

CTI for Sage User Guide



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Welcome to CTI for Sage

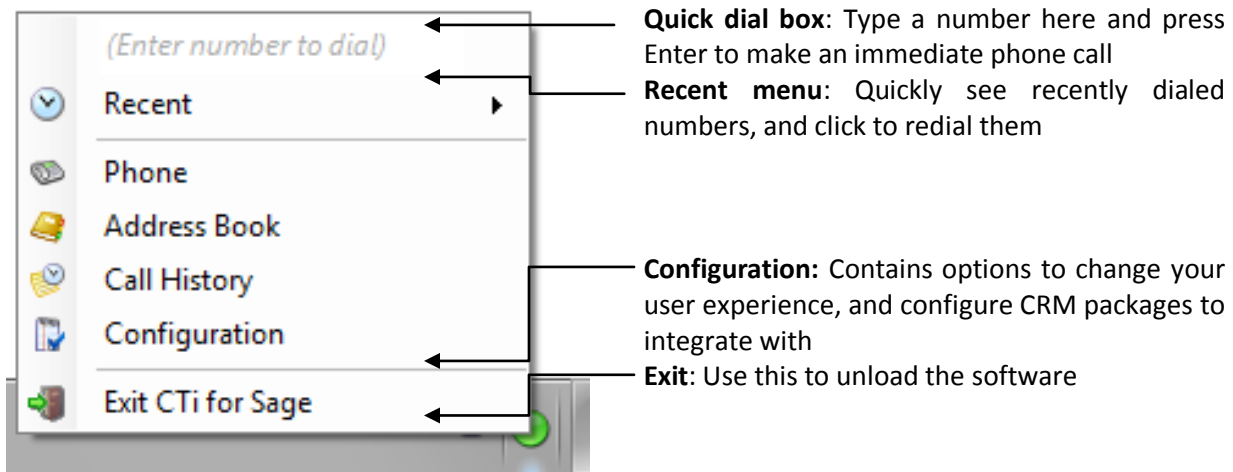
CTI for Sage has been designed to make your phone easier and more convenient to use. It can do this in a number of ways and this document will show you how. But first, let's dispense with the formalities. CTI for Sage is a bit of a mouthful, isn't it? So let's simply call it "Connect" from now on.

Where is it?

Connect is designed to be discrete. Always running and providing useful information as you need it, yet at the same time not annoying and interfering when you're trying to work. So, most of the time, Connect sits silently in your tray menu, waiting for you to click on it. Note: In Windows 7, some tray icons become hidden and expressly have to be shown. These settings are stored in the 'Notification Area Icons' part of the Windows Control Panel.

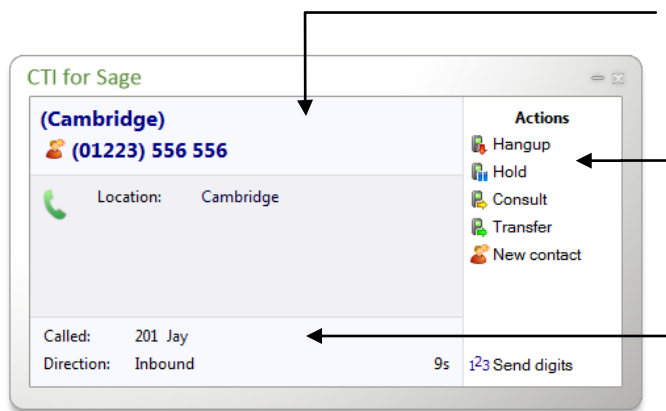
So go ahead and right-click on the Connect icon, which is a green circle (or red if you're on a call) and the tray menu should appear.

Tray menu



Phone window

The most obvious place to start is the Phone window (pictured below). Click on that option in the tray menu, or in future you can simply double click on the tray icon and the window will be shown. Let's have a look at the main parts of the Phone window:



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

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

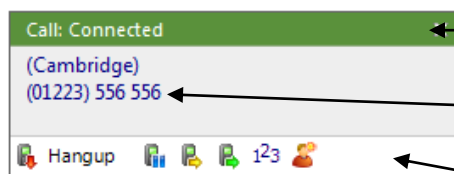
Call information: Other information about the current call.

At the start, you're likely to use the Phone window if you want to control calls or show contacts. After you've used the software for a while, though, you'll probably prefer to use the Preview window it can be more convenient and less intrusive.

Preview window

Make a call in to your extension again and the Preview window should appear. It contains much of the information from the main Phone window, but in a much more compact format. Plus it will disappear shortly after a call connects.

Let's review the main parts of the window:



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. Using some of these will display the main Phone window.

Like the Phone window, the actions at the bottom of the preview window adapt to the state of the call. The example picture shows the actions that are available when a connected call is in progress. To conserve space, the text is only shown for the first action. The rest are depicted by their icons only.

What would you like to do?

Are you still with us? Congratulations. Many people just go straight to the software and figure it out from there. But you know what? They're missing out. This is where we show you how to get the most from the software. Plus, it's presented in a topic-by-topic way, so you can read the sections that you're interested in first.

So what would you like to know? Have a look at the choices below. They are presented in a logical order based on the tray menu. They are not necessarily in order with the most interesting first, so feel free to skip over any that look dull:

[Making calls](#)

How many different ways can you make calls? Which are the best?

[Call Control](#)

How can you control calls from your PC? What is the best way to work?

[Address books and contacts](#)

How to assign names to callers and how best to use this information.

[Call History](#)

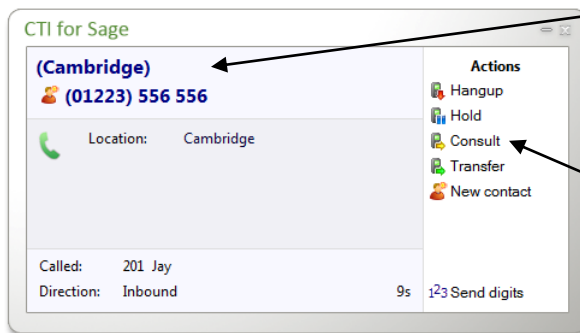
Taking a look at your call history and what you can do with it.

[Presence window](#)

Publishing your availability and seeing if other people are free

[Settings and configuration](#)

How do you configure Connect to get the most out of it?



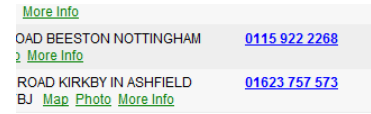
Want to know how to assign names to callers?
Read **Address books and contacts**.

Want to know how to control calls? Read **Call control**.

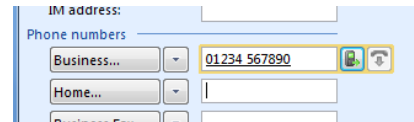
Making calls

So, we’re going to look at ways of making it easier to call people. But at the same time, we don’t just want to use technology for the sake of it. So where do we start?

Well, the best way to do this is to look at the different ways that you might get the number that you’re going to call, and then look at the best way to call them. For instance, you might be browsing the internet and see the telephone number of a company who you’d like to call. In this instance, the most natural thing would be to click on the number to dial them. We call that internet dialing (more about this later).



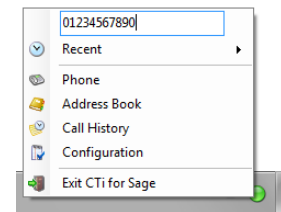
Or if you are using your company’s Contacts Management program and you have a contact’s details on screen, you don’t want to have to lift your handset and dial the number by hand. There’s a much easier way now.



So when you make calls, where do you get the numbers from? Let’s look at some possibilities:

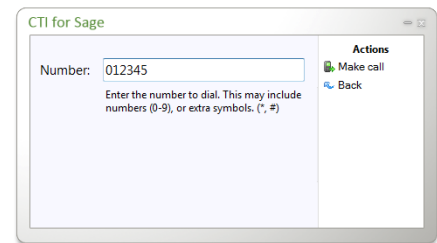
From a piece of paper

Well, you might as well lift your handset and dial the number on your telephone keypad. But if that’s the case then you should think about storing the person’s name in Connect and then next time, you can find them more easily.



Alternatively, you could right click on the Connect tray icon and then enter the number in the text box at the top. You can even use the backspace key if you type it wrong. Easy, eh?

Or, if you happen to have the Phone window open, then just start typing a number on your keyboard. Connect will understand that you want to make a call and switch to the “Make call” screen. Press the Enter key when you’ve finished typing to make the call.



Someone you spoke to recently

If you spoke to them using the phone that Connect is connected to then the call should be in your call history. At the main menu, press the call history button and you will get a list of your calls in reverse date order. If you see the caller in this list, then click on their telephone number to make a call to them directly from this screen.

Alternatively, if the person was one of the last ten people that you spoke to, then they will be in your “Recent” list. You can get to the Recent list from either the Connect tray icon or from the Make call screen.



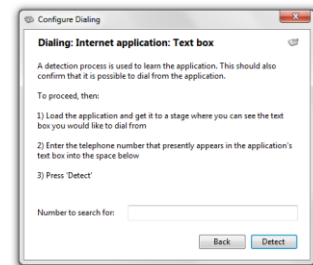
Note: these Recent numbers are stored on your PC not on the server.

From a web page

You can configure Connect to search your web pages (Internet Explorer only) for telephone numbers to dial. It won't find all of them, unfortunately, but it is good at phone directory searches because it is optimized to understand this kind of page. To turn this functionality on, you need to go to the Configuration main menu option and then go into Dialing settings. Here you can turn on "Web Page Dialing".

Some web pages, such as Contact Management systems may contain text boxes with telephone numbers in. These work slightly differently because we can't make these into hyperlinks. To add dialing support to this type of web page, then you will need to tell Connect to search for them. This is also done from the Configuration screen. To add dialing support for the application, you need to follow a couple of simple steps:

- i) In the Configuration screen, on the Dialing page, press the Add button. This will load the Dialing wizard.
- ii) Select the Internet Explorer option, then choose Text boxes.
- iii) Locate a page in your application that contains telephone numbers in a text box. Enter the telephone number that is shown in your application into the wizard.
- iv) Then press the Detect button. Connect will then scan all open web pages and find the first instance of your number (you can only do one at a time). Press the Save button and in future (next time you refresh the page) it will add a Dial button next to the text box.

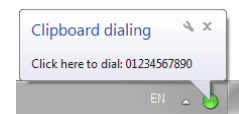


From another application

It is very common to store telephone numbers on a PC, particularly in contact management applications. However, applications actually vary a lot as to how these numbers are presented. This gives quite a challenge for applications such as Connect to make dialing possible. Fortunately, we've been doing this kind of thing for a while and we've put some nice tools into Connect to allow you to dial from other applications. The first and easiest of all of them is Clipboard dialing.

Clipboard dialing can be turned on in the Settings -> Dialing settings page. When on, Connect will keep an eye on the clipboard and if you copy something to it that looks like a telephone number then a bubble will appear from the tray icon that asks you if you want to call the number.

When using this method of dialing, you may want to help

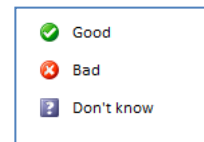
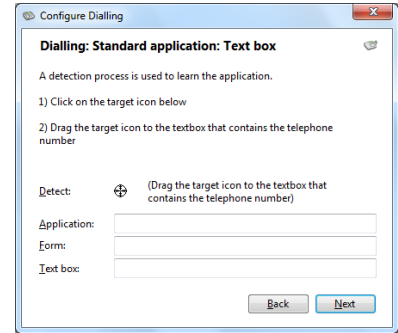


Connect know what is a valid number by entering a minimum and maximum length and possibly a prefix that numbers must start with. This can be done in the Dialing settings page.

If you regularly dial from a certain application then there may be a quicker way to dial. This involves a detection phase where Connect learns your application, and is called **Application dialing**. To try it out, then go to the Dialing page in the Configuration.

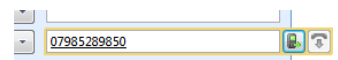
At this screen then press the Add button and you can try to detect your application. The way that you do this is as follows:

- i) Select the “Any other type of Windows application” option, then press Next.
- ii) On the next page, click and hold the mouse down on the crosshair next to the word “Detect” as in the screenshot above.
- iii) Drag the mouse (without releasing the button) over the text box in your application when a number is stored.
- iv) Release the mouse button when the mouse cursor is above the textbox. (This obviously means that you need to get Connect and your application side-by-side to achieve this). If the crosshair icon changes to a check then it is likely that Connect can add dialing support to this box.
- v) When you have finished then press the Next button and then press the Close button to save the settings. Then press Save in the main configuration page too.



Next, close and reopen your application window to see if it has worked. The results will depend on what type of application it is. You will either see one of three possibilities:

- i) A dial button will appear to the right hand side of the text box. This means that you have a “.Net application”. (You probably saw a check when doing the detection also). If this is the case, then you should proceed to “Detect” the other text boxes in your application to make them work also.
- ii) Alternatively, try hovering your mouse above the text box (making



sure that there is a valid telephone number in it). All being well, a Dial and Hangup button will appear to the right hand side of the text box. This means that you have a non-.Net application.

- iii) If neither of these two things happen, then the text box probably isn't supported, so you should consider using the Clipboard method instead. Note: you might also be trying it with a web-based application, if so then have a look at the earlier section under dialing from a web page.

From your own in-house developed application or database.

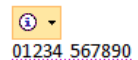
We have to get a little “techie” here, so if you don't develop your own in-house applications, then feel free to skip straight past this.

So what kind of an application do you have?

- i) **Web-based:** If so, then we suggest that you put “Anchors” <A> around any telephone numbers. The href should be “Dial: 123” and replace 123 with your real number. If you want to put Dial buttons next to your input textboxes or under buttons, then we suggest that you use the window.OpenURL function and construct a string containing “dial: 123” as a parameter (changing the number to the correct one obviously).
- ii) **Non-web based:** When you want to make an outbound phone call (ie by putting a Dial button next to a text box) then do so by running or shelling the PhoneHelper.exe program (found in the same directory as Connect) with a command line parameter of “Dial(123)” (without the quotes).

From Word and other Microsoft Office applications

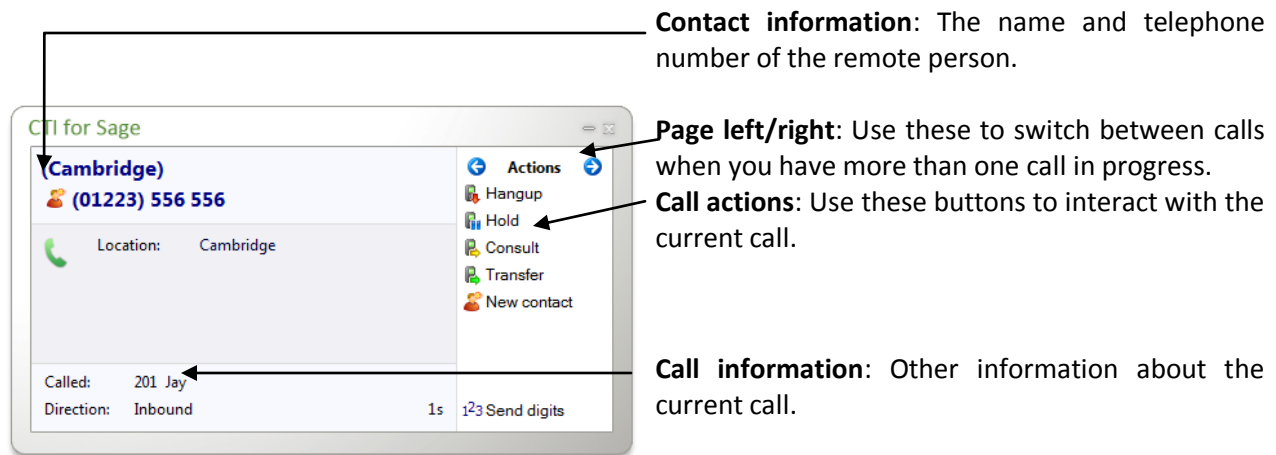
When Connect is installed, then it also installs “SmartTags” for use in Microsoft applications. These SmartTags allow these applications to actively detect telephone numbers and when they see one then they underline them. Putting your mouse over a SmartTag highlighted number then brings up an information box which includes an option to dial the number.



So, that's it for dialing options. Unless you can think of any more...

Call Control

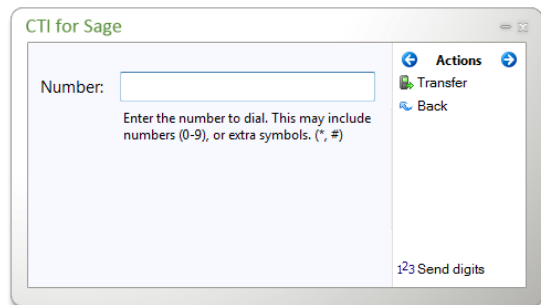
By now, you will probably have seen the Call screen in the Phone window a number of times. It appears when you make or receive a call. Let's take a moment to review the items on the screen.



As you can see, the Phone window allows you to interact with the current call in a number of ways. One of the most common ways is to click on the New contact or Edit contact button to apply a name to the person you are speaking to. This is covered in a later section, [Address books](#).

It is also common to use this screen to perform a transfer of the current call to another extension or user. To do this you must be Connected to the call (as opposed to it being on Hold or Ringing). When you are Connected then the Actions list looks like the above example. To transfer a call you do NOT press the Hold button. The Hold button has a different purpose (more about his later). Instead you either press the Consult or Transfer button. You choose the button according to whether you want to speak to the other person (Consult) or not (Transfer).

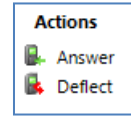
You are then presented with a screen like the Make call screen, but with the word Consult or Transfer at the top. Your call is not on hold at this stage yet, but when you are ready, type the number to transfer to (or choose one of the dialing options) and if you are Consulting then the original call will be put on Hold pending transfer (the pending transfer bit is important). If you are transferring then the call will be put straight through (remember to say goodbye first).



You can also transfer calls by using the [Presence](#) window. This feature is covered later in that section.

More call control

We've seen what you can do with a connected call. Can you interact with other calls? Yes, when a call is ringing, you can choose to answer the call or Deflect it (transfer it without answering it) to another extension. Deflecting a call is done a manner similar to transferring calls. If you want to use this feature, then why not go ahead and try it out now. Phone in from your mobile and see how it works and then you'll be ready if you need to deflect a call for real.



Deflecting calls is not just used to avoid work. If you are already on the phone and someone else phones you, then you can use Deflect productively to move the call to a colleague who can tell the caller to wait for you to become available.

You can also put calls on hold. Depending on your telephone system configuration, this means that the other person should hear music. When you are ready to talk to them again, use the Unhold button. Remember, the Hold button is not for transferring calls. It is purely to pause the call. If you want to transfer a call that is on hold, then first you will have to take the call off hold first.

Address books and contacts

The Address book window is accessed from the Address book item on the main menu or tray menu icon. It provides access to a company-shared address book. Unless you're the first person to use the software at your company, then there are probably some entries already in there. Go ahead and have a look. Don't worry about filling in any of the boxes, just press the Search button at the top and see if there are any entries already there.

No, none in there? No problem, we'll add one now. If you did see some entries, we'll discuss the results page shortly. But first, we're going to add another entry.

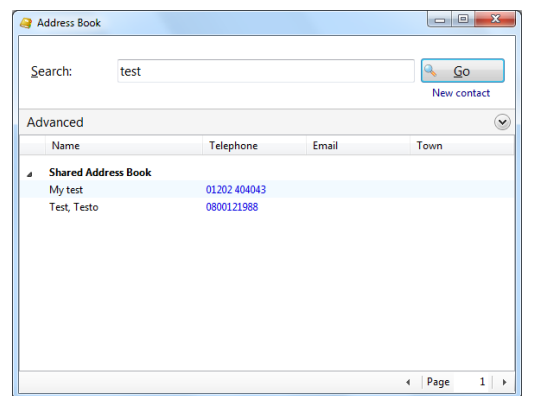
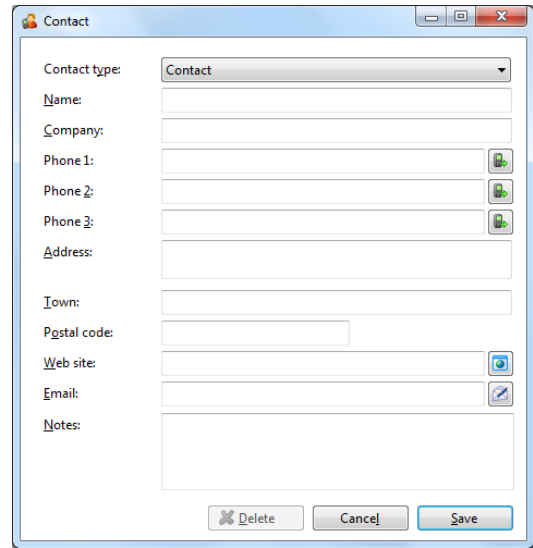
At the top of the window, press the New Contact button. This will present you with a blank Contact window. Enter a name, company and phone number in the relevant boxes. All of the boxes from the Contact window, including the Notes box at the bottom, can be searched. You can also interact with some of the boxes to make a call, send an email, etc.

You may be wondering what the Type box is for at the top of the page. This is used to change the format of the Contact window. Different "types" have different templates. Pick the one that best represents the contact entry that you are creating.

When you're finished press the Save button and we'll search for your new entry.

Back at the main Address book window, enter search criteria to find your entry. Most of the time, you can find the results that you want by entering text in the search box and pressing Go. However, if you get too many results back, you may want to consider further restricting your search by using the Advanced section. Names and telephone numbers area searched using the original Search box, but in the Advanced section you can filter by address fields such as town or postal code (Where) or other fields (What) as well.

Press the Search button and after a short delay you'll be presented with a list of results. From this screen you can click on the telephone number of a contact to dial them, or click on their name to edit or view their contact details.

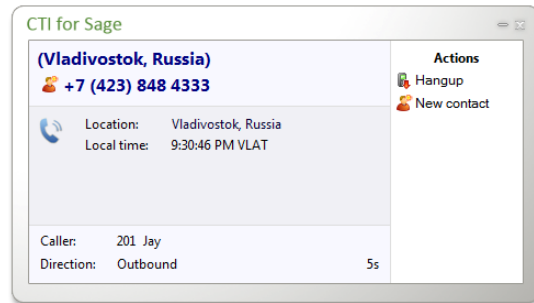


Storing contact details when on a call

If you've made or received an external call using the Phone window yet, you've probably noticed that when Connect doesn't know who the other party is that you're speaking to, then it will show a town or location name instead.

It does this in an effort to be helpful, but if you really want to help yourself, then you'll add a name to the contact for future use.

How do you do this? You press the Add contact button on the right hand side of the screen. (You already knew this, didn't you?)



You can then store the caller's details for future use.

Adding contact details from the Call History window

You may find it easier to add a contact's name and other details after the call has ended. This is fine, you can concentrate better this way. To do this, go into your Call History and click on where the name would appear (it will be a location name in brackets instead). When you do this, the Create contact window will appear like before.

It's a good idea to have a look in your Call History, from time to time, and enter caller's details in this way. That way, when you're looking for someone's number, you will be able to find it.

Date: Today				
16:28:01	01162561000	(Leicester)		11 mins, 52 secs
14:50:37	01234567890	Bedford test		24 secs

Call History

Once you've used Connect for a while you will come to rely on the Call History. It's a great way to find the telephone number of someone who you spoke to recently. The Call History window is accessed from the Call History item on the Main menu or from the tray icon menu. As well as reviewing recent activity you can dial someone from here by clicking on their telephone number and you can access their contact record here by clicking on their name (we saw this in the [Address Book](#) section). It's good practice to store the names of people when you speak to them, especially if you're likely to speak to them again.



Date/Time	Telephone	Name	Duration	Direction
Today				
09:12:50	07777456789	Mike Tombe, Ready Set	12s	Missed
09:12:18	07777456789	Mike Tombe, Ready Set	30s	Missed
09:11:56	206	Extn206	18s	Out
09:10:50	01223556556	Cambridge Tyres	42s	Out

By default, the Call History screen returns the fifty most recent calls. The next fifty can be accessed by pressing the page right button in the bottom right of the window.

Also, to aid readability you can hide and show individual days from your history by pressing the expand/collapse button to the left of the date.

Settings and configuration

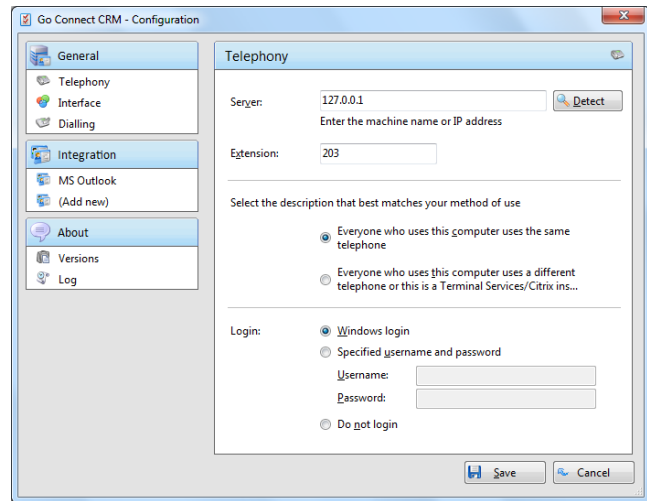
The Settings menu contains many options that you can change to improve your enjoyment of Connect. Let's take a look at some of the more common ones. If you select the Configuration menu item from the tray menu then you are given a page with options on the left hand side.

Telephony settings

When you first install Connect, it takes you through an installation phase where you need to tell it your telephony server's address and your extension number. When it does this, it presents the Telephony settings page of the Configuration window, so you may have seen these before. You're not that likely to change these settings, but you might as well know what they do.

The first option, Server, contains the details of your telephony server. The Extension option contains the local user's extension number.

The next choice, "method of use", is useful when several people share the same PC. Read the two choices and select which one best fits your mode of working.



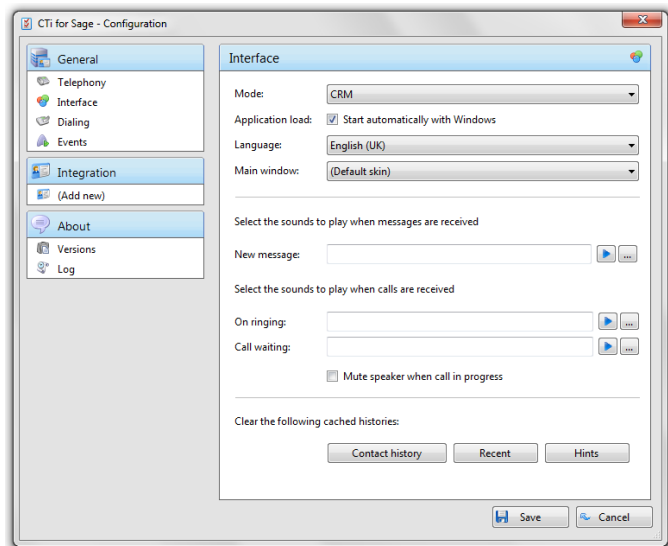
The final choice is the User mode. This allows Connect to support a number of different operations. Most users log in to their PC as a name (or username) that is the same, or similar to their own name. Or in other words, they log in as a name that uniquely identifies them. Connect can take advantage of this to associate this user name with the extension that the user is logging in as. This behavior, of associating the user and the extension number, gives Connect some powerful functionality such as "hotdesking" where other others can reach you, by name, even if you temporarily use another PC. If you like this functionality, but don't use "unique" usernames (i.e. you log into your PC as something like "user" or "technician") then you can still use it by manually declaring your username and password on the User tab. (Your administrator will have to create a user on the telephony server for you first). Finally, if you want to be completely anonymous as a user on your network, then you can choose not to log in. Be careful if you use this, though, because there are some features in the software that require a logged in user to work.

Interface settings

The Interface page allows you to change settings relating to the look and feel of the software, including actions that happen when calls take place.

To have the software start automatically when you log on to Windows, put a tick in the tickbox. The setting will take effect next time you log on to Windows.

Language packs are available for the software to change the language of the user interface. By default, the software will attempt to automatically select the language to use based on the language setting of your operating system. However, you can change the language used by selecting from the Language dropdown list. If your language is not in the list, contact your reseller to find out when it will be available. Any changes you make to the language will take effect next time you start the software.



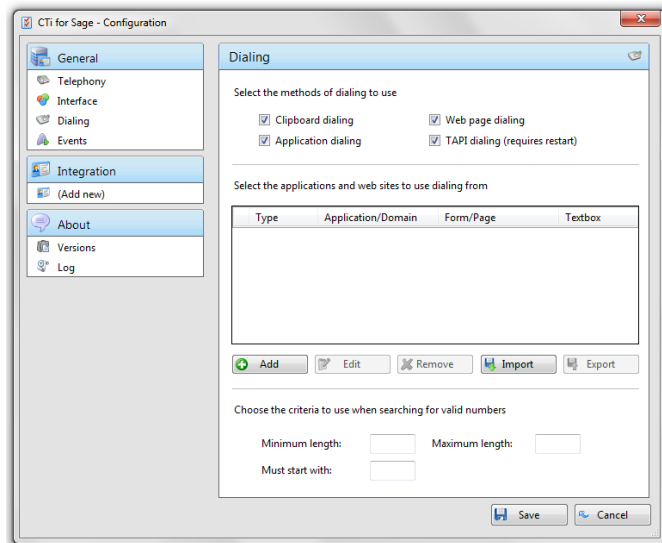
By default, many of the software's windows have a "skin" to make them look nice. Your reseller may have added their custom branding to the skin too. If you find that you don't like the "skinned" windows, perhaps for accessibility reasons, you can turn them off by selecting "No skin" from the Phone window dropdown. The next time you load the software, the windows will all be standard Windows-style windows using the theme from your operating system.

The next section on the Interface page allows you to choose a sound to have your computer play when your phone is ringing and/or you have a call waiting. This can help you to uniquely identify that it is your phone that is ringing and not a colleague's. You can also tick the box to have your computer's sound automatically muted whenever a call is in progress, which is useful if you listen to music or Internet radio while you work, giving you a more professional appearance.

The last section of the Interface page has buttons you can press to quickly and securely clear the history of contact history, recent numbers (as shown in the Recent list), and which hints the software has shown you (clearing hint history allows the software to show you the hints again).

Dialing settings

This page allows you to turn on and off dialing from all the different types of application that the software supports. As a review, the different methods of dialing are: Clipboard dialing (where you copy a telephone number to the clipboard and the software detects it), Web page dialing (where the software automatically scans web pages in Internet Explorer and converts anything that looks like a telephone number into a clickable hyperlink and adds new buttons next to telephone number fields that you have told it about), Application dialing (where the software adds new Dial buttons to applications that you have told it about), and TAPI dialing (where any application that supports Microsoft TAPI can dial through Go Connect).



Any applications or webpages that you have told the software to add Dial buttons to appear in the table, click Add to launch the wizard (described earlier in this document) that allows you to add a new application to the table. You can use the Edit and Remove buttons to correct any mistakes you have made. If you have set up some applications that you dial from and are now moving PC, or want to give the settings to another user, you can use the Export button to export the dialing settings of the applications and webpages that you have set up and save them in a single file named “dial.settings”. If you have a “dial.settings” file and want to add the settings from it to your software, you use the Import button.

The last section on this page allows you to define what telephone numbers look like, to help the software more accurately determine whether a string of numbers it sees in a webpage or on the clipboard is really a telephone number or not. You can tell the software the minimum and maximum length of telephone numbers (anything outside the range will be disregarded as not a real telephone number), and you can also specify that telephone numbers must begin with a certain string of characters.

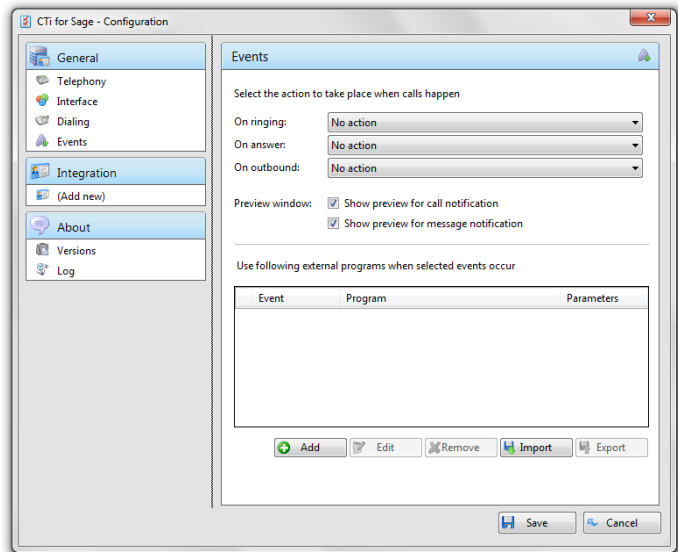
Events settings

You can make the software either show the Phone window or pop the contact when certain events happen. Just select the relevant action from the relevant dropdown list: On ringing, On answer, or On outbound. You can also turn on or off the unobtrusive Preview window for all calls by ticking or clearing the box.

The software can also be configured to run one or more custom executable on selected events. To configure this, press the Add button and configure the following information: The Event list is used to select the event on which to run the program. The Program box allows you to select which executable to run. This box should be left blank to load an internet browser.

The Parameters box allows you to either choose the “command line arguments” for the program, or in the case of a browser, the URL to load. When using a URL, make sure that you include the URI scheme (ie HTTP://). Then you can include in the Parameters any number of values from the call. For instance, to output the caller’s telephone number you can include %Call\CallerContact\Tel%. To use the telephone number of the remote party (as opposed to the caller, who may be the local user), you can use the syntax %Call>Contact\Tel%, or you can use %Call>Contact\DisplayTel% to get the formatted number.

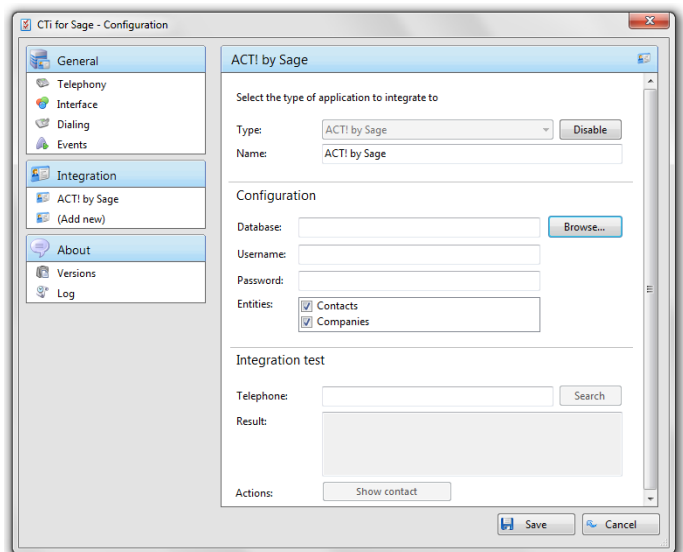
Finally, to help testing, you can use the word Message Box in the Program entry, if you want to show a message box with the translated Parameter output.



Integration settings

The Integration pages allow you to see and modify the databases that you have set up integration with. Integration means the database will be searched when calls happen to convert telephone numbers into names; and the database will be searchable manually from the Address Book window; and contacts that are found in the database can be “popped”.

To make a new integration, click the (Add new) item, select the type of database from the dropdown list, and click Set (the first



time you enter this screen you may have to wait a few seconds as the software scans to find out what integrations are available).

To modify an existing database that you have set up, click its name in the list. You can also click its name and then click Delete if you no longer want integration to that database.

The Integration test area allows you to test the settings you have entered by entering a telephone number and seeing if the software can find it. If the number is found, you can click the Show contact button to make sure that “popping” works.

When you are done, click Save. The new integration will be available immediately.

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