



**5 Enmore Gardens
London
SW14 8RF**

**www.iteloffice.com
support@iteloffice.com**

Tel: +44 (0) 20 8876 7257

Itel Office Manual Version 1.0

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Introduction

Itel Office is a contact management system. Essentially a database system to manage and track contacts. It can detect inbound calls, extract the Caller ID and automatically lookup the caller, presenting the appropriate contact record while you answer the call. Think of it as a contact and office organiser.

Before you can use Itel Office you need to install it. Have a look at the Itel Office Installation Guide for your particular variant of the program to see how to do that.

What will Itel Office Do For Me?

Itel Office is an easy to use, contact management system, with all the benefits that brings.

Contact Manager

A Contact Manager is an address book with add-ons. Let us now list how this can help you.

Benefits of a Contact Manager

Record Customer Interaction

Itel Office tracks telephone calls with customers and indeed any caller into your organisation. Think of it as your memory but stored on a computer so it persists and cannot be forgotten.

Improved Customer Service

Imagine if you had every document relating to a contact, every detail of each call with the contact, every note written about the contact. And imagine when that contact called you, these details were immediately retrieved for you, even before you answer the call. You could almost anticipate what the caller would ask before they even open their mouth. Do you think that would improve your interaction with that caller? It's hard to imagine that it wouldn't!

And you wouldn't have to ask them to wait a few minutes as you try to retrieve their file.

Improved Office Administration

Itel Office can be your electronic filing system. You don't even need to file anything. Call details are automatically stored. Notes are just there as you write.

Getting Started

To launch Itel Office either launch your web browser and enter the address localhost/index.html or select from the Windows Start menu, Programs... Itel Office... Itel Office icon.

The Itel Office Contacts form has two modes: search mode and view/edit mode. Search mode is the mode you are in where you are entering search text when you are looking to return contacts that meet your filter criteria. View/edit mode is the mode you are in when you are viewing the returned contacts or adding, changing or deleting a contact.

When you launch Itel Office it starts in search mode. So you can immediately start entering text for a contact you want to find. You can enter any text in any field. It is case insensitive and the text you enter acts as a filter. For example, if you have three contacts in the database and two of them have the Category field set to customer and the other contact has the category set to supplier. If you enter customer in the Category field and click Search then both the contacts with the customer category will be returned.

If on the other hand you had entered LS in the postcode field and customer in the Category field, then all contacts categorised as customer with postcodes starting with LS would be returned.

To get Itel Office to perform the search you can either click on the Search button or hit the Enter keyboard key. If at least one contact which met your criteria is found then you will change to view/edit mode. If no contacts meet your criteria you will remain in search mode.

When in view/edit mode, you can move back into search mode by either clicking the Cancel button or hitting the Esc key.

Manage Contacts

Add a Contact

When you start, the database is completely empty so there is not a lot you will see. You have to add a contact to the database. There are three ways to do this:

1. Manually add a contact. Click the New button, enter details and click Save to save to database.
2. Telephone call entry. Wait for the contact to call you which enters their number into a telephone field. You can then add further details and click Save to save to database.
3. Import contacts from a comma separated values, csv, format file. You need contacts in a csv file to use this method. Many programs provide a csv export feature, so you can export from the program and then import into Itel Office.

Manually Add a Contact

To perform manual entry follow these steps:

1. Launch Itel Office.
2. Click on the Contacts tab.
3. Click on the New button.
4. Enter contact details.
5. Click Save button.

After saving, you can search for the contact to check it really exists in the database. Searching works on a filter. If you enter no filter and click Enter or hit the search button, then ALL records in the database are returned. If there are already multiple records you can click Next to navigate each record. Or Last to go to the last entered contact.

If you entered a contact with name Darcus Vendy you can filter by entering 'Darcus' or 'Vendy' or 'darcus' or 'dar', you get the idea, and hitting Enter (or click Search button) to retrieve this specific contact.

Telephone Call Entry

Refer to section Enable Computer Telephony Integration to for instructions on how to enable caller ID detection on your telephone line.

When a contact calls you who is not yet in your contacts database, then Itel Office saves you some time by entering the Caller ID into the mobile telephone field of a new contact form. You can then enter other details and notes and when ready click Save button to save the contact.

The next time this contact calls, the contact record you just created will be screenpopped. This saves having to search for the contact to get back to the contact information.

Note that if you are in the middle of editing a record, then Itel Office saves (caches) the caller ID using the minipop feature - refer to Minipop - Screenpop whilst Editing a Contact. You can complete your current editing task and then click on the minipop form to add the telephone number to the new contact form when ready.

Import Contacts from CSV

To be able to import from a csv file, you obviously need a csv file. So how do I get my contacts into one of those? The process does vary between software providers. Two examples are used below: Intuit Quickbooks and Microsoft Outlook.

Export Quickbooks Contacts to CSV

The sequence of steps below is for Quickbooks Pro 2016. Other versions may vary slightly.

1. Launch Quickbooks.
2. Click on Customers, Customer Centre menu.
3. In the Customer Centre specific menu, click the Excel with down arrow button and select Export Customer List...
4. Select Create a comma separated values (.csv) file.
5. Select a suitable folder to save the file and give it a suitable name, for example customers.csv.
6. If you would also like to add suppliers to the Itel Office database, then select Suppliers, Supplier Centre menu.
7. Using the same Excel with dropdown arrow button, save suppliers to a file, for example, suppliers.csv

Export Outlook Contacts to CSV

The sequence of steps below is for Microsoft Outlook 2007. Other versions may vary slightly.

1. Launch Outlook.
2. Select Contacts tab.
3. Select File... Import and Export.
4. Select Export to a file, Next.
5. Select Comma Separated Values (Windows), Next.
6. Contact leaf should be open, select Next.
7. Select a suitable path and filename, for example outlookcontact.csv.
8. Click Finish.

Import into Itel Office

1. Launch Itel Office.
2. Click Admin tab, then Import tab.
3. Hit Choose File button, and navigate to a csv file, Open.
4. The Source Field column should now expand and display the heading fields in the csv source file.
5. Map the source to destination field name in Itel Office. This can require a bit of thought. For example, for Quickbooks, there are fields "Mr./Ms./...", "First Name", "M.I.", "Last Name", "Primary Contact", "Bill to 1" and some more contact name related. You may want to scan the csv file in a text editor or Excel to check which columns have been populated. In QuickBooks as an example, the author was asked to import data from a customer QuickBooks file. This company had fairly consistently populated the "Bill to 1" field so for the import, we mapped 'Bill to 1' in QuickBooks to the name destination field in Itel Office. Thankfully, mapping the other fields is usually much more straightforward. For example, map email contact field to email in Itel Office. Any miscellaneous data that you want to see in Itel Office, you can map to the notes field. For example, you could map QuickBooks Credit Limit field to the notes field. It is advisable to study the input data to get the best possible results from the import. See example import from QuickBooks below.
6. Special handling of the name field in Itel Office. In the Itel Office contacts database, the name field for the contact is a single field. But data that you import may split the name into multiple fields. For example Outlook has a 'First Name' and a 'Last Name' field. So multiple fields from the source must be merged into a single column in the import csv file before you can import. Example merge from a csv file exported from Outlook to merge name columns into a single name column steps:
 - a) Open the csv file in Excel.
 - b) Select the Column after the columns you want to merge into 1 column. If you click on the header, eg the lettered title row, then you select the entire column. You can then right click on the select column and select Insert to insert a new column. We will merge the contents of multiple columns into this column.
 - c) After exporting the csv file from Outlook, you should have header text, for example, Title, First Name, etc. If we want to merge both the First Name and the Last Name into a single new column, we might create the column to the right of the Last Name column. Then you can label that column, you could just call it name.

d) Just under the text you used, which might have been name, select that cell. In that cell, enter the following formula:

=CONCATENATE(B2, " ", D2)

Note that in this example the B2 cell contained a first name and the D2 cell contained a lastname. You should then see the concatenation of the first name then space then last name in the added column.

e) With that cell selected, enter Ctrl-C, then select the shift keyboard button, then down arrow to the last row in this csv file, then enter Ctrl-V. Now the new column should be populated with the contents of the firstname and surname with a space character between. Make sure you name the column because you will import from that source column when you later import into Itel Office.

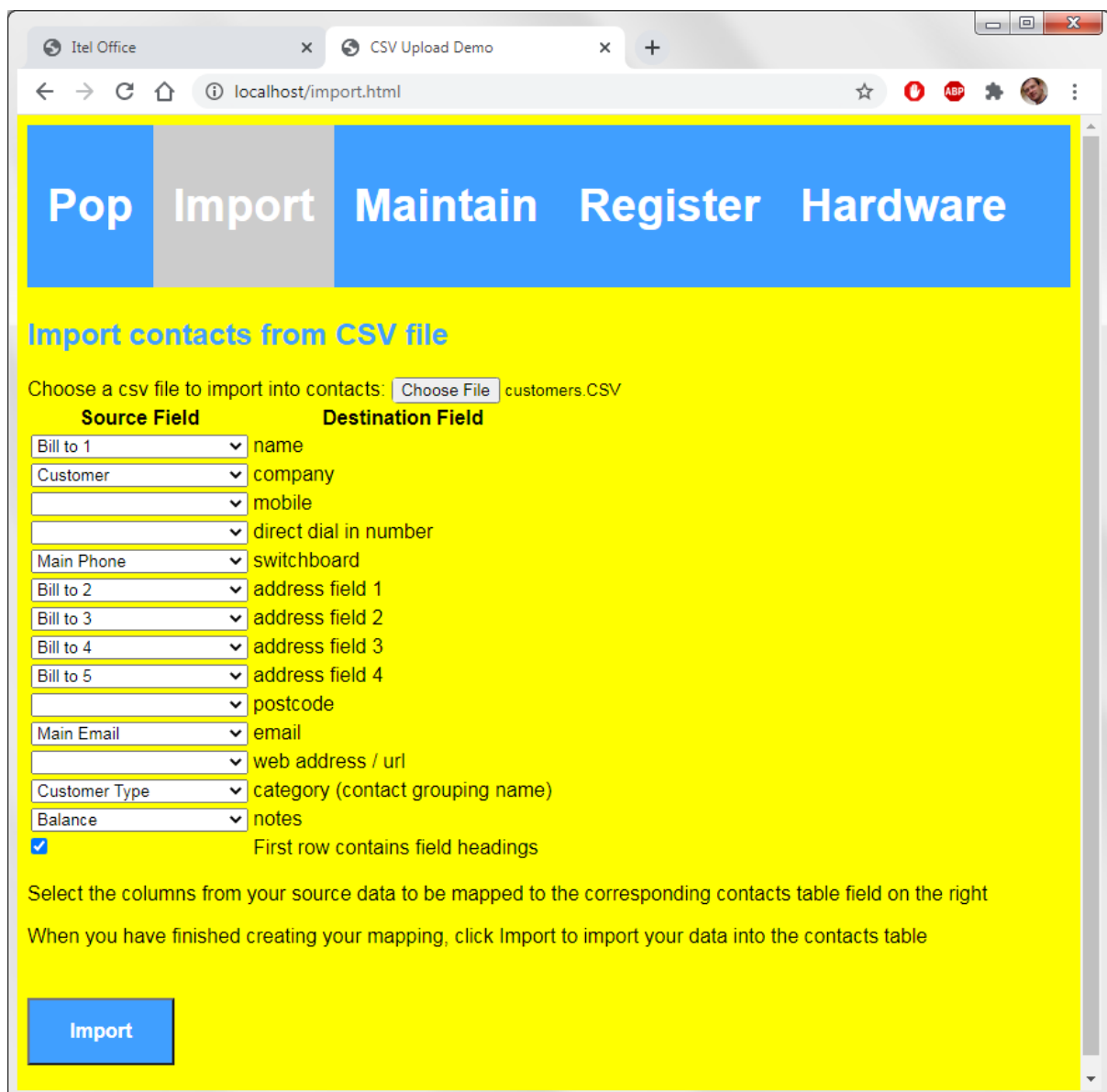


Figure 1: Import from Quickbooks Contacts example

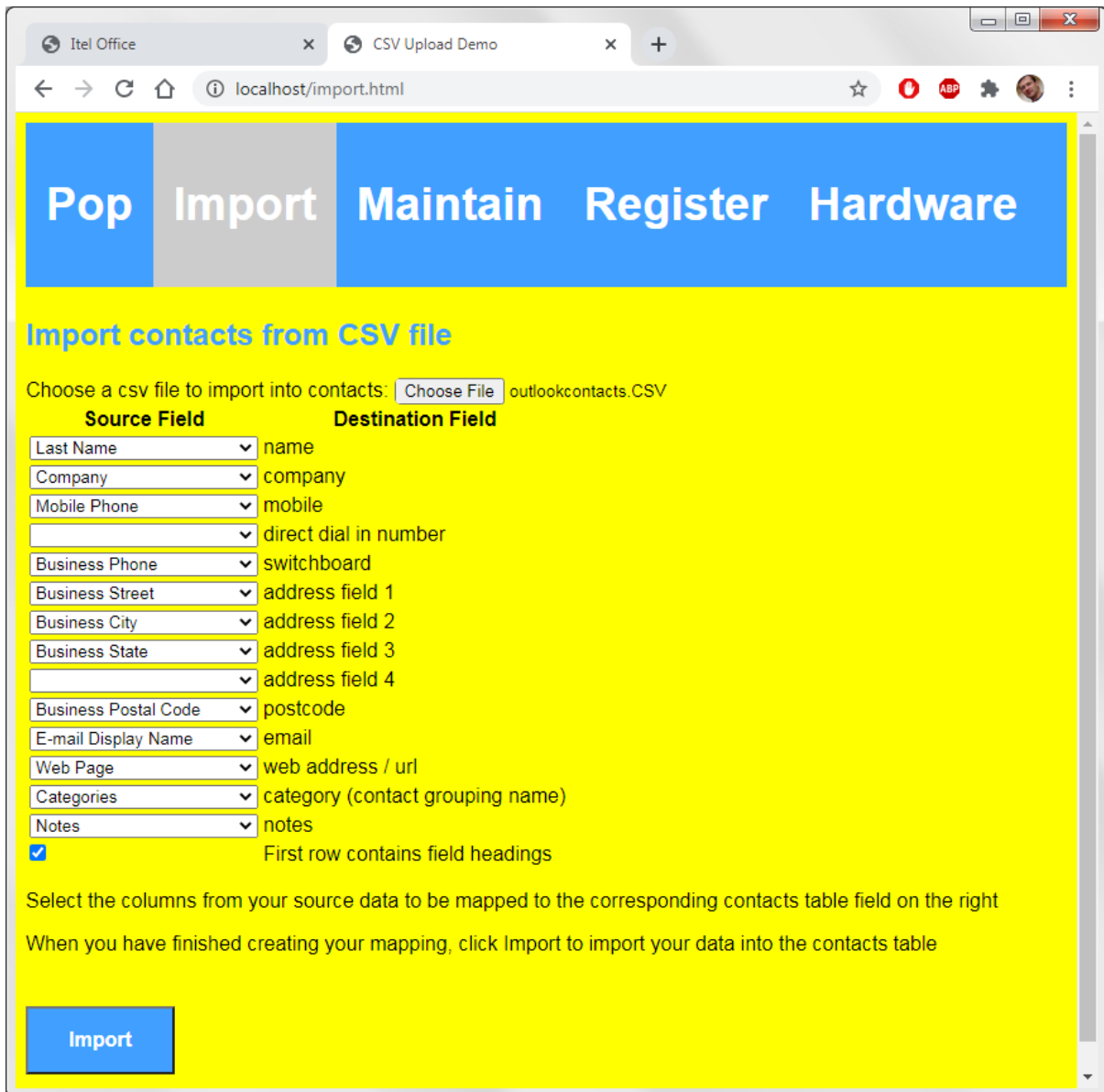


Figure 2: Import from Outlook example

7. Click Import button.
8. Click the browser alert button displaying the number of rows imported.

Delete a Contact

1. Find the contact using search - see Find a Contact.
2. Click Delete button.
3. Click OK on the confirm deletion dialog box.
4. Status bar should now display: 'Record successfully deleted with rowid: x' where x is the ID of the database row deleted.

Edit a Contact

1. Find the contact using search - see Find a Contact.
2. Click Edit button.
3. amend the contact as required.
4. Click Save button.

Find a Contact

1. Launch Itel Office.
2. Click on Contacts tab if not already selected.
3. Enter any part of contact details you know. eg if you entered some distinctive note about the contact but can't remember the name enter the note. Or the name or part or a combination of the information in fields you know.
4. Either press Enter key or click on the Search button.
5. If the contact could not be found, then the status bar will display 'No record found which matches the criteria'. If the one or more records match the criteria then the status bar will display: Displaying 'record x of y'. If more than one record is returned you may need to click on the Next button a few times to find the contact you want.

Navigate Contacts

1. Press Enter to return all available contacts in the database.
2. Click First to move to the first contact in the returned set of contacts.
3. Click Prior to move to the contact prior to the current contact.
4. Click Next to move to the contact next in the list of returned contacts.
5. Click Last to move to the last contact in the list of returned contacts.

Cancel / Revert an Edit

Click the Cancel button or hit Esc key to cancel an edit and move to search mode.

Handle Incoming Calls

If Itel Office is used in conjunction with a supported telephony device, then the call log will be populated each time a new call rings on your phone and the caller can be screenpopped to make handling calls much smoother and simpler.

Enable Computer Telephony Integration

To enable the feature follow these steps:

1. Launch Itel Office and select the Call Log tab.
2. Click on the 'Start Call Monitoring' button.
3. You should now see 'Telephony device reported state: operational' displayed in the status bar. If not, see Telephony Troubleshooting.
4. If you later want to stop calls being logged or prevent screenpop, click on the 'Stop Call Monitoring' button.

Screenpop unknown Caller

To test this feature you can dial your landline number with your mobile. Example screenshot below.

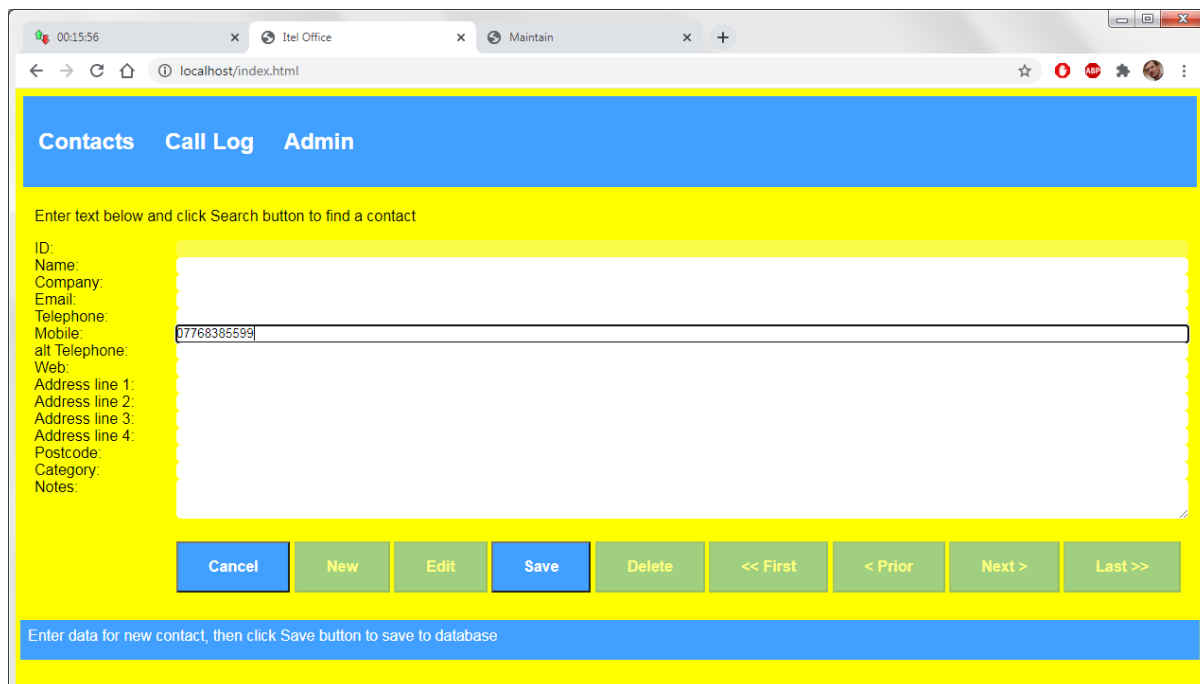


Figure 3: unknown caller screenpop

You can now enter additional information and click Save button when finished.

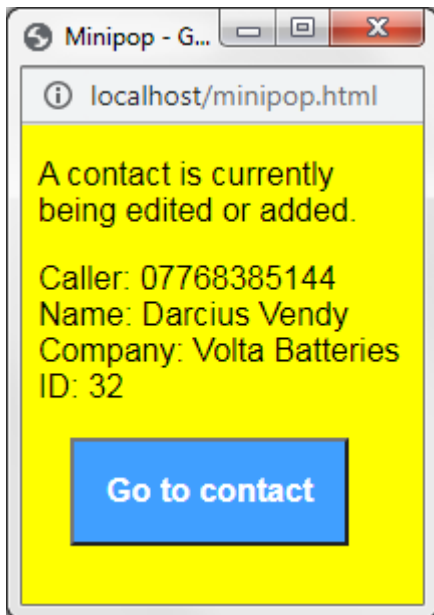
Screenpop Known Caller

To test this feature add yourself as a contact with your mobile number. Now dial your landline number with your mobile. ITEL Office will switch to the Contacts tab displaying the contact with the telephone number of the caller.

Minipop - Screenpop whilst Editing a Contact

To check this feature, follow these steps:

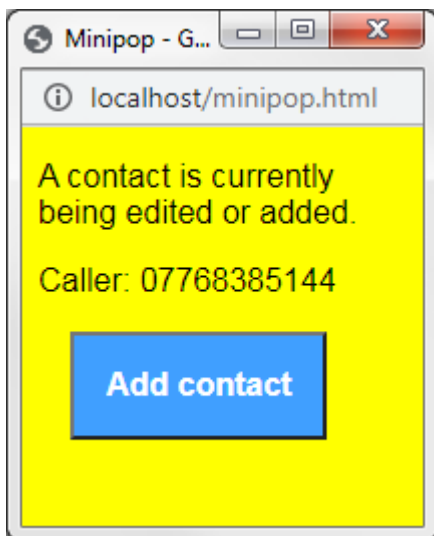
1. enable Telephony as described in Enable Computer Telephony Integration.
2. Find a contact as described in Find a Contact.
3. Click Edit button to start editing the contact (to check the feature, it is not necessary to make any changes to the contact).
4. dial in with your mobile.
5. minipop window should appear as below.



6. Complete editing of contact or click Cancel.

7. Click on Go to contact button in minipop window to screen pop the contact.

Note that if the caller is NOT found in the contacts database then the minipop window will look like this:



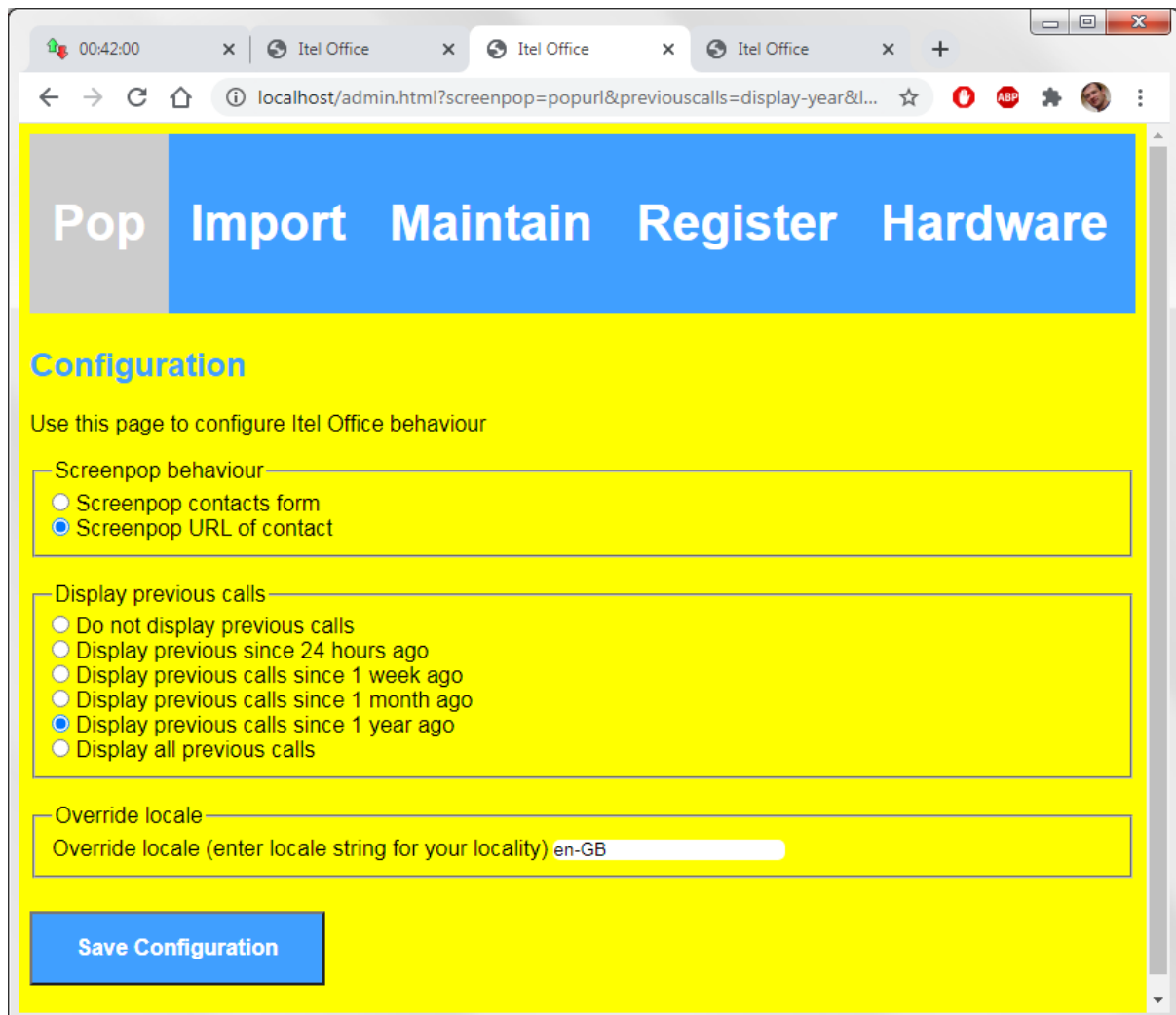
And when you click on Add contact button in the minipop window, the caller's number will be added to the mobile field of a new contact. You can add more information and click Save.

Screenpop URL

By default, an incoming call screenpops the contact form. However, if preferred, the screenpop action can pop a URL. The url popped is the url entered in the Web field in the contact with the caller ID of the caller in one of the three telephone fields.

To enable the screenpop URL feature follow these steps:

1. Launch Itel Office and select the Admin tab.
2. Click on the Pop tab if not already selected.
3. Under Screenpop behaviour select Screenpop URL of contact.
4. Click Save Configuration button.



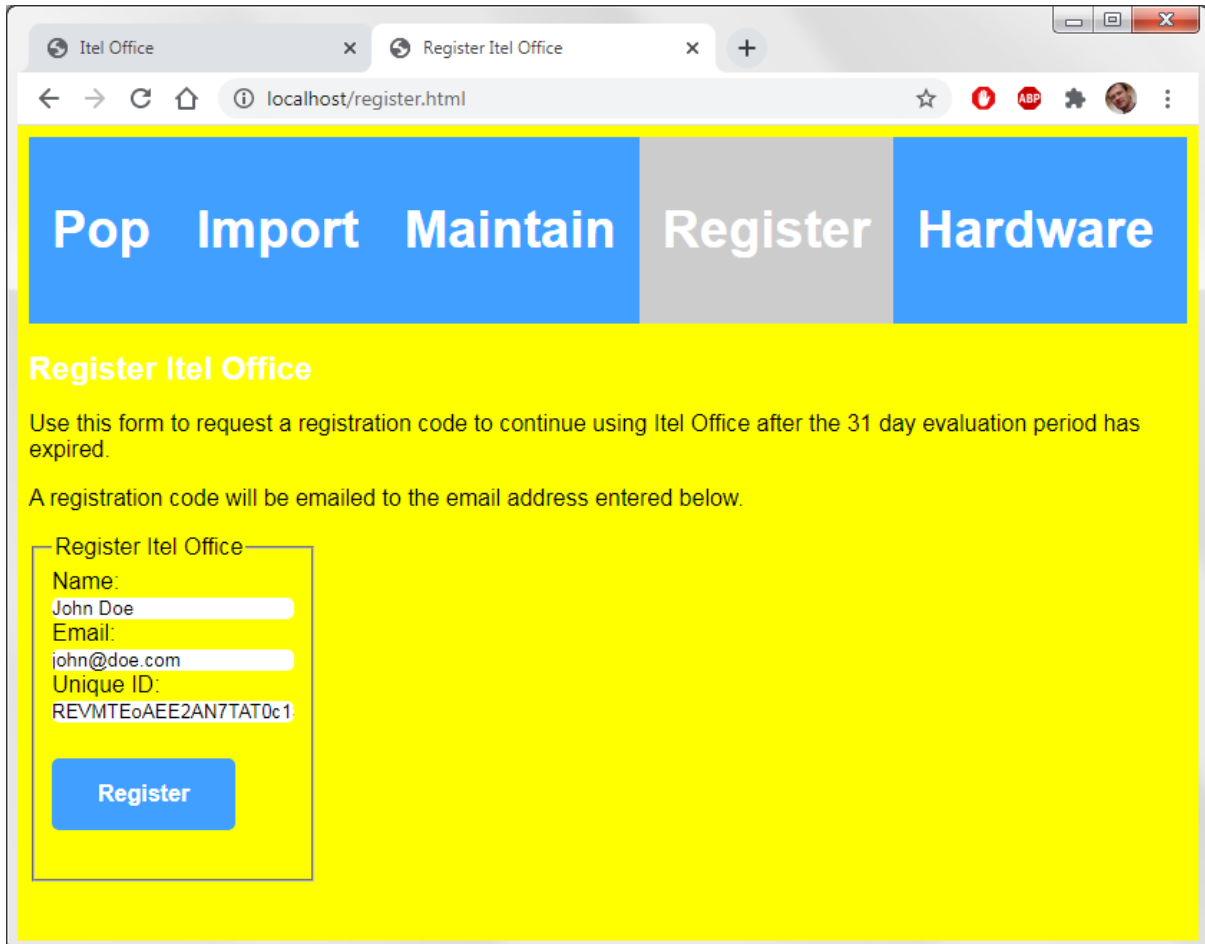
After making this change, the web address entered in the Web field of the contact will be screenpopped.

Register Itel Office

Itel Office is offered as a free trial download for 1 month so that users can evaluate the product with no obligation. After the trial period ends, the software will still work but with the limitation that the database access changes to be read-only. So you can still search for contacts and screenpop will still work, but it is no longer possible to edit any contacts.

To continue to use Itel Office in unrestricted mode, ie with full read/write access to the contacts database, it is necessary to register your product. To register, follow these steps:

1. Launch Itel Office and select the Admin tab.
2. Click on the Register tab.
3. The registration page will be displayed with a unique ID which is a unique identifier for your PC pre-populated.
4. Enter your name and email address and click Register to start the registration process. See example below.



If the registration process completes, which may require payment, a registration code will be emailed to the email address provided. When you receive this email simply double click on the hyperlink to commit the registration code to your installed product. After this process has been completed, you can run the product completely unrestricted in perpetuity.

Note that you must double click on the registration code link on the computer on which you run Itel Office. If you cannot access your email program on this same computer you can copy the link url of this link and just run this same url on your Itel Office computer.

Troubleshooting

Database in Read-only Mode

If you attempt to make a change to a contact after the 1 month trial period has expired, you will see a read-only status message after attempting to perform the operation. See Register Itel Office for instructions on how to fix this issue.

Telephony Troubleshooting

When Itel Office is installed, the drivers for the telephony device are installed and the device should automatically be detected and made ready for use. So screenpop should just work.

If screenpop is not working, then it may be possible to fix the problem by forcing a re-discovery of the telephony device. Follow these steps to force a refresh of the telephony hardware saved in the Itel Office configuration:

1. Launch Itel Office and select the Admin tab.
2. Click the Hardware tab.
3. Any device which provides a serial port interface should be detected and displayed on this page.

Example below:

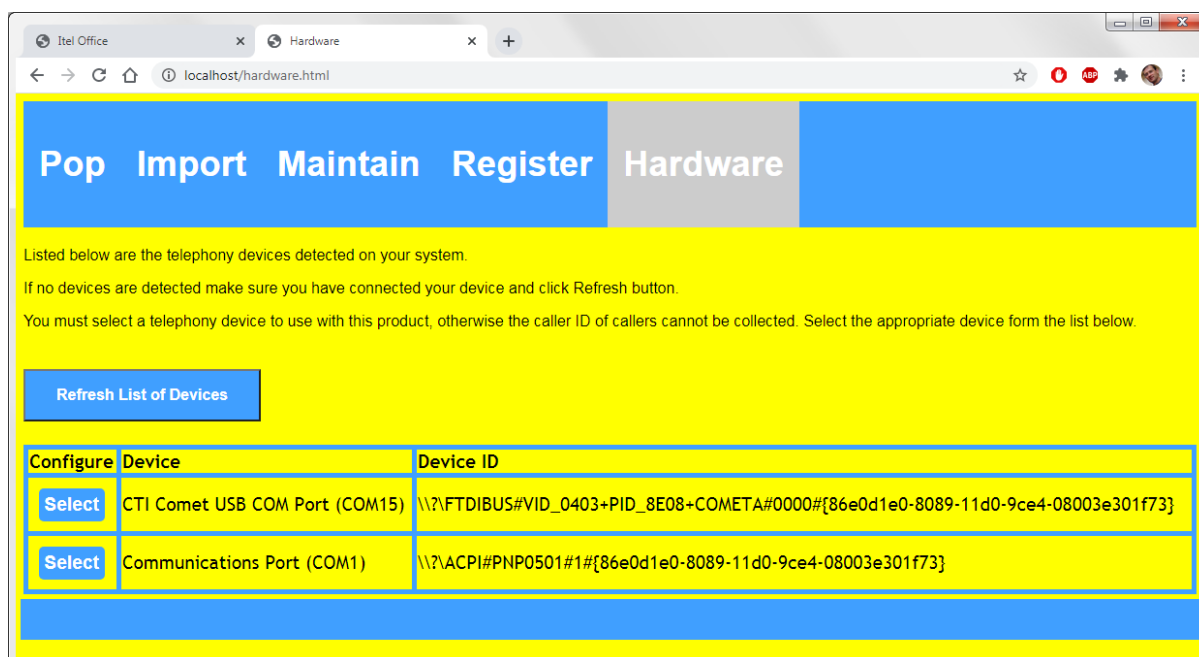


Figure 4: Detected telephony hardware

Generally, this page will only display a single telephony device which would have been purchased to provide computer telephony integration on the PSTN line. The example above shows two serial port devices, a Comet USB Caller ID device plus another serial port device.

If you see no entries in the device table, then check that your device is correctly installed and cabled securely. For external USB devices check the USB connection is not loose. Try a different USB port to see if that works. You can click on the Refresh List of Devices to refresh the list after re-connecting a new device.

Click on the Select button for the device which you believe is most likely to be the correct telephony device.

To check if screenpop is now working follow these steps:

1. Click on the Call Log tab.
2. If the Start Call Monitoring button is disabled click on the Stop Call Monitoring button.
3. Click on the Start Call Monitoring button.
4. You should now see 'Telephony device reported state: operational' displayed in the status bar. If not, see Telephony Troubleshooting.
5. If you see a different status message then please contact Itel Office support where our staff will be able to remotely troubleshoot and either fix the issue or at least provide some next step advice.