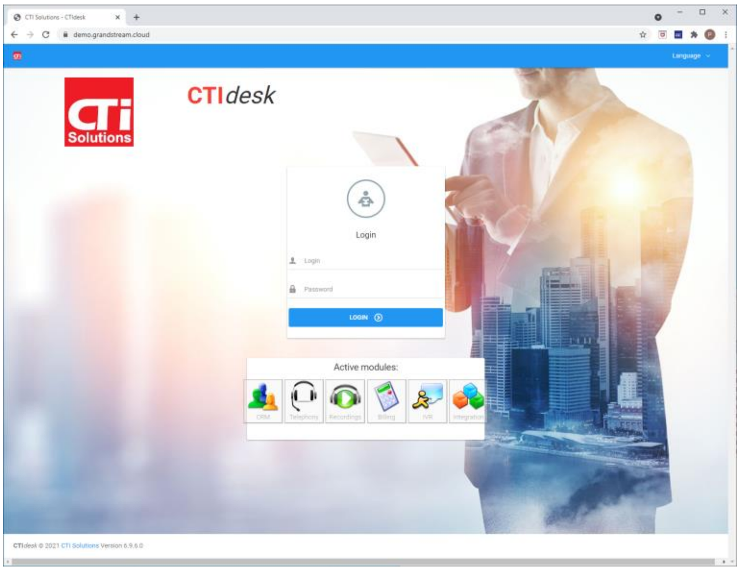
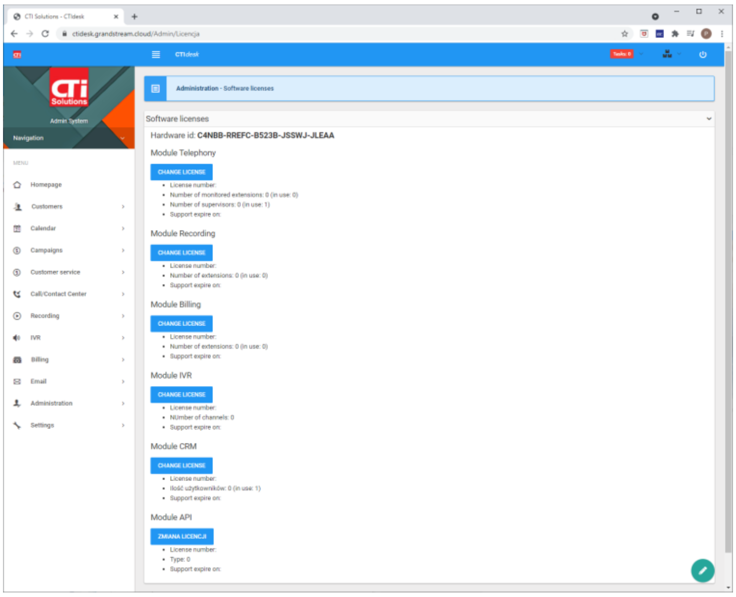
CTI desk – configuration

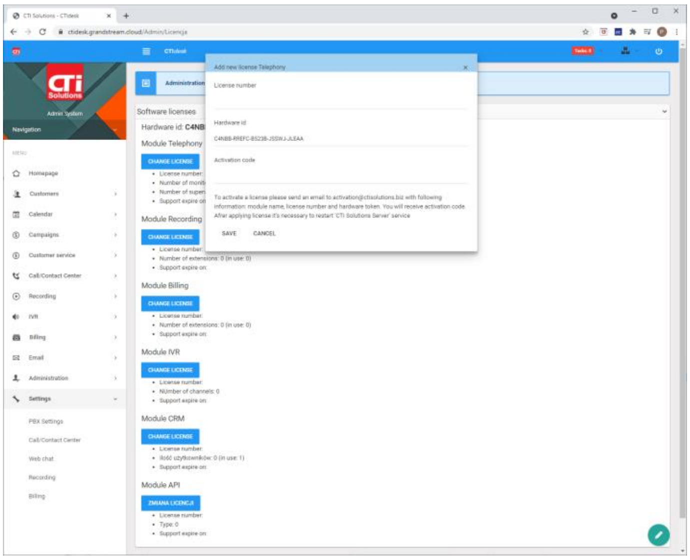
Login to CTIdesk as an administrator. By default login is ‘admin’ with empty password.



At first step you have to activate your licenses.

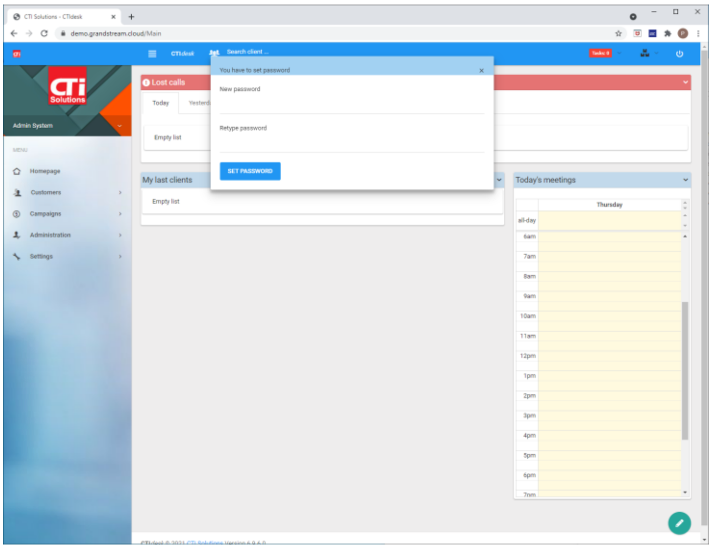


Please click on „Change license” on proper module. In a new window type license number. To obtain activation code you have to send email to helpdesk@ctidesk.com with your license number and hardware id. In return you will receive activation code.

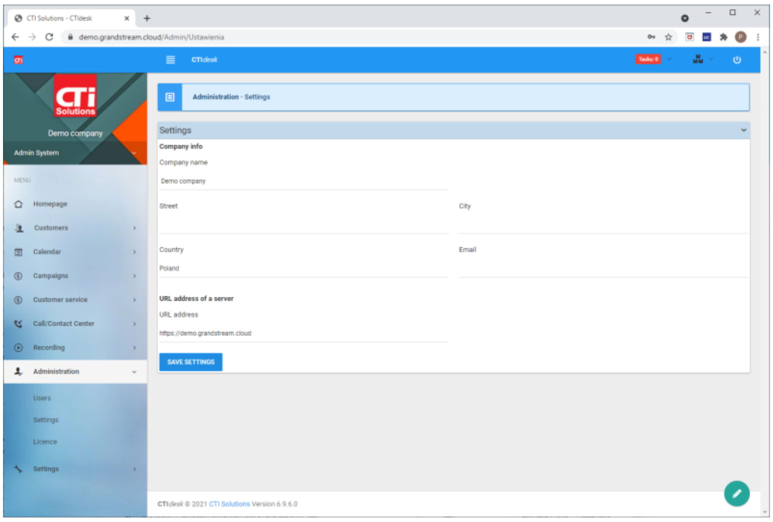


The same way please activate all your licenses.

After first login with empty password program will prompt for setting new password.

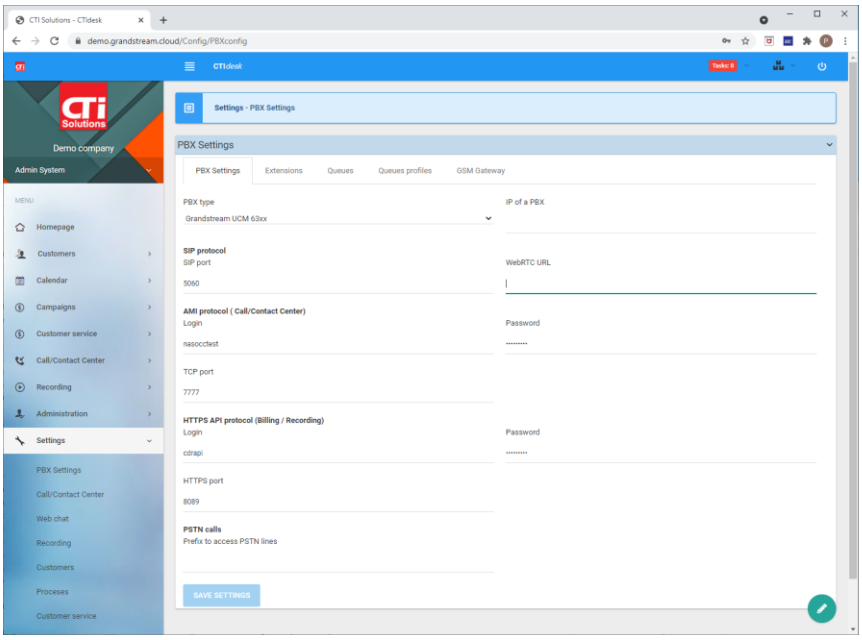


In next step you have to configure company information and URL address of a server. Specifying URL address is necessary to correct communication between CTIdesk server and web interface. Go to menu Administration-Settings

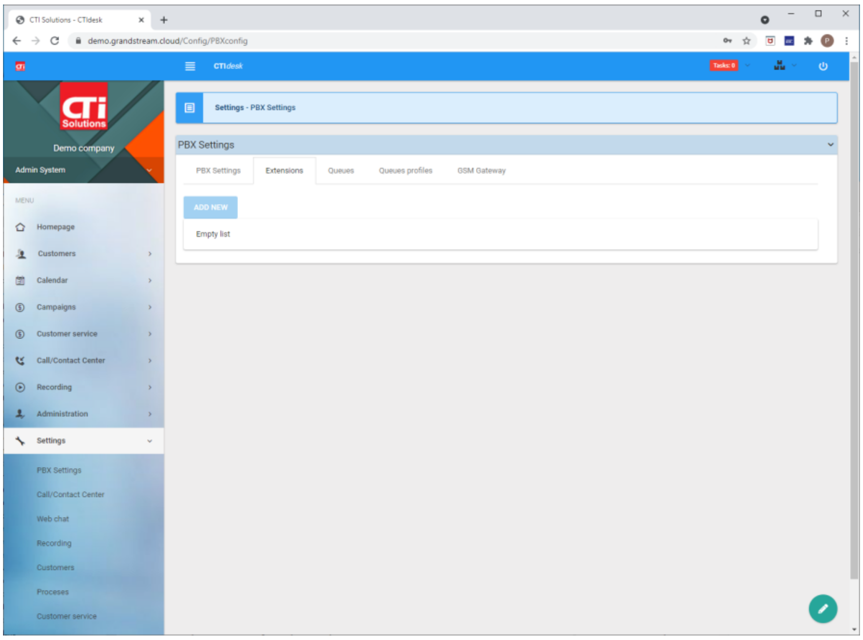


PBX configuration

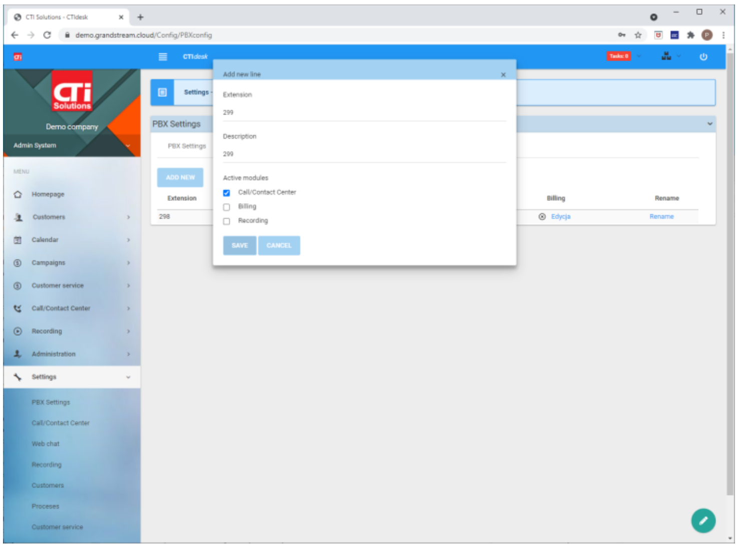
To configure connected PBX please go to menu Settings->PBX Settings. Select from the list PBX you are using and fill all necessary information. Please remember that it's necessary to configure PBX to use API protocols.



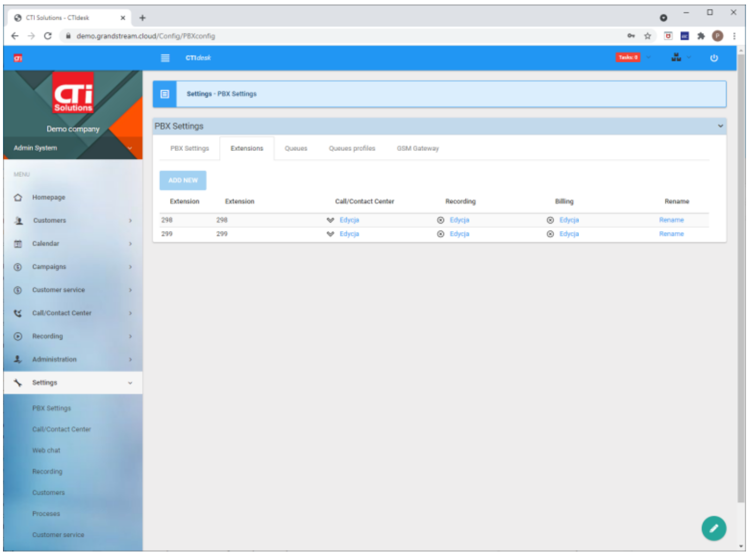
In a next step it's necessary to define which extensions will be monitored.



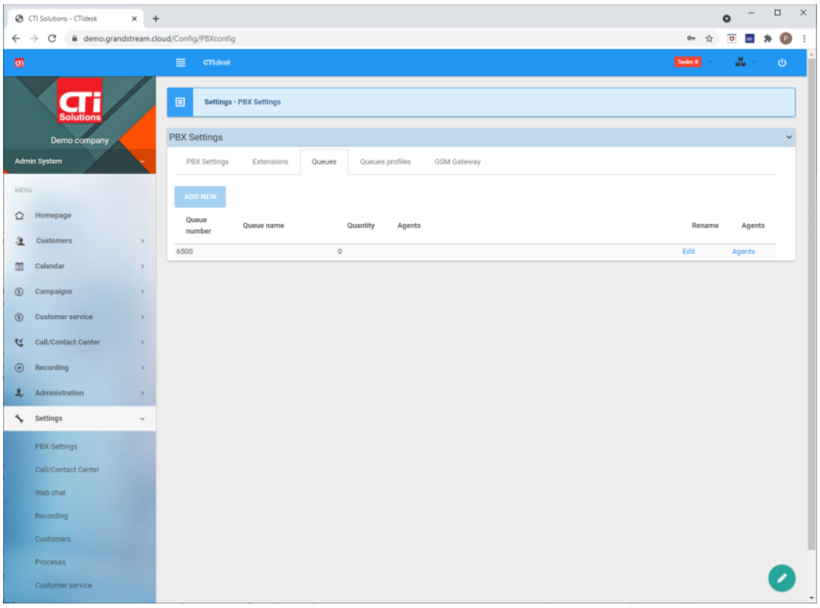
Click on „add new" and define new extension. Active modules will be visible according to purchased licenses. You can select which modules will be active for this specified extension.



On the list of defined extension you can click on „edit" to change parameters of extension for specified module.

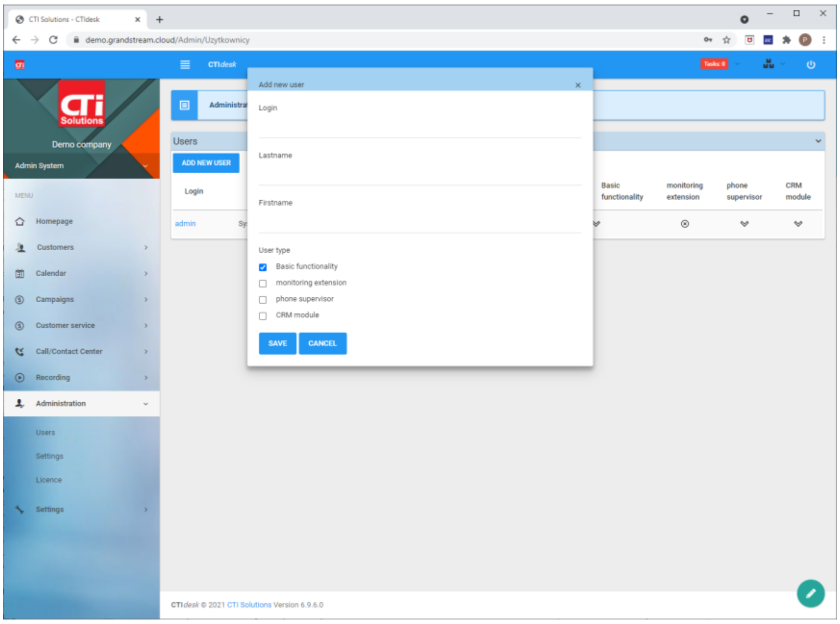


In queues tab you can define queues that will be managed by CTIdesk (login/logout of users). It's necessary to add queue and then assign users to this queue. Please note that if you want to login/logout users from queue it's necessary to remove all static agents from PBX configuration.

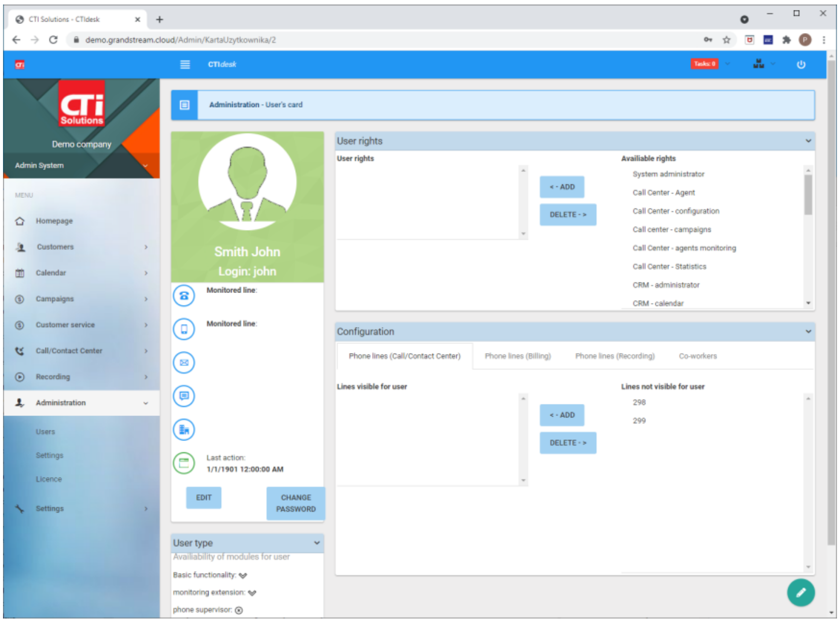


Users

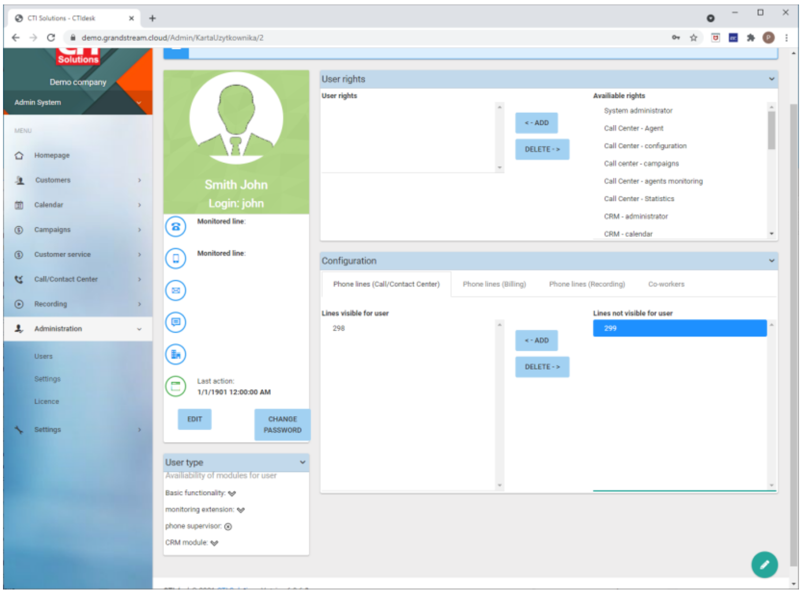
To add users please go to menu Administration->Users. By default only user ‘admin’ is created. Click on „add new user” to create new one. In a first step you have to define login, last name, first name and assigment of user to specific modules (telephony, supervisor, CRM)



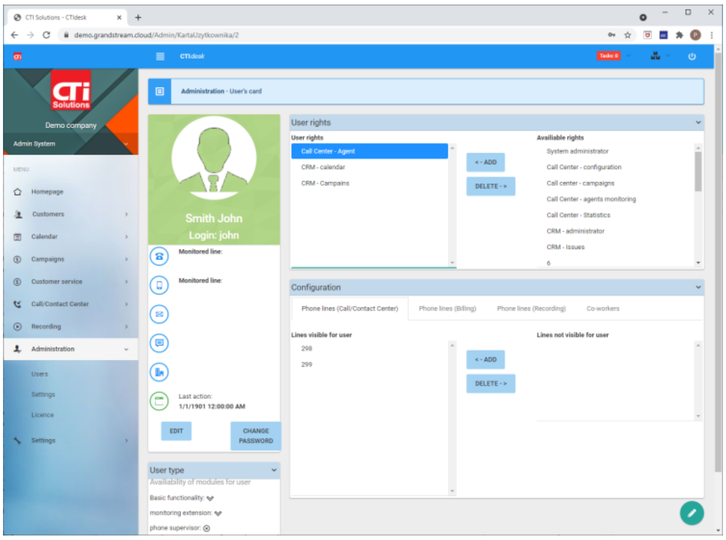
After creating user „User card” will appear.



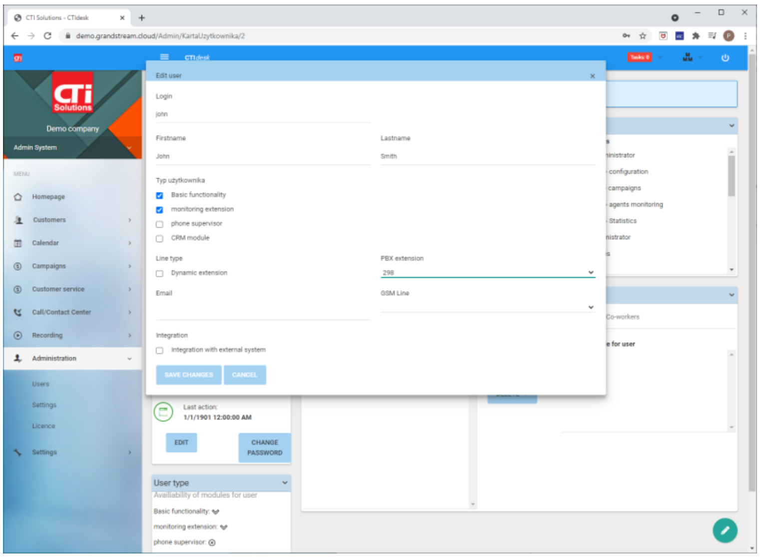
Information is grouped in tabs. On the left side you have basic information on user, on the right from top list of assigned user rights and below tabs with rights to lines for each specific module.



User rights tab allow to define rights for user, rights that user already have are on left side, on right side there are rights that can be added. Changes of user rights are effective at next login of user.



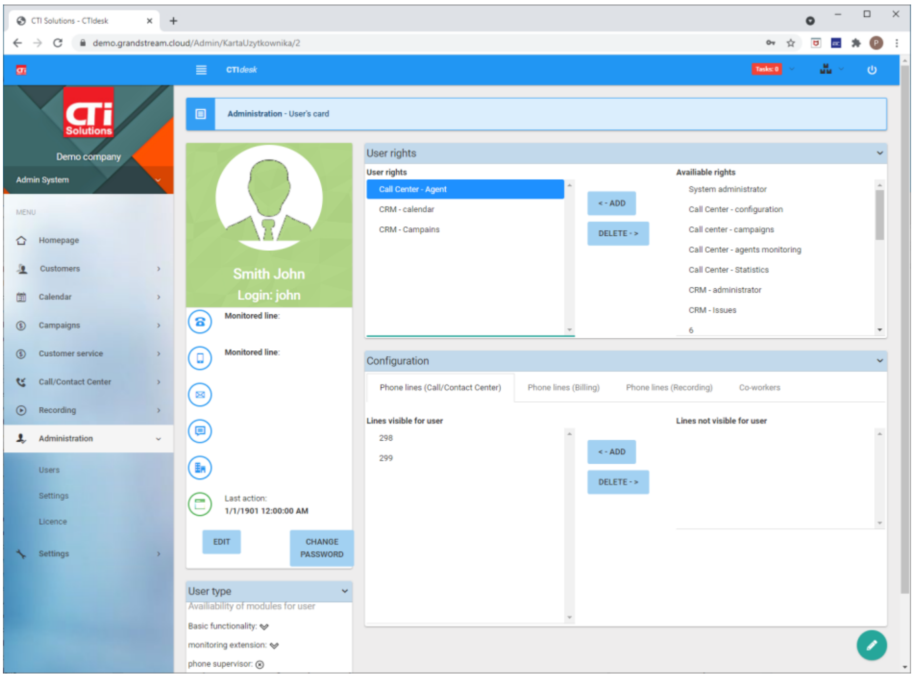
By clicking on “edit” you can change basic information and assignment of user to specified modules and extension which user is monitoring. It’s also possible to select “Dynamic extension” – in this case after each login system will ask which extension user is monitoring at this time.



“Change password” allow to change user’s password.

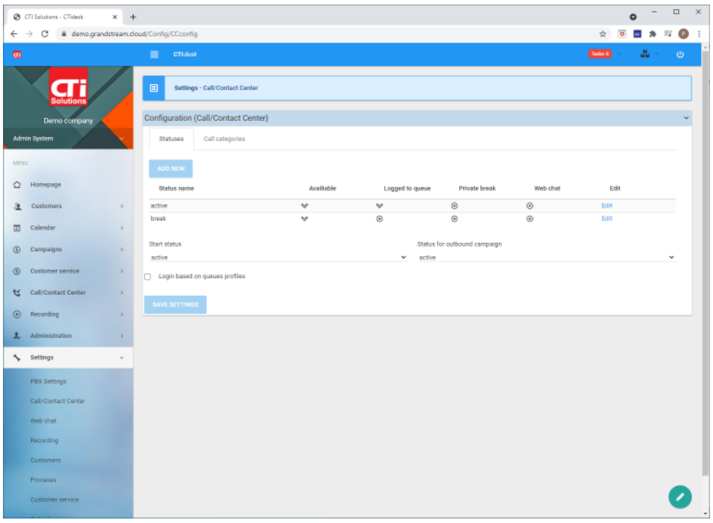
“Configuration” section contains 4 sections to define rights to extensions or co-workers.

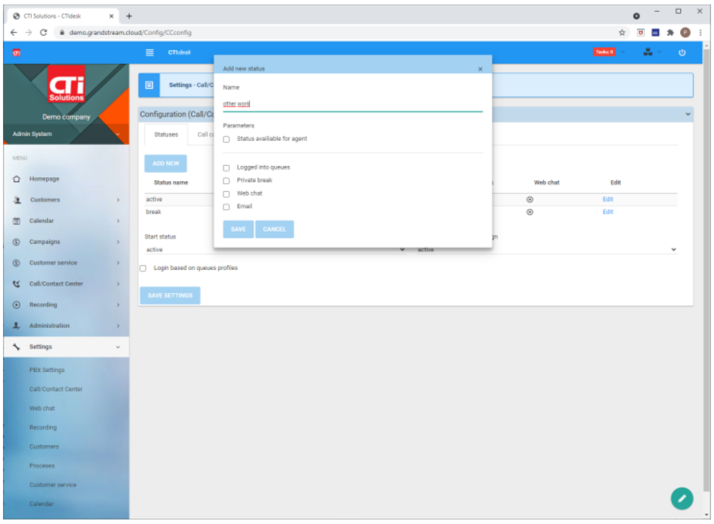
- Phone lines (Call/Contact Center) – for definition which lines are visible in module Telephony
- Phone lines (Billing) – for definition which lines are visible in module Billing
- Phone lines (Call recording) – for definition which lines are visible in module Call recording
- Co-workers – for defining which co-workers are visible for user



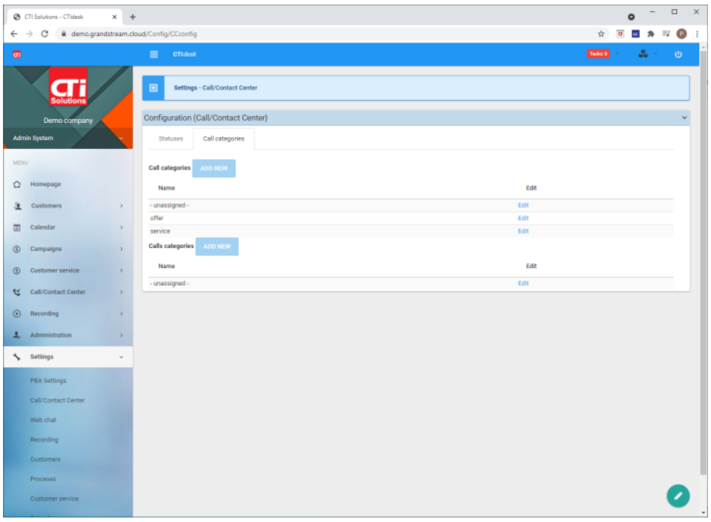
Telephony module configuration

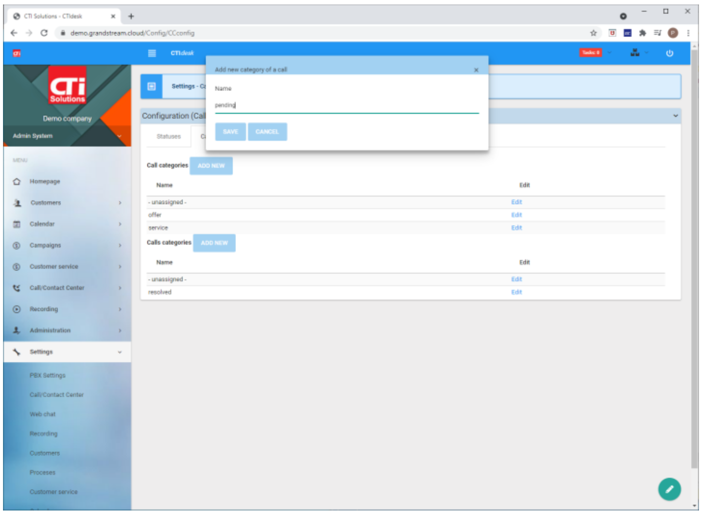
From menu Settings->Call/Contact Center you can define user statuses (with information which communication channels are active on this state.





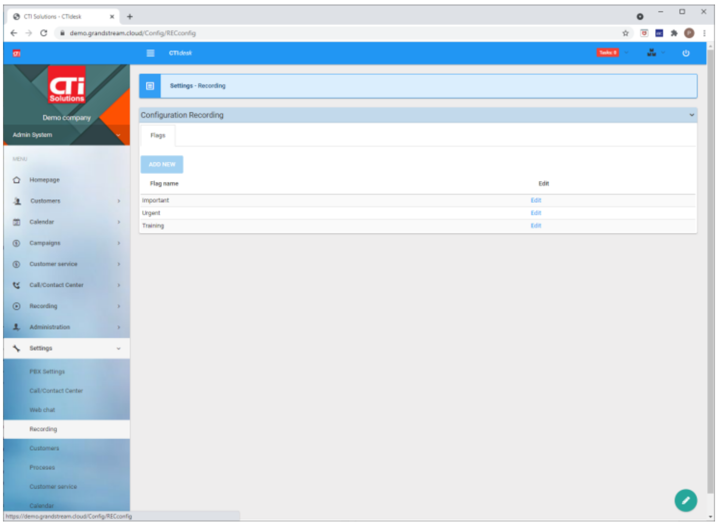
In "call categories" you can define two drop-down lists which appear to user on proceeding a call. During a call user can select type and category of a call together with comments. Later this type and category can be user in reports for grouping calls.





Call recording settings

In menu Settings->Recording you can define flags that can be assigned to calls.



Clients settings

In menu Settings -> Customers you can define customers parameters:

- Clients types – types of companies and persons
- Address types – types of addresses
- Profiles – extended fields describing clients (available only if CRM license is active)