



User guide

Webitel call manager for Creatio

Webitel

Contents

- Introduction..... 3
- Working with the CTI-panel 4
 - Making a call 4
 - Actions during a call 6
 - Call post-processing 7
- Features description 9
 - User parameters10
 - Connecting caller with the responsible manager12
 - Client's queue priority management13
 - Configuring Skype Connect16
- Call statistics17
- Call statistics in Kibana20
- Use cases examples22
 - Case No. 122

Introduction

The 'Webitel call manager for Creatio' app is a native Webitel telephony connector that allows you to manage calls using Creatio's user interface without any transitions, additional software or devices.

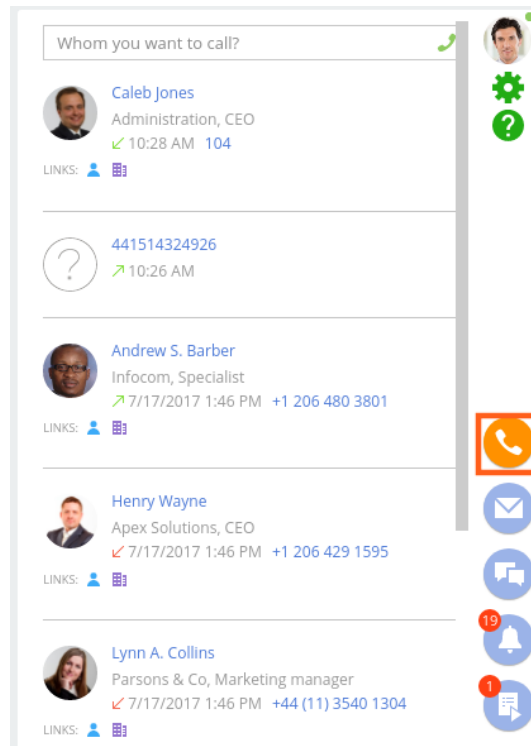
The product allows not only to make calls, but also enables a user to link them to other system elements, such as Leads, Cases, and Orders, as well as to create detailed reports on all call parameters.

Working with the CTI-panel

Making a call

To make a call, open CTI-panel by clicking the Phone button (Fig. 1).

Fig. 1 – CTI-panel

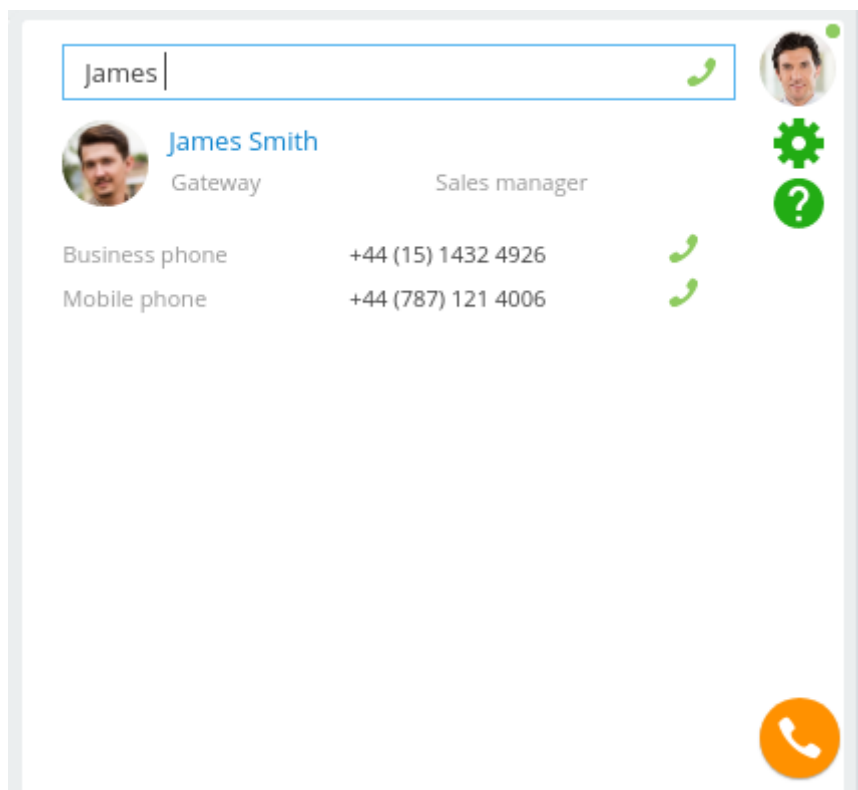


CTI-panel is the main user interface area for call processing. It displays the log of recent calls.

To make a call, input the number in the field hinted with "Whom you want to call?" and press [Enter] or click the green phone icon next to the field.

This field can be also used for searching and calling existing contacts. To do this, start entering name of the contact in the field hinted with "Whom you want to call?" and select the desired contact from the suggested list (Fig. 2).

Fig. 2. - Contact query example

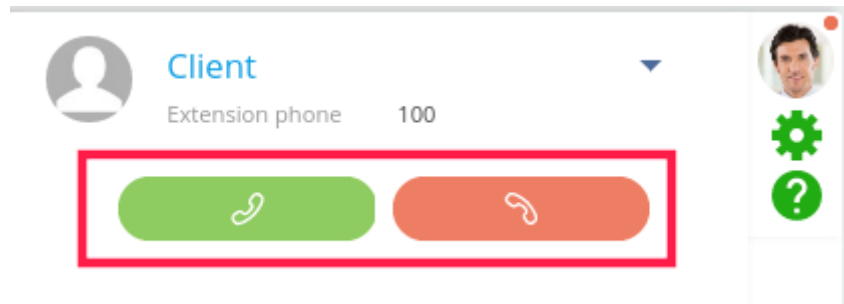


Actions during a call

During an inbound call, the caller's phone number, name and company will be displayed on the panel, and, if previously indicated in the Creatio, the name and company of the caller.

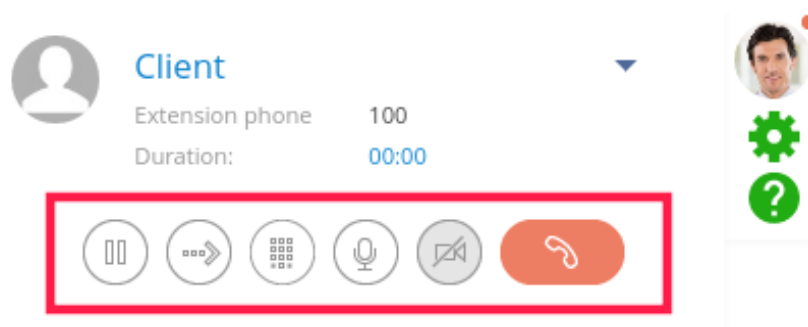
At that moment, the user will have two buttons available, for accepting and rejecting a call, respectively (Fig. 3).

Fig. 3 - Accept / reject call window



During a call, there are 5 main buttons available to the user (Fig. 4).

Fig. 4 - Active call window



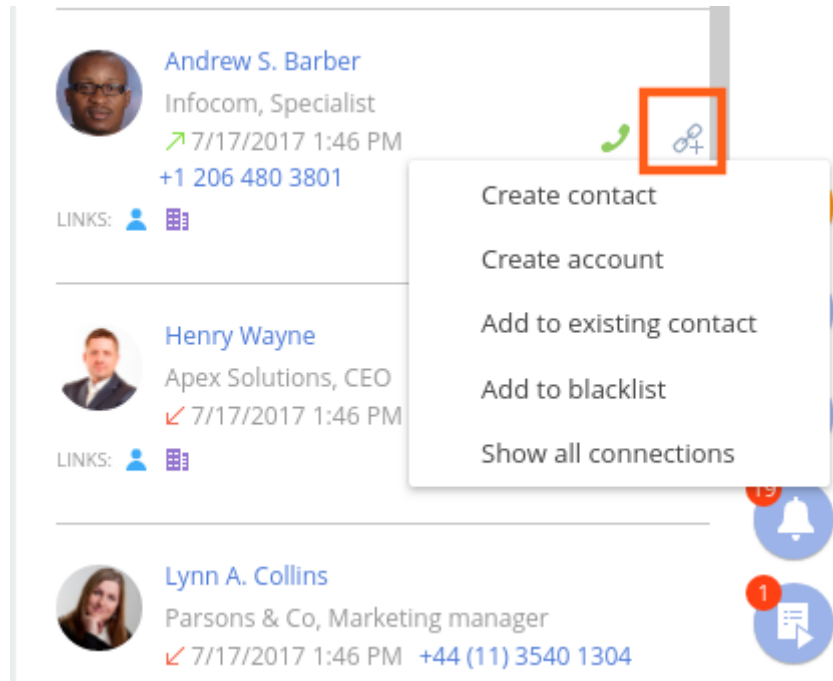
The buttons description from left to right is the following:

- Hold - allows putting the current caller on hold during a call. The client will hear the melody while holding. Press this button again to remove a person from hold and return to the call.
- Call transfer - allows the user to connect the current caller with a new caller (Attended transfer is used).
- Dial pad - reveals the digital dial pad for tone dialing.
- Enable/disable microphone - toggles the microphone during a call.
- Enable/disable video calling - toggles video stream during a call.

Call post-processing

To perform additional actions with the current call, move the mouse cursor over it and click on the [Create Link] button to reveal the context menu (Fig. 5).

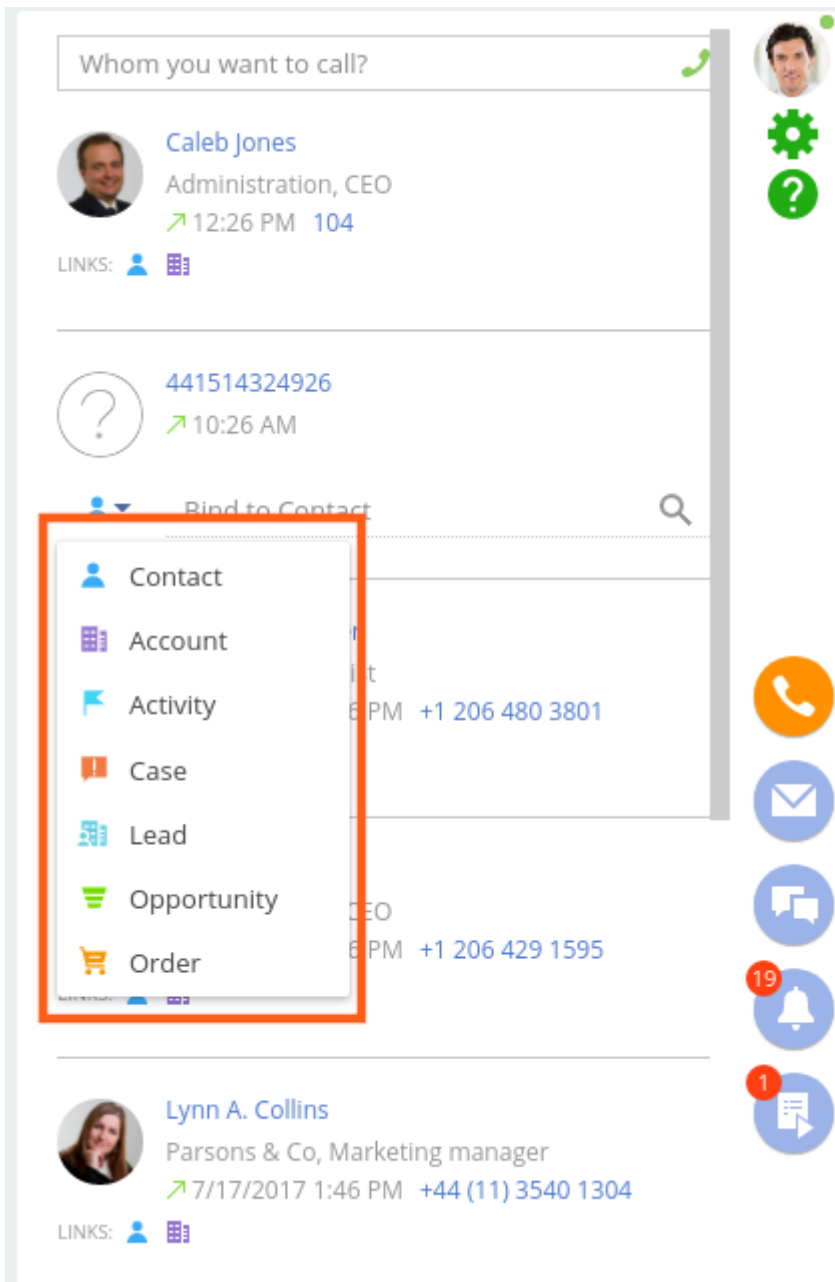
Fig. 5 - [Create Link] button usage example



Call context menu includes the following options:

- Create contact - allows to create a new contact in Creatio and link the selected phone number to it.
- Create account - allows you to create a new account in Creatio and link the selected phone number to it.
- Add to existing contact - allows you to link a given number with an existing contact or account.
- Add to blacklist - allows you to add the selected number to the Blacklist. If, when adding a number, no black list is displayed in the pop-up window for selecting a black list, please contact your system administrator to create a black list by following the [instruction](#), or contact Webitel technical support via support@webitel.com or support.webitel.com support portal on behalf of your company's contact person.

Fig. 6 - An example of section selection for linking a call



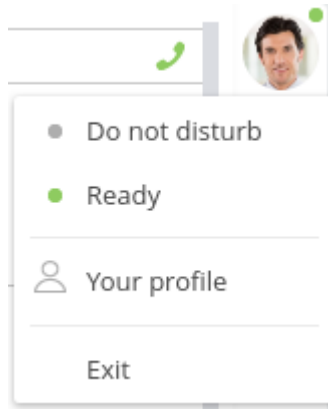
It is generally recommended to create internal numbers and save customer numbers in accordance with the E.164 international standard. Detailed information is available [here](#).

Features description

Changing telephony user's status

In order to change the status of a telephony user in Creatio, click the [Profile] icon in the upper right corner. In the revealed context window, you can change the status of the telephony user (Fig. 7).

Fig. 7 - Telephony user status selection window



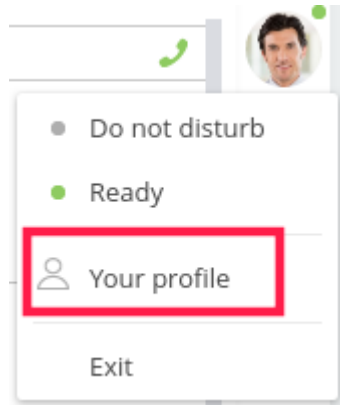
- Ready - in this status the user is able to make outbound calls and receive inbound calls.
- Do not disturb - in this status user is able to make outbound calls, but not to receive inbound calls.

User parameters

In order to change the telephony settings of a given user, log in to Creatio using credentials of the corresponding user.

In the upper right corner, click the [Profile] icon and select [Your profile] (Fig. 8).

Fig. 8 - Profile popup menu



In the revealed window, click the [Call Center Settings] button. This menu contains the telephony user parameters (Fig. 9).

Fig. 9 - User telephony settings

Webitel parameters setup

- Disable Call Center integration
- Enable debugging
- Auto-connection
- Use web phone
- Sound notification on incoming call
- Use video
- Agent
- Available on demand

-
- Disable Call Center integration - this parameter allows you to disable the integration with Webitel telephony. The call making button will no longer appear on the communication panel of the application.
 - Enable debugging - this parameter allows to display diagnostic information in the browser console. It may be used when telephony issues arise and when customer support service is contacted.
 - Auto-connection - this parameter is responsible for automatically entering the Ready status (willingness to receive a call) when agent is logged in Creatio.
 - Use web phone - if this option is enabled, the user will be able to make calls to Creatio using a headset or internal computer audio devices. When disabling this parameter, the call will be made using the SIP phone, which should be registered using current user's credentials.
 - Sound notification on incoming call - this parameter toggles the sound notification during an incoming call.
 - Use video - this parameter allows you to make video calls to internal numbers.
 - Agent - this parameter is responsible for automatically entering the Agent mode (for example, to receive calls from an incoming queue) when log in the Creatio system.
 - Available on demand - if this checkbox is ticked, the user exits Operator mode after each call from the queue. In order to receive the next call from the queue, status need to be changed manually.

Connecting caller with the responsible manager

This feature enables the possibility to automatically connect an inbound call from the indicated Lead number to the responsible manager.

Please note, in order for this functionality to work, it must be preconfigured in your call routing.

To activate the check for responsible manager for certain contacts, open the desired contact page and specify the corresponding manager in the [Responsible] field (Fig. 10)

Fig. 10 - Example of configured responsible manager (Record Owner)

The screenshot shows a contact record page with a navigation bar at the top containing: < CONTACT INFO CURRENT EMPLOYMENT MAINTENANCE TIMELINE HISTORY COMMUNICATION CHANNELS ATTACHMENTS >. The 'CONTACT INFO' tab is selected. The record details are as follows:

Type	Customer	Owner	Sia Morton
Title	Mr.	Gender	Male
Recipient's name	Barber	Preferred language	

After completing these steps, the system will automatically connect the customer to the corresponding manager when a given customer calls the company's number.

Client's queue priority management

Webitel allows to add certain numbers to a special list in order to alter the inbound call processing algorithm for numbers from that specific list.

For instance, it is possible to add important customers to a special list so that their calls will no longer get into the general queue and will instead connect to the manager directly, or will automatically become first in the operator call Queue.

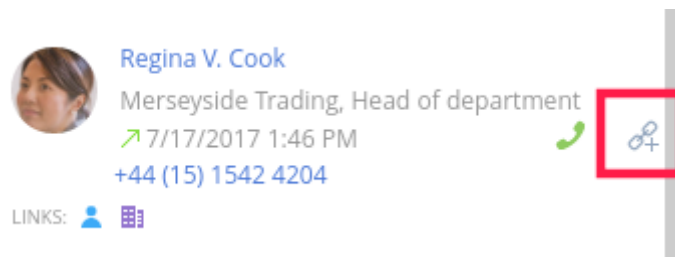
Please note, in order for this functionality to work, it must be preconfigured in your call routing.

After completing these steps, telephony users will be able to add numbers to a special list.

In order to do this, the following actions are needed:

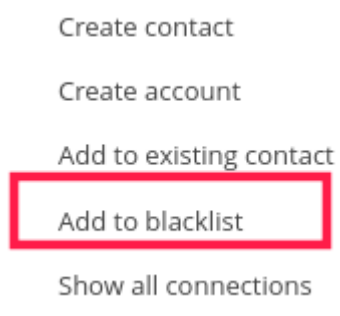
- In the CTI panel, select the desired number.
- Click on the [Link] button (Fig. 11).

Fig. 11 - The highlighted [Link] button.



- In the context menu, select [Add to blacklist]. (Fig. 12).

Fig. 12 - Highlighted button [Add to the black list].



- In the window that appears, select the list to which you want to add this number (Fig. 13).

Fig. 13 - List selection Window.

Select: ×

SELECT CANCEL ACTIONS VIEW ▾

Name ▾ **SEARCH**

Name ^

Important Clients

Call from a website

This feature allows you to add a call widget to the website, which customers can use to directly call your company by clicking on the widget icon.

In order to make a call, Navigate to the website which has this widget installed and click on the phone icon (Fig. 14).

In the window that appears, click the button that is responsible for making a call (the button may vary depending on the configuration).

Wait for the call to be answered.

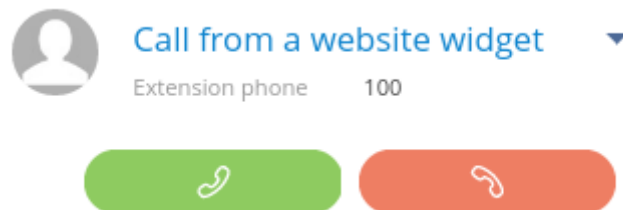
Fig. 14 - An example of a call widget icon.



Receiving a call made by using the widget does not differ from receiving a regular call.

To receive a call, press the [Accept] button during a call (Fig. 15.).

Fig. 15 - An example of an incoming call made from a widget through a website



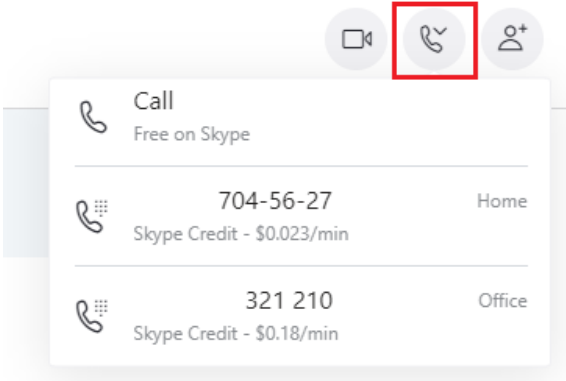
Configuring Skype Connect

This feature allows you to combine skype account with Webitel system. Call to skype account will be routed to the Webitel telephony server and processed according to the call routing configured from the Webitel's side.

To make a call using Skype app select your account and click the [Call] button (Fig. 16.).

Fig. 16 - An example of making a call to the skype connect number.

Fig. 16 - An example of making a call to the skype connect number

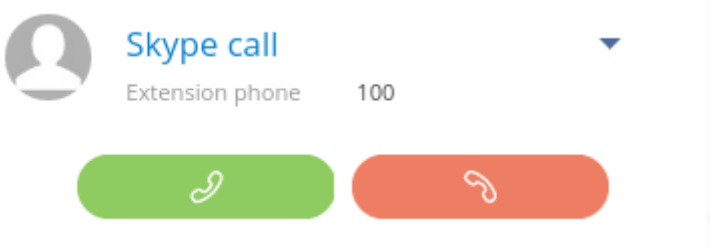


If you have purchased a local Skype Connect number, your customers can also use it to contact you.

Receiving a skype call does not differ from receiving a regular call.

To receive a call, press the [Accept] button during an incoming call (Fig. 17).

Fig. 17 - An example of an incoming call made from a widget through a website



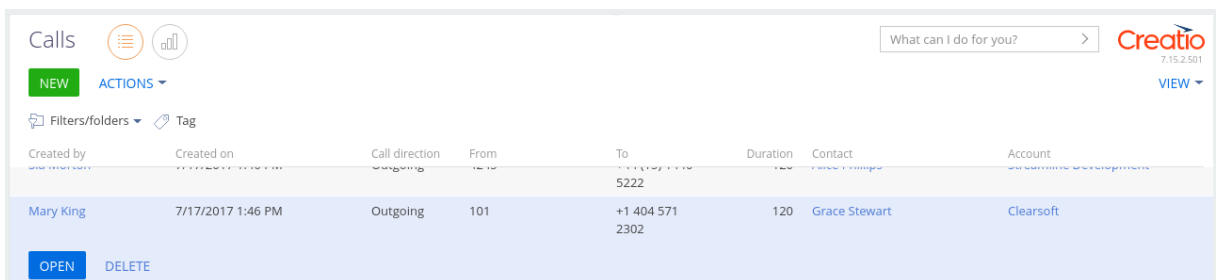
Call statistics

There are 2 sections in Creatio system for viewing and working with the call log:

- Calls section - this section displays information on all calls made using the Creatio system or softphone, provided that the Creatio system was opened when the call was answered using the softphone.
- CDR section - this section displays information on all calls made by telephony users, regardless of whether the call was made using Creatio system, the softphone or a SIP phone that is registered as Webitel telephony user.

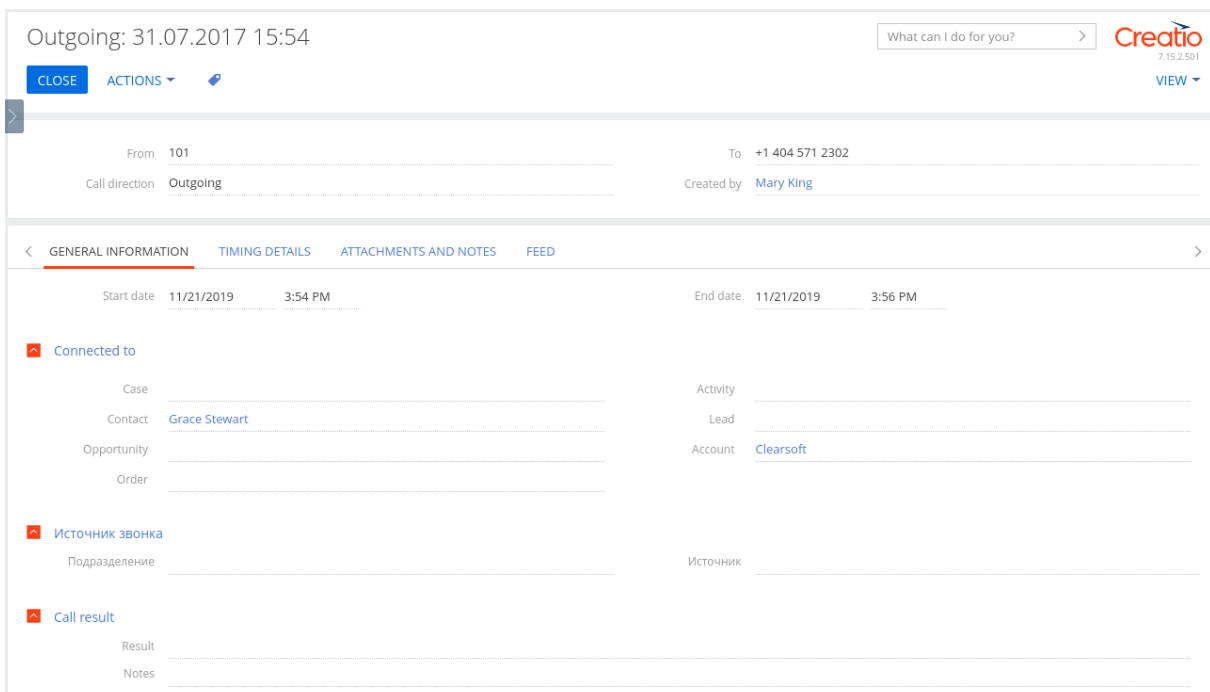
When working with calls in these sections, the user has 3 main buttons available (Fig. 18):

Fig. 18 - An example of selecting a section for communication with a call



- Open - allows you to open the current call page, which contains detailed information about the call (Fig. 19).

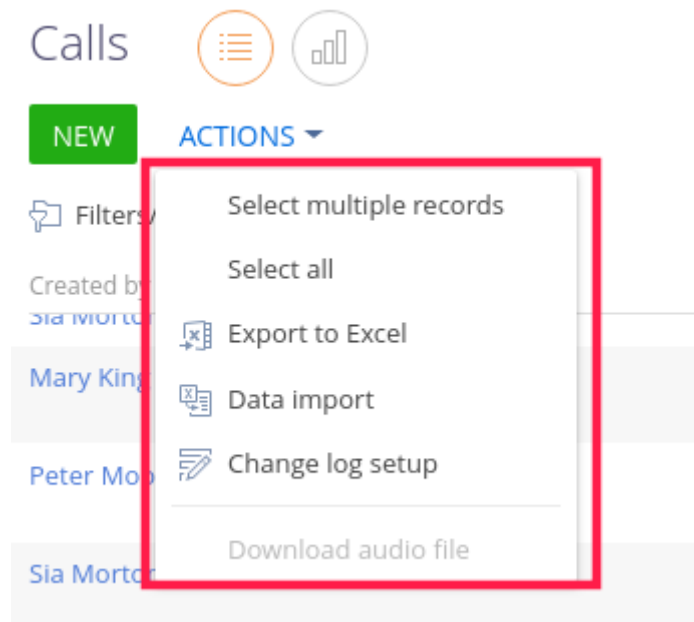
Fig. 19 - An example of a call page



- Listen - allows you to listen to the selected call. The call will be played in a dedicated media player. While listenin the call recording you can rewind or skip forward. This button is absent if there was no connection with the callee during the call.
- Delete - allows you to delete the selected call from the call statistics.

In the main section window, click the [Actions] button to open the context menu. The following functions are available in it (Fig. 20):

Fig. 20 - An example of opening the context menu when you click the [Actions] button.



- Select multiple entries - allows you to select entries to work with them further. For instance, you can export selected entries to Excel, download audio files, or delete entries.
- Select all - allows you to select all records for further work with them
- Export to Excel - allows you to save all call log entries, or only selected entries to your computer as a spreadsheet file.
- Import data - allows you to upload call records from a local spreadsheet file into this section.
- Download audio file - allows you to download selected call records to your computer.

There is also [Add] button available in the main window of the Calls section, which allows you to manually add call information (Fig. 21).

Fig. 21 – New Call page

New record What can I do for you? > **Creatio** 7.15.2.501 VIEW ▾

SAVE CANCEL ACTIONS ▾ 📌

From _____ To _____
 Call direction **Not determined** Created by **Sia Morton**

< **GENERAL INFORMATION** TIMING DETAILS ATTACHMENTS AND NOTES FEED >

Start date _____ End date _____

Connected to

Case _____ Activity _____
 Contact _____ Lead _____
 Opportunity _____ Account _____
 Order _____ 🔍

Источник звонка

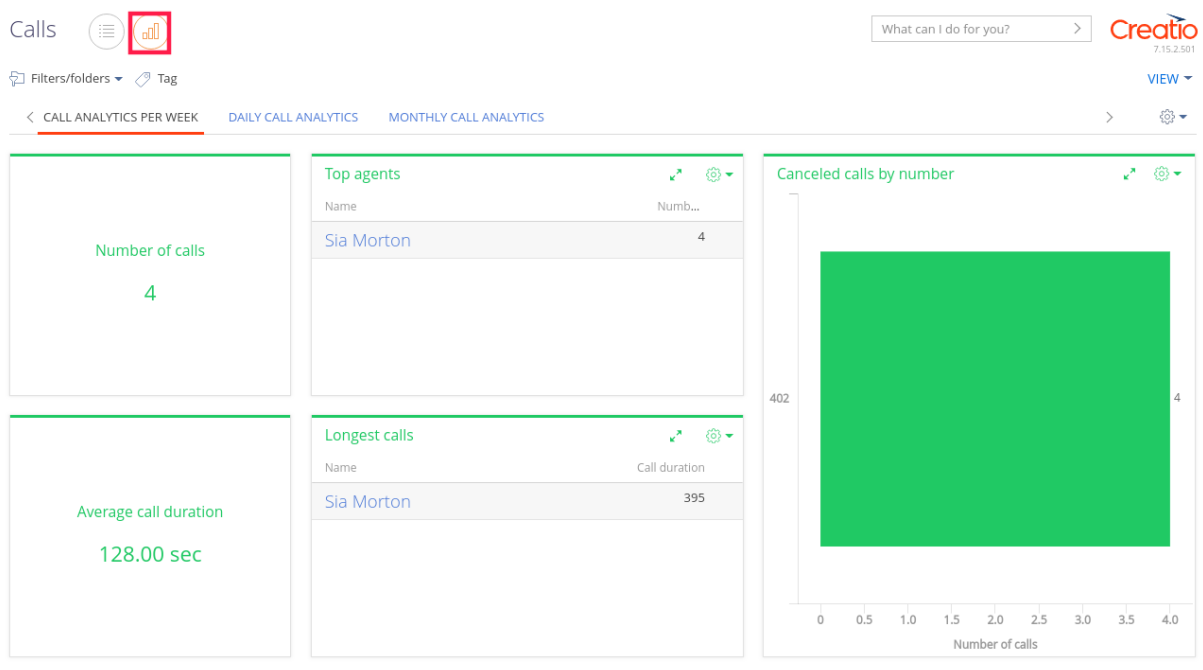
Подразделение _____ Источник _____

Call result

Result _____
 Notes _____

To view call analytics in both sections (Calls and CDR), navigate to the [Summary] view. This window allows you to add reports for displaying analytics, for instance, a graph, a scale, or a list (Fig. 22).

Fig. 22 - An example of visualizations in the Summary window.

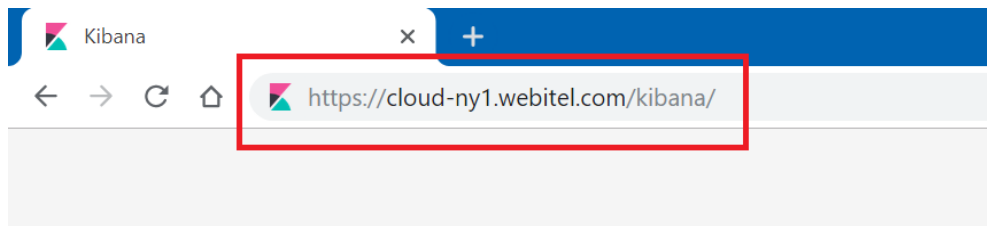


Call statistics in Kibana

To view calls and telephony user's status statistics in more details, you can use the Kibana system.

To access Kibana, navigate to the address of your telephony server with the '/kibana' appended to the end of the URL (Fig. 23).

Fig. 23 - An example of Kibana URL.



In the login and password field, enter your telephony user credentials (Fig. 24), where:

- login - your_internal_number@your_domain
- password - your telephony user password

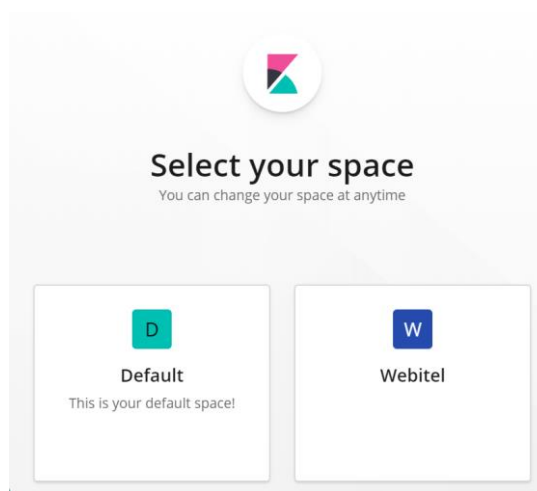
Fig. 24 - Kibana login window.

A screenshot of the Kibana login window. The window has a title 'Kibana'. Below the title, there are two input fields: 'Username' and 'Password'. The 'Username' field contains the text '100@creatio.webitel.com'. The 'Password' field contains a series of dots. Below the input fields, there is a 'Login' button.

If you have no access rights to Kibana, contact Webitel Technical Support on behalf of your company's responsible person.

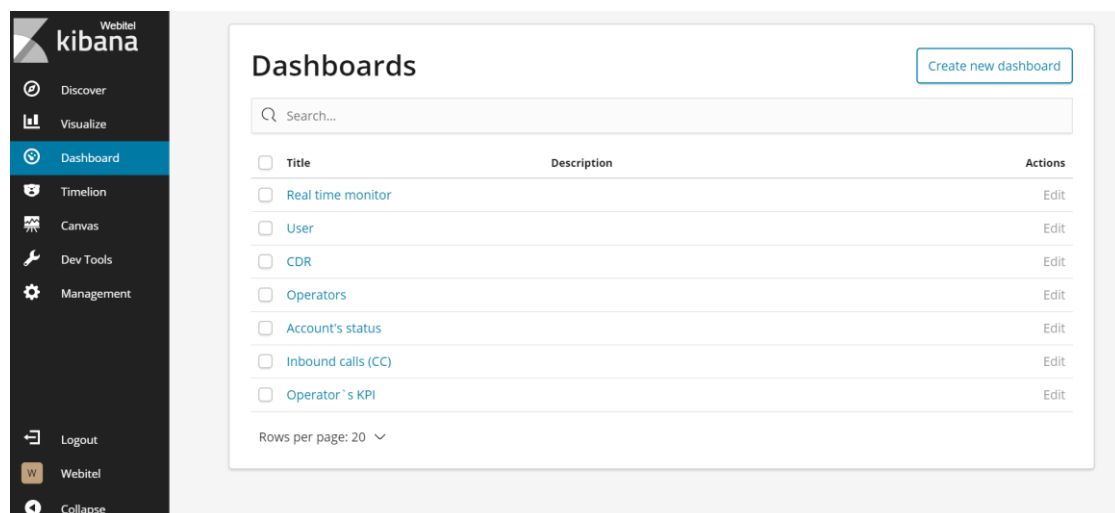
After signing in the system, you will be prompted with the space selection window, provided that you have several spaces created for viewing call statistics. Select the desired space by clicking on the corresponding icon (Fig. 25).

Fig. 25 Kibana space selection window



Navigate to the [Dashboard] section, which contains 7 main reports (Fig. 26):

Fig. 26 - List of reports in the Kibana system



- Real time monitor - displays information about the number of agents in the queue
- User- displays information about the time spent by telephony users in each status
- CDR - displays information about the total number and average time of calls for a certain period of time
- Operators - displays data about the incoming call queue
- Account's status - displays information about the current status of telephony users
- Inbound calls (CC) - displays information about calls in the incoming queue
- Operator's KPI - displays information on the main indicators of operators

Further information on Kibana system is available at the [following link](#).

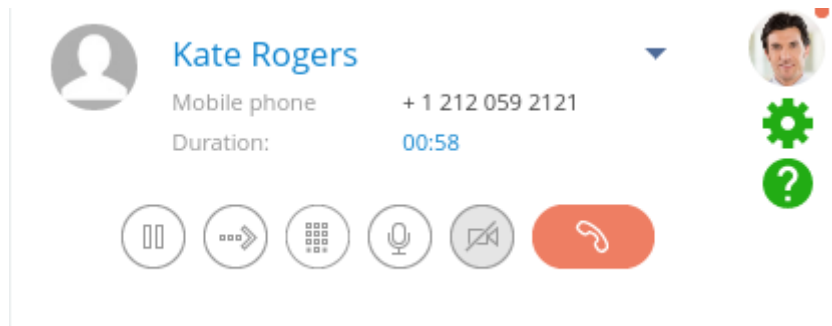
Use cases examples

Case No. 1

The contact center operator receives a call from Kate Rogerts, the customer. She is interested in an update on her order status, which she has made yesterday, however, she can't remember the order number.

To check information on this client, the operator clicks on the client's name of on the Communication panel (Fig. 27).

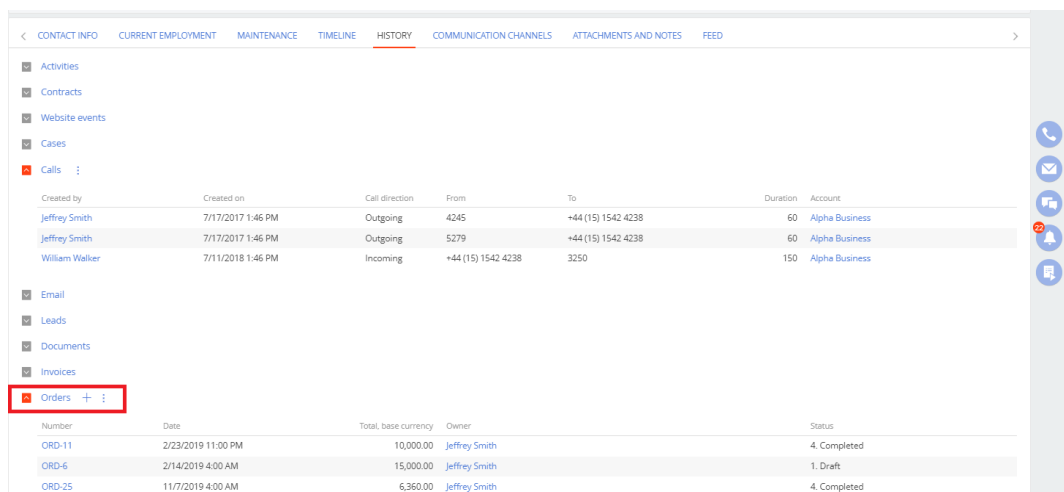
Fig. 27 - CTI panel with an active call



By clicking the customer's name, operator opens up a customer page. On the [Timeline] tab, the operator can see the complete the action history regarding this client, as well as info on customer's orders.

To check the information about the client's order, the operator can click the order name (Fig. 28).

Fig. 28 – An order selection on the customer page



After clicking, the order page opens. The [Product] tab displays all information about the product that is being delivered, such as its cost, quantity and active discounts (Fig. 29).

Fig. 29 - Order page with the product information

Product	Price	Quantity	Unit of measure	Discount, %	Total
Battery Back-up System APC Back-UPS ES 70...	196.95	2.000	pieces	0.00	393.90
Gamepad Logitech Wireless Gamepad F710	56.31	1.000	pieces	0.00	56.31

Items: 2 Total: \$ 450.21

To view delivery information, the operator can navigate to the [Delivery] tab.

The operator is now able to make a respond to the client and specify that his order is in the [Execution] state and is already passed to the courier service, as well as update the customer on any additional information regarding the order.

Additional information is also indicated in the [Comment] field, namely that the order will be delivered on Monday, which the operator also can tell the client (Fig. 30).

Fig. 30 - Order page with delivery info

Delivery type: **Courier** Payment type: **Non-cash payment**

Delivery address

- 11377, United States, New York, New York, 5717 Queens Blvd
- Add address

Recipient Information

Phone: **+1 212 775 9012**

Recipient's name: **Kate Roberts**

Notes: _____