Gigaset pro CTI

Sales Presentation
Version 2.5

This is a sales presentation for 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.

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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 phone system 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.

As we will demonstrate throughout this presentation, Gigaset Pro CTI also helps to improve the collaboration of (and communication between) users.
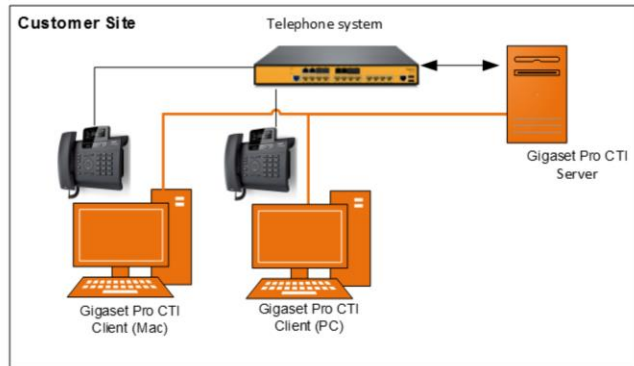
Product Architecture

Ok, let's start the main presentation now by looking at the architecture of Gigaset Pro CTI.

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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.

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PC Client

Let's begin with the PC Client…

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PC Client

- Available as "Connect" and "Connect Plus".
- Same basic functionality available in both versions, including integration with Microsoft Outlook, Lotus Notes, Google Contacts, and National Directories (Sweden, Belgium, Switzerland).
- The "Connect Plus" version includes integration to supported applications.
- PC client interfaces include: System tray menu, Preview window, Phone Window, Presence window...

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Control your **phone**
from your **computer**

BECAUSE IT'S YOUR BUSINESS

The PC client has the same basic functionality across the "Connect" and "Connect Plus" versions.
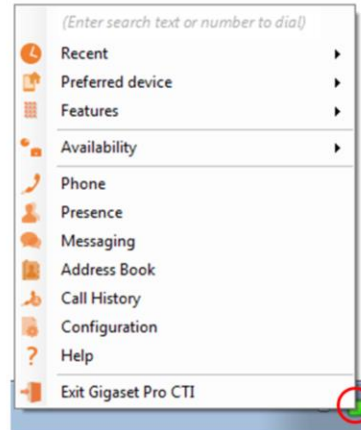
Both versions offer integration as standard into Microsoft Outlook, Lotus Notes, National Directories (Sweden, Belgium and Switzerland) and Google Contacts.

The "Connect Plus" version offers integration into a wide range of other CRM systems and applications.

Once installed and running, the PC client provides functionality through several different windows.

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System Tray Menu
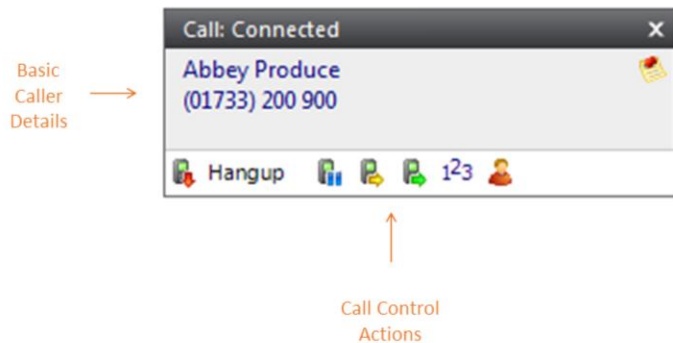
- Right-click on the application icon in the system tray.

	(Enter search text or number to dial)	
🕐	Recent	▶
📱	Preferred device	▶
▦	Features	▶
📞	Availability	▶
📞	Phone	
👤	Presence	
💬	Messaging	
📖	Address Book	
⏱	Call History	
📄	Configuration	
?	Help	
◀	Exit Gigaset Pro CTI	

The primary access for features and configuration of the PC Client is through the System Tray menu, which is accessed via a discrete icon.

All of the main functions of the client are available through this menu, and we'll be looking at most of them as we work through this presentation.

PC Client: Preview Window

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Preview Window

- Compact and unobtrusive.
- Appears on inbound/outbound calls.
- Disappears shortly after call connects (hover mouse over the system tray icon to recall it)

Basic Caller Details →

Call: Connected

Abbey Produce
(01733) 200 900

Hangup · · · 123 ·

Call Control Actions

The most commonly used interface within the PC Client is the "Preview" Window, which is displayed whenever an inbound or outbound call is ringing. It automatically disappears shortly after the call has connected, but can be re-displayed again at any time during the call simply by hovering over the system tray icon.

The compact Preview window has been specifically designed to be as unobtrusive as possible. It displays all the basic caller details together with icons for accessing all the main Gigaset Pro CTI call controls, but without taking up a large proportion of the user's screen or obscuring the screen(s) of other running applications.

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Preview Window (Positioning)

- Can be re-positioned into any of the four quarters of the screen.

- Simply drag-and-drop into the desired screen quarter and the position will be remembered.

- The eventual positioning will always be in the far extreme corner of the quarter
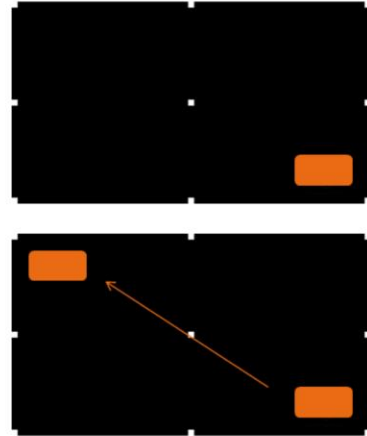
The Preview window can be re-positioned into any of the four quarters of the screen by simply dragging-and-dropping it into the desired screen quarter – the position will be remembered the next time the Preview window is displayed.

The eventual positioning of the Preview screen will always be in the far extreme corner of the quarter.

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Phone Window

- Click Preview window to reveal the larger Phone Window.

- Same actions available to control inbound/outbound calls.

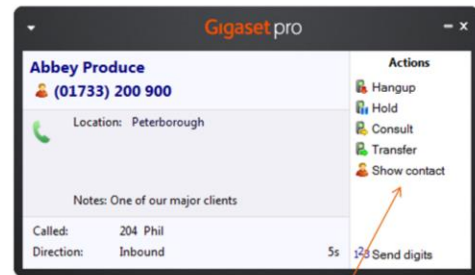- View caller contact information and notes.
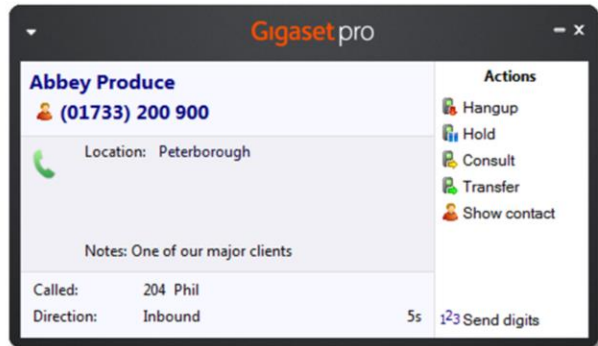
The larger "Phone" Window can be accessed either from the "Phone" option on the System Tray menu, or simply by double-clicking the system tray icon.

This window contains many of the same caller details and call control options as the Preview Window and is usually used by beginner users as they first start to become familiar with the Gigaset Pro CTI client and its features. More experienced users tend to use the Preview window.

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Call Controls

- Actions vary if the call is connected or not -

  ➤ **Hangup**

  ➤ **Hold** (pause the call, user can hear "hold" music)

  ➤ **Consult** (speak to person you are transferring the call to)

  ➤ **Transfer** (transfer call to someone else without first speaking to them)

  ➤ **Show Contact** ("pop" the contact details if they are in the shared address book).

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Abbey Produce
👤 (01733) 200 900

Location: Peterborough

Notes: One of our major clients

Called:	204 Phil	
Direction:	Inbound	5s

Actions
- Hangup
- Hold
- Consult
- Transfer
- Show contact

123 Send digits

Optional integration into other applications.

See "Application Integration" later.

The call controls displayed in the Phone and Preview windows will be dependent on whether the call is connected or not.

For example, while the call is ringing, you have the option of either answering the call or deflecting it off to another extension.

Once the call is connected, you have access to the usual call controls (hangup, hold, consult, transfer) which are represented by icons on the Preview Window, or by icons and text labels if you are using the larger Phone Window.

If the caller has been located in the shared address book, you can "pop" their full details into a separate window via the "show contact" link.

If the caller's details have been matched to a record in an integrated application, the icon for that application will appear in the Preview or Phone window, and clicking on the icon will locate and display the caller's record within the integrated application.

PC Client: Shared Address Book

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Shared Address Book

- Stored in a shared central location for access by all Gigaset Pro CTI users.
- Create, edit and delete details of regularly used contacts.
- When talking to a known contact, click "Show Contact" to view their contact record.
- If they are not in the address book, click "New Contact" to add their details while on the call.
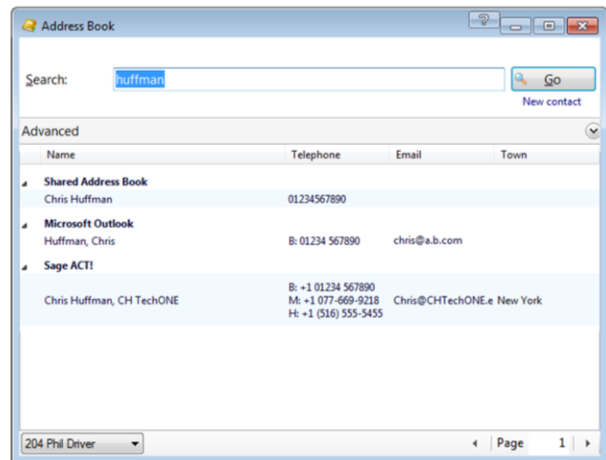- Or you can add contacts afterwards via call history.
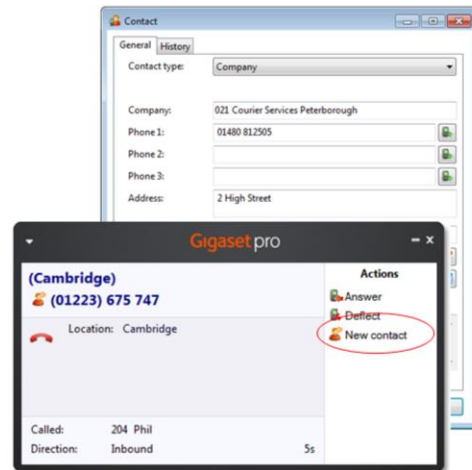
A standard feature within Gigaset Pro CTI is the shared Address Book, which can be used to store the details of regular contacts. This feature is particularly useful for organisations that do not currently use a CRM application or other shared contact database.

The "new contact" link allows the user to add a new unknown contact into the Address Book while they are talking to them. Alternatively, the caller can later be located in either the "recent" or "history" lists and quickly added to the address book after the call has completed.

As we will see later, a user's ability to read, edit and add contacts within in the Address Book is controlled via permissions set in the server/user configuration.

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Contact Searching

- Easy searching for contacts in the shared address book.

- Both versions of the PC client can also search MS Outlook, Lotus Notes and Google Contacts (and some national directories)

- The "Connect Plus" version can also search for contacts in any integrated CRM databases or applications (See "Application Integration" later).

- Once a contact is found, just click the required number to dial.

Address Book

| Search: | huffman | | | Go |
| | | | | New contact |

Advanced

Name	Telephone	Email	Town
Shared Address Book			
Chris Huffman	01234567890		
Microsoft Outlook			
Huffman, Chris	B: 01234 567890	chris@a.b.com	
Sage ACT!			
Chris Huffman, CH TechONE	B: +1 01234 567890 M: +1 077-669-9218 H: +1 (516) 555-5455	Chris@CHTechONE.e	New York

204 Phil Driver ▾   ◀ Page   1 ▶

Searching for contacts within the Address Book is a quick and easy process, and is combined with a simultaneous search for a match in Microsoft Outlook, Lotus Notes or Google Contacts if configured to do so.

If the "Connect Plus" version of the client is being used, the search will also extend to any integrated CRM application or other contact databases.

Once located via the search, the contact's full details can be displayed, they can be dialled with a simple click on their phone number.

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Call Controls (from Address Book)
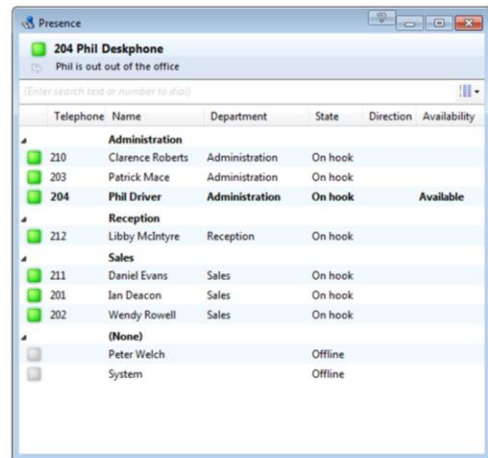
- "Consult" and "Transfer" call controls are now available directly from the address book.

- Just right-click on any name in the search results.
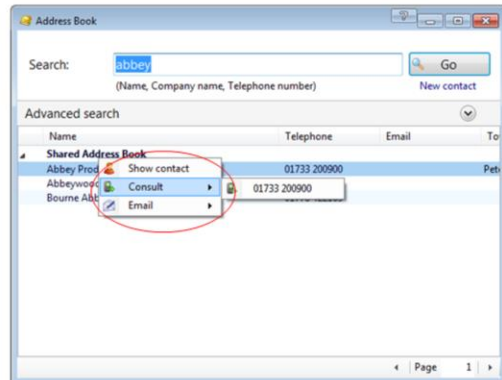
The "consult" and "transfer" call controls are available in the address book. Simply right-click on the contact's name in the address book search results.

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Presence

- Check status of colleagues in the Presence window.
- If they are "off hook", you can see who they are talking to.

		Presence				
	204 Phil Deskphone					
	Phil is out out of the office					
(Enter search text or number to dial)						
	Telephone	Name	Department	State	Direction	Availability
		Administration				
210		Clarence Roberts	Administration	On hook		
203		Patrick Mace	Administration	On hook		
204		**Phil Driver**	**Administration**	**On hook**		**Available**
		Reception				
212		Libby McIntyre	Reception	On hook		
		Sales				
211		Daniel Evans	Sales	On hook		
201		Ian Deacon	Sales	On hook		
202		Wendy Rowell	Sales	On hook		
		(None)				
		Peter Welch		Offline		
		System		Offline		

Another useful interface available in the PC Client is the Presence window, which is accessible from the System Tray menu (and Phone Window drop-down menu).

The Presence window is a fundamental element in the collaboration of Gigaset Pro CTI users. From here, you can see if a user's phone is free ("on hook") or if they are engaged on a call ("off hook"). If they are on a call, you can see who they are talking to.

The Presence window also allows you to see each user's current availability, which we will look at in a moment.

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Presence (Combined View)

- The "combined" view shows —
  - ➤ Users (square icon)
  - ➤ Extensions associated with users
  - ➤ Extensions *not* associated with users
  - ➤ Call Groups
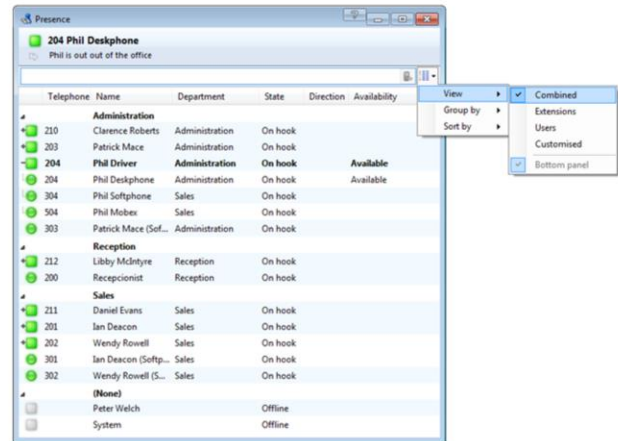
The Presence window has views for "Users" and "Extensions". There's also a "Combined" view, which shows users, extensions associated with users, extensions not associated with users (e.g. a meeting room) and also call groups.

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Presence (Multi-Device Users)

- A "+" sign next to a user indicates that multiple devices are associated with that user.
- Click the "+" to show the devices and their statuses.
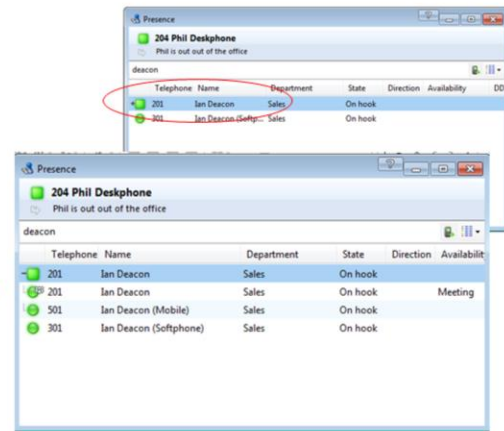
If a user is associated with multiple devices (e.g. deskphone and softphone), a "+" sign is shown next to their name. If you click on the "+" sign it will expand and show the status of the devices associated with that user.

Later on in this presentation we'll look at the "Preferred Device" feature.

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Presence (Docking)

- Available only on Windows 8 and 10 systems.

- The Presence window can be "docked" to the right-hand side of the user's primary monitor.

- Set the width when normalized...and then click the maximise button.

- When other applications are maximised, they fill the left-hand portion of the screen, up to the left edge of the docked presence window.
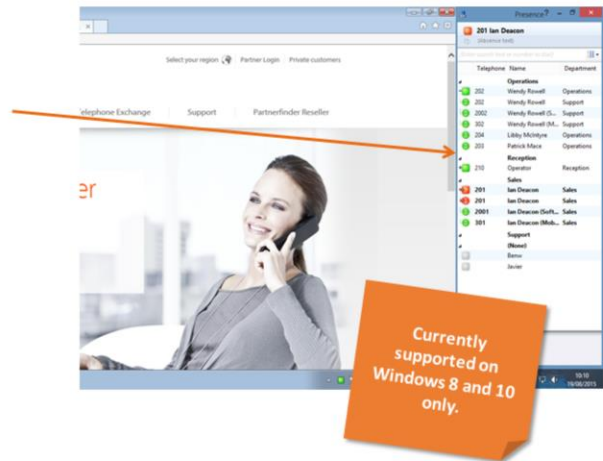
Currently supported on Windows 8 and 10 only.

On Windows 8 and 10 systems, the Presence window can be "docked" to the right-hand side of the user's primary monitor.

The docking is controlled by setting the width of the Presence window while it is normalised, and then simply clicking the maximise button. The docking will take place automatically.

With the Presence window docked, all other running applications that are maximised will fill the left-hand part of the user's primary monitor, right up to the left-hand edge of the docked Presence window.

Gigaset Pro CTI users can manually set their availability through the system tray menu.

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Availability (Activities)

- Availability can also now be changed *automatically* through Activities, and dependant upon external events -

  ❑ Online Meeting (GoToMeeting, Webex, TeamViewer, Skype call)

  ❑ Keyboard/mouse inactivity

  ❑ PC Locked

  ❑ Outlook or Google calendar event

- Automatically change the behaviour of handset (e.g. call forward, DND, Preferred device) when combined with Availability based actions – see later

Activities

Online meeting detection
▢ Detect meeting software

Inactivity detection
▢ Detect no activity on keyboard/mouse after: [10 minutes ▾]

Locked computer
▢ Availability state to select when screen is locked: [No change ▾]

Calendar integration
☑ Use calendar information to change availability
▢ Publish meeting subject as absence text

Microsoft Office presence
▢ Display other users' availability

[💾 Save] [Cancel]
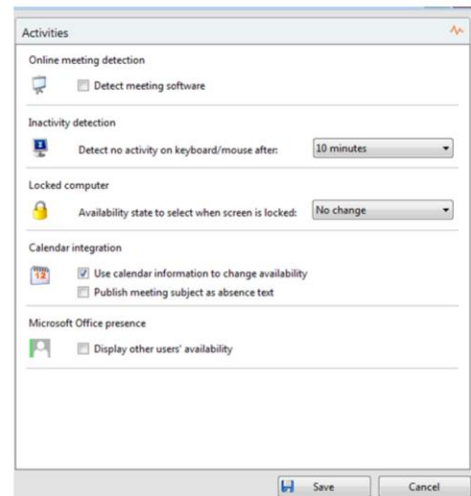
There are also some additional "auto-sense" states. These states are not set directly by the user, but are controlled by various new settings in the configuration of the user's client

For example, the user's Availability can also now be changed automatically through Activities, and dependant upon external events; e.g. Online Meeting (GoToMeeting, Webex, TeamViewer, Skype call), Keyboard/mouse inactivity, PC Locked, Outlook or Google calendar event.

The behaviour of the user's handset can be automatically changed (e.g. call forward, DND, Preferred device) when combined with Availability based actions – see later.

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Availability States – Outlook Calendar Mapping

- Outlook states map to Gigaset Pro CTI states as follows -

Outlook	Gigaset Pro CTI
Free	*Available*
Busy	*Meeting*
Tentative	*Meeting*
Working elsewhere	*Working away*
Out of office	*Not at work*
Outside working hours	*Outside working hours*

Gigaset Pro CTI maps its own status settings from those available within Outlook.

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Availability-based Actions

- Program actions, based on availability state.
- Action can be programmed for *entering* ("on enter") or *exiting* ("on exit") the availability state.
- Configured on the "Availability" page of EVENTS section
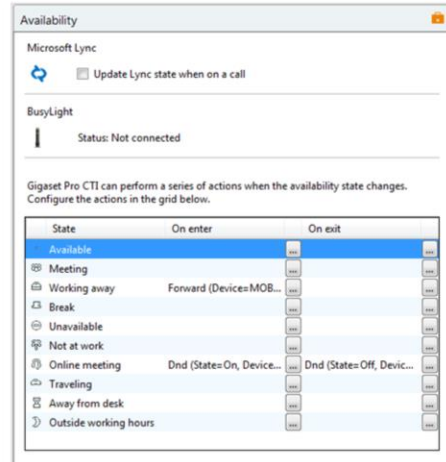
Users also have the option of using a feature called Availability-Based Actions, which allows them to pre-program actions based on a given availability state, and that action can take place when either entering or exiting that state.

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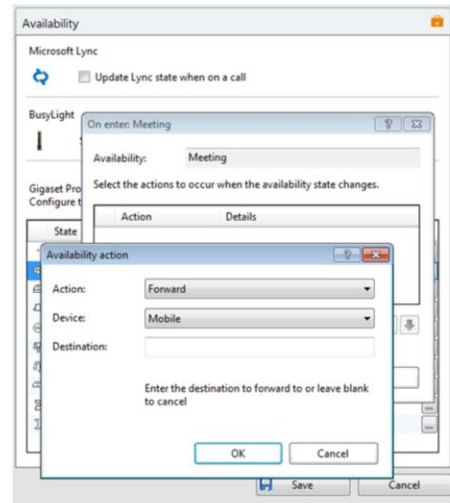
Having selected the required availability state that we want to program an action for, and then clicked on either the "on enter" or "on exit" button, we can then add in one or more actions.

Various types of actions are available, the behaviour of which can be configured according to context.

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Busylight Integration

- Kuando's Busylight is a USB-connected LED that visually indicates handset status.

- Gigaset Pro CTI now includes plug-and-play integration with Busylight.

- Now everyone in the office can see if you are available, busy on the phone, or simply do not wish to be disturbed...!

www.busylight.com

Gigaset Pro CTI	Busylight color
- Available (Not on a call)	Green
- Held	Fast flash yellow (250ms)
- Busy	Red
- Active Online meeting	Red
- Ringing	Flashing red (500ms)
- Do Not Disturb / Forward	Blue

And, while on the subject of users' availability, it's worth noting here as well that Gigaset Pro CTI includes plug-and-play integration with Kuando's Busylight – a USB-connected LED that visually indicates handset status.

Now everyone in the office can see if you are available, busy on the phone, or simply do not want to be disturbed..!

See the Busy Light website (www.busylight.com) for more details.

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Receiving Forwarded Calls

- Calls forwarded to you from a busy colleague will display the origin of the inbound call.

- See the identity of the caller (and who they originally wanted to speak to) before you answer the call.

- In our example –

  - ➢ Inbound call to Wendy Rowell on Ext. 202 has been forwarded to you.

  - ➢ The inbound caller's details are also displayed.

Call: Ringing
(Bedford)
(01234) 567 801
▸ 202 Wendy Rowell
Answer

The inbound caller's details

Who they wanted to speak to

If your colleagues are busy and are forwarding calls to you, the Preview window will display the details of both the inbound caller and also the extension and name of your colleague who forwarded the call to you.

This useful feature lets you know, *before you answer the call*, who the caller is, and who they originally wished to speak to.
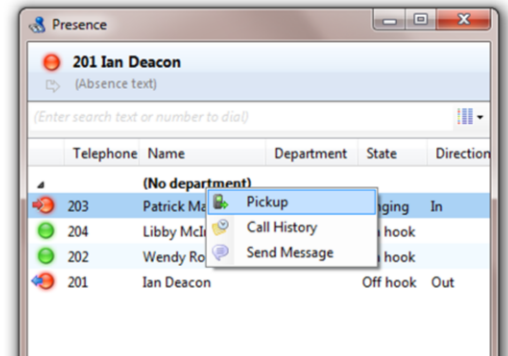
You also have the option to pickup calls ringing on a colleague's extension.

Aside from checking other users' availability, the Presence Window is also where users can go to pickup these calls.

If a colleague's desk phone is ringing, rather than walking over to their desk to pickup the call, and without having to use any special commands on their own desk phone, you can pickup the call by clicking on the colleague's name in the Presence Window and selecting the "Pickup" option.

You'll notice also from the same display that users can view their colleague's call history (more on that later in the presentation).

Gigaset Pro CTI users can also use the Presence display to send messages to other Gigaset Pro CTI users, perhaps after having picked up a call…

PC Client: Messaging

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Messaging

- The PC client also includes an integrated messaging window.

- Multiple windows are supported (one per conversation).

- Send a message to one or more of your colleagues.

- Rich text and hyperlinks are supported in the messages.

- Messages are displayed as a pop-up via the recipient's client.
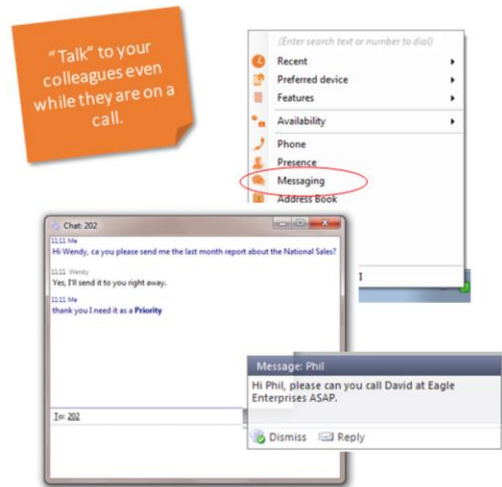
The messaging facility is also available from several other places too, including the System Tray menu.

Multiple message/chat sessions can be running at once, and users can send their messages to one or more recipients. The messages themselves can be properly formatted using rich text, and they can contain hyperlinks if required.

This messaging facility makes it easy to "talk" to colleagues even when they are on the phone.

When a user receives a message, a discrete Message window pops up (similar to the Preview Window) and from here the user can read the message and optionally send a response back to the message sender.

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Email (via Presence)

- You can also send emails to colleagues directly from the Presence window (in the "User" and "Combined" views only).

- Click "send email" and it will open a new Outlook email and insert the recipient's email address.
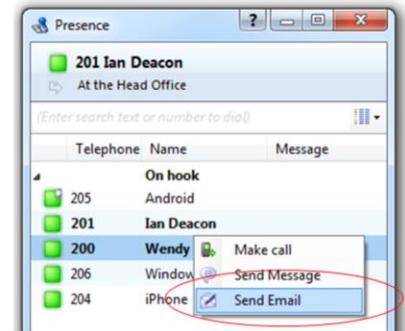
You also have the option of emailing your colleagues directly from the Presence window.

Simply right-click on the person in the Presence display that you want to send the email to, and then select "Send Email". This will open up a new Outlook email and insert your colleague's email address into the TO: box.

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Making Calls

- Similar call control options as Inbound.
- Call recipient's details are displayed, including -
  - ➢ Telephone number
  - ➢ Location
  - ➢ Local Time
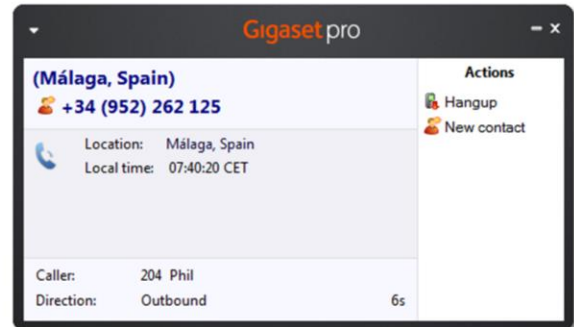
Ok, we've looked at inbound calls to our own extension, and picking up calls ringing on a colleague's extension, so let's take a look now at Outbound calling.

As with inbound calls, when making a call, you can view and control the call through the discrete Preview Window or the larger Phone Window.

Once the call is connected, all of the same call controls are available in both windows, including hangup, hold, consult and transfer.

The outbound call recipient's number and (if they are a known contact) their name, together with their location and local time will be displayed.

The "send digits" facility allows you to enter digits to an automated call-handling system without having to touch the handset.

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Click-to-dial

- Full range of "click-to-dial" options available -
  - ➢ Quick dial
  - ➢ Search-and-dial
  - ➢ Recent Dial
  - ➢ Call History
  - ➢ Clipboard
  - ➢ Web page
  - ➢ In-Application dialling
  - ➢ Focus dialling
  - ➢ Lync dialling

The Gigaset Pro CTI client offers a wide range of click-to-dial features to help speed up the outbound calling process.

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Quick Dial

- Various options for quick dialling from the system tray pop-up -

  ➤ Type the **number** to dial.

  ➤ Type partial **name** and the address book and integrated applications will be searched...

	01223232654
🕑	Recent ▸
📱	Preferred device ▸
▦	Features ▸
📞	Availability ▸
📞	Phone
👤	Presence
💬	Messaging
📖	Address Book
🔖	Call History
📄	Configuration
?	Help
◀	Exit Gigaset Pro CTI
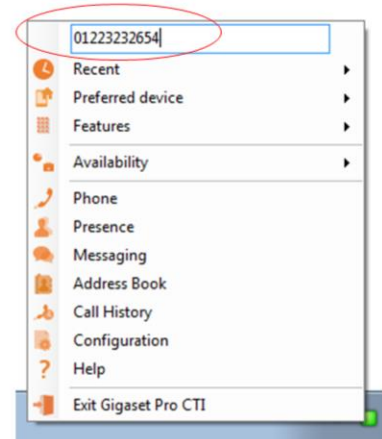
For example, in the "quick dial" entry box at the top of the System Tray menu, you can simply type the phone number and hit Return to dial the number.

You can also type a contact's name (either full or partial) to initiate a search in the shared address book and integrated applications.

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Search-and-dial

- Once the search has been completed and the results are displayed....just click the required number to dial.

Address Book			
Search: huffman			Go
			New contact
Advanced			
Name	Telephone	Email	Town
Shared Address Book			
Chris Huffman	01234567890		
Microsoft Outlook			
Huffman, Chris	B: 01234 567890	chris@a.b.com	
Sage ACT!			
Chris Huffman, CH TechONE	B: +1 01234 567890 M: +1 077-669-9218 H: +1 (516) 555-5455	Chris@CHTechONE.e	New York

Page 1
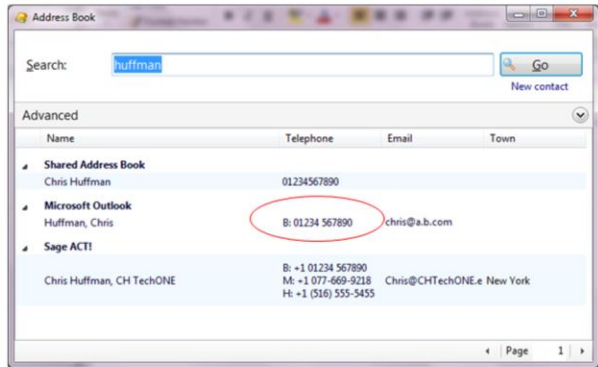
If you initiate the name search and one or more matches are found, you can then simply click on any of the phone numbers listed in the search results to initiate an outbound call.

33

Gigaset pro CTI

Recent Dial

- Overview of your recent call activity.

- Click any number to quickly re-dial a contact you recently spoke to.

01733232332	Designer Group
01733566847	Abbotsmede Primary School
01733361004	A P Partnership (The)
0034952262125	(Málaga, Spain)
0173381924771818	(Peterborough)
01081924771818	(National rate)
01223675747	(Cambridge)
01733200900	Abbey Produce

(Enter search text or number to dial)

- Recent ▸
- Preferred device ▸
- Features ▸
- Availability ▸
- Phone
- Presence
- Messaging
- Address Book
- Call History
- Configuration
- ? Help
- Exit Gigaset Pro CTI

The "recent" link in the Phone window menu and System Tray menu displays a list of the contacts that you have spoken to most recently. Simply click any of the contacts in the list to automatically re-dial them.

This feature is particularly useful for reducing the amount of time spent locating and dialling numbers, especially when contacts are regularly dialled and re-dialled in a relatively short space of time.

Gigaset pro CTI

Call History

- A log of all you recent inbound, outbound and missed calls.

- You can also view the call history for a colleague or another extension.
  (security policy permitting)

- Filter by direction, answered, missed, call duration.

- Click on any number to quick dial.

The "call history" link displays a list of your most recent inbound and outbound calls. You can click on any of the numbers shown in the list to re-dial that contact.

You can filter the history list by direction (inbound/outbound), answered (answered or missed) and by call duration.

As long as you have the appropriate security policy setting, from here you can also view the call history of any of your colleagues or any extension on the PBX simply by clicking on the name or extension.

Gigaset pro CTI

Clipboard Dialling

- The Clipboard is monitored by the Gigaset Pro CTI client.

- If what appears to be a phone number is copied into the clipboard....a bubble is displayed from the tray icon offering the opportunity to dial the number.

- Click the number to dial it.

- Set options for min/max length and starting digit.

Clipboard dialing ✕

Click here to dial: 01234 567890

| ⊕ Add | 📝 Edit | ✖ Remove | 💾 Import | 💾 Export |

Choose the criteria to use when searching for valid numbers

Minimum length: Maximum length:

Must start with: Advanced rules...

💾 Save   🔁 Cancel
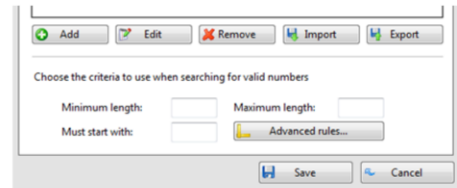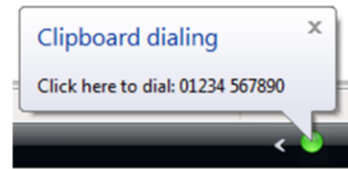
Another example of a click-to-dial feature in Gigaset Pro CTI is "Clipboard dialling".

If you copy what appears to be a phone number from a document or a webpage, a discrete bubble is automatically displayed from the system tray offering you the option to dial the number.

The minimum and maximum length can be set (and possibly a prefix) to help Gigaset Pro CTI determine more accurately what might be a valid telephone number.

Dialling numbers from within an application is also supported.

Once the application has been configured to allow Gigaset Pro CTI to properly recognise telephone numbers, the Gigaset Pro CTI client will then display a phone icon next to any phone numbers, and simply clicking on the icon will initiate an outgoing call.

Focus Dialling

- An additional "click to call" option.
- Automatically checks the contacts of a selected field for a dial-able number and, if found, provides a dial button.
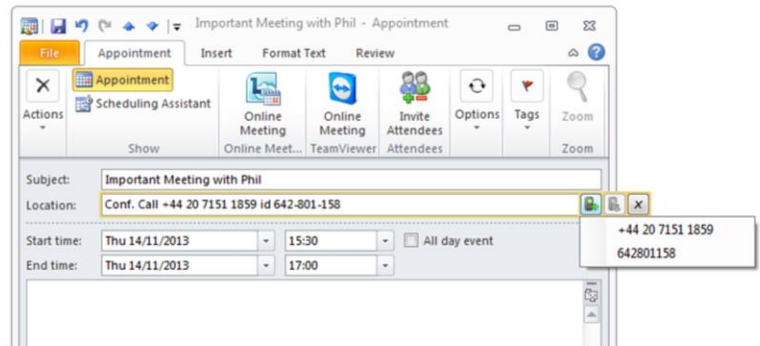
Focus dialling is another click-to-dial feature, which automatically checks the contents of a selected field for a dial-able number and, if found, provides a dial button.

In the example shown, focus dialling has sensed two possible phone numbers in the Outlook appointment's "location" field, and is automatically offering the chance to dial either one of them with a simple click.

Gigaset pro CTI

Web Page Dialling

- Recognises telephone numbers on web pages.

- The number is displayed as a hyperlink.

- Click on the link to dial it..!
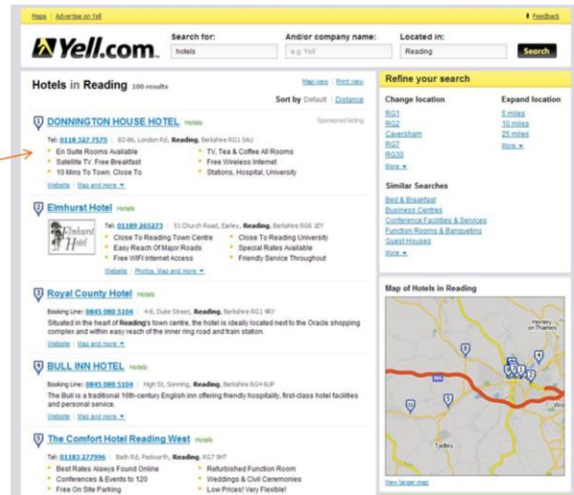
The Gigaset Pro CTI Client can also recognise telephone numbers within the text of web pages, and will offer the chance to click-to-dial the number from within the web page (i.e. *without you first having to copy it to the clipboard*).

Gigaset pro CTI

Lync Dialling

- 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".

"Update Lync state when on a call"

- An option in the PC Client configuration (in "Availability") allows the Gigaset Pro CTI client to update the status of a user's Lync client based on the hook status of their handset – i.e. shows "in a call" when handset is busy or "Do not disturb" when handset is set to DND.
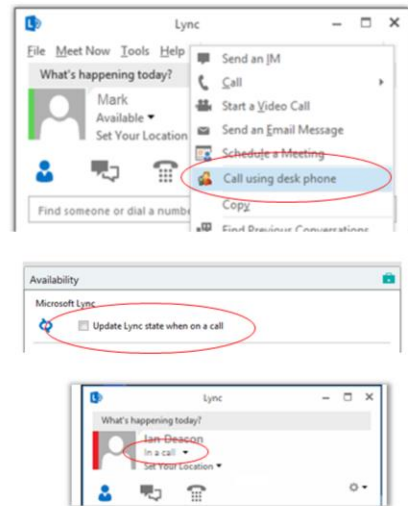
Users of Lync 2013 (and Office 365 versions of Lync) can now make a call on their handset directly from the Lync client. This functionality is enabled automatically when the Gigaset Pro CTI client is started on the user's PC.

There's also a configuration option to allow the Gigaset Pro CTI client to update the status of a user's Lync client based on the hook status of their handset. This also does not require the RCC Gateway.

Gigaset pro CTI

Dialling Configuration

- The dialling options available within the client can be tailored.
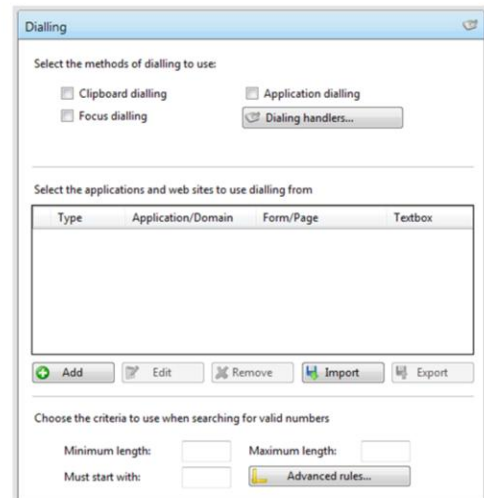
Some of the dialling features we've just looked at, such as clipboard dialling, application dialling and focus dialling, can be enabled or disabled in the "dialling" section of Gigaset Pro CTI client configuration, which is accessible from the "Configuration" option on the system tray menu.
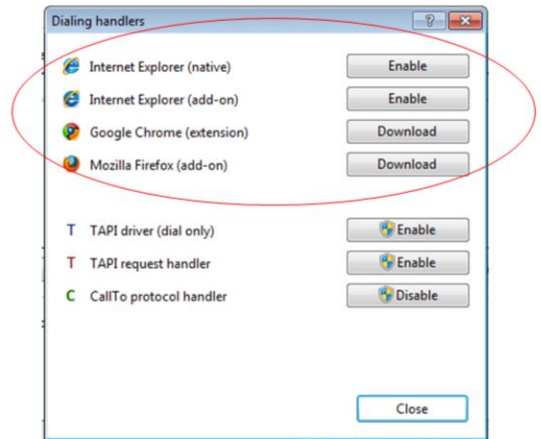
Gigaset pro CTI

Dialling Handlers

- The Dialling handlers configuration page is used to configure the following dialling techniques –

  - ➤ Web-Page dialling

  - ➤ TAPI Driver

  - ➤ TAPI Request Module

  - ➤ CallTo Protocol handler
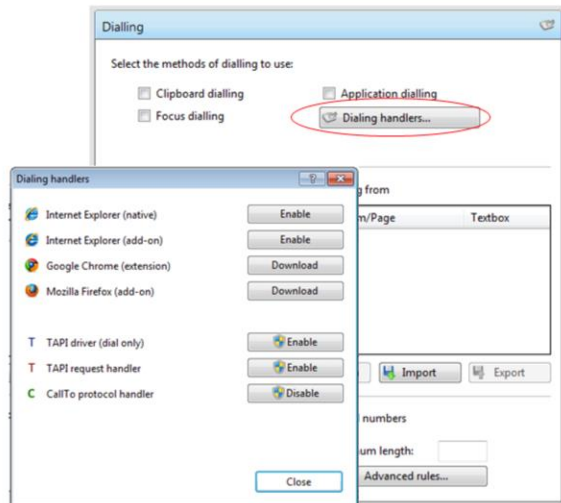
Additional dialling techniques, including the web page dialling, are configured through the Dialling Handlers screen.

Gigaset pro CTI

Web Page Dialling

- Configure web page dialling for –
    - ➢ Internet Explorer
    - ➢ Google Chrome
    - ➢ Mozilla Firefox

Dialing handlers	? ✕
Internet Explorer (native)	Enable
Internet Explorer (add-on)	Enable
Google Chrome (extension)	Download
Mozilla Firefox (add-on)	Download
T TAPI driver (dial only)	Enable
T TAPI request handler	Enable
C CallTo protocol handler	Disable
	Close

For Internet Explorer, just click the enable/disable toggle button to control the native or add-on implementation.

Google Chrome (extension) and Mozilla Firefox (add-on) first need to be downloaded from the appropriate resource before they can be enabled.

The dialling handlers page is also where you configure some of Gigaset Pro CTI's other dialling techniques.

- **TAPI driver.** Enables dialling from applications that are programmed to support dialling through a TAPI driver
- **TAPI request handler.** Enable Gigaset Pro CTI to handle TAPI dial commands issued directly from the TAPI compliant application (not via a driver)
- **CallTo protocol handler.** CallTo is a popular protocol used by developers to mark up telephone numbers within their application. Any numbers, when marked up in this way and clicked, will cause Gigaset Pro CTI to dial the number

Gigaset pro CTI

Security Policies

- Create a secure system tailored to security requirements of its users.

- Security policies allow client features to be enabled and disabled for a user or group of users.
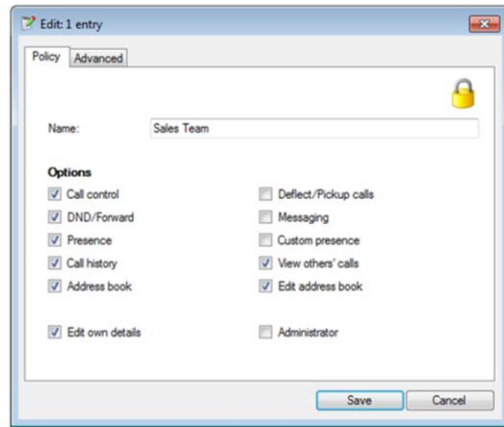
Some of the potentially "role-specific" features, such as accessing the Presence window, using the messaging system, viewing call history and editing contact details in the Address Book, can be controlled on a single user or group basis through the Security Policies, which are setup on the Gigaset Pro CTI Server.

Gigaset pro CTI

Language Support

Gigaset Pro CTI is designed with a worldwide audience in mind and the client (and supporting collateral) is available in a ride range of languages including:

- *English (UK & US)*
- *Arabic*
- *Bulgarian*
- *Chinese*
- *Czech*
- *Danish*
- *Dutch*
- *Finnish*
- *French*
- *German*
- *Greek*
- *Hebrew*
- *Hungarian*

- *Italian*
- *Japanese*
- *Korean*
- *Lithuanian*
- *Polish*
- *Portuguese*
- *Romanian*
- *Russian*
- *Serbian*
- *Spanish (Castilian)*
- *Swedish*
- *Welsh*

Gigaset Pro CTI is designed with an international, worldwide audience in mind, and the client interface is available in a wide range of languages (it defaults to the local language).

The Gigaset Pro CTI website and other collateral is also provided in local languages whenever possible.

And just to round off this section on the PC Client, it's worth noting the context-sensitive online help system.

You access the help by clicking on the "?" icon at the top of any Gigaset Pro CTI screen, and you will be taken to the help page that is relevant to that screen.

Gigaset pro CTI

MAC Client

The Gigaset Pro CTI desktop client is also available for Macs.

Gigaset pro CTI

Mac Client

- Similar features to the PC Client.

  Including: Call control, Presence, Chat, History, Browser Dialling (Safari), Clipboard.

- Both versions include integration to Apple Address Book.

  Caller preview, add contacts, click to dial.

- "Connect Plus" version also has integration to Salesforce (Enterprise edition).

- See website for full feature comparison
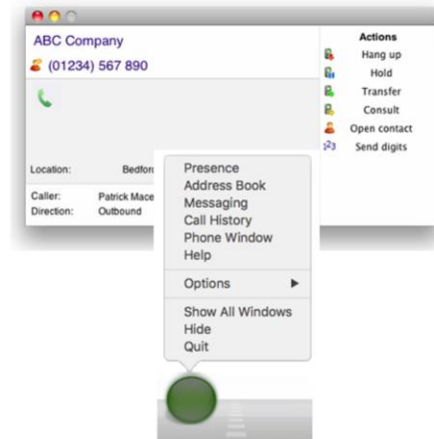
The MAC client shares some of the core features that we've described for the PC client, including call control, presence, chat and history.

The clipboard dialling is also supported, as is the browser click-to-dial option (through the Safari browser).

Integration into the Apple Address Book is also available in both versions of the client, offering similar integration functionality as previously described on the PC client.

Due to the restricted availability of CRM-type applications on the MAC platform, application integration within the "Connect Plus" client on the MAC is currently limited to the Enterprise edition of Salesforce.

See the Gigaset Pro CTI website for a full feature comparison between the PC and MAC clients.

Gigaset pro CTI

Multi-Device Users

Multi-Device Users

Let's take a quick look now at a couple of features that are aimed at Gigaset Pro CTI users who are associated with more than one device (e.g. deskphone and softphone).

If a user has more than one device associated with them, they can choose and set their "Preferred Device".

This is the default device that will be used whenever they make a call through their Gigaset Pro CTI client. The user can, for example, initiate a call on the PC client, but the call actually goes out through their mobile phone, if the mobile phone has been set as their preferred device.

The preferred device is also used by other people when they call the user through the Presence window. The user's preferred device will always be the first one displayed, and if they click-to-call the user, the preferred device will be used.

A user's devices can be set in the Telephony tab for that user on the server.

If the secondary extension has not been set on the server, the user has the option of providing that information in the mobility section of the client configuration (if the secondary extension *has* been set on the server, the mobility options are greyed).

Gigaset pro CTI

## Preferred Device (Selecting)

- Select preferred device from the system tray menu.

- The preferred device can also be selected from –

  ➢ The Presence screen

  ➢ Call History

  ➢ Address Book
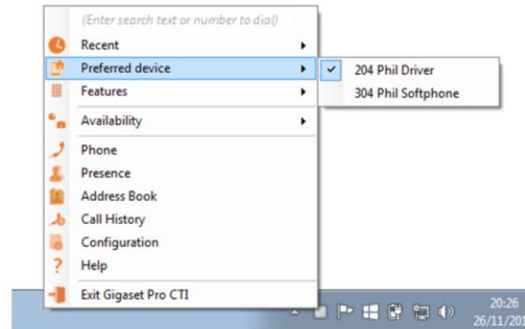
If the user has more than one device associated with them, they can set their preferred device either via an option on the system tray menu, or by a drop-down selection at the top of the Presence window.

Gigaset pro CTI

Preferred Device (Caller Preview)

- The standard "preview" window will automatically appear when a call comes in on *either* of the associated devices.

- Contact popping is supported from the preview screen as normal.

Call: Ringback

021 Courier Services Peterborough
(01480) 812 505

🔴 Hangup   👤 Show contact
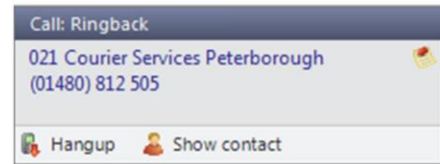
The "all device" caller preview feature ensures that the standard Preview window will automatically appear on the called party's PC client when a call comes in on any of their associated devices.

Application Integration

We've mentioned already in several places in this presentation Gigaset Pro CTI's ability to integrate with CRMs and other applications.

Let's take a look now at this support in more detail…

Gigaset pro CTI

Application Integration

- Common elements of this integration include:

  - ➢ Caller Preview
  - ➢ Contact Popping
  - ➢ Contact searching
  - ➢ Click-to-dial

- Integration into –

  - ➢ CRM applications
  - ➢ Other contact databases and applications
  - ➢ Online resources (web pages)

When discussing Gigaset Pro CTI's "application integration" in general, this may refer to CRM applications or other systems where contact details may be stored, and also interaction with online resources, such as web pages).

Certain common elements are usually provided within this integration, so let's first clarify the terminology…

Application Integration: Preview and Popping   **Gigaset** pro CTI

Caller Preview

- Displays caller (or called party) name in the Preview or Phone window when a match against is found in the shared address book or integrated application(s).

Contact Popping

- Click the integrated application's icon in the Phone or Preview window.
- The caller's contact record is displayed in the integrated application.
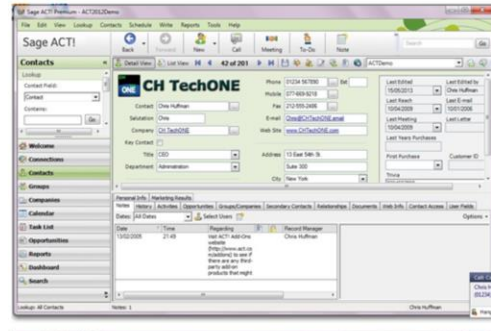
"Caller Preview" is the function where the basic details of the caller (or person being called) are obtained from the integrated application and displayed, together with the incoming phone number. Generally, this is the caller's name, company and location.

The term "contact popping" involves clicking on the integrated application's icon in the Phone or Preview Window. As previously explained, an application's icon will only appear in the window if a match for the caller has been located in the application, and when the icon is clicked, that caller's record will be displayed within the application.

Application Integration: Searching and Click-to-dial

Gigaset pro CTI

Contact Searching

- Concurrently search the shared address book and any integrated applications (e.g. Outlook), then click on the name in the results to dial them.
- No need to go into the integrated application itself.
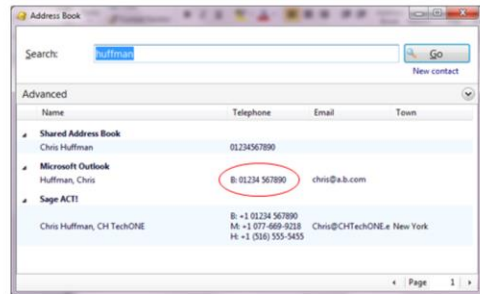
Click-to-Dial *(Within the Application)*

- Transposes a "dial" symbol on a number field *within* an application.

"Contact searching" is the generic term used to describe the search facility in the Gigaset Pro CTI Client.

Having configured the integration into the CRM and other application(s), the contact searching that we described earlier for the shared Address Book will also encompass the searching of the other integrated application(s). The results of the consolidated search are then displayed, and any contact listed in those search results can be dialled simply by clicking on them in that display.

"Click-to-dial" is the term used to describe the ability to click on a contact's name or a phone number in order to dial the required number without having to lift the handset.

In the context of application integration, this involves adding a "dial" button next to the phone number, such that the number can be dialled directly from *within* the application itself.

Gigaset pro CTI

Standard Integration

- The "Connect Plus" version of the PC client includes support for a range of widely used applications.

As shown in the graphic, the "Connect Plus" version of the Gigaset Pro CTI client includes standard integration into a wide range of other CRMs and applications.

The Integration section of the Gigaset Pro CTI website includes a full and up-to-date list of the applications currently included in this "standard integration" support, including latest version levels.

The "Connect Plus" version of the client also includes integration into a wide range of more specialised industry-specific applications.

The "Integration" section on the Gigaset Pro CTI for website provides more information on these applications.

We are always keen to extend this area of application integration and support, so if you have a customer requirement to integrate with a non-standard application please contact us. The request is processed through the online Application Integration Request Process (AIRP).
.

Application Integration: Events & Customisation

Gigaset pro CTI

Events & Custom Integration

- Control what automatically happens when call rings, or when it is answered, or when a call is made -

  ➤ Display Phone window.
  ➤ Pop contact details.

- Based on an event (call ringing, call connected etc), you can run a program or go to a web page.
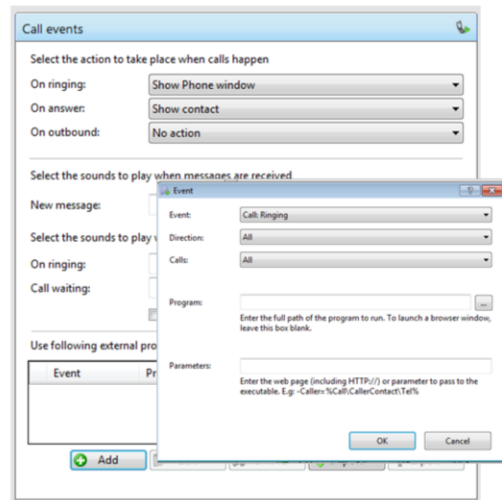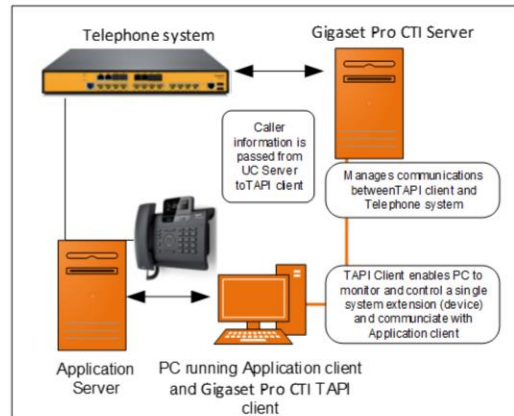

In the context of a more generic "integration", the Gigaset Pro CTI client can also be configured to run a custom executable on a selected event.

- The "Event" drop-down sets the event on which to run the program (e.g. when a call is connected).
- The "Direction" drop-down determines if the program is run for incoming or outgoing calls, or both.
- The "Calls" drop down can restrict execution of the program to just internal or external contacts.
- The program name is supplied in the "Program" box (or left blank an internet browser is to be loaded).
- The "Parameters" box contains command line arguments for the program (or a URL if a web page is to be loaded).

Through the same client configuration, the user can also control what automatically happens on inbound or outbound calls, or when a call is answered, and these control options include displaying the phone window or popping the contact details.

Gigaset pro CTI

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.

Telephone system — Gigaset Pro CTI Server

Caller information is passed from UC Server to TAPI client

Manages communications between TAPI client and Telephone system

TAPI Client enables PC to monitor and control a single system extension (device) and communicate with Application client

Application Server — PC running Application client and Gigaset Pro CTI TAPI client

*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.

Note: Other proprietary APIs are available for connection to named applications.
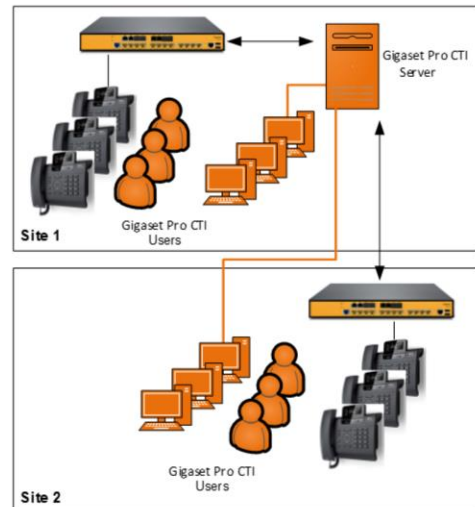
Gigaset Pro CTI Site and Federation

Ok, that concludes our look at the various Gigaset Pro CTI clients and the features and integration available within them.

We close off the presentation now with a brief look at two optional features aimed at organisations with more than one site.

Gigaset Pro CTI Site provides for the integration of multiple sites, and it allows for the simultaneous connection to the Gigaset Pro CTI Server of up to 6 telephone systems. Each of the additional sites (after the 1st one) requires a Gigaset Pro CTI Site license.

These connected PBXs may be in the same country, or they might be spread around multiple countries with different time zones and language requirements.

By adding DDI numbers into the telephone system, Gigaset Pro CTI users can directly call extensions at any of the other connected sites, even if no private network is in place to allow this functionality.
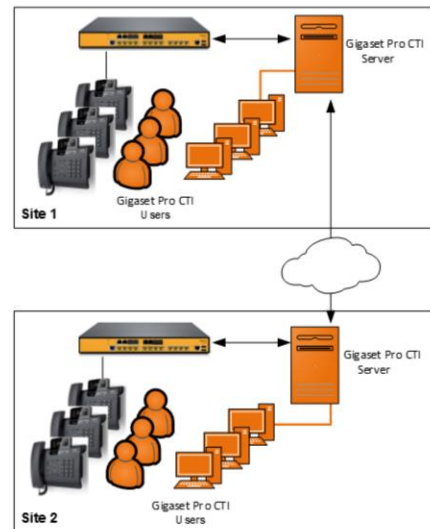
The slide shows an example of a basic Gigaset Pro CTI Site implementation.

The Gigaset Pro CTI Server, which is physically located at Site 1, is supporting two separate sites, and is connected to the two separate telephone systems. To enable this sharing of the Gigaset Pro CTI Server, a Gigaset Pro CTI Site license is required for Site 2.

We discuss multiple site implementations and their licensing in the separate "Pre-Sales" presentation.

An alternative to Gigaset Pro CTI Site is Federation, which allows multiple Gigaset Pro CTI servers to be inter-connected (or "federated").

Up to 6 Gigaset Pro CTI servers can be connected, allowing geographically separate sites to share presence and chat data (although the "shared" address book remains unique to each server).

Federation of Gigaset Pro CTI servers provides a very similar end user experience to Gigaset Pro CTI Site, but Federation is better suited to environments where a lower quality of network connectivity exists between the various sites. Unlike with Gigaset Pro CTI Site, if the connectivity between the sites is interrupted, users on a Federated system will still have access to Gigaset Pro CTI functionality (albeit restricted to their own site) whereas users at the remote site(s) in a Gigaset Pro CTI Site system would lose all Gigaset Pro CTI functionality.

In the simple example on the slide, two separate sites, each with their own local telephone system and locally attached Gigaset Pro CTI server, are taking part in the Federation.

We discuss the licensing requirements for Federation in the separate "pre-sales" presentation.

Gigaset pro CTI

Gigaset Pro CTI and Microsoft Lync

And to close things off, just a quick mention of how Gigaset Pro CTI interacts with Microsoft Lync.
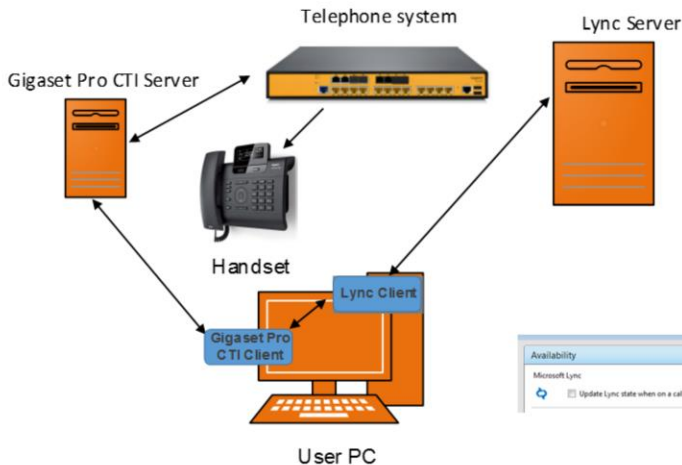
Gigaset Pro CTI and Microsoft Lync

- 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").

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.

Gigaset pro CTI

Summary of Benefits

That concludes the main Sales presentation, let's take a recap now by looking at the key benefits of Gigaset Pro CTI.

Gigaset pro CTI

The Benefits of Gigaset Pro CTI

- **Increase Customer Satisfaction:**
    - ✓ Reduce call response times
    - ✓ Professional handling/transferring of calls
    - ✓ Identify and return missed calls
- **Increase Staff Productivity and Collaboration:**
    - ✓ Ideal for businesses with high inbound/outbound calls
    - ✓ Leverage investment in CRMs and other applications
    - ✓ Contact searching and "popping", click-to-dial
    - ✓ Users can see the availability of colleagues (through Presence) and set their own availability status.

One of the most important benefits for organisations that use Gigaset Pro CTI is the increase it can have on their customers' satisfaction. By reducing inbound call response times and missed calls, and with a seamless handling and transferring of calls, callers that contact the organisation will receive a much more professional service.

Gigaset Pro CTI is particularly well suited to businesses with a high number of inbound and/or outbound calls. Its inbuilt shared Address Book and integration to CRMs and other applications provides key features like "contact searching", "contact popping", and "click-to-dial" which all help to speed up the process of locating contact details and making or receiving calls.

The implementation of Gigaset Pro CTI will also have a significant and positive effect on the productivity of (and collaboration between) the organisation's staff.

The Presence window allows users to check the availability of their colleagues, which reduces the time spent trying to contact or transfer calls to colleagues who are not available.

Gigaset pro CTI

The Benefits of Gigaset Pro CTI

- **Bundling Gigaset Pro CTI "Connect":**
  - ✓ The "Connect" client is entry point, but still feature rich. Its low price point means that it can potentially be bundled as standard with a telephone system sale.
  - ✓ Use the "Connect" client's features to lead the sales process.

- **Minimal Hardware Requirements:**
  - ✓ Smaller systems (e.g. one PRI, < 50 users) can run on an existing shared server.
  - ✓ This eliminates the need for the client to invest in additional hardware to support Gigaset Pro CTI.

The "Connect" version of the client is the entry point to the Gigaset Pro CTI product, but it is still feature rich, and its low price point means that in some circumstances it can be bundled with a telephone system sale, or perhaps used to drive forward the sales process.

It should also be noted, when talking to prospective customers, that the Gigaset Pro CTI Server has very minimal requirements in terms of hardware, and in small environments it can easily be accommodated on an existing server – negating the need for the client to invest in any additional hardware to support the Gigaset Pro CTI environment.

Gigaset pro CTI

Software Assurance

Sales of Gigaset Pro CTI products can be supplemented by the optional Software Assurance programme.

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

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.

Gigaset pro CTI

Thank You

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