

SPECIFICATIONS

ShoreTel Salesforce.com Call Center Adapter

BENEFITS

- Combines voice and data in a single application to enhance productivity and shorten response times, increasing customer loyalty
- Centralizes operational procedures to boost individual and organizational productivity
- Enables agents to collaborate in real-time, including sending call notes
- Allows users to optimize their work environment by specifying personal settings and customizing screen page layouts

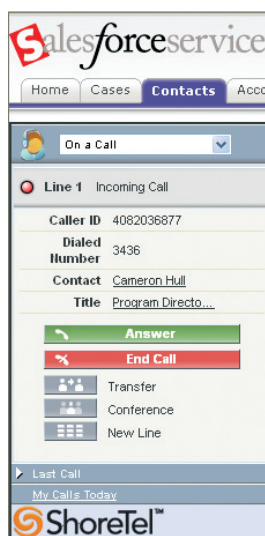


Figure 1: Call Control Tool

The ShoreTel Salesforce.com Call Center Adapter allows Salesforce.com application users to integrate overall business processes with the ShoreTel IP telephony system, directly from their desktops. With the Call Center Adapter, agents can respond more effectively, leading to faster response times and shorter calls – benefits that, in turn, improve agent productivity and can increase customer loyalty.

Tight integration delivers multiple benefits

The Call Center Adapter was designed to integrate with the IP telephony system through a customizable call control tool (shown in Figure 1), that appears in the sidebar of every Salesforce.com page. When the call control tool is activated using the Call Center Adapter, voice and data functions are converged, significantly boosting individual and organizational productivity.

From within the Salesforce.com application, ShoreTel Communicator (formerly ShoreTel Call Manager) Personal, Professional, or Operator Access Level users and ShoreTel Contact Center, Workgroup Edition agents can make selections by clicking on the appropriate icon to dial and answer calls from the desktop, put callers on hold, initiate conference calls, transfer calls, or initiate new calls on a second line.

Users and workgroup agents can also attach comments to a call log or associate a record with a call by navigating to the record and then selecting it. Workgroup agents can write notes during live phone calls. If a workgroup agent subsequently transfers a call both the appropriate contact record and the new call notes will appear on the screen of the receiving

party, facilitating real-time collaboration to speed resolution of escalated or otherwise transferred calls.

Click to call

The Call Center Adapter lets users conveniently place calls from directly within individual contact or account records by simply clicking once on any hyperlinked and annotated phone number field. Inbound calls trigger Salesforce.com screen pops that contain related account information.

All together, these capabilities enhance a ShoreTel IP telephony system users' ability to work more effectively and assist customers more quickly, two important benefits that can have a widespread, positive impact on operations – and the bottom line.

Customizable user interface

With the Call Center Adapter, Salesforce.com application users can specify personal settings to automate login and customize record opening based on individual preferences. Users can also customize the screen page layout by adding, removing or changing the order of the fields or the records to match their work flow. Finally, the call control tool

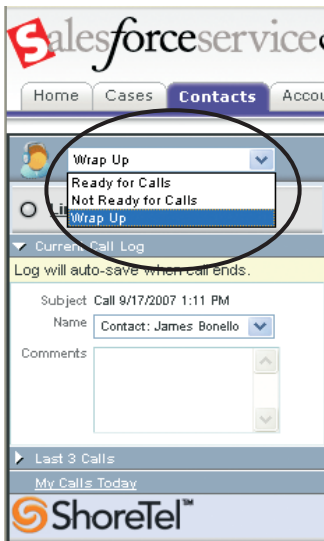


Figure 2: Call Center State Area

Call center state

The call center state area in Figure 2 shows the current agent status and allows an agent to change it as follows:

- From any state, the agent can change his state to "Not Ready for Calls" to signal he is temporarily unavailable
- From "Wrap Up", the agent can change his state to "Ready for Calls" if he concludes his wrap up early before the automatic timeout
- From "Not Ready for Calls", the agent can change his state to "Ready for Calls" to resume accepting workgroup calls

provides convenient "Last Call" and "My Calls Today" displays that let users quickly and conveniently review recent activities.

Easy activation

Any Salesforce.com Professional, Enterprise or Unlimited Edition customer has the option to activate the Salesforce.com Softphone feature at no additional charge. The ShoreTel Salesforce.com Call Center Adapter which acts as the intermediary is available for order from your ShoreTel reseller for a one time fee, priced per user.

Technical notes

Operation

Once the Call Center Adapter has been installed, it can be manually invoked to run, or, depending on settings, can be automatically run when the user logs in to their computer.

The tray icon menu is displayed by right clicking the ShoreTel taskbar icon. The menu offers the following choices:

Auto start at login

The alternative is for the user to manually start the program at login.

Logging

Displays a dialog that allows the logging feature of the Call

Center Adapter to be controlled. Depending on its settings, the Call Center Adaptor will write to the Logs folder within its installation directory.

About

Displays the About box for the Call Center Adapter showing the version of the Salesforce.com code portions, as well as the ShoreTel specific code.

Application integration features

The Call Center Adapter has built-in features intended to ease future integration with Interactive Voice Response (IVR), Automatic Call Distribution (ACD) and other applications. These features are available for

use by programmers developing custom solutions using the ShoreTel COM or TAPI Software Developer Kit through the ShoreTel Developer Network. Learn more at www.shoretel.com/partners/developer/. Alternatively your ShoreTel reseller can arrange for ShoreTel Professional Services to create these custom IVR and ACD solutions for you.

Requirements

- Microsoft Internet Explorer Version 6.0 or higher or Mozilla Firefox Version 3.5 or higher
- Microsoft .NET Framework Version 2.0 runtime. If this is not installed, the ShoreTel installation program will direct

the user to the Microsoft Web site for installation

- ShoreTel Communicator (formerly ShoreTel Call Manager) must be installed for the application to function; does not need to be running
- ShoreTel Version 6.1 or higher
- A Salesforce.com Professional, Enterprise or Unlimited Edition account

About ShoreTel

ShoreTel is the provider of brilliantly simple Unified Communication (UC) solutions based on its award-winning IP business phone system. We offer organizations of all sizes integrated, voice, video, data, and mobile communications on an open, distributed IP architecture that helps significantly reduce the complexity and costs typically associated with other solutions. The feature-rich ShoreTel UC system offers the lowest total cost of ownership (TCO) and the highest customer satisfaction in the industry, in part because it is easy to deploy, manage, scale and use. Increasingly, companies around the world are finding a competitive edge by replacing business-as-usual with new thinking, and choosing ShoreTel to handle their integrated business communication. ShoreTel is based in Sunnyvale, California, and has regional offices and partners worldwide. For more information, visit shoretel.com.

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