

CATALOG

# ShoreTel Advanced Applications

## Overview

ShoreTel offers a portfolio of software applications that deliver on the promise of unified communications (UC) by increasing return on investment of both the ShoreTel UC system and a customer's existing business applications. By tying organizational communications into core business processes, these innovative solutions help to increase employee productivity, shorten response times, encourage collaboration, and improve customer satisfaction. The result is a more efficient and profitable enterprise.

Packaged offerings include automated Call Recording, Emergency Notification, Active Directory Import, and Outbound Campaign IVR as well as add-ons for ShoreTel Workgroups and Contact Center and integrations with Salesforce.com, Microsoft Dynamics CRM, Sage ACT!, NetSuite CRM, Copitrak, Equitrac, and many others. Software integration boosts organizational productivity and offers organizations crucial communication and safety benefits, for instance internal notification when emergency calls are placed on the ShoreTel system.

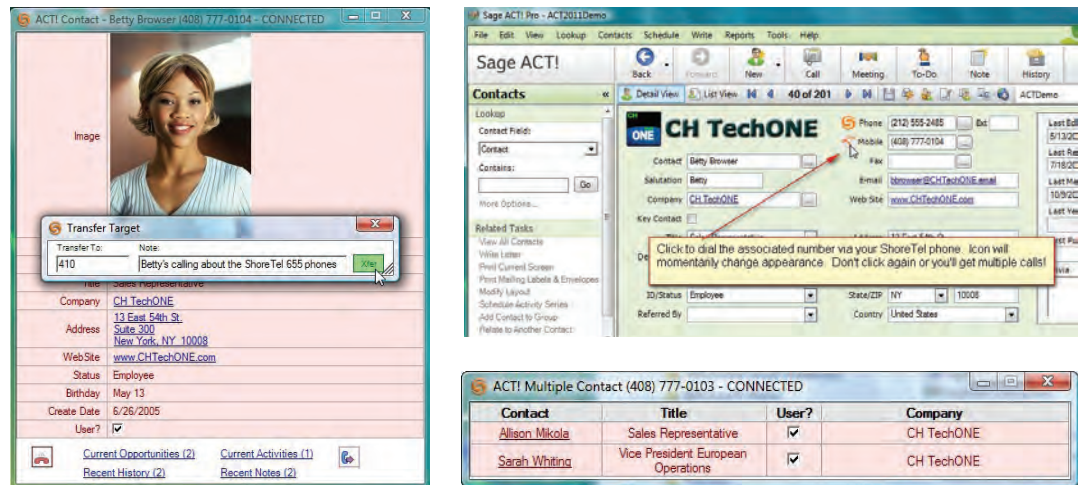
In addition to an expanding set of packaged solutions, ShoreTel offers custom software development services to address unique business requirements and give organizations a competitive edge. Examples of custom capabilities include the ability to embed ShoreTel call control within other applications or to automatically harvest in-depth statistics using customer information. Both packaged and custom applications are available through authorized ShoreTel resellers and distributors.

This catalog is intended for reference by all ShoreTel customers and provides an overview of currently available packaged and custom applications, highlighting benefits and target markets. For further information, contact the ShoreTel Advanced Applications organization via email to [professionalservices@shoretel.com](mailto:professionalservices@shoretel.com) (preferred) or by phone at +1 800-425-9385 x3331.

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## ShoreTel ACT! Integration Application



### Overview

- Screen Pop Integration to Sage ACT!
- Sage ACT! is a customer/contact management system
- ShoreTel provides a fully configurable Caller ID based display of key customer information
- ShoreTel Contact Popup displays Information elements as hyperlinked functions
  - Contact, Company, Website
  - Current Opportunities & Activities, Recent History and Notes
  - Address: Triggers browser window to display map of mailing address
- User configurable options for customizing contents of ShoreTel Popup
- Color coding of text and background indicates contact type (Prospect, Customer, Employee, Family, Friend)
- Pop-up includes embedded call control – Answer, Transfer with real-time note, Disconnect
- Custom ShoreTel dial control button embedded within ACT!
- Client software loaded on user desktop machines
- Compatible with ACT! thick client (not browser based version)

### Benefits

- Richly featured integration for wide variety of customers
- Increases productivity & enhances customer service levels
- User friendly – Employees enjoy individual control over application behavior

### Target Customers

- Any customer running Sage ACT! (desktop client version) revision 2010 or later

## ShoreTel Active Directory (AD) Import Application



### Overview

- Auto synchronizes ShoreTel System Directory with Microsoft AD information
- Supports mixed PBX environments and facilitates user migration to the ShoreTel system
- Keeps ShoreTel System Directory current with AD information
- Complete corporate directory from legacy systems available on phones and from Communicator
- Custom import & update for users in groups or batches
- Custom mapping between System Directory fields and LDAP Properties
- Test run option available
- Windows Event Log summary and Application Log of AD Imports and test runs
- Optional update of user group for ShoreTel users no longer in AD
- Optional import of non-ShoreTel users facilitates system migration scenarios
- Optional AD update with ShoreTel DIDs and extensions

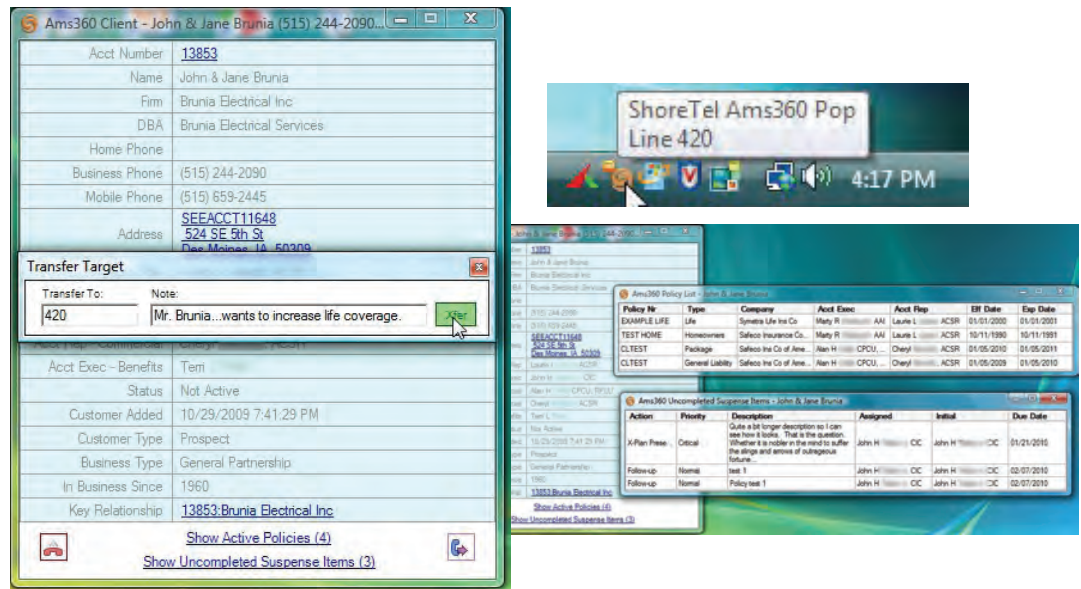
### Benefits

- Reduces manual work & saves operational cost
- Easy look up and dialing among users on all systems

### Target Customers

- All ShoreTel installed base and new customers

## ShoreTel AMS 360 Integration Application



### Overview

- Screen Pop Integration to Vertafore AMS 360
- AMS 360 is an office management system for Independent Insurance Agencies
- ShoreTel provides a Caller ID based display of key customer information
- Key information elements are hyperlinked functions:
  - Account Number: Triggers AMS 360 to display customer record
  - Address: Triggers browser window to display map of mailing address
- User configurable options for showing links to Active Policies and/or Uncompleted Suspense Items
- Color coding of text and background highlights customer type
- Pop-up includes embedded call control – Answer, Transfer with real-time note, Disconnect
- Client software loaded on user desktop machines

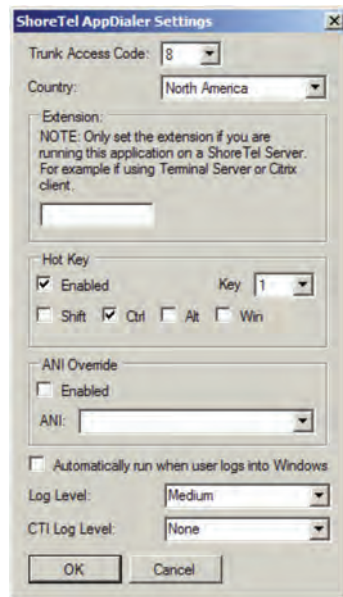
### Benefits

- Tight & richly featured integration designed expressly for Insurance Agencies
- Increases productivity & enhances customer service levels
- User friendly – Employees enjoy individual control over application behavior

### Target Customers

- All Independent Insurance Agencies (Brokers) using Vertafore AMS 360

## ShoreTel Application Dialer ("AppDialer")



### Overview

- Supports easy dialing from any Microsoft Windows application that supports "<ctrl> + C" copying of selected text
- Simply select phone number text, then press a hot key or click the AppDialer icon
- Compatible with Microsoft Office Applications such as Word, Outlook, Excel, and PowerPoint
- Allows individual users to optionally override Caller ID for their outgoing calls
- Client software loaded on user desktop machines

### Benefits

- Lightweight, automatic, and generic "works everywhere" solution
- Extends ShoreTel's reach to the desktop
- User friendly – Keyboard centric users can define their own hot keys

### Target Customers

- Any customer whose users want to click to call from their Windows desktops



## ShoreTel AS/400 Connector

AS/400 system integration represents a practice area specialty for the ShoreTel Advanced Applications organization. We have delivered AS/400-based integration solutions in the past and can leverage that experience to provide economical solutions going forward. New customer requests will be treated as custom projects requiring some basic discovery and a statement of work document. The goal will be to leverage existing software to the largest extent possible, thereby containing costs.



### Overview

- Screen-pop of customer information based on Caller ID (ANI)
- EasyPop or Contact Center Agent Toolbar must be configured to run the application when a new call arrives or is answered
- Utilizes a dedicated AS/400 terminal emulator session
- Sends keystrokes to the emulator to search for a matching record
- Requires implementation of a custom AS/400 command to search for ANI
- Application is installed on the client PC or on a Citrix or WTS server

### Benefits

- Quickly access customer information when a call arrives
- Personalized call handling

### Target Customers

- Customers desiring ShoreTel integration with their AS/400 system



## ShoreTel BCA (Bridged Call Appearance) Call Hold Monitor



### Overview

- Monitors BCA calls which have been on hold for more than a configured time
- Calls are transferred to a configurable destination when call hold time is exceeded
- Software only Application loaded onto ShoreTel Director or DVS server

### Benefits

- Ensures customer satisfaction by guaranteeing that phone requests are handled promptly
- Ensures that no end customer is left on hold for an unreasonable length of time
- Simple configuration
- Support for multiple BCAs within a system

### Target Customers

- Retail environments where personnel serve both live customers and phone requests
  - Auto Parts, Appliance centers
  - Grocery Stores
  - Department Stores
- Any customer who uses the Bridged Call Appearance feature

## ShoreTel Call Handling Mode (CHM) Override Application



### Overview

- Allows phones in DND or forwarded modes (e.g. “In a Meeting”) to be called
- Caller must use special dialing technique to activate
- Software only Application loaded onto ShoreTel Director or DVS server

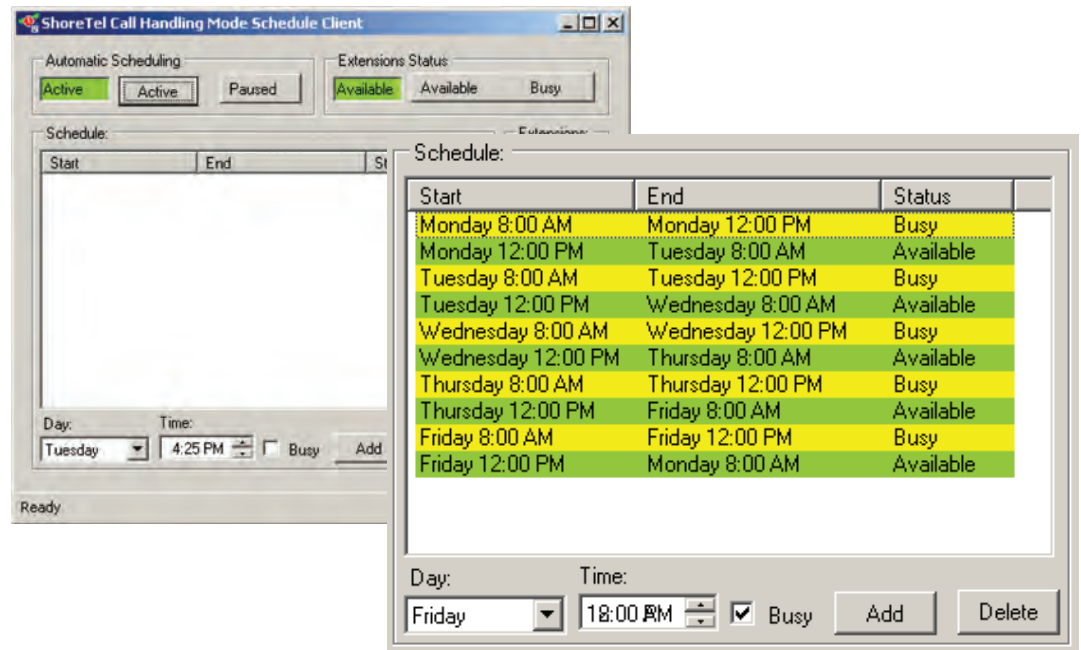
### Benefits

- Natural pair for ShoreTel CHM Schedule Application
- Fully automatic – Once installed, application runs continuously in background
- Special dialing technique can be shared with limited group of company personnel
- Dialing technique simple and configurable
- Configurable no answer timeout before caller will be transferred to called party’s voicemail box
- Calls must be made from a ShoreTel IP phone

### Target Customers

- Natural fit for customers (e.g. K-12 schools) who purchase CHM Schedule Application
- Any customer who desires the ability to communicate instantly and privately (i.e. not via intercom) with employees regardless of phone mode

## ShoreTel Call Handling Mode (CHM) Schedule Application



### Overview

- Automatically sets a group of phones into the configurable “busy” or “available” state based on a pre-set schedule
- Phone states are set based on hour of the day for each day in the week
- Used to prevent inbound calls at certain times of day
- Software only Application loaded onto ShoreTel Director or DVS server

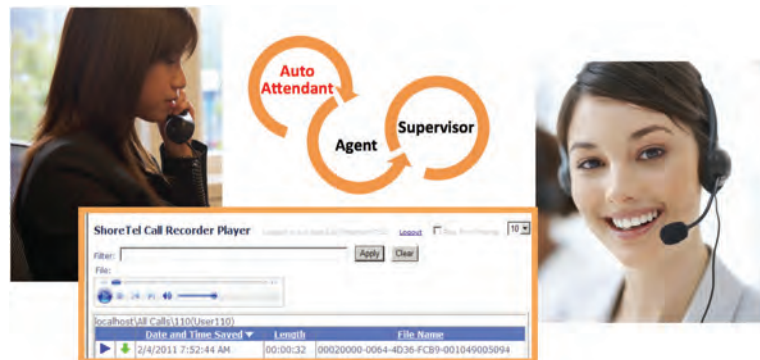
### Benefits

- Extends ShoreTel ease-of-use
- Centralized management for consistent system behavior and less work for users
- Intuitive color coded administrative interface
- Pairs perfectly with ShoreTel CHM Override Application for full flexibility

### Target Customers

- K-12 schools for blocking calls into classrooms during teaching hours
- Medical facilities with shared use rooms

## ShoreTel Call Recorder



### Overview

- Automatic recording of external calls continuing through call transfers and redirections
- Persistent call recording captures 'cradle to grave' caller interactions including those with IVRs, VoiceMail, Hunt Groups, Workgroups, and other extension types
- Flexible Call Record Profiles to effectively record what needs to be recorded
- User control of Save/No Save and Pause/Resume of call recording
- Pause/Resume support allows agent to not record sensitive information (e.g. customer credit card number,) thereby facilitating PCI compliance
- Configurable Customer Stop Recording key
- Automatic storage in multiple file systems and/or multiple ShoreTel VoiceMail boxes
- Custom folder & file names in call recording archives
- Custom Subject: and From: fields in ShoreTel Voicemail box
- Web-based Recorder Player
  - Convenient searching, downloading, and management of recordings
  - Playback via phone or computer
  - Player URL access allows recording links to be embedded within web based applications including Salesforce.com and Contact Center Interaction Viewer among others

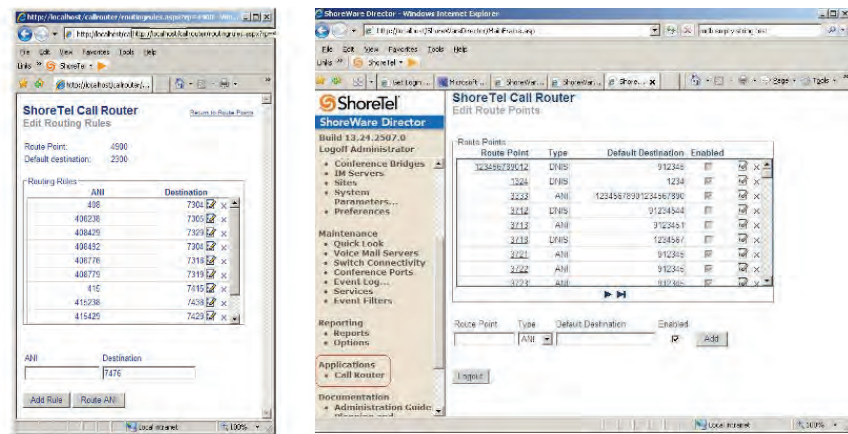
### Benefits

- Cost-effective native ShoreTel pure-IP application
- Facilitates organizational training and operational reviews for improved customer service and fraud prevention
- Quick & easy call recording retrieval
- Configurations to help comply with national and local laws such as PCI DSS standard
- Easy scaling and strategic deployment to optimize use of ShoreTel system resources
- Single click Recording playback in context with other business data from within Salesforce.com and other applications

### Target Customers

- Any customer for whom audio call recording, storage, and management is critical

## ShoreTel Call Router



### Overview

- System-wide application that distributes incoming calls to configured destinations based on ANI (Caller ID) or DNIS (Called Number)
- Supports routing based on domestic & international, fully flexible number formats
- Includes a ShoreTel Director-embedded\*, password authenticated administrative interface for creating routing rules
- Supports multiple route points hosting associated rule sets
- Calls with no caller ID, DNIS, or for which no match is found will be routed to a configured default destination
- Note: This capability is distinct from Personal Call Handling controls allowing user control via Professional Call Manager

\* Director integration available with ShoreTel V9.2 and above; standalone web administration provided for earlier releases.

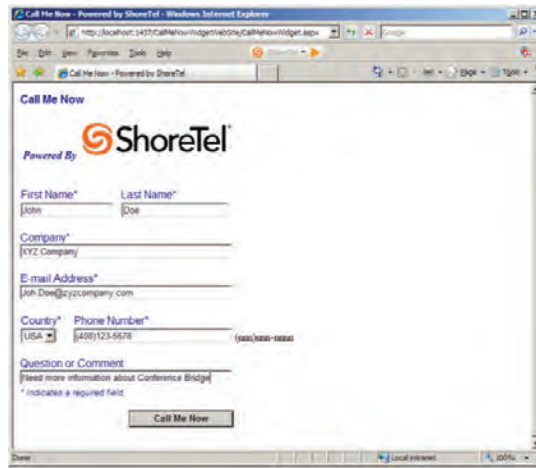
### Benefits

- Lightweight software application installed on ShoreTel Director or any Distributed (DVS) server
- Convenient ShoreTel Director-integrated, web-based administration
- Flexible rules configuration

### Target Customers

- Wide variety of businesses who want to automatically and efficiently direct incoming calls on a system-wide basis

## ShoreTel Call Me Now Application



### Overview

- Allows companies to add a "Call Me Now" feature on their web site
- Supports callback to US or Canada based phone numbers
- Consists of a front end "Call Me Now" web widget and a back end web service
- Back end web service is loaded onto ShoreTel HQ server and web widget is loaded on ShoreTel HQ server or any customer server with IIS
- Back end web service is associated with a dedicated ShoreTel Route Point
- After called party answers, call is routed to a ShoreTel extension such as a Workgroup, a Contact Center entry point, an Auto Attendant, or an end user

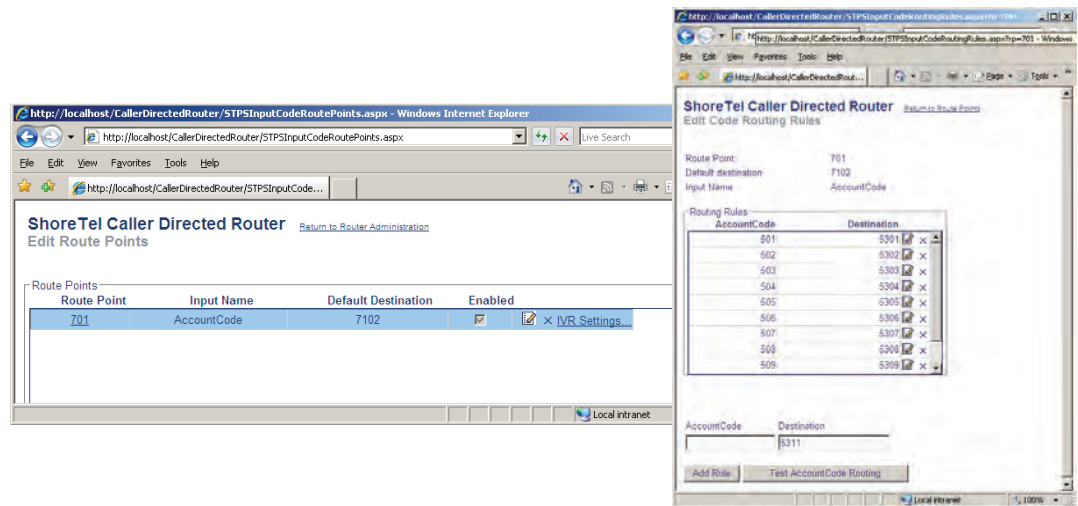
### Benefits

- Encourages customers to connect with a company immediately, obviating the need to dial a number
- Used within company websites in a simple way by mashing up the "Call Me Now" web widget.
- Back end web service may also be used directly to build a custom web UI and integrate with business processes.
- Called party information is stored for later export, reporting, and follow up
- "Call Me Now" web widget can be rendered in all major browsers including Microsoft IE, Mozilla Firefox, Apple Safari and Safari mobile browser on Apple iPhone
- Allows passing of user "context" such as the web page currently being viewed or a user's question or trouble ticket number. This context is attached as a call property to the call, allowing agents to provide personalized service to web site visitors

### Target Customers

- Wide variety of businesses who want to provide enhanced experience to their web site visitors and gather potential customer leads

## ShoreTel Caller Directed Router



### Overview

- Server application that distributes incoming calls based on caller input (e.g. account code, zip code and others)
- Input code can be of fixed or variable length
- Includes a web based, password authenticated administrative interface for creating rules table and configuring code gathering IVR behavior
- Calls with no matching input code will be routed to a configured default destination

### Benefits

- Lightweight software application installed on ShoreTel HQ or any DVS server
- Convenient web-based administration embedded within ShoreTel Director-Application (ST9.2 & above)
- Flexible rules and IVR configuration and built-in rules test mode
- Application is associated with a Route Point extension; calls are routed to this extension using standard system facilities
- Codes passed as call properties to support desktop integration
- Implements multiple speed dial lists for internal users
- Multi-lingual Support

### Target Customers

- Wide variety of businesses who want to automatically and efficiently direct incoming calls based on caller input



## ShoreTel Contact Center Agent Activity Event Feed Web Service

(Validated for NICE IEX Workforce Management Integration)



### Overview

- Allows open and real time access to Contact Center Agent Activity Events
- Validated for integration of ShoreTel with NICE IEX Workforce Management
- Workforce Management systems enable call centers to forecast & manage staffing needs
- Open architecture: Published specification available for consumption by other systems (Workforce Management and other)
- Industry standard platform independent web service interface

### Benefits

- Open, fully supported software architecture enables rich integration
- ShoreTel Advanced Applications organization provides expert support to 3rd parties
- Sophisticated business process integration for optimal efficiency
- Efficient, effective call centers, productive agents, & high customer satisfaction

### Target Customers

- Any Contact Center customer interested in business process integration

## ShoreTel Contact Center Agent Alert



### Overview

- Notifies agents when they enter a state in which they cannot receive ACD calls
- Displays a large red window covering entire screen.
- Until they click "close" agents will not be able to utilize their computers

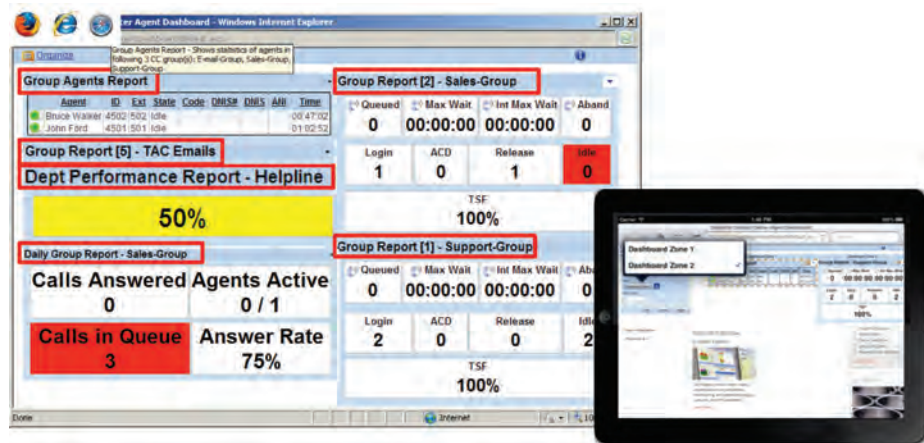
### Benefits

- Alerts unaware agents that the system has made them unavailable for calls
- May not have answered a prior ACD call or can forget to log in after breaks

### Target Customers

- Busy environments where agents have frequent work away from their desks

## ShoreTel Contact Center Agent Dashboard



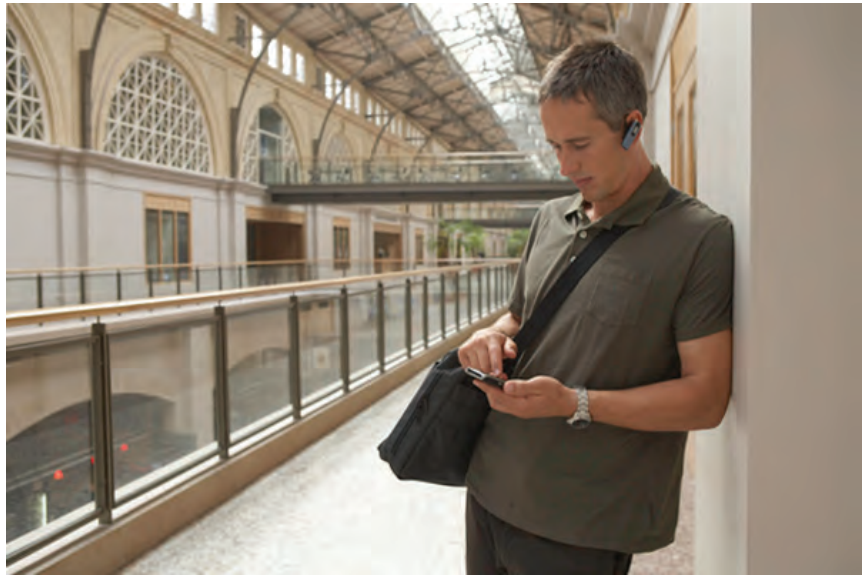
### Overview

- Add-on application for ShoreTel Contact Center to display real-time customer service metrics
- Configurable Contact Center Agent Dashboard (CCAD) reports on Agent and Group Performances:
  - Group Agents Report: Agent State details
  - Group Report: Real-time metrics for both ACD voice and e-mail calls
  - Department Performance Report: Real-time, daily accumulative call-answer rate in a department
  - Daily Group Report: Real-time daily accumulative call-answer rate of the configurable group of active agents
- Conscientious designs for minimal report footprint include informative tooltips and a separate full screen mode
- Administrators to design custom CCAD webpages and users to personalize report displays
- Clear report captions and color-coded thresholds
- Compatible with ShoreTel Contact Center 6 and higher
- Supports Apple iPad platform in addition to Windows and Apple Mac
- Not replacement for the Contact Center Agent Manager or Wallboard Applications

### Benefits

- User-friendly report displays and at-a-glance summaries of service status
- Communicates key metrics to agents in real time, empowering them to self-manage
- Extends real-time performance monitoring capabilities to all agents
- Easily managed single web application for designing, publishing, and viewing

## ShoreTel Contact Center Instant Override Message



### Overview

- Telephone User Interface (TUI) for rapidly changing a Contact Center override announcement wave file
- PIN authentication to prevent unauthorized access
- Provides functions to play the existing override message, disable the override message, enable a pre-recorded override message, and to record and enable a custom override message.
- Microsoft Windows event log audit trail
- Application is installed on the on the primary and optional backup Contact Center Server

### Benefits

- Easy to use phone interface for changing an override message
- Immediately inform Customers of emergency conditions without requiring computer based access to Contact Center administration
- Retail customers may inform callers of daily specials.
- Countless other uses

### Target Customers

- Contact Center customers wishing to rapidly change IVR announcements

## ShoreTel Contact Center Interaction Viewer

**ShoreTel Contact Center Interaction Viewer**

Welcome Viewer Filters Settings

Current filter settings:

Date Range: Tuesday, April 12, 2011 – Tuesday, April 12, 2011  
Time Range: 00:00:00 – 23:59:59  
Current Expression: None

Matched 83 records (4 pages) Show 25 rows/page

Call ID	ACD Call?	Start	Duration	Calling	Called	Agent Nr	Agent Nm	Aban?
733266249	N	04/12 09:00:54	00:00:11		2649			N
707839812	N	04/12 09:00:47	00:00:24		3573			N
4106391281	N	04/12 09:00:18	00:01:18	2615	917168838888			N
400392218	N	04/12 08:58:58	00:00:31	2615	917168838888			N
3018244510	N	04/12 08:55:39	00:00:18	2615	917168838888			N
3396352993	N	04/12 08:53:24	00:00:18	2615	917168838888			N
2045976603	N	04/12 08:50:56	00:00:18	2615	917168838888			N
2130114922	N	04/12 08:50:37	00:00:18	2615	917168838888			N
1036316775	N	04/12 08:48:39	00:00:18	2615	917168838888			N
1361065042	N	04/12 08:48:22	00:00:18	2615	917168838888			N
255488592	N	04/12 08:47:31	00:00:18	2615	917168838888			N
2500500202	N	04/12 08:45:26	00:00:18	2615	917168838888			N
1571065	N	04/12 08:44:20	00:00:18	2615	917168838888			N
864127110	N	04/12 08:44:20	00:00:18	2615	917168838888			N
1655204075	N	04/12 08:43:04	00:00:18	2615	917168838888			N
3607212743	N	04/12 08:41:09	00:00:18	2615	917168838888			N
536827525	N	04/12 08:36:32	00:00:18	2615	917168838888			N
3051723404	N	04/12 08:35:02	00:00:18	2615	917168838888			N
620955844	N	04/12 08:34:40	00:00:18	2615	917168838888			N
4154775242	N	04/12 08:32:02	00:00:18	2615	917168838888			N
4238913561	N	04/12 08:30:42	00:00:18	2615	917168838888			N
112222903	N	04/12 08:27:50	00:00:18	2615	917168838888			N
2581575565	N	04/12 08:26:15	00:16:12	7038	7008			N
280499541	N	04/12 08:24:54	00:01:18	2634				N
2665713884	N	04/12 08:23:11	00:00:30	7038				N

1 2 3 4

**ShoreTel CDR Call Entry**  
Call table record as logged by the ShoreTel system for CallID = 1571065042

Table ID	Start	End	Duration	Type	Called	Caller ID
0726303	08:47:40	08:48:05	00:25:15	00:27	917168838888	917168838888

**ShoreTel CDR Connection Entries**  
Entries in the Connect table represent all connections on this call, as logged by the ShoreTel system. The highlights first entry is the originating party on the call. Other entries represent the originator's subsequent connections on the call.

Start	Reason	Device	Group	Number	Name	Calling to	Calling ext	Mailbox	Talk	Hold	Ring	Duration	LD	Disconnect
08:42:50	Originate	Trunk	Sunnyvale AT&T 173	+541533545100					00:00:10:00	00:00:00:00:00:00	00:22:0	Normal		
08:42:51	Transfer	Virtual	Sunnyvale NAB	2615	Patricia Barnes	6090	NAB Main Entry Script		00:00:00:00	00:00:00:00:11:00	00:00:0	Forwarded		
08:43:03	Redirect	Virtual	ForwardVoice Mail Redirection	1004	VM Forward	2615	Patricia Barnes	2015	00:00:10:00	00:00:00:00:00:00	00:10:0	Normal		
08:43:04	Called	Branchpoint	Sunnyvale NAB	2002	NAB Main Entry Script				00:00:00:00	00:00:00:00:00:00	00:00:0	Normal		

### Overview

- Web based Application for viewing “Cradle to Grave” information on a call by call basis
- Extensive data filtering from date/time range to advanced matching conditions
- Optional links to audio call recordings when paired with ShoreTel Call Recorder
- Tie to ShoreTel CDR - Each call is “clickable” to determine complete routing from trunk to agent
- Requires CCIR Transform Service which transforms ‘raw’ CCIR data

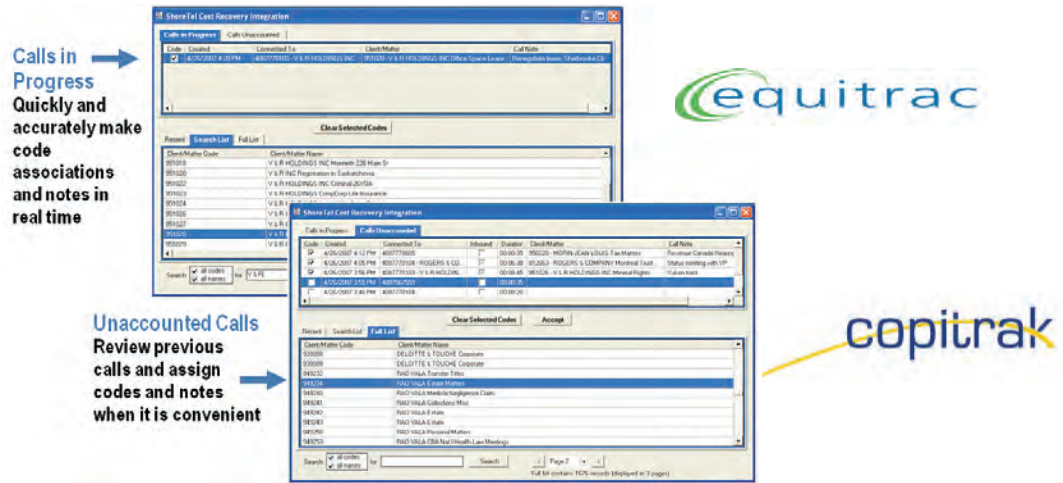
### Benefits

- User friendly view enables quick and accessible analysis
- Easily managed web application
- Merged data (available within minutes of call completion) from the Contact Center and the PBX
- CCIR Transform Service can be purchased separately to allow customers build their own applications

### Target Customers

- Any customer desiring easy access to detailed call by call (as opposed to statistical) information

## ShoreTel Cost Recovery Integration Application



## Overview

- Alternative to built-in Account Code feature
- Provides automatic import of codes from external system
- Open design allows for easy integration with systems such as Copitrak & Equitrac, the leading legal and professional services cost recovery systems
- Automatically matches inbound & outbound phone numbers to tracking codes
- Supports both client/matter and single account code structures
- Allows code assignment during or after calls
- Summary and detailed reports included for standalone operation

## Benefits

- A specialized offering for businesses that bill their customers by the hour
- Connects a company's UC and accounting systems for
  - More comprehensive time capture
  - Faster code matching
  - Greater accuracy
  - Easier administration
  - Increased revenue

## Target Customers

- Any law, professional services, or consulting firm
- Any company interested in classifying phone calls



## ShoreTel Custom Reports

ShoreTel Advanced Applications organization offers several packaged ShoreTel CDR reports (please reference the ShoreTel Enhanced Reports entry in this catalog.) To ensure an economical solution, we generally advise that customers first review entire set of built-in and pre-built enhanced reports before engaging in a custom reporting engagement. Should custom report development be required, the ShoreTel Advanced Applications organization is happy to evaluate needs and provide a proposal with associated effort based price quote.

Date	Total	Total	Average		Dialed Number	Total	Total	Average
Dialed Number	Calls	Duration	Duration		Date	Calls	Duration	Duration
Wednesday, January 7, 2009				Country	(800) 777-1234 Totals:	1	0:14	0:14
700 Totals:	1	0:24		State/Province	101 Totals:	2	1:02	0:31
January 7, 2009 Totals:	1	0:24		Area Code	14087770410 Totals:	1	0:21	0:21
Friday, January 9, 2009				Rate Center	410 Totals:	7	5:16	0:45
410 Totals:	1	0:43		Ireland Totals	470 Totals:	2	0:58	0:29
501 Totals:	2	0:31		United States	490 Totals:	2	0:36	0:18
January 9, 2009 Totals:	3	1:14		California	501 Totals:	80	41:57	0:31
Monday, January 12, 2009				Area Code 408	700 Totals:	89	77:17	0:52
470 Totals:	2	0:58		Rate Center SNJS WEST Totals				
490 Totals:	2	0:36		Area Code 408 Totals				
January 12, 2009 Totals:	4	1:34		Area Code 858				
				Rate Center LA JOLLA Totals				
				Area Code 858 Totals				
				California Totals				

### Overview

- Specialized reports delivered according to customer specifications
- Summary views can combine data from ShoreTel CDR as well as external customer data sources or additional data generated as necessary

### Benefits

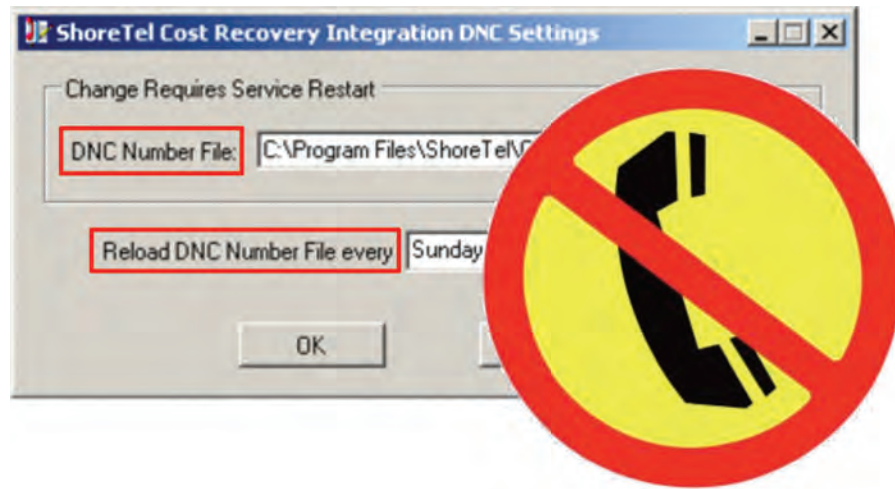
- Provide customers with data that directly impacts how they run their businesses
- Reports are easily accessible via web links & provide optional advanced features
  - Input parameter sets can be saved for repeated runs
- Compatible with ShoreTel releases 7.0 and greater

### Examples

- Custom User Activity Report combining data from ShoreTel CDR and external customer database
- DND Activity Report (requires TAPI application for recording additional data points)



## ShoreTel "Do Not Call" Integration Application



### Overview

- Automatic, reliable blocking of outbound calls to designated phone numbers
- Real-time Connection to customer provided Do Not Call (DNC) data
- DNC enforcement is combined with call coding capabilities of ShoreTel Cost Recovery Integration
- Integration with customer maintained database
- Solution replaces built-in ShoreTel Account Code Feature
- Software only Application loaded onto ShoreTel Director server

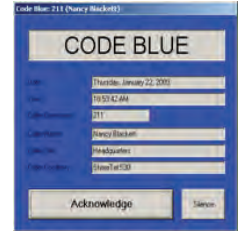
### Benefits

- Automatic screening and blocking of calls in real-time
- Customer directly controls DNC database
- Subscribers individually configured for one or both of Call Blocking and Call Coding
- Maintains detailed log of DNC blocking events for later review & analysis

### Target Customers

- Any company involved with outbound calling campaigns
- Businesses dependent upon cost-effective outbound marketing
  - FCC fines retroactive and prohibitively steep
  - Fee avoidance ROI easily demonstrable

## ShoreTel Emergency Notification Application



### Overview

- Generates audible desktop alerts & phone calls when an emergency or less urgent “code blue” call is detected
- Supports site-specific alerting for geographically dispersed businesses
- Supports country-specific and multiple external emergency numbers
- Alerts include name and extension as well as site and physical location
- Allows key company personnel to communicate in real-time
- Creates an integrated call log of code blue and emergency related activities

### Benefits

- Increase oversight and communication
  - Communicate in real-time using built-in client messaging
  - Alert Screens prompt for acknowledgement
- Obtain a comprehensive activity log
  - All activity is integrated into a single event log
  - Use the log for legal reference, public relations activities, safety training, and policy management

### Target Customers

- Businesses and organizations who want to coordinate in-house response during critical and emergency situations
  - Campus Settings – Schools, corporate campuses, manufacturing plants, military bases, motels
  - Widely distributed environments – Airports, amusement parks, convention centers, high-rise apartments or hotels
  - Healthcare – Nursing homes, retirement facilities, clinics

## ShoreTel Enhanced Paging Application



### Overview

- Paging solution that offers alternative to built-in ShoreTel paging
- Distributed solution, allows for intra-site paging to reduce WAN traffic
- Supports "Forced" & "Optional" modes for emergency vs. informational purposes
- Includes Text Paging to user telephone displays

### Benefits

- Convenient web-based administration for setting up paging groups
- Support for "super groups" containing multiple individual groups
- Automatic call throttling
- Paging calls sent out in batches to groups with more than 100 members
- Forced mode puts any existing call on hold and connects to user to play page
- Text pages of up to 4000 characters entered via web & sent to selected groups
- Textual page causes audio 'beep' and lit display on user's ShoreTel phone

### Target Customers

- Large multi-site companies for whom paging in critical situations is important
- Customers concerned about WAN usage

## ShoreTel Enhanced Reports

The image displays six overlapping screenshots of various ShoreTel reports. The reports shown are:

- Calls by Dialed Party Report:** Shows a list of calls with columns for Date, Time, and Dialed Party.
- Call History Report:** Provides a detailed view of a specific call, including call duration, status, and agent information.
- Calls by Origin Report:** Lists incoming calls by caller ID origin, showing date, time, and origin details.
- Workgroup Agent Detail Login/Logout Report:** Tracks agent login and logout times for a specific workgroup.
- Workgroup Exceptional Call Report:** Identifies calls that were not connected to an agent, including abandoned calls.
- Workgroup SLA Target Report:** A summary report showing performance metrics against SLA targets, including call volume, average speed of answer, and other key indicators.

### Overview

- Historical CDR based Reports that extend ShoreTel's built-in reporting capabilities
- Call History Report – Presents 'cradle to grave' information on a call by call basis
- Calls by Dialed Party Report – Presents incoming calls by the number dialed (the called party)
- Calls by Origin Report – Lists incoming calls by caller ID origin
- Workgroup Agent Detail Login/Logout Report – Shows exactly when each agent logs in & out
- Workgroup Agent Ring Time Report – Shows how long each call rings at the agent extension
- Workgroup Custom Service Level Agreement Report – Average Speed of Answer based modeling
- Workgroup Exceptional Call Report – Shows calls not connected to an agent with reasons; includes Abandoned Calls only view
- Compatible with ShoreTel releases 7.0 and greater
- Supported along with all built-in reports by ShoreTel Report Scheduler

### Benefits

- Analyze business operations from new angles
- Help call center supervisors to gain an added level of insight into operations
- Track performance, improve operations, and anticipate problems

### Target Customers

- Any company that leverages ShoreTel reports to drive their business
- Any company that uses ShoreTel Workgroups

## ShoreTel Hospitality Connector



### Overview

- Allows an external system to initiate user name, user group, and Call Handling Mode changes to ShoreTel phones
- Enables complete ShoreTel integration with Property Management Systems via applications such as DuVoice
- Enables automation and unified administration for guest check in and check out
- Software only Application loaded onto ShoreTel Director server
- This service is an enabler only that requires a compatible system (such as DuVoice) to initiate any changes.

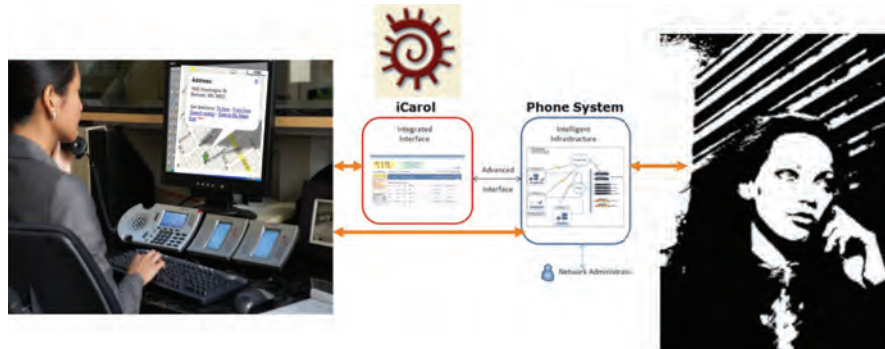
### Benefits

- Enables Property Management System integration to ShoreTel that reduces manual work
- Name change ensures that hotel staff phones properly display guest names
- User Group change enables control of calling permissions for each room (reducing call permissions for unoccupied rooms and increasing them at guest check in.)

### Target Customers

- Hotel/motel customers using a validated Application Server (such as DuVoice) for Property Management System Integration

## ShoreTel iCarol™ Connector Application



### Overview

- Provides telephony integration interface with iCarol help line software (iCarol Telephony Integration feature required)
- Screen pops with call entry forms populated with call data based on incoming call information
- Works with ShoreTel EasyPop Application or Contact Center Agent Toolbar triggers to open new browser tab according to the incoming call attributes
- Real-time database search as new call information entered into call record to bring up more call information for repeat callers
- Flexible command parameters facilitate the most effective telephony integration interface for every organization

### Benefits

- Improves effectiveness of the crisis, reference and helpline operations
- Time savings with the automated screen pops pre-populated with caller information
- Enhances productivity by automatically linking calls to repeat callers as call information is entered
- Improves handling of new callers by providing automatic New Call Record
- Facilitate management review process via iCarol reporting capability

### Target Customers

- Any crisis, referral and helpline non-profit service centers using iCarol software



## ShoreTel Interactive Voice Response (IVR) Applications

The ShoreTel Advanced Applications organization offers two purpose-specific, pre-packaged IVR applications. These include the Caller Directed Router and the Voice Forms IVR, both of which have dedicated entries within this catalog. As many customers have unique call flow and back end system integration requirements, we are also available to deliver customized IVR Applications based on customer specifications.



### Overview

- Customized, interactive telephone "self service" applications
- Integration with back end customer data
- Software only Applications loaded onto ShoreTel Director or DVS servers

### Benefits

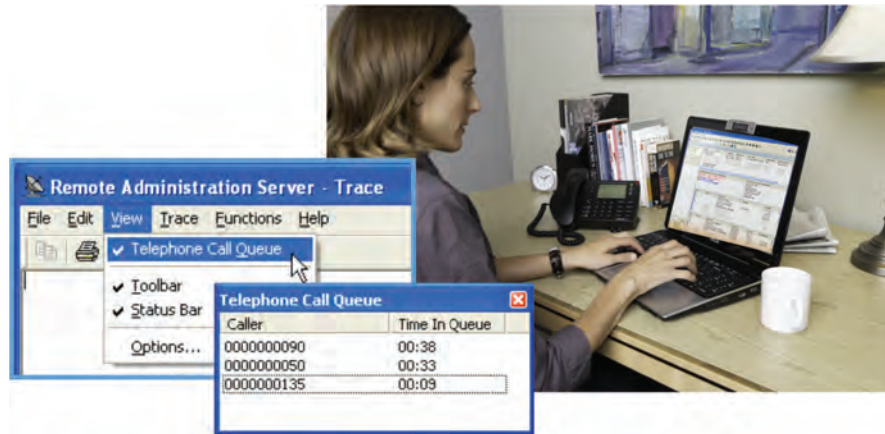
- Economical option for Workgroup customers who may not require full Contact Center
- Cost effective, created from a library of building blocks
- Built to customer requirements
- Flexible, configurable via XML script files
- Text to Speech optional for audio rendering of dynamic data

### Examples

- Medical Billing "self service" financial transactions application
  - Account balance inquiries
  - Credit Card payment transactions
  - English & Spanish Language Menus
  - Integration with customer databases and back end banking systems
- Retail Store Locator
  - Callers input zip code
  - Names, number, & addresses of 3 closest store locations are read back
  - Detailed reports kept for later business analysis



## ShoreTel Jack Henry Symitar™ Screen Pop



### Overview

- Screen pop application for popular credit union core processing system
- Jack Henry Symitar™ is a leading system provider to Credit Unions
- ShoreTel interacts with Symitar™'s Windows thick client component named "Episys"
- Lightweight desktop client software

### Benefits

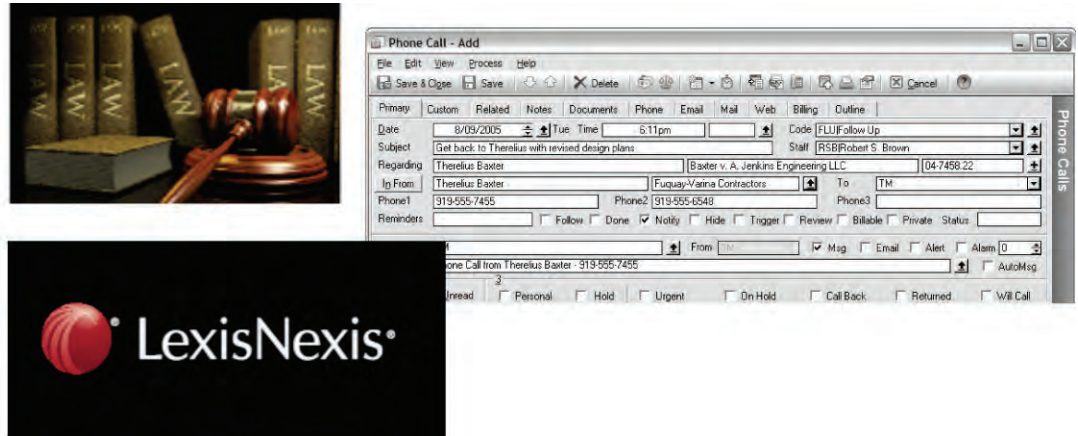
- ShoreTel differentiator in Credit Union vertical
- Leverages built-in Symitar™ telephony framework – "Telephone Call Queue"
- ShoreTel integration compatible with both ShoreTel Workgroups and Contact Center
- Credit Union member enters Account number via front end IVR
- When no match is found, an 'Account lookup Window' will pop to user
- Cost effective, built from a library of building blocks
- Reliable Account number-based record matches

### Target Customers

- Credit Unions who want to increase efficiency and member service levels

## ShoreTel LexisNexis Time Matters™ Integration Application

LexisNexis Time Matters represents a practice area specialty for the ShoreTel Advanced Applications organization. We have delivered Time Matters-based integration solutions in the past and can leverage that experience to provide economical solutions going forward. New customer requests will be treated as custom projects requiring some basic discovery and a statement of work document. The goal will be to leverage existing software to the largest extent possible, thereby containing costs.



### Overview

- Seamless integration of leading legal software with ShoreTel UC system
- Automated access to client records & creation of phone records based on phone number matches
- Embedded click to call support (works natively with ShoreTel TAPI)
- Users customize application behavior according to individual preferences
- Client software loaded onto users' desktop computers

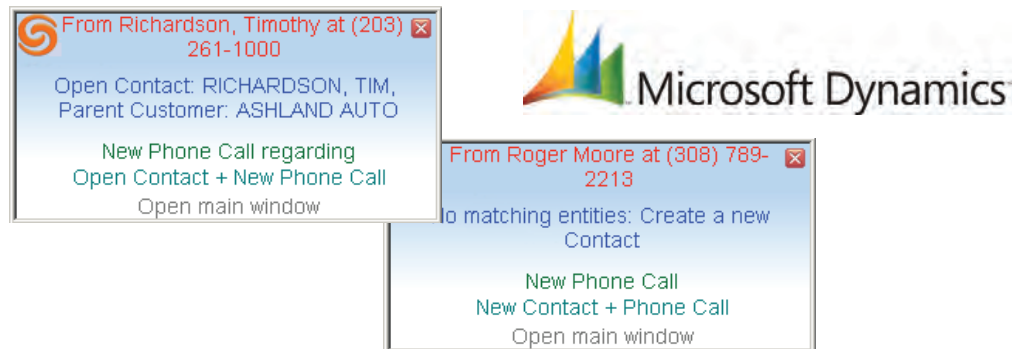
### Benefits

- Time Matters is a leading practice management system: <http://www.timematters.com/>
- ShoreTel integration a significant competitive differentiator
- Combines voice capabilities with immediate access to customer data
- Enhances caller satisfaction and employee productivity
- Consolidates all client-related data and communications within a single repository

### Target Customers

- Law Firms who use LexisNexis Time Matters for practice management
- Any professional services firm who uses Time Matters

## ShoreTel Microsoft Dynamics® CRM Integration



### Overview

- Seamlessly integrate Microsoft CRM customer data
- Automate records access for both inbound and outbound calls
- Preview CRM entities from automated screen pop
- View active calls and associations to CRM entities through an automated window
- Create phone call activity records automatically or manually
- Control all active calls from the desktop
- Automatically answer ringing calls while simultaneously opening an associated CRM form
- Click to call outbound numbers using the ShoreTel Web Dialer application

### Benefits

- Fully leverage your most valuable information asset: Customer data
- Use the convergence of voice and data to enhance productivity, shorten response times, and increase customer loyalty
- Consolidate data for better reporting and improved decision making
- Integrate seamlessly using personalized setting options
- Realize immediate benefits from ease of installation and intuitive interface

### Target Customers

- Any customer running Microsoft Dynamics CRM Online and On-premises versions 4.0 and 2011

## ShoreTel NetSuite® Integration



### Overview

- Merges ShoreTel UC with NetSuite services
- Automates routine tasks and ensures accurate record keeping
- Configurable Screen pop, automatic record creation and call logging, and embedded click to call

### Benefits

- Seamlessly links enterprise communications with key customer data
- Enhances productivity by automatically linking calls to existing customer accounts records
- Improves handling of new accounts by providing automated customer record creation options
- Encourages collaboration among employees
- Improves customer service and satisfaction

### Target Customers

- Any user of NetSuite CRM

## ShoreTel Nuisance Call Handler Application



### Overview

- Call monitoring application that blocks incoming calls to specified extensions and work/hunt groups from designated phone numbers
- Calls from blocked numbers are automatically disconnected or transferred to specified destinations
- Calls with no caller ID are redirected to a voicemail box with recorded message
- Application is loaded onto ShoreTel Director or DVS server and continuously monitors all extensions

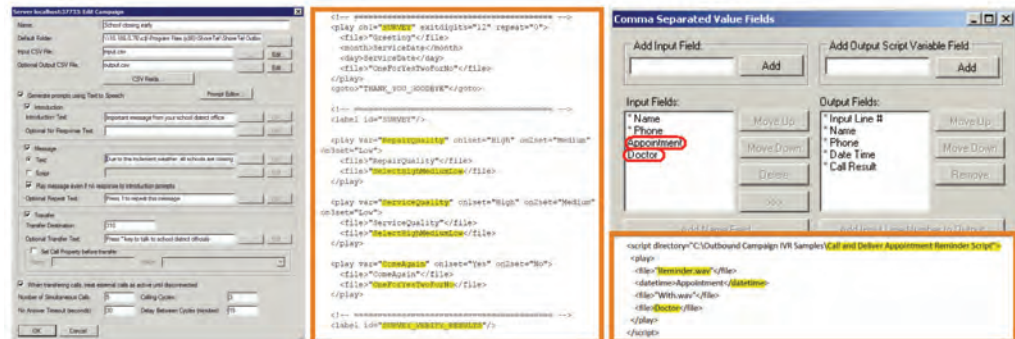
### Benefits

- Lightweight software application installed on ShoreTel Director or any DVS server
- Convenient web-based administration

### Target Customers

- Wide variety of businesses whose employees are interrupted by nuisance calls

## ShoreTel Outbound Campaign IVR Application



### Overview

- Allows creation of automated calling campaigns for variety of purposes
  - Simple Announcements with static, pre-scripted messages
  - Scripted Announcements with dynamic flows and contents pre-programmed for customer interactions
- Introduction and transfer to queue with associated desktop integration
- Graphical UI & Powerful Scripting to create campaigns with pre-recorded voice prompts and/or text-to-speech prompts
- Launches campaigns manually, or automatically as pre-scheduled
- Distributed architecture for easy scaling and strategic deployment across the ShoreTel system

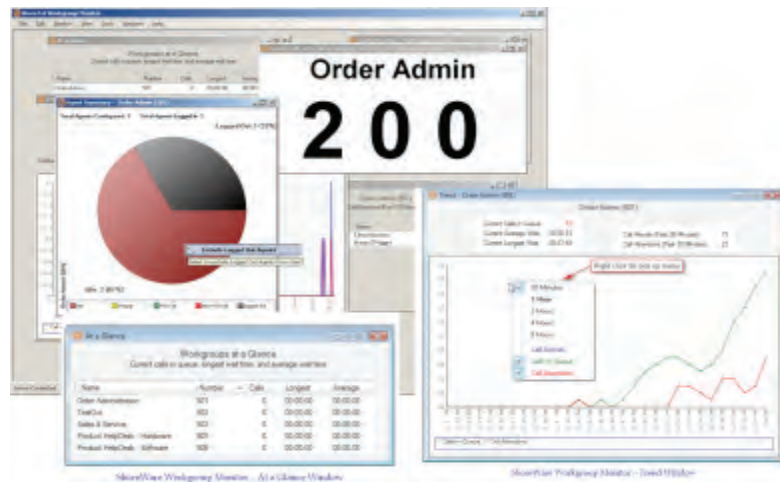
### Benefits

- Efficient and accurate customer care with minimal resources
- Flexible Interactive Notification offering
- Wide Variety of audiences: Medical Offices, Utilities, Schools, Government
- Software only - Leverages existing ShoreTel system resources
- Works equally well with ShoreTel Workgroup and Contact Center deployments
- Customers easily create Sophisticated Interactive Call Flows

### Examples

- Appointment reminders "You have an appointment on May 12th with Dr. Kelly. Press 1 to confirm or press 2 to be connected to our office to re-schedule."
- Financial Transactions: "Your electric bill is 3 days overdue. Your last payment was made on December 16th in the amount of \$176.48. Press 1 to make a payment using our automated system or press 2 to speak to an agent."
- Community Reminders, School Snow Days

## ShoreTel Real-Time Workgroup Monitor Application



### Overview

- Real-time performance display for ShoreTel Workgroups
- Statistics displayed in graphical and table formats
- Displays both Queue & individual Agent trends
- Customizable thresholds for visual "red/yellow/green" status and audible alerts
- Software loaded onto ShoreTel server and associated client desktop machines

### Benefits

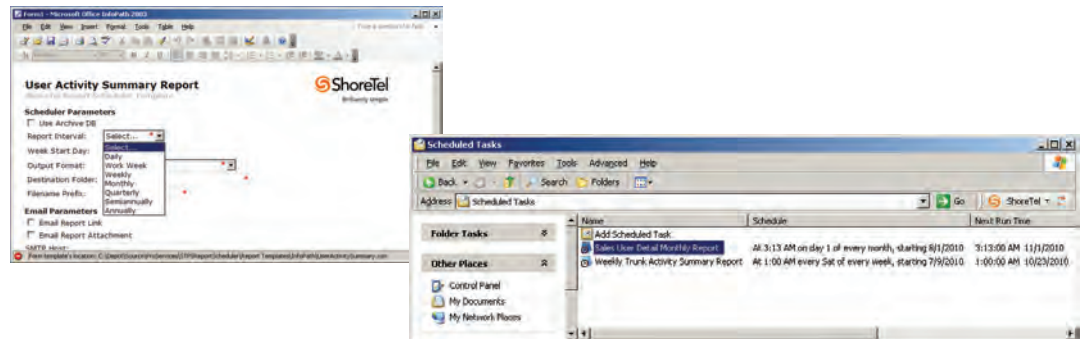
- Enhancement to Workgroups for customers who do not require full Contact Center
- Enables call center supervisors to react quickly to trends such as increasingly long wait times or large numbers of abandoned calls
- Supervisors customize their application "palette" to contain desired views
- Intuitive and easy to configure
- At a Glance, Trend, and Abandoned Call Detail views for groups
- Summary & Detail comparative performance reports for individual agents
- Large format option for displaying key statistics on big screens

### Target Customers

- Any company that uses ShoreTel Workgroups and wants to improve call center efficiency and customer satisfaction



## ShoreTel Report Scheduler Application



### Overview

- Automatically runs ShoreTel built-in and enhanced reports
- Flexible report scheduling (daily, work week, weekly, monthly, quarterly, ...)
- Report output formats: PDF, RTF, XML, Excel, and Crystal Reports
- Options for saving and EMailing reports
- Supports ShoreTel CDR archive database
- Geared towards an Administrator who schedules reports for Users
- Uses XML report parameter files and the MS Windows Task Scheduler
- Software is installed on a non-ShoreTel Server or client machine.

### Benefits

- Automatically run, then save and/or deliver reports to Users by EMail
- Minimize system performance impact by scheduling reports to run during off hours
- Completely eliminate system performance impact by using the CDR archive database

### Target Customers

- Any new or existing ShoreTel customer who could benefit from automatic generation and delivery of reports
- Non Contact Center Customers

## ShoreTel RightNow™ CRM Integration

RightNow CRM represents a practice area specialty for ShoreTel Advanced Applications organization. We have delivered RightNow CRM-based integration solutions in the past and can leverage that experience to provide economical solutions going forward. New customer requests will be treated as custom projects requiring some basic discovery and a statement of work. The goal will be to leverage existing software to the largest extent possible, thereby containing costs.



### Overview

- Desktop client application to automate RightNow™ CRM screen displays
- Software accepts call parameters and triggers RightNow™ CRM behavior accordingly
- Examples:
  - Trigger RightNow™ CRM incident screens based on ID entered by caller
  - Trigger contact screen display based on caller ID
  - Create a new incident based on IVR-entered parameters such as product model number
- Customizable to align with specific customer call flows and RightNow™ implementations
- Software only Application loaded on user desktop computers

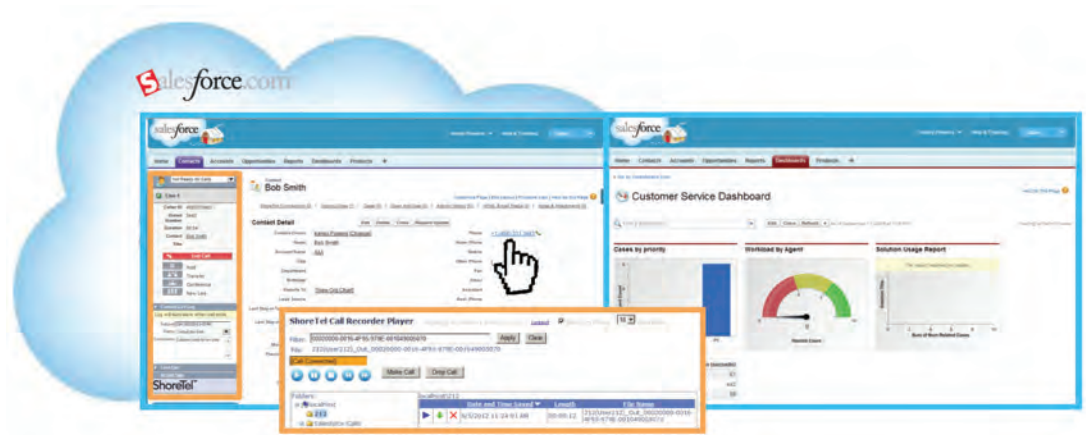
### Benefits

- Increases agent productivity by automating routine tasks
- A natural extension for customers who have deployed RightNow™ CRM
- Flexible settings: Inbound/Outbound, Internal/External, On Answer/On Appearance
- Choice of automatic or user-initiated pop
- Can be paired with ShoreTel AppDialer to provide outbound click to dial from RightNow™ CRM

### Target Customers

- Any customer running RightNow™ CRM
- May apply to Sales, Support, or Manufacturing Logistics functions

## ShoreTel Salesforce.com™ Call Center Adapter



### Overview

- Improve workflow by associating salesforce.com records with a call, add comments to user records then transfer call or conference with another agent
- Customize salesforce.com screen layout for preferences and workflow
- Enjoy call control features embedded within Salesforce.com application
- Monitor and adjust workgroup agent status
- Leverage rich reports that merge call activities with customer data
- Call recording playback with a single click at Salesforce.com Call Connection record

### Benefits

- Handle all communications functions from a single application
- Use the convergence of voice and data to enhance productivity, shorten response times, improve operations and increase customer loyalty
- Manage time more effectively by centralizing operational procedures
- Collaborate with other agents by associating and sending call notes in real time
- Specify personal settings and customize screen page layouts

### Target Customers

- Any Salesforce.com Professional, Enterprise or Unlimited Edition customer.

## ShoreTel Salesforce.com™ Connector for Contact Center IVR

This software enables tight integration between ShoreTel Contact Center and Salesforce.com, enabling IVR call flows based on CRM housed business intelligence. Customer specific Contact Center scripting and Salesforce.com configuration are both required and are then combined with this “connector” software to produce an end to end solution. New customer requests will be treated as custom projects requiring collaboration among a Contact Center script developer, the Customer’s Salesforce.com administrator, and a ShoreTel Advanced Applications developer.



### Overview

- Enables design of dynamic ShoreTel Contact Center IVR call flows based on Salesforce.com information
- Examples include routing based on client VIP flag & special prompting of unknown callers
- Automates call processing based on chosen customer, lead, or other attributes
- Tightly links dynamic customer data with call center operations
- Flexible design – End to end solutions are customized to fit customer’s Salesforce.com data structure and desired call flows

### Benefits

- Automated call routing and other processing based on business intelligence
- Improved Contact Center efficiency
- Enhanced customer service

### Target Customers

- ShoreTel Contact Center customers using Salesforce.com

## ShoreTel Salesforce.com™ Integration for Mac



### Overview

- Provides Sales force automation (SFA) on Mac platform and ShoreTel Call Reporting service
- Screen pop of Salesforce.com Contact information on external incoming call
- Click-to-dial on Salesforce.com and any webpage
- Presents ShoreTel Call Detail Records (CDR) on Salesforce.com as Reports and Dashboards
- Call recording playback with single click on Salesforce.com Call Connection record

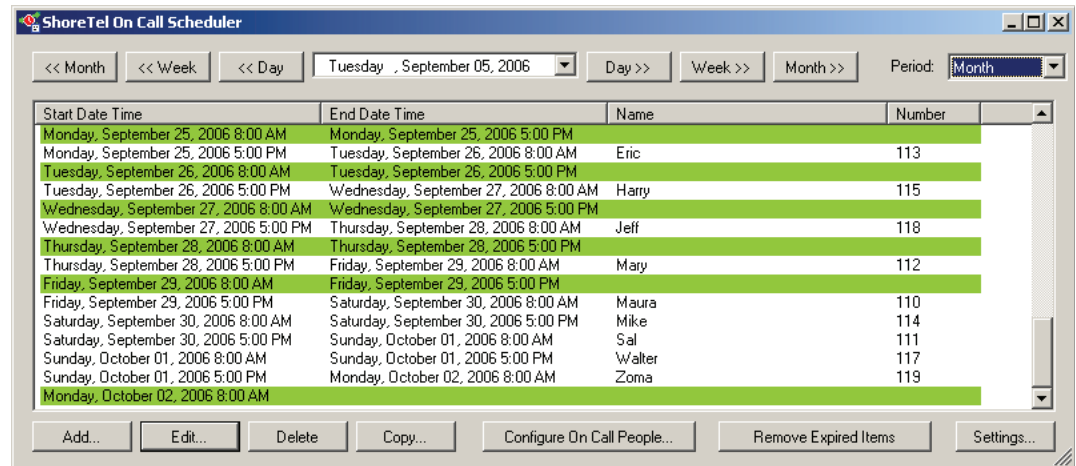
### Benefits

- Efficient business communication with contact information for the incoming calls
- Improve productivity with single-click dialing on Salesforce.com or any webpage
- Streamline business operation and process review by having all information within Salesforce.com application

### Target Customers

- Any Salesforce.com Professional, Enterprise or Unlimited Edition customer with Mac users

## ShoreTel Schedule Based Routing ("On Call Router") Application



### Overview

- Automatically routes inbound calls based on customer-defined schedules
- Administrative interface for editing schedules and routing destinations
- Automates contact of professionals according to on call schedules
- Software Application loaded onto ShoreTel Director or DVS server

### Benefits

- Eliminates overhead by automating communications
- Intuitive color coded administrative interface
- Day, Week, Month, and Year schedule views
- Lightweight server application associated with ShoreTel Route Point

### Target Customers

- Medical environments with on call doctors
- Helpdesks where on call support individuals vary based on a schedule

## ShoreTel SEDC UtilityPOWERnet Connector



### Overview

- The SEDC UPN is a Utility company CRM
- Screen-pop customer record based on Caller ID (ANI), account number, member number, social security number, or collected phone number using EasyPop or Contact Center Agent Toolbar
- ShoreTel Contact Center IVR interface that provides callers the ability to:
  - Obtain account information
  - Update account information, and
  - Make credit card payments

### Benefits

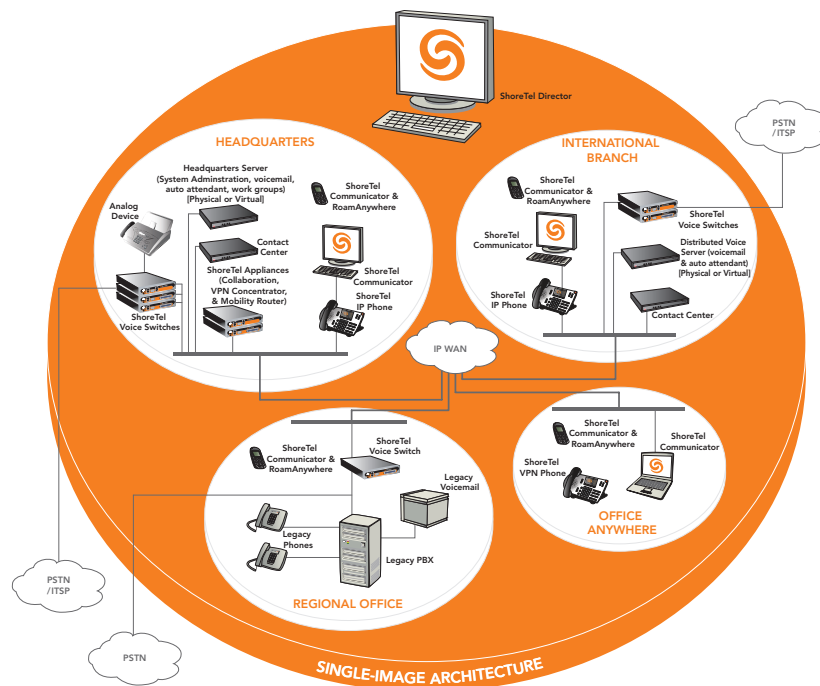
- Rapid access to customer data upon call arrival
- Personalized call handling
- Self service portal for customers

### Target Customers

- Utility customers using the SEDC UtilityPOWERnet CRM



## ShoreTel Site Router Application



### Overview

- Routes calls based on the ShoreTel Site of the caller
- Flexible configuration to define multiple Route Points and destination numbers for sites

### Benefits

- Publish system wide numbers which route calls to site specific numbers
- Useful for defining a single number for company departments (e.g., HR, Emergency) which forwards calls to a site specific department

### Target Customers

- Customers with multiple ShoreTel sites

## ShoreTel Super Group Application



### Overview

- Enhanced Hunt Group Feature
- Allows more than 16 phones (up to 100) to simultaneously ring in response to an inbound call
- Phones will ring until configurable timeout period expires then transfer caller to VoiceMail
- Software only Application loaded onto ShoreTel Director or DVS server

### Benefits

- Fills competitive gap with a common legacy feature
- Phone displays present Route Point name and calling party number
- Phone display example: "House Phone – (401) 333-8888"
- Simple configuration

### Target Customers

- Any environment in which traditional multi-phone ringing behavior is desirable

## ShoreTel System Directory Synchronization Application



### Overview

- Synchronizes System Directory information between/among separate ShoreTel systems
- Any number of ShoreTel systems may be synchronized with each other
- Imports first name, last name, and extension number into the System Directory
- Runs daily during off-hours periods

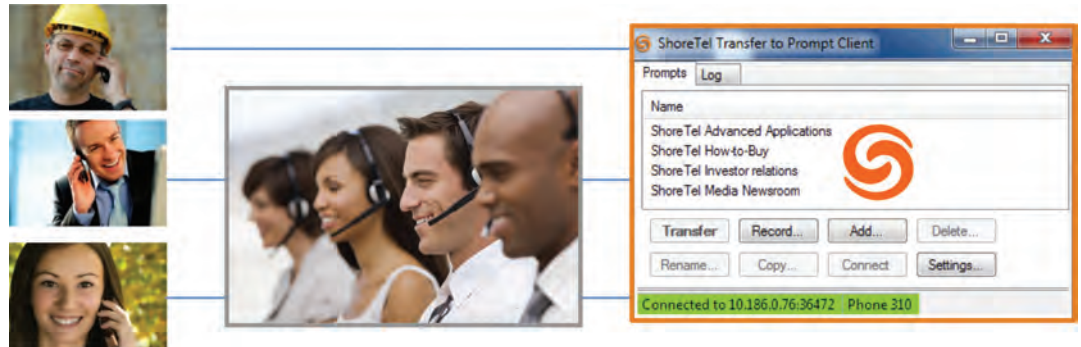
### Benefits

- Provides a global Dial-By-Name directory for placing calls from ShoreTel IP phones and from ShoreTel Communicator

### Target Customers

- Customers running multiple ShoreTel systems who want to facilitate employee communications

## ShoreTel Transfer to Prompt Application



### Overview

- Allows an agent to transfer the current call in order to play a pre-recorded message to the connected party
- Speeds up handling of calls best served with pre-recorded audio
- Frees call center agents to answer new calls and novel questions
- Supports silence detection so that calls can be immediately transferred into voicemail systems, freeing agent for the next call. Application will, with no user involvement, await greeting completion before playing message.
- Desktop software allows individual users to easily record and name new message files for subsequent selection
- Software only application
  - Server component runs on ShoreTel Director and/or DVS servers
  - Client component runs on users' Windows desktop machines

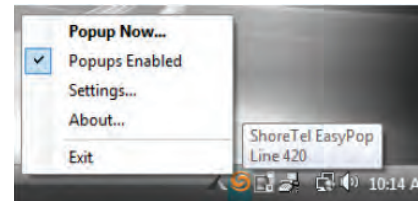
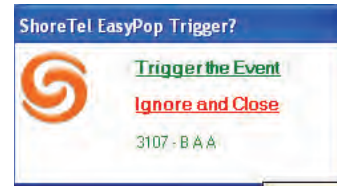
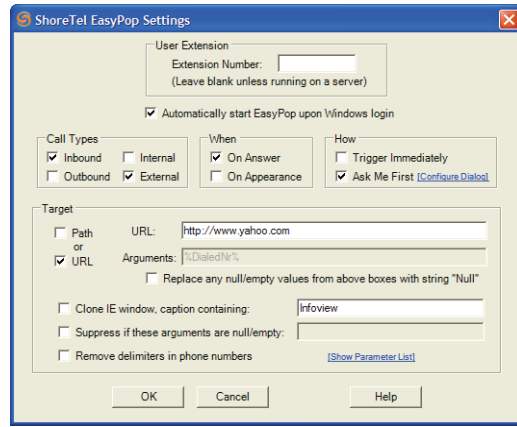
### Benefits

- Increases call center efficiency
- Reduced wait times for live assistance and optimal use of human capital
- Pre-recorded messages can be shared across agents to ensure completeness and consistency of communications
- Easy to use desktop software allows users to create new messages to facilitate their work in an ad hoc way

### Target Customers

- Organizations required to repetitively communicate legal, disclaimer, or other information to their customers
- Organizations desirous of incorporating marketing or informational communications into all of their client interactions
- Call Center environments where customer satisfaction and employee productivity are paramount

## ShoreTel Universal CRM Connector (aka "EasyPop") Application



### Overview

- Generic desktop client screen pop "helper" application
- Provides ability to execute a particular user defined program, batch file, or URL when an incoming call arrives and/or an outgoing call is placed
- Any or all available ShoreTel call properties including IVR collected digits can be passed to an outside program
- Software only Application loaded on user desktop computers

### Benefits

- Speeds development of proprietary applications by insulating user from ShoreTel programming details
- User concentrates on target function development and simply configures ShoreTel EasyPop settings as desired
- Flexible settings: Inbound/Outbound, Internal/External, On Answer/On Appearance
- Choice of automatic or user-initiated trigger behavior

### Target Customers

- Any customer desiring economical path to powerful desktop integration

## ShoreTel User Group Schedule Application

Schedule:

Start	End	Status
Monday 8:00 AM	Monday 12:00 PM	Restricted
Monday 12:00 PM	Tuesday 8:00 AM	Standard
Tuesday 8:00 AM	Tuesday 12:00 PM	Restricted
Tuesday 12:00 PM	Wednesday 8:00 AM	Standard
Wednesday 8:00 AM	Wednesday 12:00 PM	Restricted
Wednesday 12:00 PM	Thursday 8:00 AM	Standard
Thursday 8:00 AM	Thursday 12:00 PM	Restricted
Thursday 12:00 PM	Friday 8:00 AM	Standard
Friday 8:00 AM	Friday 12:00 PM	Restricted
Friday 12:00 PM	Monday 8:00 AM	Standard

Day: Friday Time: 12:00 PM ☐ Restricted Add Delete



### Overview

- Automatically sets a group of phones into "standard" or "restricted" states based on a configurable schedule
- Phones are assigned to User Groups based on hour of the day for each day in the week
- Underlying User Group calling permissions are configured as appropriate
- Used to prevent outbound calls (except those to 911) at certain times of the day
- Software only Application loaded onto ShoreTel Director or DVS server

### Benefits

- Prevents unauthorized telephone use during non-business hours
- Centralized management for consistent, automated behavior
- Intuitive color coded administrative interface

### Target Customers

- A variety of settings involving employees with differing communications needs
- Examples: Dormitory environments during "study hours", office buildings with night crews

## ShoreTel Voice Forms IVR Application



### Overview

- Configurable IVR Application that allows callers to fill out “forms” over the phone
- Application prompts caller with questions and awaits response before proceeding
- All verbal responses are consolidated into a single voice file which is stored in a designated ShoreTel VoiceMail box
- Software only Application loaded onto ShoreTel Director or DVS servers

### Benefits

- Cost effective solution that leverages in place ShoreTel resources
- Easily modified and deployed for a variety of purposes
- Flexible, configurable via XML script files
- Callers can be presented with a menu of options once the form is complete
- Options might include starting another form or transferring caller to an operator

### Examples

- Subscription Refill Application
  - Callers respond one by one to questions when prompted
  - All answers are consolidated into a single voice file which is stored in a ShoreTel Voicemail box
  - Administrators later retrieve and fulfill medicine refill requests
- Product Ordering Application
  - Callers specify product model, billing, and other information
  - Order Administrators later retrieve orders to fulfill



## ShoreTel Web Dialer



### Overview

- Two Web Dialer variants to cover all major browsers on all major platforms
- Highlights (in ShoreTel orange) & creates clickable links to phone numbers
- Clicking on a highlighted phone number connects ShoreTel phone to that number
- Connects the ShoreTel system to any web-based application or phone directory
- Adds a "ShoreTel Web Dialer" item to the browser context menu for "short" digit sequences such as internal extensions or numbers in text/input boxes
- Rescan button to recalculate links for pages with dynamic content
- Provides dialing options for ambiguous strings of digits

### Benefits

- Enhances user productivity by making communicating easier
- Generation of dial-able links can be enabled & disabled using the toolbar control
- Ability for web page designers to create links for any number that can be created on a web page

### Target Customers

- Any company whose employees leverage web browsers for their work

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## About ShoreTel

ShoreTel is a provider of business communication solutions whose brilliantly simple unified communications platforms, applications and mobile UC solutions promise a new rhythm of workforce engagement and collaboration. With costly complexity eliminated by design from its award winning, all-in-one IP phone system, UC and contact center solution, and its industry leading hosted business phone system, workers enjoy a freedom and self-reliance that other providers can't match. Users have full control to engage and collaborate, no matter the time, place or device, for the lowest cost and demand on IT resources in the industry. ShoreTel is headquartered in Sunnyvale, California, and has regional offices and partners worldwide. For more information, visit [shoretel.com](http://shoretel.com) or [shoretelsky.com](http://shoretelsky.com)



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