

Phone Manager is part of the Dialog Manager suite, which is a unique multi-channel solution enabling you to attract, retain and grow customer relationships across traditional sale-, service- and marketing boundaries.

Phone Manager, DIALOG MANAGER

INSTANTANEOUS CUSTOMER IDENTIFICATION WITH CTI



DESCRIPTION

Phone Manager equals complete integration between the company's phone system and computers in interplay with the rest of the Dialog Manager suite. The dialogue becomes even more structured - the history always saved.

Computer-Telephony Integration (CTI)

The phone is an ever important part of the company's media and contact with customers. Phone Manager is designed to cover the many related needs by providing a user friendly interface, where the phone contact is optimized via the computer that automates access to all relevant customer information.

CTI revolves around two primary elements: "Call Control" and "Telephone Information". Call Control is about optimization of phone call management via the computer as well as the possibility to carry out- and receive calls and secure rapid and accurate transferring. Telephone Information gives access to seeing updated information about all phones connected to the system.

Automatic recognition

Before your phone rings the system has already retrieved the caller's Main Data - no matter whether the call comes from a company, a private phone or a mobile phone. As a reason, the call can immediately be made relevant, personal and be carried out with a professional and positive tone.

In case further caller information is need there is quick access to all information about- and history on the person or company. Via a status list the responder can see all phones and their current status in the system - if necessary you can even press a button and view the individual's calendar.

While talking on the phone...

In case the user receives a new call during the ongoing call Phone Manager will display the ID of the new caller. The user can now choose to put the first call on "Hold", answer the second call, switch between calls or just let a caller know that he/she will be called back later. Name, phone no. etc. is already logged for later lookup.

During any call the user can open letters, emails, create messages, minutes, mail merge, plan follow-up activities and checkmark tasks with a scheduled reminder function and plan meetings, etc. - all with direct lookup in MS Office and Outlook/Notes.

An extension to the phone system - not a replacement

With CTI the phone system still needs to perform important tasks. Phone Manager creates new opportunities for optimum communication via the phone, but will not change the rules that are already encoded into the phone system. Instead the system is optimized making everything easier for the users and a more positive experience for the customer at the other end.

KEY BENEFITS

- ✓ Automatic customer identification and lookup in Profile Manager gives the customer the positive experience that the recipient is well-informed about their business and situation
- ✓ Called-Id enables recognition of the called number and with this proactive management of call response
- ✓ Log of lost calls enables the user to make follow-up activities on otherwise lost dialogue - and lost business
- ✓ History on calls with the contact opens for:
 - Statistics and history analysis
 - Adaptation of internal processes to actual calls
 - Continuous optimization of call response
- ✓ "Automatic Dialing" by button increases both productivity and focus on the current activity
- ✓ Phone time is registered for the call and consolidated to:
 - Department level
 - Branch level
 - Company level
 - Parent level
 - or Private level
- ✓ Local no. list gives the responder a constant overview of the individual colleague's current openness to calls with "Do Not Disturb":
 - Green: Available to receive calls
 - Grey: Rather not disturb - but important calls are acceptable
 - Red: Do not disturb - and calls are not accepted
- ✓ Local no. list can be made selective and individual allowing the responder to see a list of only relevant colleagues
- ✓ Possibility to handle several simultaneous calls when the calls are frequent and complex - with this also calls on HOLD
- ✓ Integration with Outlook/Lotus Notes opens for:
 - Local email message with transferral of Main Data
 - Local email with quick messages
 - External email after finished call
 - Direct lookup in colleague's calendar
- ✓ CTI controlled transfer in all kinds increases:
 - Transferral efficiency
 - Overview of phone activity
 - Customer's positive call experience

See **FUNCTIONALITY** on back side



- ✓ Extended Enterprise Edition **Phone Manager**, DIALOG MANAGER
- ✓ Enterprise Edition
- ✓ Professional Edition
- ✓ Small Business Edition

FUNCTIONALITY

The following functionality is included in Phone Manager:

- ◆ Automatic customer identification (via A-no.)
- ◆ Link A numbers unlimited on dimensions
- ◆ Automatic customer and information lookup
- ◆ A number presentation
- ◆ Presentation of customer telephone history
- ◆ Presentation of user telephone history
- ◆ Easy creation and maintenance of A no. on customer
- ◆ Transferral to local no.
- ◆ Transferral to mobile phone
- ◆ Transferral to ACD group
- ◆ Transferral, blind
- ◆ Transferral, assisted
- ◆ Local no. list
- ◆ Independent local no. list
- ◆ Individual local no. list
- ◆ Calls on hold
- ◆ Multiple simultaneous call handling
- ◆ Multiple phone no. call options
- ◆ Primary call no.
- ◆ Call lists
- ◆ Local email message with Main Data transferral
- ◆ Local email with quick messages
- ◆ External email after completed call
- ◆ Multi-tasking with integrated programs
- ◆ Log over lost calls
- ◆ Automatic call log and history
- ◆ Full CDR (Call Detail Record)
- ◆ Automatic call list creation (requires Batch Manager, amongst others)
- ◆ DMAPi integration (requires PowerScript Manager, amongst others)
- ◆ Outlook Integration (requires Outlook Integration Manager, amongst others)
- ◆ Lotus Notes Integration (requires Lotus Notes Integration Manager, amongst others)
- ◆ Access control on record level (requires Security Manager, amongst others)
- ◆ Call access from entire CRM universe
- ◆ CRM integration
- ◆ Dialog Manager integration
- ◆ Local email message with transferral of A no.
- ◆ Called-Id (dialed no. is identified)

CHECKLIST

- ✓ Profile Manager call + response
- ✓ Contact lookup
- ✓ MS TAPI 2.1 or later
- ✓ PABC drivers:
 - Avaya Argent Office
 - Nortel Meridian
 - Ericsson MD110
 - DM Generic MS TAPI 2.1
- ✓ Support for CRIMP Integration
- ✓ Transferral
- ✓ Local no. list
- ✓ HOLD
- ✓ Multi-call management
- ✓ Log
- ✓ History
- ✓ CDR (Call Detail Record)
- ✓ Called-Id
- ✓ (Functionality can vary in relation to PABC)