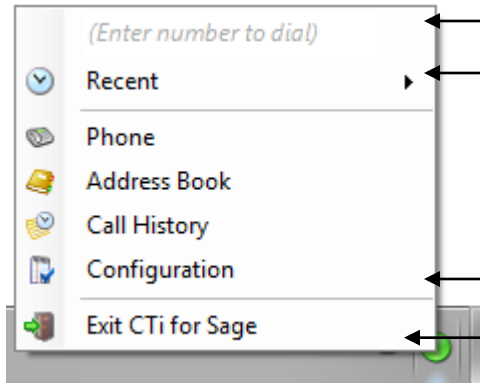


CTI for Sage - Quick Reference

Welcome to *CTI for Sage*. This quick reference guide contains some useful information to help you get started. *CTI for Sage* runs in the system tray. It will appear as a green (or another color) circle. This document describes the various screens that can be accessed by right-clicking on the tray icon.

Tray menu



Quick dial box: Type a number here and press Enter to make an immediate phone call

Recent menu: Quickly see recently dialed numbers, and click to redial them

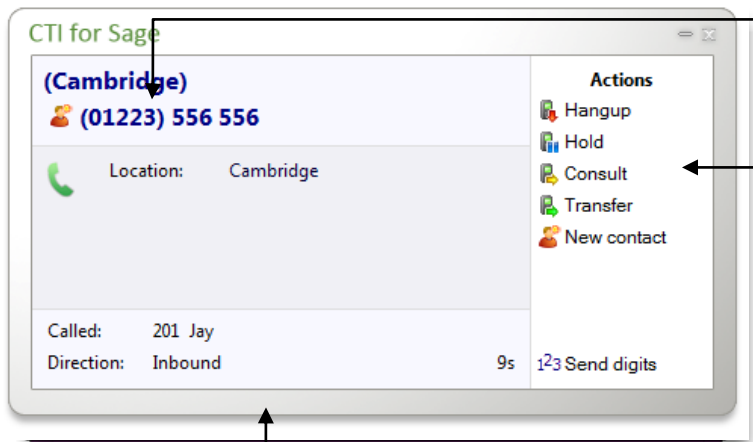
Configuration: Contains options to change your user experience, and configure CRM packages to integrate with

Exit: Use this to unload the software

Phone window

When you are not on a telephone call, you can type numbers on this window to dial.

When you are on a telephone call the software will show information that is known about the person you are speaking to and a list of actions that you can perform:



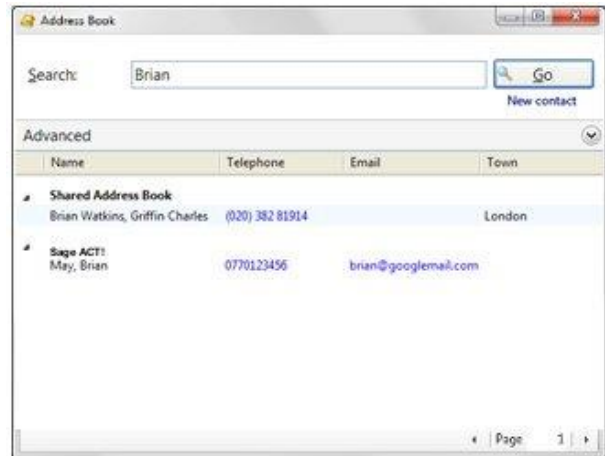
Contact information: The name and telephone number of the remote person

Actions: Use these buttons to interact with the current call and contact

Call Information: Other information about the current call

Address books and contacts

The Address Book window provides access to a company-shared address book as well as any integrated address books that have been configured. You can either click the 'New contact' button to add a contact for future use, or type in search criteria and press 'Go' to look for existing contacts.



Clicking on the name in the search result area will show the contact in more detail. Clicking the telephone number will make a call to the contact, and clicking the email address will create a new email to the contact.

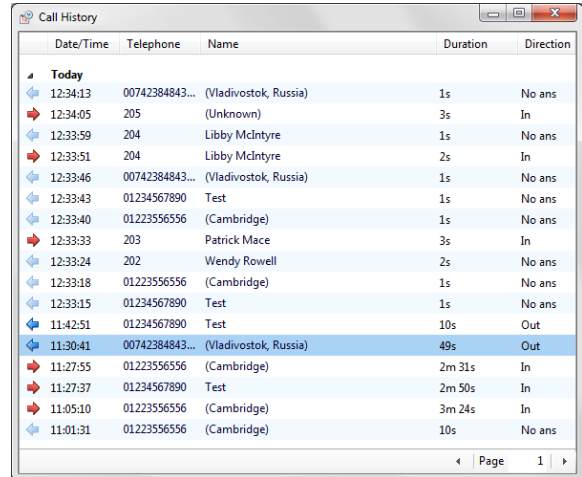
The contacts in the address book can be entered in a number of different other ways including during a telephone call and from the Call History window.

Call history

The Call History window shows your fifty most recent calls, arranged in reverse date and time order. The next fifty can be accessed by pressing the page right button in the bottom right of the window.

You can make calls from this window by clicking on the contact's telephone number and you can add or edit their name by clicking on the entry in the Name column.

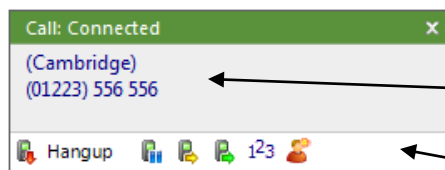
The arrow in the left hand column shows whether the call was made by you or received by you, and whether or not it was answered.



Date/Time	Telephone	Name	Duration	Direction
Today				
12:34:13	00742384843...	(Vladivostok, Russia)	1s	No ans
12:34:05	205	(Unknown)	3s	In
12:33:59	204	Libby McIntyre	1s	No ans
12:33:51	204	Libby McIntyre	2s	In
12:33:46	00742384843...	(Vladivostok, Russia)	1s	No ans
12:33:43	01234567890	Test	1s	No ans
12:33:40	01223556556	(Cambridge)	1s	No ans
12:33:33	203	Patrick Mace	3s	In
12:33:24	202	Wendy Rowell	2s	No ans
12:33:18	01223556556	(Cambridge)	1s	No ans
12:33:15	01234567890	Test	1s	No ans
11:42:51	01234567890	Test	10s	Out
11:30:41	00742384843...	(Vladivostok, Russia)	49s	Out
11:27:55	01223556556	(Cambridge)	2m 31s	In
11:27:37	01234567890	Test	2m 50s	In
11:05:10	01223556556	(Cambridge)	3m 24s	In
11:01:31	01223556556	(Cambridge)	10s	No ans

Preview window

By default the preview window is set to appear when calls happen. The window will fade away after a few seconds.



Close button: Use this to make the Preview window disappear more immediately

Contact information: The telephone number and name of the other party

Call control actions: Use these to interact with the call or show the contact if it is found in an address book