

Gigaset proCTI

Pre-Sales Presentation

Version 2.5

This is a pre-sales presentation for Gigaset Pro CTI.

In this presentation, we provide a brief overview of the Gigaset Pro CTI portfolio of products and then provide detailed information on the various licensing options of each of the individual components, together with some pricing examples.

Gigaset Pro CTI “Pre-Sales” Presentation

- For reseller sales personnel
 - Specifications
 - Component Licensing
 - Installation Services
 - Pricing examples



This presentation is aimed at reseller sales personnel to provide a good understanding of Gigaset Pro CTI, its various architectural options and its hardware and software specifications. As well as outlining the licensing options, we also provide some sample pricing and introduce and explain the various installation services that are available.

The separate “sales” presentation is a pre-requisite to this pre-sales presentation as it provides much more detail on Gigaset Pro CTI and its various components

Gigaset proCTI

Product Overview

OK, let's start with a brief high-level re-cap on Gigaset Pro CTI...

Gigaset Pro CTI

- A multi-platform CTI product.
- Designed to help users make optimal use of their telephone system.
 - Full control of their handset from their computer
 - Integration with a wide range of CRMs and other applications.

Gigaset Pro CTI is a multi-platform CTI product that has been designed to help your users get the optimal use from their telephone system.

Gigaset Pro CTI allows the user to have full control of their handset from their computer, and to integrate into a wide range of CRMs and other applications.

The Benefits of Gigaset Pro CTI

- Know who is calling (*before* the call is answered).
- Quick access to the caller's full details.
- Improves call handling and the caller's experience.
- Find contacts quickly from "recent dial" and "call history" lists.
- Store regular contacts in a shared address book.
- Locate and dial contacts from CRM databases and other integrated applications.
- Improve collaboration between users.



One of the key benefits of Gigaset Pro CTI is that it can noticeably improve the productivity of the telephone system's users.

With Gigaset Pro CTI, users can see who is calling them before they pick up the phone, and they can quickly access the caller's contact details. This helps to improve the handling of inbound calls and also the caller's overall experience when dealing with the company.

Details of regular contacts can be stored on a central shared address book, or they can be accessed from an existing CRM system or other application. Click-to-dial facilities within these applications can significantly speed up the outbound dialling process.

The "recent dial" and "dial history" lists contain details of contacts that have most recently been spoken to, again offering a quick and easy way to locate (and click-to-dial) the required number for an outbound call.

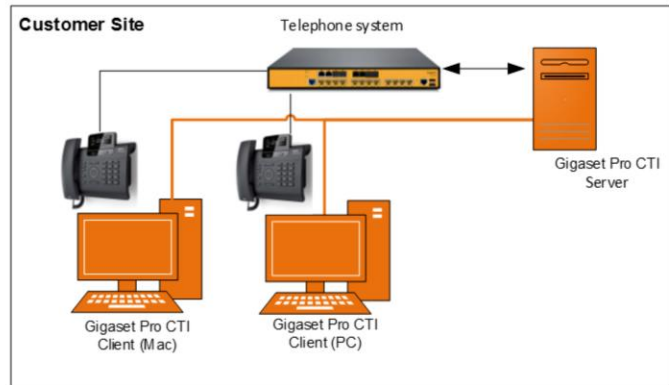
Gigaset Pro CTI also helps to improve the collaboration of (and communication between) users of the telephone system.

Product Architecture

Server–PBX connection. Asterisk Manager Interface (AMI) over an IP connection.

Client–Server connection. IP connection.

Handset–PBX connection. Normal connection of digital or IP handset to the PBX.



Gigaset Pro CTI is based around 2 core components.

The Gigaset Pro CTI Server is a centralised server, which is connected to the Telephone System via Asterisk Manager Interface (AMI) over IP, and on which all of the licensing is stored and maintained (as well as user administration, system configuration and the shared address book).

Each PC or Mac user has the Gigaset Pro CTI Client installed on their machine, which connects to the Gigaset Pro CTI server over IP. The client software requests either the "Connect" or "Connect Plus" functionality via the licensing request to the server.

SPECIFICATIONS

The Gigaset Pro CTI Server and desktop clients have specification requirements. These requirements are fully documented on the Gigaset Pro CTI website, but are summarised in the following slides...



Server Specifications

Sizing Definitions

	"Small Single Site"	"Medium Multi-Site"	"Large Multi-Site"
Number of Sites	1	6	6
Trunks	30	150	300
Calls/hr	500	2000	4000
Ext/Users	50	400	1000

Notes:

- Please consult with us for sites larger than those specified.

The minimum specification for the Gigaset Pro CTI server is dependent on the size and number of phone systems that will be connected to it.

To assist with providing guideline specifications, here are three examples that we will use in the forthcoming slides.

- A "Small Single Site" is where there is only one phone system (site) connected to the Gigaset Pro CTI server. The phone system has up to 30 trunks, handling up to 500 calls per hour with up to 50 users and extensions.
- A "Medium Multi-Site" is where there are up to 6 separate phone systems connected to the Gigaset Pro CTI server. The phone systems have a combined 150 trunks, handling up to 2000 calls per hour with up to 400 users and extensions.
- A "Large Multi-Site" is where there are up to 6 separate phone systems connected to the Gigaset Pro CTI server. The phone systems have a combined 300 trunks, handling up to 4000 calls per hour with up to 1000 users and extensions.

Please contact us if you have a potential Gigaset Pro CTI installation that falls outside of these example definitions.



Server Specifications

Supported Operating Systems

	Small Single Site	Medium Multi-Site	Large Multi-Site
Windows Server 2008 R2	Yes	Yes	Yes
Windows Server 2012	Yes	Yes	Yes
Windows Server 2012 R2	Yes	Yes	Yes
Windows 10	Yes	Yes	Yes
Windows 8.1	Yes	Yes	Yes
Windows 7 (SP1)	Yes	Yes	No
	32 bit and 64 bit	32 bit and 64 bit	64 bit only

Notes:

- Virtual environments are supported (e.g. VMware, Hyper-V)
- A "small single site" server installation may co-exist with other applications on a shared server. However, if Integrated Telephony experiences any performance issues, a dedicated server should be used.

This slide shows the server operating systems that are supported by our three example Gigaset Pro CTI installations.

Note that Windows 7 (SP1) is not supported for the large multi-site installations.

Virtual environments (e.g. VMware, Hyper-V) are supported, and if it's a "small single site" server installation, this can generally co-exist on a shared server. However, if performance issues are experienced with the Integrated Telephony, a dedicated server should be used to host the Gigaset Pro CTI server.



Server Specifications

Server Hardware Requirements

	Small Single Site	Medium Multi-Site	Large Multi-Site
GB of Memory	2	3	4
GB of free hard drive	20	20	20

Notes:

- Network adapter connection to TCP/IP network (not wireless) required.
- Processor requirement should be as advised by Microsoft for the chosen server Operating System

This slide shows the minimum hardware requirements for the various types of Gigaset Pro CTI installation.

The Gigaset Pro CTI server must be connected to the TCP/IP network via an adapter (not wireless).

The processor requirement for the server should be determined by the Microsoft recommendation for the Operating System that is installed on the server.



Server Specifications

MS SQL – Minimum Requirements

Small Single Site	Medium Multi-Site	Large Multi-Site
<p>SQL Server Express 2008 R2 <i>(Recommended & shipped with software)</i></p> <p><i>SQL Server 2008 R2 also supported</i></p>	<p>SQL Server Express 2008 R2 <i>(Recommended & shipped with software)</i></p> <p><i>SQL Server 2008 R2 also supported</i></p>	<p>SQL Server 2008 R2 or SQL Server Express 2008 R2* <i>(Recommended & shipped with software)</i></p> <p><i>* If SQL Express is used, please note that call history would need to be restricted to 14 days</i></p>

The Gigaset Pro CTI server utilises an SQL database for storing various elements of data, including Call History and the Shared Address Book.

If SQL is not already installed on the server, SQL Server 2008 R2 Express will be installed as part of the Gigaset Pro CTI server installation process. If SQL is already installed, it will not be re-installed. Instead, a separate instance will be created for Gigaset Pro CTI.

SQL Server 2008 R2 can be optionally used instead of SQL Server Express.

On Large Multi-Site installations, please note that if SQL Server Express is used, the call history would need to be restricted to 14 days to limit the potentially large volumes of call history data.



Minimum Client Specifications (PC Client)

- 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

Supported Operating Systems

- Windows Server 2003 and 2008
- Windows Server 2012
- Windows 10 (Desktop Mode)
- Windows 8 (Desktop Mode)
- Windows Vista
- Windows 7
- 32 bit and 64 bit

. ...for the PC client.



Minimum Client Specifications (MAC Client)

- Mac with an Intel processor
- SVGA display
- 1 GB Memory
- 1 GB free hard drive space
- Network adapter connected to a TCP/IP network
- Keyboard and mouse

Supported Operating Systems

- OS X Version 10.7: "Lion"
- OS X Version 10.8: "Mountain Lion"
- OS X Version 10.9: "Maverick"
- OS X Version 10.10: "Yosemite"
- OS X Version 10.11: "El Capitan"
- 64bit processor

.. for the MAC client.

LICENSING

Having outlined the typical Gigaset Pro CTI environment, architecture and specifications, let's look now at the licensing of the individual components.

Licensing

- License types:

- PC Client – “Connect” and “Connect Plus”
- Mac Client – “Connect” and “Connect Plus”
- Gigaset Pro CTI Site
- Federation
- Remote Call Control (RCC) Gateway
- 1st Party TAPI client (PC Only)
- Software Assurance

Here is a summary slide showing all of the various components of Gigaset Pro CTI that can be licensed.

Gigaset Pro CTI Server

- All licenses are loaded and maintained on the Gigaset Pro CTI Server
- Licenses are consumed based on configuration of the server, or requests from associated components (e.g. PC and Mac Clients).



All of the licensing of Gigaset Pro CTI components is stored and maintained on the Gigaset Pro CTI Server. These licenses are “consumed” based on requests coming into the Server from those components.

Gigaset Pro CTI Desktop Clients

- Licenses are concurrent and purchased in user bundles .
- Same basic functionality across both client versions.
- **PC Client:** Available as “Connect” and “Connect Plus” versions. Both versions provide integration to Microsoft Outlook, Lotus Notes, Google Contacts, and National Directories (Sweden, Belgium, Switzerland).
- **Mac Client:** Available as “Connect” and “Connect Plus”. Both provide integration to Apple Address Book. The “pro” version includes integration to Salesforce.



The Gigaset Pro CTI desktop client is available in “Connect” and “Connect Plus” versions. The same basic functionality is available in both versions.

When a client connects to the Server it requests the required access and licensing. Licenses are purchased in user packs and controlled concurrently by the Gigaset Pro CTI server – a 10 user license pack allows 10 users to be connected to the server at any given time.

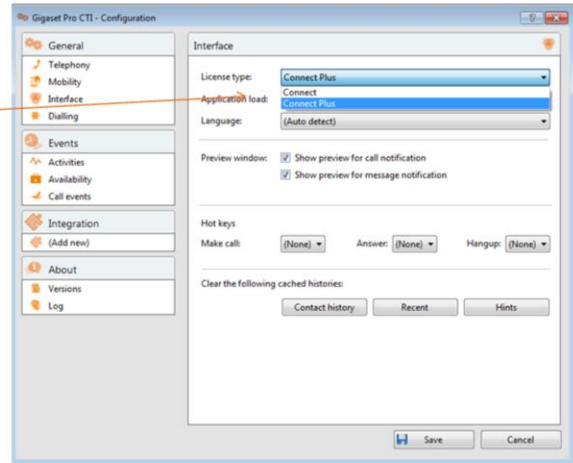
In the PC client, all versions provide integration to Microsoft Outlook, Lotus Notes, Google Contacts and National Directories (Sweden, Belgium, Switzerland).

The “Connect Plus” version includes integration to CRM systems and other applications and databases.

In the Mac client, both the “Connect” and “Connect Plus” versions include integration support for the Apple Address Book, while the “Connect Plus” version also includes support for Salesforce.

Desktop Client

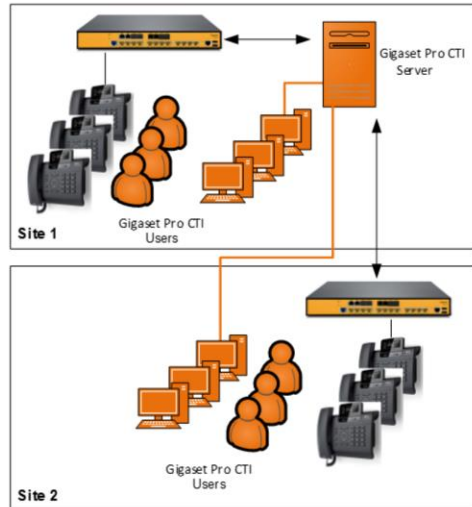
- When the client loads, it checks server for available license types.
- The license type that will be requested from the server is set in the client configuration



When a user's desktop client loads and connects to the Gigaset Pro CTI server, a setting in the client configuration determines whether the "Connect" or "Connect Plus" functionality will be requested.

Gigaset Pro CTI Site

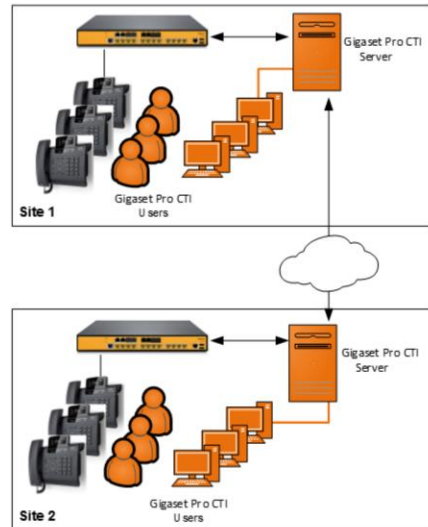
- Allows a single Gigaset Pro CTI server to be shared by up to 6 telephone systems.
- Each additional phone system requires a Gigaset Pro CTI Site License.



Gigaset Pro CTI Site allows a single Gigaset Pro CTI Server to be connected to up to 6 telephone systems. Each additional PBX (after the first one) requires a Gigaset Pro CTI Site license.

Federation

- Integration of up to 6 Gigaset Pro CTI servers.
- Similar user experience to Gigaset Pro CTI Site (e.g. shared features).
- Better suited to environments where a lower quality network connectivity exists between the various sites.
- A federation license is required for each Gigaset Pro CTI server participating in the Federation.



As an alternative to Gigaset Pro CTI Site, up to 6 Gigaset Pro CTI servers can be interconnected (or “federated”) allowing geographically separate sites to share Gigaset Pro CTI facilities, such as user presence and chat data.

Federation of Gigaset Pro CTI servers provides a very similar end user experience to the Gigaset Pro CTI Site solution, but federation is better suited to environments where a lower quality of network connectivity exists between the various sites.

Federated licenses are required for all sites participating in the federation, and in this environment users can only consume licenses from their local server.

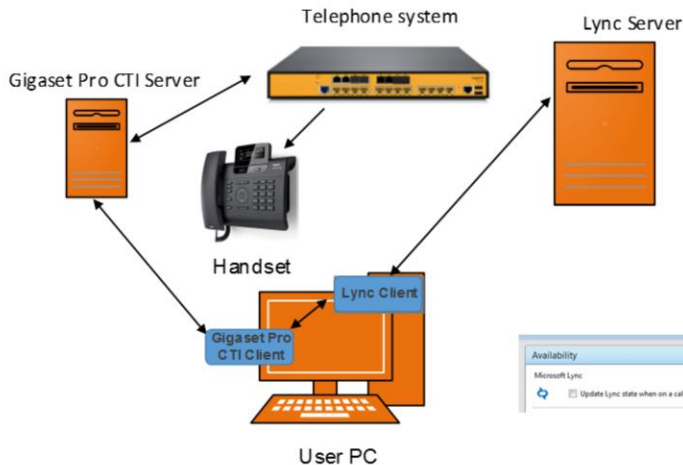
Gigaset Pro CTI and Microsoft Lync

- The Gigaset Pro CTI client allows the user to dial directly from their Lync client.
- The user can also optionally update their Lync status based on the status of their handset (e.g. “in a call” or “dnd”).



The Gigaset Pro CTI client allows the user to dial directly from their Lync client, and also optionally update their Lync status based on the status of their handset (e.g. “in a call” or “dnd”).

Gigaset Pro CTI Client



Platforms

- Premise-Based Lync Server 2013
- Office 365
- Any hosted variant

Licensing

- Any Lync CAL (Per User)
- Any Gigaset Pro CTI Client (Per user)

Call Control	
Answer handset?	From Gigaset Pro CTI Preview pop-up
Make a call?	From Gigaset Pro CTI or Lync client *
Call forward?	From Gigaset Pro CTI Client
Call transfer?	From Gigaset Pro CTI Client
* Users of Lync 2013 (and Office 365 versions of Lync) can make calls on their handset directly from the Lync client via "Call using desk phone". This feature does not require RCC Gateway and is enabled automatically.	

Status Update	
Set Lync client status to "in a call"	When handset makes or receives a call
Set Lync client status to "do not disturb"	When handset goes to DND

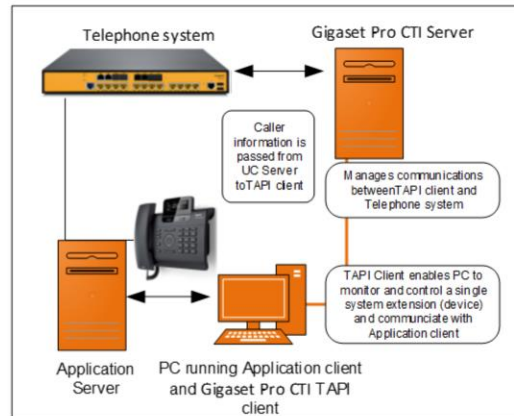
Two areas of Lync interaction are available through the Gigaset Pro CTI PC client when it is installed on a PC that is also running the Lync client.

Although most of the call control is done through the Gigaset Pro CTI client, the Lync user can make calls either from the Gigaset Pro CTI client, or using the "Call using deskphone" option within the Lync client.

And if the "Update Lync state when on a call" option is checked in the Gigaset Pro CTI PC client configuration, the Lync client's status will be automatically set to "in a call" when the handset makes or receives a call, or "do not disturb" when the handset goes to DND.

1st Party TAPI Driver

- If just “TAPI dialling” is required, additional TAPI licensing is not needed (included in Gigaset Pro CTI). *
- 1st Party TAPI Driver provides integration to a range of TAPI compliant applications **.
- The “client side” driver installs on user’s PC, and does not require a Gigaset Pro CTI client to be installed, but *does* require a connection to the Gigaset Pro CTI server.
- A license is required for each TAPI application (before purchasing a TAPI Driver license, check that the TAPI application is supported.)



* PC client only (not MAC)

** Other proprietary APIs available for connection to named applications

TAPI dialling is a standard feature in the Gigaset Pro CTI PC clients, so if just TAPI dialling is required, no additional TAPI-related licensing is necessary.

However, if full control of the desk phone in a supported and tested TAPI application is required, a Gigaset Pro CTI 1st Party TAPI Driver is needed.

The “client side” driver installs on the user’s PC, and all functionality is then provided via the TAPI application itself, and no additional Gigaset Pro CTI licensing is required.

A 1st Party TAPI client license is required for each separate TAPI application to be supported. Before purchasing a TAPI Driver license, it is important to check that the TAPI application is supported.

Note: Other proprietary APIs are available for connection to named applications.

Software Assurance

- Access to upgrades and Technical Support.
- Without Software Assurance, major and minor upgrades can no longer be completed.
 - **Major** upgrade example: 2.5 to 3.0
 - **Minor** upgrade example: 2.4.2 to 2.5.0
- Iteration updates do not require S.A.
 - **Iteration** update example: 2.5.1 to 2.5.2
- The Software Assurance license is installed on the Gigaset Pro CTI Server.
- 12 months of Software Assurance is included with each new order

Note: To re-instate lapsed software assurance the period of lapsed cover is charged at normal rates plus a re-instatement fee



As described in the separate Sales presentation, Software Assurance helps users of Gigaset Pro CTI products to achieve a maximum return on their investment by receiving upgrades to the software and new functionality, and access to the Technical Support team for ongoing support and assistance.

When a customer subscribes to Software Assurance, a license is installed alongside all the other component licensing on the Gigaset Pro CTI Server.

With the Software Assurance in place, the customer will receive both major and minor upgrades to their licensed products.

Customers who choose not to take up the Software Assurance will not receive these upgrades, although they will be entitled to receive iteration updates.

INSTALLATION SERVICES

Various installation services are available, some of which are optional, others are mandatory depending on the environment being deployed



Installation Services

- **“Remote Installation”**

- Remote telephone support for resellers’ engineers attending site to install and configure Gigaset Pro CTI.

- ❑ **GS-MAN-0001-PRI00LE** For a new customer. A first-time, remote installation of Gigaset Pro CTI Server and 2 clients.

- ❑ **GS-MAN-0001-PRA10E**. For a new customer. A first-time, remote installation of Gigaset Pro CTI Server and 2 clients, plus configuration of the Gigaset Pro CTI client plug-in/middleware on the two clients.

- ❑ **GS-MAN-0001-PRA20E**. For an existing customer with a Gigaset Pro CTI server and some clients already installed. A remote installation and configuration of the Gigaset Pro CTI client plug-in/middleware on two of the already installed clients.

- Installations are bracketed by remote pre- and post-checks

The “Remote Installation” services are designed to provide support to a reseller’s engineer who is attending a client site to install and configure Gigaset Pro CTI.

The “On Site Installation” service, which is available only for clients based in the UK, involves a technical support person visiting the client site to carry out the installation and deployment of a reasonable number of PCs, typically 2-15, depending on the environment.

Both installation types are accompanied by pre-installation and post-installation checks, which are done remotely.

Ordering & Pre-Requisites

- Order through Channel.
- The installation of the telephone system should be completed prior to installing any Gigaset Pro CTI components.
- A competent on site IT resource should be available for both installation types.
- The “installation preparation” pack must be completed prior to all installations.
- Remote Installation *must* be quoted for the following -
 - Advanced application integration
 - Gigaset Pro CTI Site and Federation
 - TAPI integration

The “Remote” and “On Site” installation services can be ordered through the Gigaset Pro CTI Channel.

An installation preparation pack has to be completed prior to all installations, and the installation and configuration of the telephone system should be fully completed and tested before starting the installation of Gigaset Pro CTI components.

An IT competent representative of the reseller or the client should be available on site during both the “remote” and “on site” installations.

In most cases the installation services are optional, but remote installation must *always* be quoted if the Gigaset Pro CTI environment being created includes advanced application integration, Gigaset Pro CTI Site or Federation, or installation of the TAPI client.

PRICING EXAMPLES

Having looked at the licensing options, let's look now at preparing quotes and some illustrative pricing examples...

Preparing a Gigaset Pro CTI Quote

- Common questions –

- How many desktop users will require access to Gigaset Pro CTI?
- Which desktop application(s) do they want to integrate with, and how many users (i.e. pro licences) for each application?
- Will the presence and chat features need to be shared across users on multiple connected telephone systems?

Preparing a Gigaset Pro CTI quote for a customer or prospect is quite easy. The details you'll need are:

- How many users in total?
- What CRM(s) and other application(s) would they like to integrate with, and how many users will require the Gigaset Pro CTI integration to these applications?
- Is this a multi-site environment, and will the users need to use presence and chat across the multiple sites?

NOTE: Always include Software Assurance in your quotes, and remember that they get 2 years for the price of one year when they purchase it at the same time as the component licenses.

Let's look at some quote examples...

Example 1

- The prospect is looking to purchase one Gigaset Pro telephone system
 - ✓ They want basic functionality (call control and presence) for 15 users.
(“Connect” client license).
 - ✓ All 15 users need integration with Microsoft Outlook.
(This is also included in the “Connect” client license).

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Example 1

Qty	Part Number	Description	Unit Cost	Total
15	GS-EXP-0001-PXX0BE	Gigaset Pro CTI Connect for PC single user (5-24 users)	€36.00	€540.00
				€ 540.00

...

Example 2

- The prospect is looking to purchase one Gigaset Pro telephone system
 - ✓ 45 users in total, all requiring basic functionality (call handling, chat and presence).
 - ✓ All 45 users require Microsoft® Outlook integration.
 - ✓ 15 of the 45 users also need full integration into Salesforce.

30 "Connect" client licenses (for the users requiring only Outlook integration)

15 "Connect Plus" licenses required (for the users requiring Outlook and Salesforce integration)

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Example 2

Qty	Part Number	Description	Unit Cost	Total
30	GS-EXP-0001-PXX0CE	Gigaset Pro CTI Connect for PC single user (25-49 users)	€28.00	€840.00
15	GS-CRM-0001-PXX0AE	Gigaset Pro CTI Connect Plus for PC single user (< 25 users)	€100.00	€1,500.00
				€ 2,340.00

...

Example 3

- The customer has two Gigaset Pro telephone systems. (1 Gigaset Pro CTI Site License required for 2nd PBX)
 - ✓ 50 users in total across the two sites
 - ✓ 15 users just require basic call control and presence on their PC desktops.
(15 "Connect" licenses required)
 - ✓ 30 users in the internal sales team require integration with Sugar CRM
(30 "Connect Plus" client licenses required)
 - ✓ 5 users in the accounts team require integration with Microsoft Dynamics NAV.
(5 "Connect Plus" client licenses required)

"Connect" (15), "Connect Plus" (35), = 50

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Example 3

Qty	Part Number	Description	Unit Cost	Total
1	GS-SIT-0001-PXX00E	Gigaset Pro CTI Site (Add for each additional site (PBX) added to server)	€550.00	€550.00
15	GS-EXP-0001-PXX0BE	Gigaset Pro CTI Connect for PC single user (5-24 users)	€36.00	€540.00
35	GS-CRM-0001-PXX0BE	Gigaset Pro CTI Connect Plus for PC single user (25-49 users)	€90.00	€3,150.00
				€ 4,240.00

...

Example 4

- The customer has one Gigaset Pro telephone system.
 - ✓ 75 users in total
 - ✓ 45 of the users requiring basic functionality and Microsoft® Outlook.
(45 "Connect" client licenses required)
 - ✓ The remaining 30 users require some of the advanced functionality (e.g. Availability-based Actions and Preferred Device).
(This is also included in the "Connect" client license).

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Example 4

Qty	Part Number	Description	Unit Cost	Total
75	GS-EXP-0001-PXX0BE	Gigaset Pro CTI Connect for PC single user (75-99 users)	€20.00	€1,500.00
				€ 1,500.00

...

Example 5

- The customer has four Gigaset Pro telephone systems. (3 Gigaset Pro CTI Site Licenses required for 2nd 3rd 4th PBX)
 - ✓ 175 users in total
 - ✓ 50 in Administration need the Preferred Device functionality (Included in "Connect" license).
 - ✓ 50 in the Customer Services team need integration with Saleslogix. (50 "Connect Plus" licenses).
 - ✓ 25 in the Accounts team want to integrate with Microsoft Dynamics NAV (25 "Connect Plus" licenses).
 - ✓ All of the above users require Lotus Notes integration (Included in "Connect" license)
 - ✓ Remaining 50 just require dialling and presence on their PC desktops. (Included in "Connect" license).

"Connect" (100), "Connect Plus" (75), = 175

...

Example 5

Qty	Part Number	Description	Unit Cost	Total
3	GS-SIT-0001-PXX00E	Gigaset Pro CTI Site (Add for each additional site (PBX) added to server)	€550.00	€1,650.00
100	GS-EXP-0001-PXX0FE	Gigaset Pro CTI Connect for PC single user (100+ users)	€12.00	€1,200.00
75	GS-CRM-0001-PXX0DE	Gigaset Pro CTI Connect Plus for PC single user (75-99 users)	€80.00	€6,000.00
				€ 8,850.00

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Quoting Tips...

- The key is to start with the specifics of the functions that they require – e.g. “call control”, “chat”, “presence”, and also the applications into which they want to integrate – e.g. Outlook and CRM systems.
- The basic “Connect” license is feature rich and provides excellent functionality for most organisations at a very affordable price, so –

Quote Gigaset Pro CTI with every Telephone System!

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Thank You