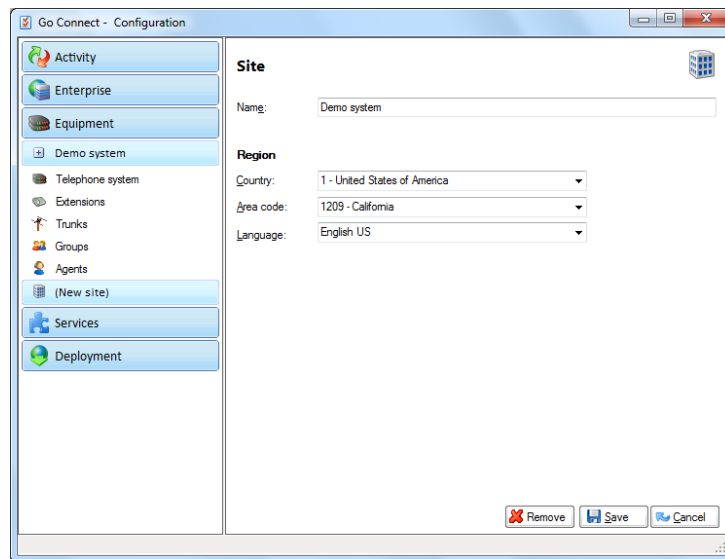


CTI for Sage

Installation and Configuration



This guide is arranged into three sections:

Requirements	Covers the requirements including the minimum specifications
Installation	Preparing a PC to install CTI for Sage Server through to the installation and first run of the software
Configuration	Configuration and administration of CTI for Sage Server on an ongoing basis

Not covered in this document:

Client software	The client product is described in the document 'CTI for Sage CRM- User guide'
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CTI for Sage – Requirements

Server PC requirements

The requirements represent the specification to support up to 64 users and 45 concurrent telephone calls. A higher specification is required to support higher number of users.

Minimum Requirements

- IBM-PC or 100% compatible
- 1.8 GHz Pentium-class processor
- SVGA display
- 2 GB Memory
- 1 GB free hard drive space
- Network adapter connected to a TCP/IP network
- Keyboard and mouse
- No modem installed (dependent on telephone system)

Operating Systems

- Windows XP Professional SP3
- Windows Server 2003 and 2008
- Windows Vista
- Windows 7
- 32 bit and 64 bit

CTI for Sage – Installation

Introduction

The CTI for Sage Server software is supplied on CD or as an Internet download. It is a self-contained setup program that contains the files needed to install a copy of CTI for Sage Server.

The setup program contains the following Microsoft components which will be installed if they are not already present:

Windows Installer 3.1
Microsoft .NET 2.0
Microsoft SQL Server 2005 Express



The setup program also contains the drivers that are required to communicate with a range of telephone systems.

The CTI for Sage Server software does not contain the files needed for client installation. These should be downloaded or sourced separately.

The client software is licensed on a concurrent connection basis, and the license is entered on the server as part of the installation process. The license code can be retrieved automatically via the Internet by the server software. If no Internet connection is available, please have the license code available during the installation. Otherwise, the software will work for 30 days and then expire.

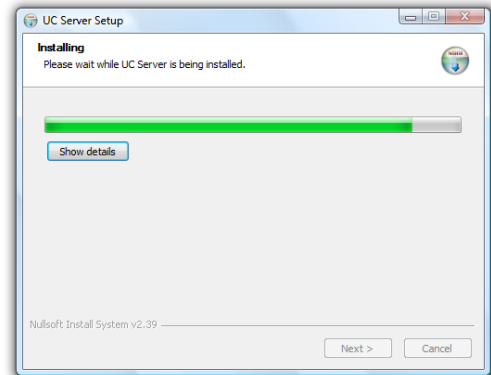
Before you start

Before you start, please check you have the following:

- A suitable PC to install the server on (please check minimum requirements)
- The CTI for Sage Server software setup program
- The client software setup program
- The IP address of the telephone system (please check for other requirements)
- Any license codes that have been provided

CTI for Sage Server software setup

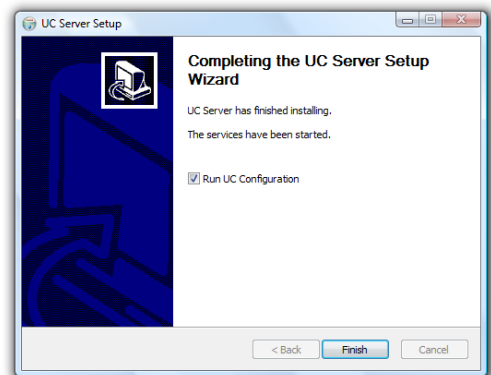
To install the CTI for Sage Server software, double-click on the CTI for Sage Server setup program. The installer package should launch and the installation will commence. The installation process may take between thirty seconds and ten minutes depending on the software that is already on your PC. If the PC is a brand new installation of Windows XP, then the setup disks will install a number of Microsoft components that take some time. Microsoft .NET 2.0 is one of the more lengthy components. If this is required, please be patient while the software installs. It may even be necessary to reboot your PC during this process. Please follow any instructions given.



If Microsoft .NET 2.0 is already on the PC then the installation should be much quicker.

After the installation is complete, the configuration program will be run for the first time. You can run the configuration program again at a later time using the icon created in the Start menu.

Note: The CTI for Sage Server software takes a minute or so to start on the first occasion that it is run. Please be patient during this process.



CTI for Sage Server services

As part of the installation process, the CTI for Sage Server service will be installed and started.

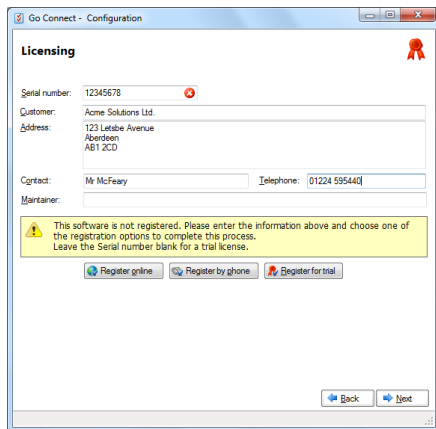
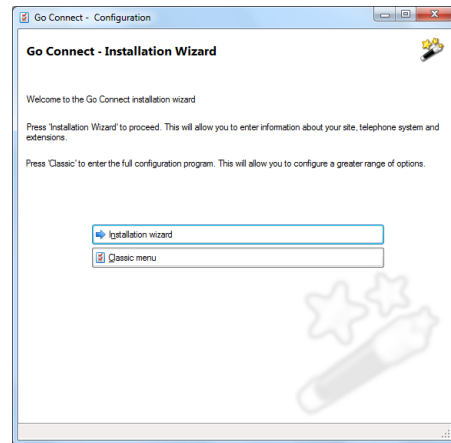
CTI for Sage Server firewall ports

The CTI for Sage clients and server communicate using TCP port 21050 and UDP port 21059. The server installation should configure the local firewall to allow support for these services. In the event that a non-standard firewall is used then these ports may need to be “allowed” manually.

Installation Wizard

When running the CTI for Sage Server Configuration program for the first time, it is recommended that you choose to run the installation wizard. In the wizard, you are presented with a series of pages that, when complete, will allow you to finalize the installation of the server components.

Press the 'Installation wizard' button to begin the installation wizard process.

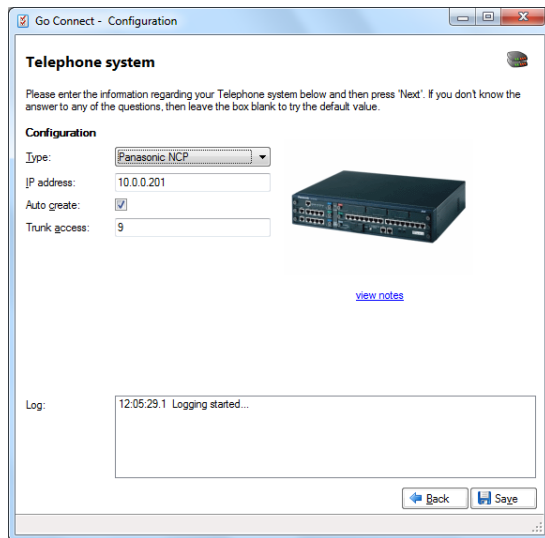
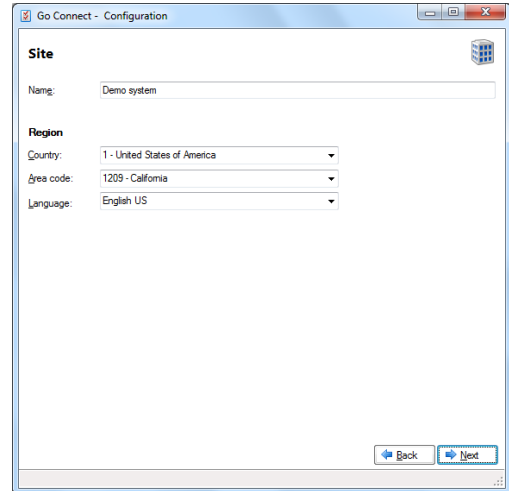


First, you will need to enter registration information. Enter the customer's details, including name, address, and telephone number. Please enter valid information as this information will be used in the event that the Server PC is replaced and a new license number is required.

After entering the registration information, there are three possible options:

- Register online – If the PC is connected to the Internet then this is the simplest option. The software will connect to the registration server and fetch the license information for the serial number.
- Register by phone – When this option is chosen a dialog box will appear with further instructions. Ring the telephone number that is shown and provide your serial number when asked. You will then be given an unlock code. This unlock code can be entered into the dialog box. Trial licenses can also be given over the phone, if required.
- Register for trial – This option also requires Internet access. The software will use the registration information and fetch a time limited trial license.

The next page asks you to enter information about your location. Please enter a name for your site, and then configure the Country and Area. The countries and areas are listed in alphabetical order, for convenience. If you select a new country the area codes selection will change accordingly.



Then, you need to enter information about your telephone system environment. The Type should be set correctly (please use the photographs as a guide if you're not sure) and Auto create should be turned on by ticking the box.

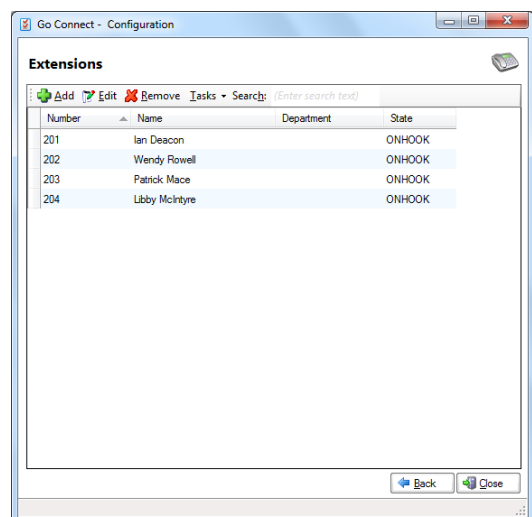
Enter the trunk access code (normally 9) and the IP address of the telephone system. Press Save and then Next when done.

At this point, the software will attempt to connect to the telephone system and download a list of extensions. This process can take several seconds.

After the extension list is downloaded, you may want to review it, and manually add or remove any extensions using the buttons provided.

If after about 30 seconds the extension list hasn't started downloading, press the 'Back' button to review the telephone system settings. You might also look at the Log as any relevant error messages would be contained here.

When you have finished reviewing the extensions press the 'Close' button. The installation wizard will end.



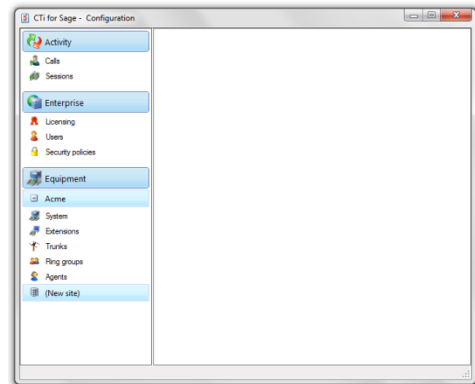
CTI for Sage – Configuration and Administration

After installing the server you may want to return to the Configuration utility to perform certain administration tasks. The Configuration program can be run from the shortcut in the Start menu. Typically, you will want to press the 'Classic menu' button to get easy access to all of the configuration screens.

Navigation

When you enter 'Classic menu' mode, you are presented with a navigation area on the left hand side and a configuration page (initially blank) on the right. You can select which page you want to configure by selecting it from the navigation area. For convenience, clicking on the sections (the blue areas) of the navigation area can expand and collapse the options below.

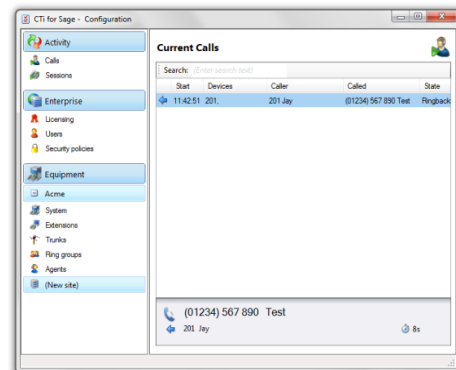
The remainder of this document examines each page of the full configuration screens under their respective sections.



Activity

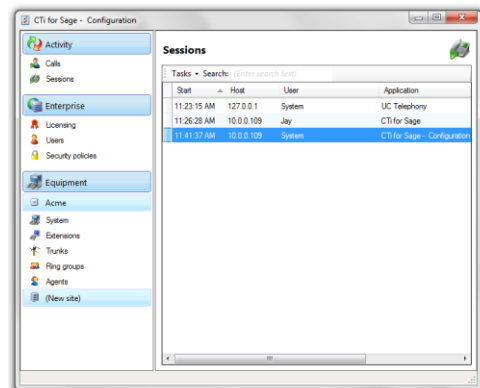
Calls

The calls page shows a list of calls in progress and is updated in real-time. The list does not show which device a call is connected at because the call may be at several locations (ie group ringing or conference call). You can enter text in the Search box to filter the list of calls being displayed, for example if you want to find if a particular call is listed.



Sessions

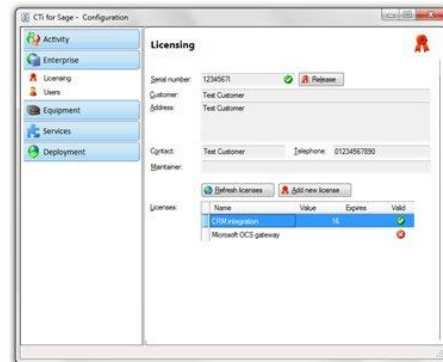
The Sessions page shows a list of active client sessions. This will include any desktop clients plus other server-based services that are connected, including the configuration program. A session can be disconnected (or reset) by selecting it from the list and choosing the Reset option from the Tasks menu. A disconnected session will likely re-appear once the client reconnects.



Enterprise

Licensing

The software must be registered before it can be used properly. If the software is registered then the licensing page will appear similar to the picture shown. If the software has not been registered yet, please refer back to the earlier section entitled 'Installation wizard', where registration is discussed.



Adding a new license

If you have been given more licenses, press the 'Add new license' button and enter the code that you have been provided with, or use the 'Refresh licenses' button to re-load the new license information from the Internet.

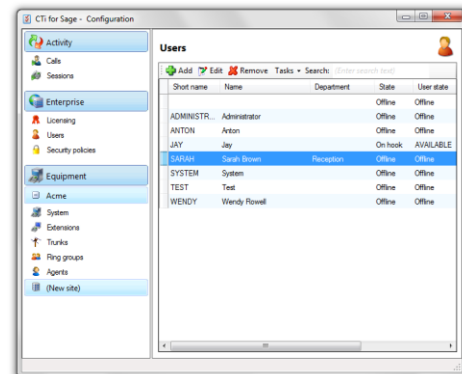
Moving the licenses to another computer

If you have already registered and you want to move the software to another server then you must release the software from the original machine. To do this, press the 'Release' button and write down the code that you are given.

You will then need to register over the telephone on the new computer. Explain that you are moving the license to a new computer and provide the release code when asked.

Users page

The software is designed to work with Windows operating system users and link them with the telephone extension that the person uses. This is done through the client software. As the software is installed and used on each new PC, the user's details will be created on CTI for Sage Server. The user's local extension number is linked to their user name so that the administrator and other users can easily reach them, even in a free-seating environment.



By selecting one or more users and then choosing the 'Apply user settings' option from the Tasks menu, you can send useful settings files to users. This functionality is covered in the 'User settings' section.

The users that have been discovered can be administered from the Users page. New users can also be added from this screen. Adding new users is particularly useful if your site does not allocate a Windows user account per person (i.e. accounts are all called "User" or another generic term). If this is the case, then typically you would add a user per person who wants to use the client software.

When adding a user manually, you should enter their “Short name” (or unique login), their (full) name, and choose a password for them. The user can then enter their short name and password in their client software. Other users will then be able to select them on the Presence list and send messages to them by name.

Equipment

Site page

Each site represents an installation of a telephone system. It is possible for the CTI for Sage Server software to connect to more than one telephone system simultaneously. An extra license is required to do this, and there are some limitations in terms of which telephone systems can be connected to in this way (see online for more details). For each site that is configured, a CTI for Sage Telephony service is automatically created.

The Site page contains the same options as the Site page in the installation wizard. The name is used for reference only.

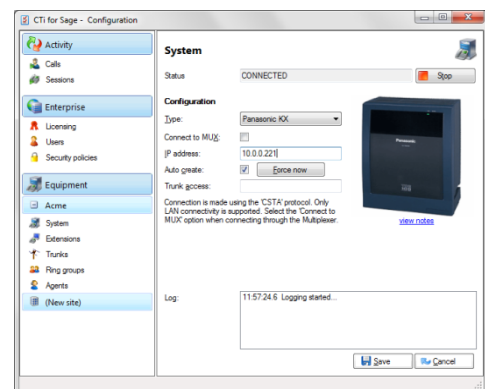
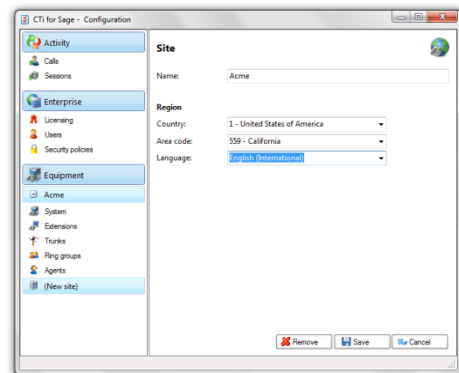
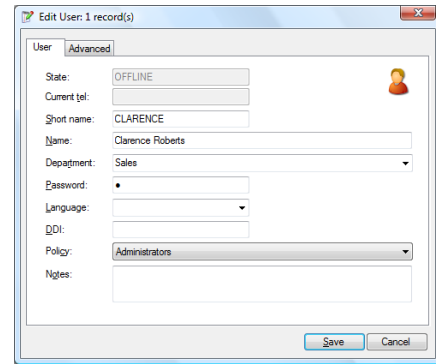
The Country and Area code boxes allow you to set your regional information. This is used when CTI for Sage Server interprets telephone calls to understand dialed numbers.

The Language option allows you to choose the default language for server and client components. English is the default option. Other language packs have to be installed before they can be used.

Using the (New site) page allows the addition of extra sites (license permitting). Please note: when starting the configuration program, the option to use the wizard will not be presented if more than one site is configured.

Telephone system

The Telephone system page is also used as part of the installation wizard. In addition to the fields that were already discussed, you can also choose to Stop or Start the CTI for Sage Telephony service from this page. Typically, there would be no need to restart the CTI for Sage Telephony service during normal operation. However, if you are experiencing telephony related problems (including the inability to make or monitor calls) then you may want to try stopping and then starting the Telephony service. This has no impact on actual telephone calls in progress, only the software’s ability to track



these calls.

Extensions page

The extensions page was also first seen as part of the installation wizard. The extensions would typically be downloaded as part of this process. However, you can also add and remove extensions from this page. You can also 'Reset' any extensions that have incorrect call information by selecting the extension and then using the option under the Tasks menu.

When adding or editing extensions, you are presented with a new window that allows you to further customize the way that the extension behaves within the software.

You can use the options on the Edit page as follows:

DDI Number – this is used to assist the CTI for Sage Telephony service when calculating the destination of direct inbound calls. Enter any value as presented by the network provider (normally the last 4-6 digits) if DDI calls do not appear to be correctly associated with the relevant extension.

Ignore answer messages – this should be set for voice processing equipment, such as voice mail, if you do not want to consider a call as 'answered' even though the call is answered at this device.

Do not monitor – this is set when you want to ignore telephony activity at this extension.

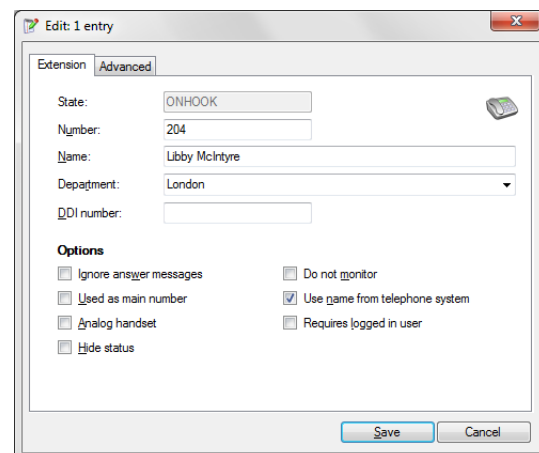
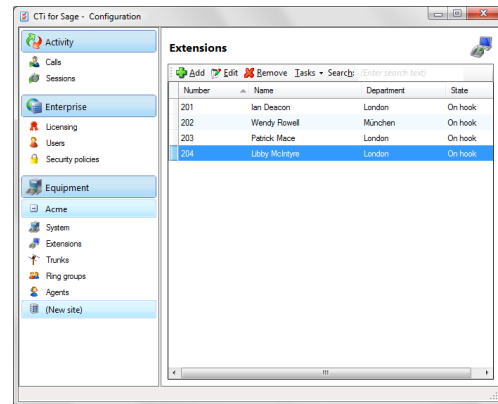
Used as main number – setting this will treat calls to this device as main number calls.

Use name from telephone system – checking this box will allow the software to automatically use any new name given to the extension when the telephone system is re-programmed.

Analog handset – set this if the device is an analog handset (i.e. a generic device with lower functionality).

Requires logged in user – If this box is checked then calls are prohibited from this extension unless a user using this extension is logged in to the client software.

Hide status – Do not show users with this value set on the Presence window.



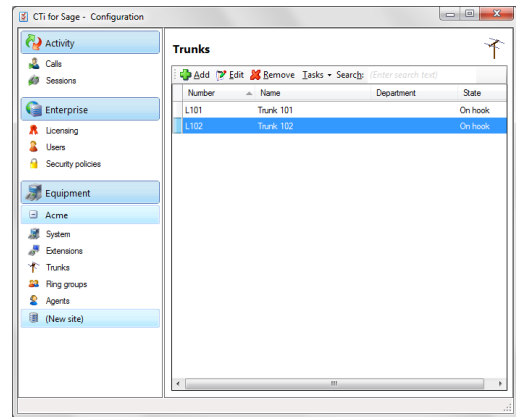
Trunks page

The trunks are listed as part of the configuration to allow the CTI for Sage Telephony service a greater degree of accuracy when tracking calls. When the trunks are listed correctly, the CTI for Sage Telephony service should be able to correctly identify external calls and calls from a withheld number, and track calls that are transferred.

Groups page

On telephone systems that support groups being monitored by the CTI for Sage Server software, groups such as ring groups and call center distribution groups are listed here.

The software can use the groups to display the human-readable group name to users of the client software, and to help track calls.



Agents page

Agents are telephone system users that “log in and out” of handsets, normally for call center operation.

Generally speaking, the CTI for Sage Telephony server will track the status of agents (on supported telephone systems) and mirror any calls that take place at the underlying extension to the agent as well. This means that desktop users can log in as the agent number instead of the extension number, if they wish.

Call center operation requires an additional license to use.

