intelli-CTi™

Version 4.1

User Guide

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Overview

This document is a guide to using intelli-CTi and QGate Breeze.

This guide outlines the following:

For additional reference information on intelli-CTi, see the intelli-CTi Help Center at www.intellicti.com/help.

For up to date information on intelli-CTi, please visit the product website at www.intellicti.com.

- What is intelli-CTi?
- What is QGate Breeze?
- Using intelli-CTi
- The QGate Virtual Telephony Server™

Other intelli-CTi Reference Information

For information on installing and configuring intelli-CTi, see the *intelli-CTi – Installation and Configuration Guide*.

For information on developing application integration with intelli-CTi, see the *intelli-CTi – Software Developers Kit (SDK).*
(contained within the **SDK** directory of your intelli-CTi Installation Package).

For additional reference information on intelli-CTi, see the intelli-CTi Help Center at www.intellicti.com/help.

For up to date information on intelli-CTi, please visit the product website at www.intellicti.com.

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What is intelli-CTi?

intelli-CTi is a sophisticated telephone call handling and call flow processing application that works alongside your customer information systems, to provide automation and business efficiency benefits to business applications.

intelli-CTi's telephone call handling is a managed service providing all the necessary call flow and call management capability, together with a visual interaction of your telephone and users activity.

This service runs within the QGate Breeze™ Application Framework, services architecture for hosting business applications and services – see the following section for more information on QGate Breeze.

Automatic Caller Recognition

intelli-CTi 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 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. It also allows you to automate the display of post telephone call wrapup screens.

Responding to Campaigns

Many businesses use DDI (Direct Dialing In) numbers in conjunction with marketing campaign and advertisements. Using intelli-CTi, any DDI number can be recognised and subsequently made to launch a specific campaign response form inside your business application, intrinsically linking both the business contact with the campaign.

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What is QGate Breeze?

QGate Breeze is an application framework for hosting applications and services that run within your users Microsoft Windows desktop environment.

QGate Breeze is able to host many applications and services within its managed framework, providing them with common hosting container and ability to cross communicate with each other.

In addition, each application or service running within the Breeze framework may also share the common presentation space and collaboration of information which is known as the Breeze Desktop.

The Breeze Desktop is presented in the form of a side-bar display upon the Windows Desktop, providing a dynamic and unobtrusive display of information and control of Breeze applications.

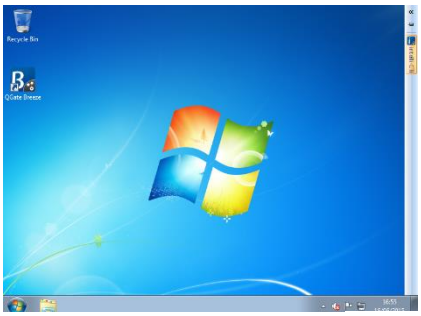


Figure 1 – Breeze sidebar collapsed

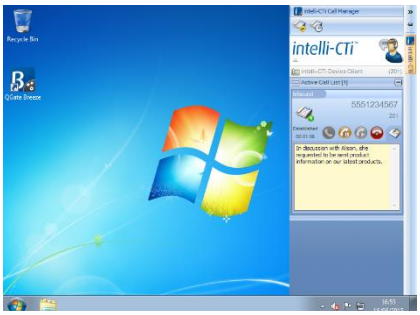
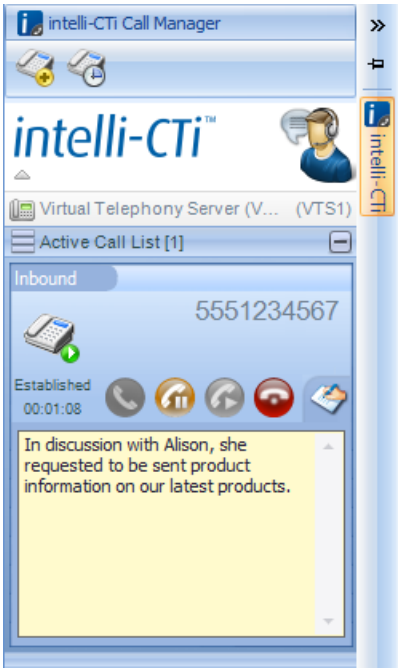


Figure 2 – Breeze sidebar expanded

intelli-CTi running within QGate Breeze



intelli-CTi uses the QGate Breeze framework as both the hosting container for the intelli-CTi services and the visual presentation of the Breeze Desktop sidebar.

Leveraging the power of the Breeze Desktop sidebar, intelli-CTi is able to dynamically present telephone call information and call control during a telephone call.

Furthermore, the Breeze Desktop sidebar provides the ability to dynamically spring out during telephony activity (e.g. incoming call) and then automatically collapse away when not required.

Figure 3 - intelli-CTi in Breeze

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intelli-CTi on your desktop

intelli-CTi is normally collapsed to the side of your screen when you are not using your telephone:

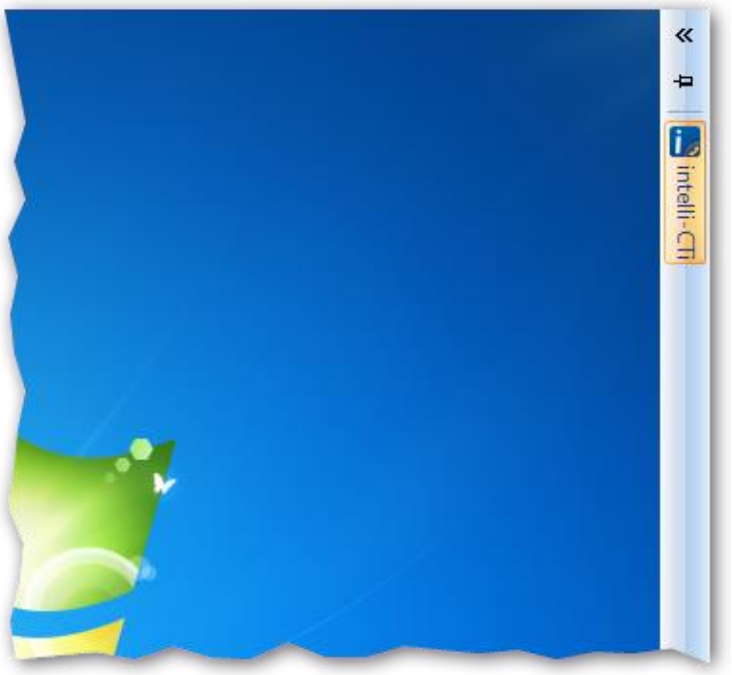

Figure 4 – intelli-CTi in the Breeze sidebar (collapsed)

When you use your telephone, intelli-CTi automatically expands out the Breeze Desktop sidebar allowing you to see details of the telephone call and perform actions upon it; e.g. to answer it:

Figure 5 - intelli-CTi showing an incoming telephone call

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Optionally, when the Breeze sidebar is collapsed, you can have it displayed as a tab instead of a bar:

Figure 6 – Breeze sidebar shown as a tab

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Using intelli-CTi

Starting intelli-CTi/QGate Breeze

To start the intelli-CTi within QGate Breeze:

1. Click on the Windows Start button and select
   All Programs > QGate Breeze> QGate Breeze

Showing the intelli-CTi panel

When intelli-CTi is minimised down to the sidebar, you can show the intelli-CTi panel by clicking on the arrow button at the top of the sidebar:

See *intelli-CTi Desktop Overview* on page 12 for more information about the intelli-CTi panel.

Stopping intelli-CTi/QGate Breeze

You can exit intelli-CTi/QGate Breeze in two ways:

1. Right-click the sidebar and choose **Exit** from the menu that is displayed.
2. Right-click on the Breeze icon in the system tray and choose **Exit** from the menu that is displayed.

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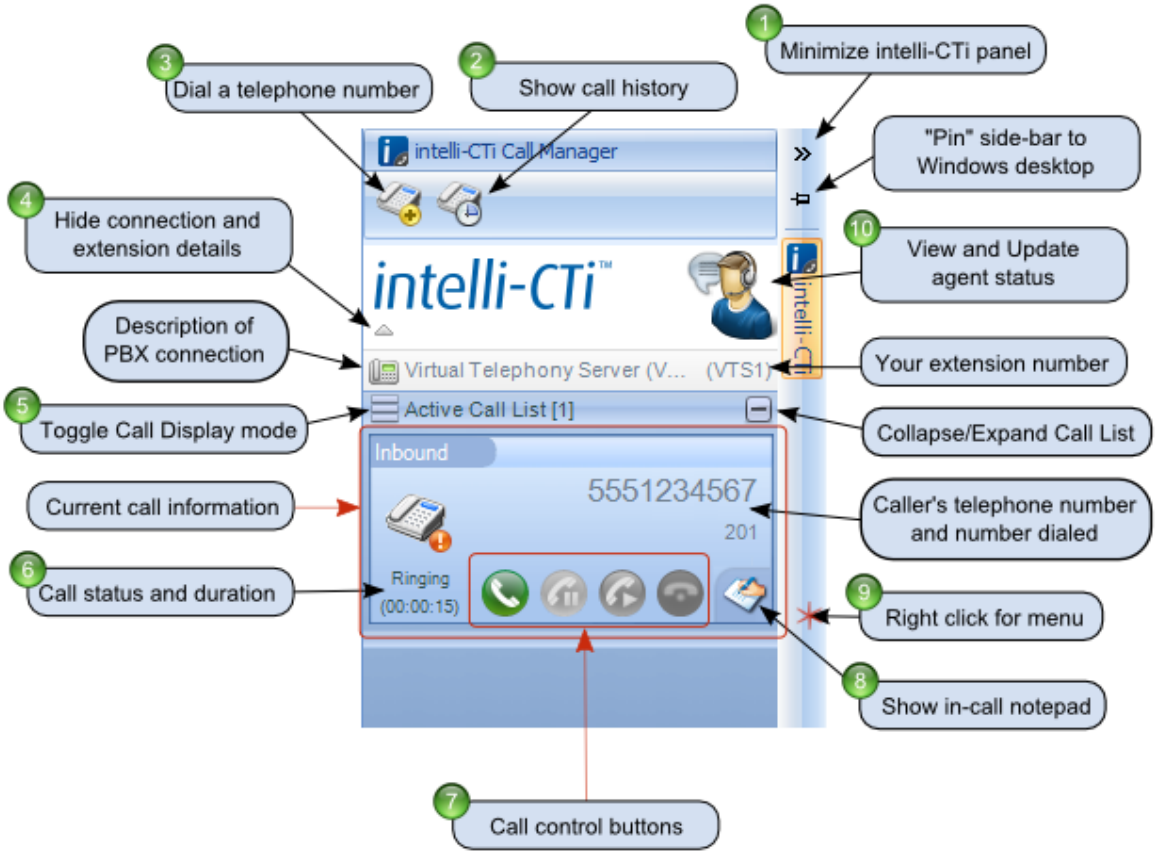
intelli-CTi Desktop Overview



1. Hide/Show the intelli-CTi panel in the sidebar/tab – See page 13
2. Show a list of your recent calls – see page 13
3. Dial a telephone number that you type in – see page 13
4. Hide your telephone system connection details – See page 13
5. Toggle the display mode used for calls – see page 14
6. View the status and duration of your current call – see page 14
7. Control your current call – see page 14
8. Take notes while a call is in progress – see page 14
9. Change your intelli-CTi/QGate Breeze configuration – see page 18
10. View and update your Agent Status – see page 15
11. Pin/Unpin the side-bar so that it remains open

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Hide/Show the intelli-CTi panel

1. You can hide or show the intelli-CTi panel by clicking on the arrows at the top of the sidebar. See the diagram on page 12.

   If you have configured Breeze in grab-tab mode, then you can do the same thing by clicking on the grab-tab.

Show a list of your recent telephone calls

2. At any time, you can use the **View Call History** button to show a list of your recent telephone calls. The list includes inbound, outbound and missed calls:

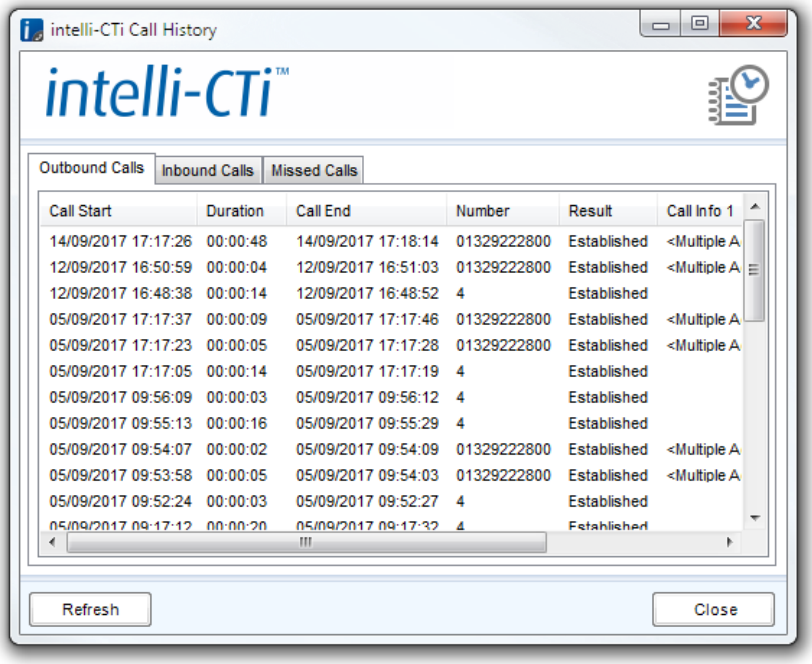

Figure 7 – intelli-CTi Call History window

You can double-click on any entry in the list to re-dial the number.

Dial a telephone number directly

3. Click the **Dial Number** icon at the top of the panel to show the intelli-CTi dialer. See the diagram on page 12.

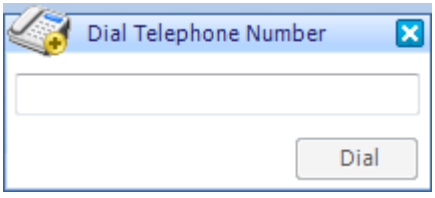

Figure 8 – The intelli-CTi dialer

Using the dialer you can type (or paste) in a telephone number and dial it using the **Dial** button.

Hide/Show your telephone system connection details

4. You can choose to have your telephone system connection details hidden or visible by clicking on the small arrow below the intelli-CTi logo. See the diagram on page 12.

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Toggle the display mode used for calls

5

There are two styles for displaying telephone calls within intelli-CTi; “full” and “compact”. To switch to a different display style, click on either the or icon, located at the top of the Active Call List.

Figure 9 – “Full” call control style

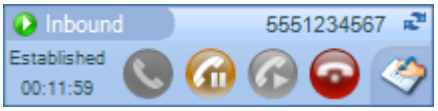

Figure 10 – “Compact” call control style

The “full” style displays the all available information about the current call. It allows for three lines of call information (shown when a call is qualified to a person or company).

Alternatively, the “compact” style provides the same call control features with just the essential call information, presented in a slimmer control. In the “compact” style, you can click the button to cycle between the CLI, DDI and Caller information.

By default, the “full” display style is used by intelli-CTi.

View the status and duration of your current call

6

When you have an active telephone call, the status of the call will be shown on the left-hand side of the call information area. See the diagram on page 12.

This area will show you the current call state (e.g. ringing, connected etc.) It will also inform you how long the call has been ringing for or how long it has been established for.

Control your current call

7

You can control the current telephone call using the buttons on the call information panel. The buttons are enabled and disabled automatically depending on what status the call is in.

The functions of the buttons are as follows:

- Answer a call that is ringing
- Hold a call
- Reconnect a held call
- Hang up a call

Taking notes while a call is in progress

8

While a telephone call is in progress, you can use the **In-Call Notes** button to display the in-call notepad. If you have installed a product that integrates intelli-CTi with another application, e.g. a CRM system, then the notes will be saved in that application.

Important Note: If you have not installed any integration with another application, then any notes you type here will be lost when the call ends.

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Change your intelli-CTi/QGate Breeze configuration

You can use the QGate Breeze control menu to change the configuration of QGate Breeze and the intelli-CTi application.

To access the menu, either right-click the QGate Breeze sidebar/tab or right-click the QGate Breeze icon in your system tray:

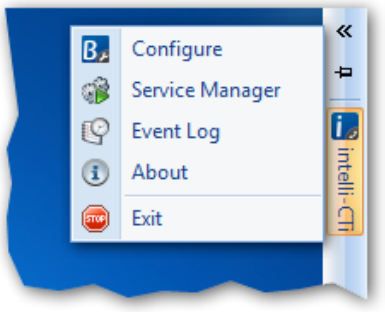

Figure 11 – QGate Breeze control menu

The 'Configure' menu option

Use the **Configure** menu option to display the QGate Breeze Configuration window:

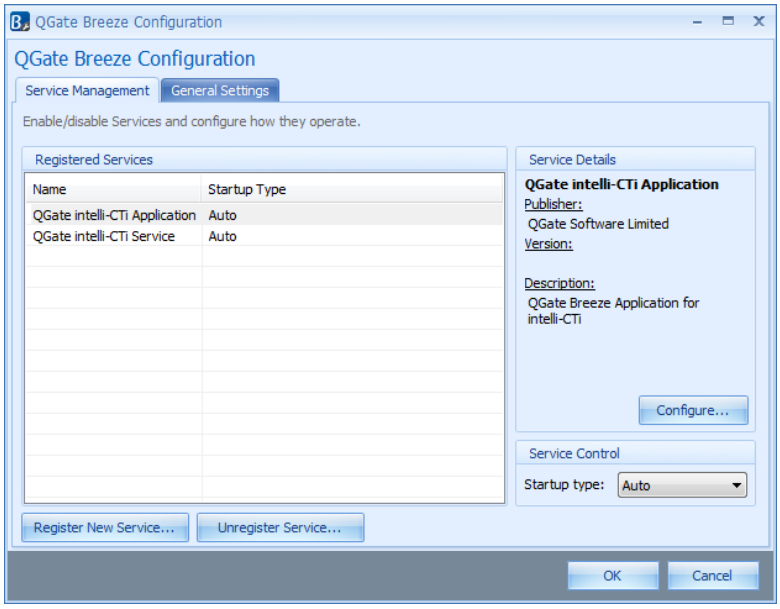

Figure 12 – QGate Breeze Configuration Window

From here you can:

1. Manage the QGate intelli-CTi Application settings by selecting it in the list and clicking the Manage... button, or by double-clicking it in the list.

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Figure 13 – intelli-CTi Application Management Window

2. Select whether you would like intelli-CTi to expand automatically when there is telephone call activity.
3. Manage the **QGate intelli-CTi Service** settings. These settings should only be changed by your system administrator. See the intelli-CTi Installation and Configuration Guide for more information.
4. Unregister services or change their start-up type. These settings should only be changed by your system administrator. See the intelli-CTi Installation and Configuration Guide for more information.

On the QGate Breeze Configuration – General Settings tab:

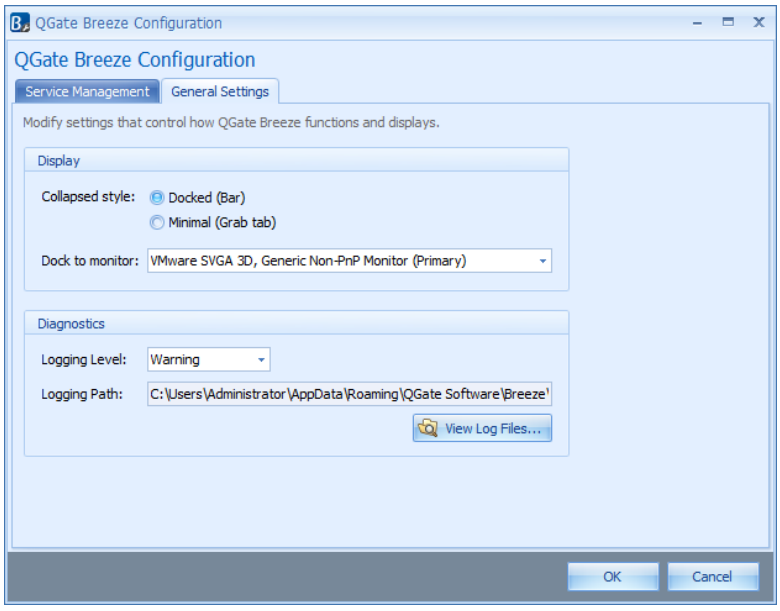

Figure 14 – QGate Breeze General Settings Tab

5. Select whether you want to show the QGate Breeze Desktop as a sidebar or a grab-tab. See intelli-CTi on your desktop on page 9 for more information.
6. Select which monitor to display the QGate Breeze Desktop on (if you have more than one monitor).

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View and update your Agent Status

If you have installed a product that integrates intelli-CTi with another application, e.g. a CRM system, then you can use your **Agent Status** to indicate to the other application whether you are available or not.

When you are not using the telephone, the Agent icon indicates what your Agent Status is currently set to. There are three different statuses:

- You are available

- You are unavailable

- You are performing wrapup actions for a call

- Click the agent icon to toggle between Available and Unavailable.
- Right-click the agent icon to display a menu that allows you to select between all three statuses.

The effect of changing your Agent Status is dependent on the application integration you have installed.

When you have an active telephone call, the agent icon appears like this:

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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

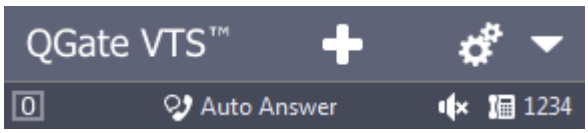

Figure 15 – QGate Virtual Telephony Server™ dialog

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**.

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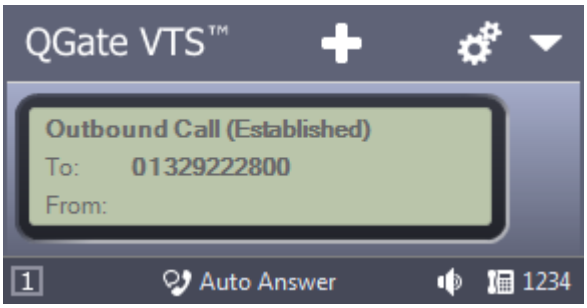
Simulating an Outbound Call

1. Dial the required telephone number, either from the intelli-CTi dialer (see page 13) or from an integrated application, if you have one.
2. You'll see the Outbound call being simulated in the display of the VTS.



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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).*
        - This is the Contact’s telephone number.
    - **To** *(Direct Dialing In – DDI).*
        - This is the telephone number that the Contact dialed to call you.

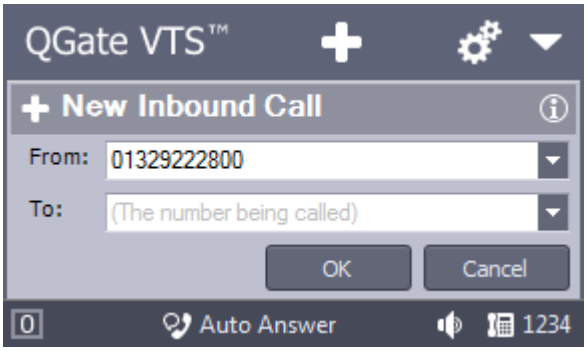

Figure 16 – Inbound call simulation dialog

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

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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:

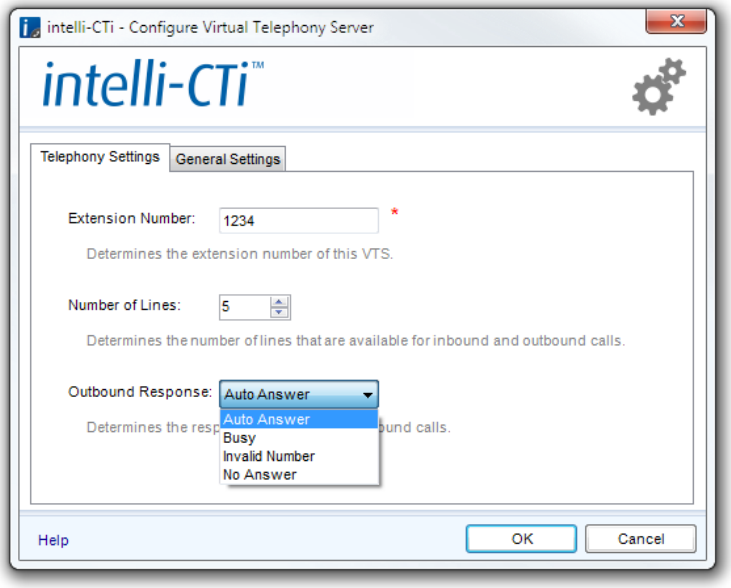

Figure 17 – Outbound call simulation dialog

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.

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intelli-CTi – Technical Support

In the interest of providing customers with the latest product support information, QGate provides the following online resources within our intell-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.

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