input field

4   [incoming] Answers the incoming call

5   [active] Puts the active call on hold

6   [hold] Takes the active call off hold

7   [active] Ends the active call

Hide/Show the dialing panel

1 You can hide or show the CTi panel dialing input by clicking on the key pad within the CTi panel of the Unified Service Desk application. This dialing panel will only ever be displayed while the agent is not in any active calls.

Inputting a number to dial

2 The agent would use this input field to enter the number that will be dialed to start a new call. Once the dialing begins, the inputted number is cleared and the field is removed from the display. The agent can can trigger the dialing directly from the input by pressing the "enter" key.

Dial a telephone number inputted

3 Clicking dial icon will use the number inputed into the number input field to start a new outbound call for the agent.

The call will only be triggered if input is provided by the agent otherwise the agent will be noticed for the information by a small ring and a highlighted red input field.

Answering a inbound call

4 On a new inbound call the answer call will become active, clicking the answer call button will answer the call, putting the agent in a active call state and remove the ability to perform outbound calls.
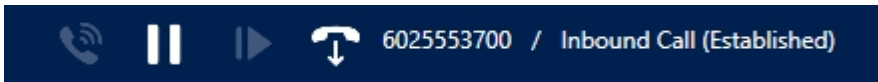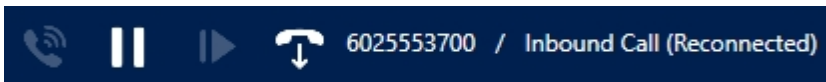

Putting a active call on hold

5 When the agent is in a active call, the pause button will become active for selection, clicking the pause call button will put the active call on hold. Adjusting the active controls to fit around the options related to a now on hold call.
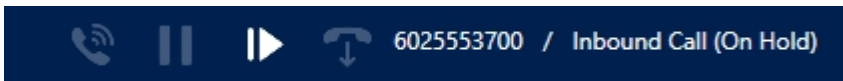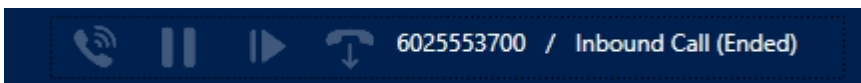

Resuming a call on hold

6 When the agent is in a active call that is on hold, the resume button will become active for selection, clicking the resume call button will take the on hold call of hold. Adjusting the active controls to fit around the options related to a now on active call.

Ending a active call

7 When the agent is in a active call, the end button will become active for selection, clicking the end call button will take the on active call and end it. Adjusting the active controls to now reset back to idle.

Unified Service Desk QGate Search Overview

On a inbound call with multiple matches related the number, intelli-CTi™ for Unified Service Desk will display a new panel called "QGate Search". This panel will display all the matches within there related groups. Selecting one of these entities will trigger the active session to match the selected entity.

This panel will remain open unless closed by the agent, allowing the agent to come back and select another match if the selected record was incorrect.

QGate Virtual Telephony Server™

For the purposes of demonstration, your intelli-CTi software comes complete with a telephone switch simulator, called the QGate Virtual Telephony Server™ (VTS).

The VTS enables you to simulate both inbound and outbound telephone calls, illustrating the benefits of the software and how the software may be used.

The VTS provides an ideal environment in which to understand telephony software systems, develop software solutions, and perform testing and analysis.

The VTS technology provides switch simulation without the need for any additional and expensive hardware components.

What s more, the VTS provides an ideal means of presenting your CTI solutions to new customers and business areas, all from the comfort of a single PC or laptop computer.

The VTS would not typically be used in a production CTI environment, and would be replaced by a genuine telephone system.

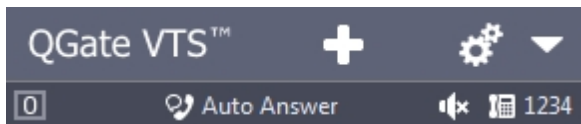## Configuring intelli-CTi to use the VTS

Figure 15 – QGate Virtual Telephony Server™ dialog

To configure your system to use the VTS, you should switch to this mode from the intelli-CTi Service settings. For more information, see the **intelli-CTi Installation and Configuration Guide**.

Simulating an Outbound Call

1. Dial the required telephone number, either from the intelli-CTi dialer or from an integrated application, if you have one.
2. You ll see the Outbound call being simulated in the display of the VTS.
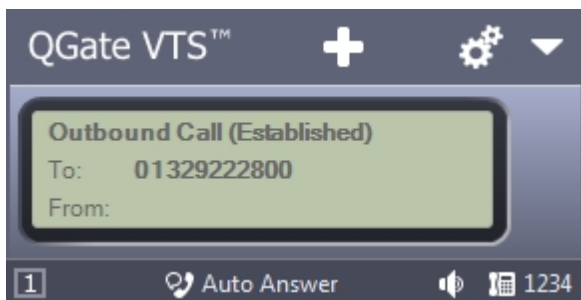
Simulating an Inbound Call

1. From the QGate Virtual Telephony Server, click on the "Simulate Inbound Call" button:

2. Type the required telephone number in the **CLI** box. This number can be taken from your Customer Database Contact records. Optionally, you can also type a number into the **DDI** box.

*   **From** *(Calling Line Identifier – CLI).*
    o   This is the Contact s telephone number.
*   **To** *(Direct Dialing In – DDI).*
    o   This is the telephone number that the Contact dialed to call you.
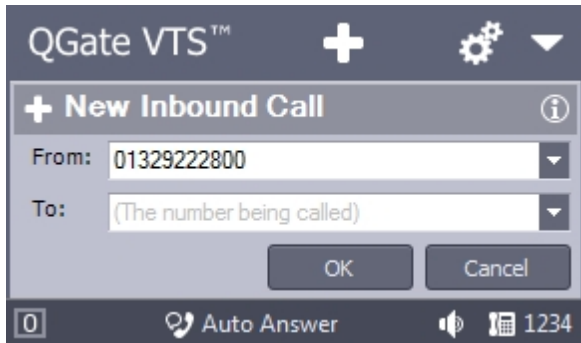

Figure 16 – Inbound call simulation dialog

3. Click on the **OK** button and the simulated inbound call will be dialed.

Configuring the Virtual Telephony Server

1. From the QGate Virtual Telephony Server, click on the "Settings" button:

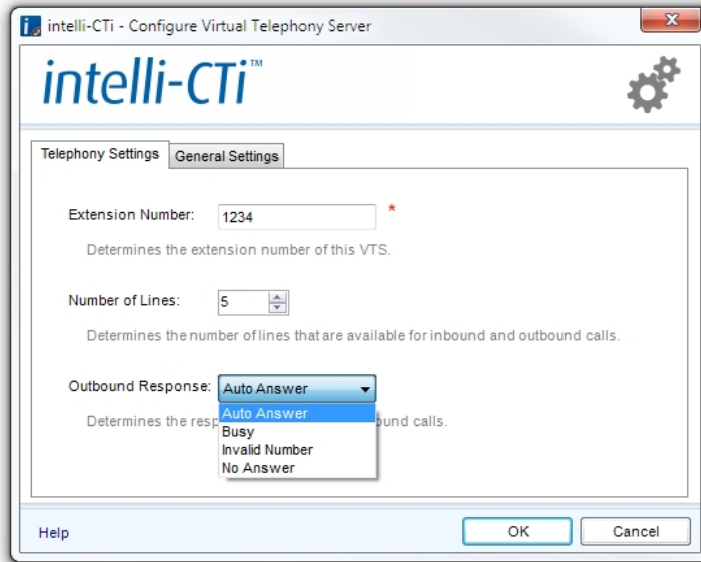2. Select the desired outcome of the outbound call you are going to simulate:

Figure 17 – Outbound call simulation dialog

The available options are as follows:

*   **Auto Answer** (Default) – The outbound call will ring for eight seconds and will then simulate being answered.
*   **No Answer** – The outbound call will ring without being answered.
*   **Busy** – The outbound call will respond as if the destination telephone number were busy.
*   **Invalid Number** – The outbound call will respond as if the destination telephone number were invalid.

intelli-CTi for Unified Service Desk – Technical Support

In the interest of providing customers with the latest product support information, QGate provides the following online resources within our intelli-CTi™ Help Center website:

General Support

For general technical support information, please visit the main product support page:
www.intellicti.com/help/

Troubleshooting

For troubleshooting common problems and scenarios relating to intelli-CTi, please visit the troubleshooting page:
www.intellicti.com/help/troubleshooting/

System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi, please visit the product system requirements page:
www.intellicti.com/help/sysreqs/

Product Information

For more information about intelli-CTi, please visit the intelli-CTi product website:
www.intellicti.com/

Fault Reporting

If you wish to report a fault or an issue with intelli-CTi, please contact your intelli-CTi software supplier.

Upgrades and Service Releases

Revision upgrades and service releases of intelli-CTi are available from your intelli-CTi software supplier.
Warning: We strongly recommend you review the release information provided with each release, to ensure each upgrade is suitable to apply. If you are in any doubt, we recommend you contact your intelli-CTi software supplier.
All major version release upgrades will require the purchase of a new licence.

Systems Integration

For advice on integrating intelli-CTi into other products and applications, please contact your intelli-CTi software supplier.