

CATALOG

Integrated Applications

SHORETEL PROFESSIONAL SERVICES

Overview

ShoreTel offers a portfolio of software applications that deliver on the promise of unified communications (UC) and help increase the return on investment from both the ShoreTel UC system and the customer's existing business applications. By effectively integrating with current business processes, these applications can help increase employee productivity, shorten response times, encourage collaboration, and improve customer satisfaction.

Packaged offerings include integrations with Salesforce.com, Microsoft Dynamics CRM, NetSuite CRM, Copitrak, Equitrac, and many others. Software integration also makes it possible to offer organizations crucial communication and safety benefits, for instance internal notification when an emergency call is placed on the ShoreTel system.

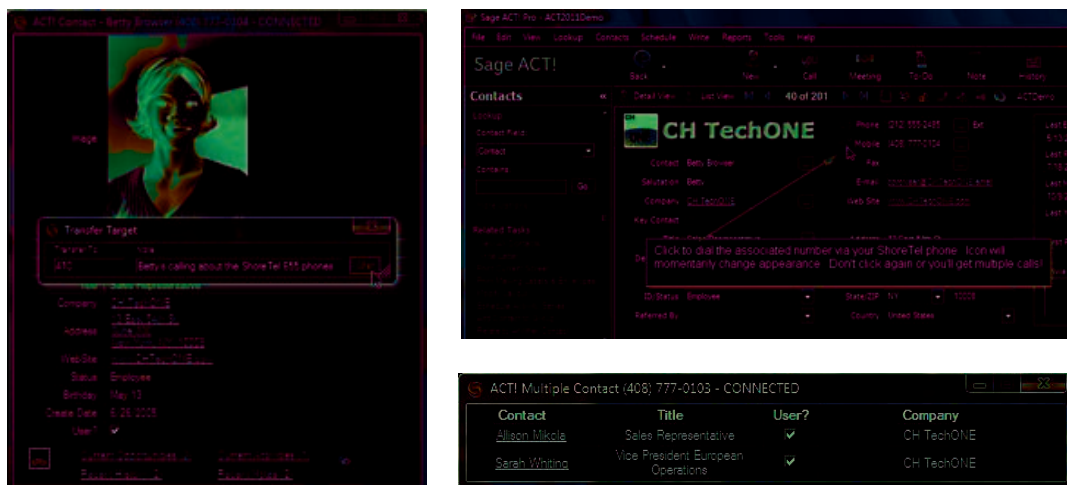
In addition to an expanding set of packaged solutions, ShoreTel offers custom software development services to help address unique business requirements and give organizations a competitive edge. Examples of custom capabilities include the ability to embed ShoreTel call control within other applications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

This catalog provides an overview of currently available packaged and custom applications, highlighting benefits, target markets, and ordering information. Please note that the information contained within this document is intended for Partner reference use only. Pricing is available and updated regularly in the Quote Management System (QMS) and in the Quote Tool located on ShoreTel's partner website at: <http://partners.shoretel.com/manage/>. For further information contact ShoreTel Professional Services via phone at +1 800-425-9385 x3331 or email to professionalservices@shoretel.com.

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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)

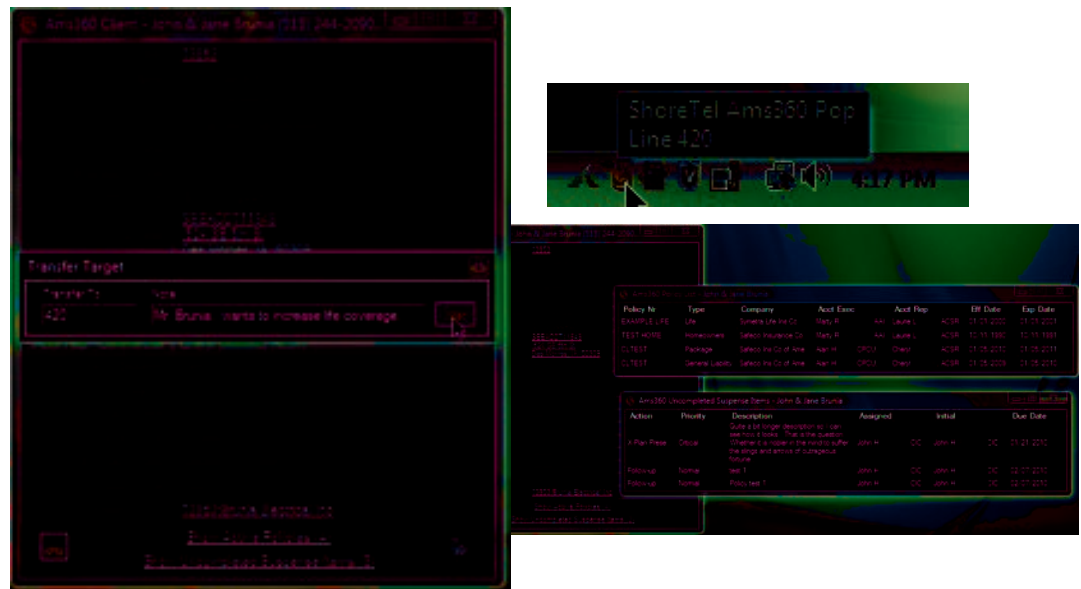
Benefits

- 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)

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

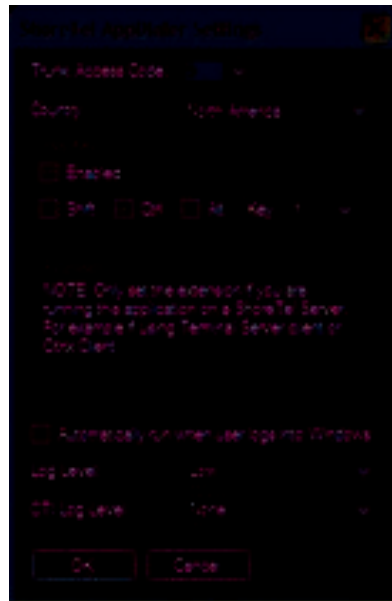
Benefits

- 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
- 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
- Broadly applicable solution for dialing from any 3rd party application
- Allows individual users to optionally override Caller ID for their outgoing calls
- Client software loaded on user desktop machines

Benefits

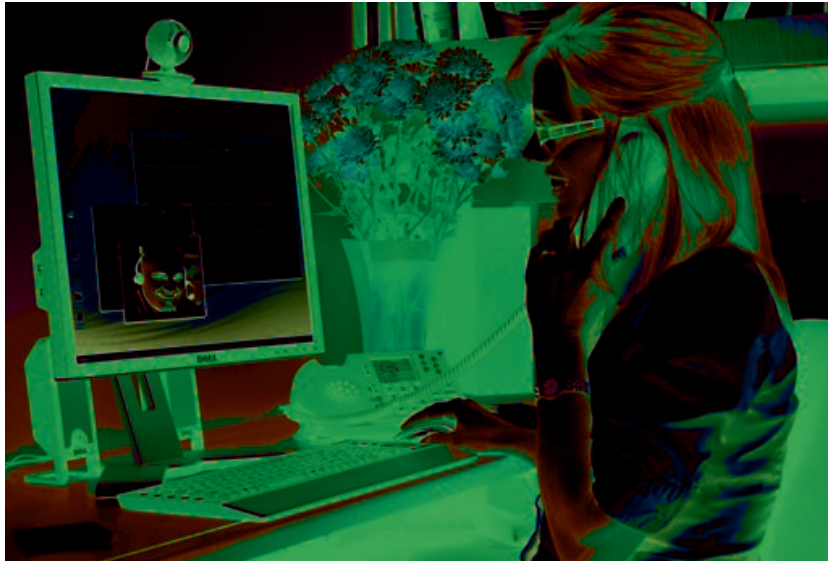
- Lightweight, automatic, and generic "works everywhere" solution
- Extends ShoreTel's reach to the desktop
- User friendly – Keyboard centric users can define their own hot keys

Target Customers

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

AS/400 Connector

AS/400 system integration represents a practice area specialty for ShoreTel Professional Services: 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

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

Call Compliance Teleblock™ “Do Not Call” Database Integration



Overview

- Real-time Connection to up-to-date Do Not Call (DNC) number data
- DNC enforcement is combined with call coding capabilities of ShoreTel Cost Recovery Integration
- Seamless integration with hosted system: <http://www.callcompliance.com/products/teleblock.html>
- 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
- Teleblock database always up to date
- Teleblock contains all available federal, state, wireless, 3rd party, and in house DNC lists
- Call Compliance Teleblock™ system is national leader, patented, and multi-award winning
- Support for single button “call tagging” when a user encounters a new DNC number
- Subscribers individually configured for one or both of Call Blocking and Call Coding
- Maintains detailed log of DNC blocking events for later review & analysis
- Teleblock database could be replaced with customer’s own DNC database if desired

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

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

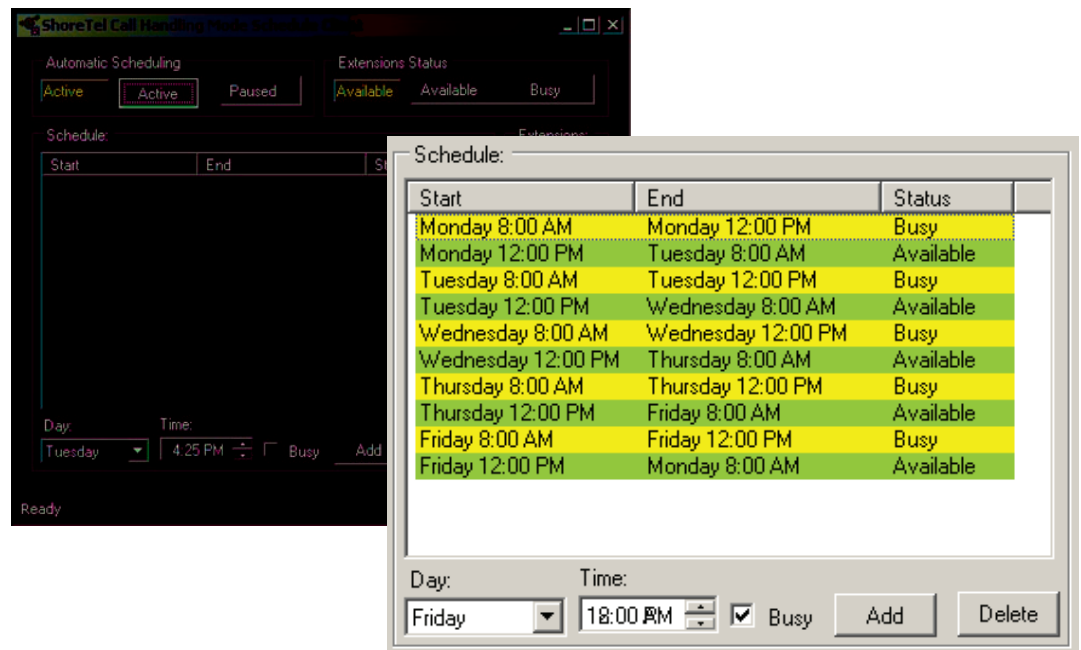
Benefits

- 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

Call Handling Mode (CHM) Schedule Application



Overview

- Automatically sets a group of phones into “busy” or “available” states based on a configurable 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 Quality Monitoring Tools



Overview

- Pair of applications intended to help troubleshoot call quality issues
 - ShoreTel Call Log Server
 - ShoreTel Call Test Client
- ShoreTel Call Log Server
 - Allows users to 'tag' calls using a specific digit sequence in case of bad audio
 - Call details will be logged to the Windows Event log
 - Installed on ShoreTel Director or DVS server
 - Acts as server to ShoreTel Call Test Client
- Test Call Utility
 - Allows administrator to perform test calls remotely via command line
 - Test Calls made from any internal station extension to a specified number
 - Calls automatically connect and disconnect after some period of time
 - Returns call results to console and to scripts
 - Utility is installed on same server (HQ or DVS) as ShoreTel Call Log Server

Benefits

- Facilitates diagnosis of difficult to isolate call quality issues
- Hearsay" reports transformed to quantitative statistical data
- Allows administrative personnel to run test calls and analyze results remotely

Target Customers

- Broad spectrum

ShoreTel Call Recorder



Overview

- Automatic recording of external calls
- Flexible profiles determine which calls are recorded
 - Range of extensions
 - Filters based on call properties
 - Percentage of calls to record
 - Weekly schedule based recording
- Recordings stored to file system and/or to ShoreTel VoiceMail
- Administrator defines folder & file names constructed from call information for automatic classification of calls when storing to the file system or the Subject: and From: fields when storing in a ShoreTel Voicemail box
- Lightweight client software allows users to control which recordings to save
- Browser based Recorder Player
 - Convenient searching, downloading, and management of recordings
 - Playback via phone or computer
 - URL access to Player for integration into other systems
- Software Application loaded onto one or more ShoreTel servers

Benefits

- Cost-effective native ShoreTel application
- Simple to manage
- Distributed architecture for easy scaling

Target Customers

- Any customer for whom recording of calls 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

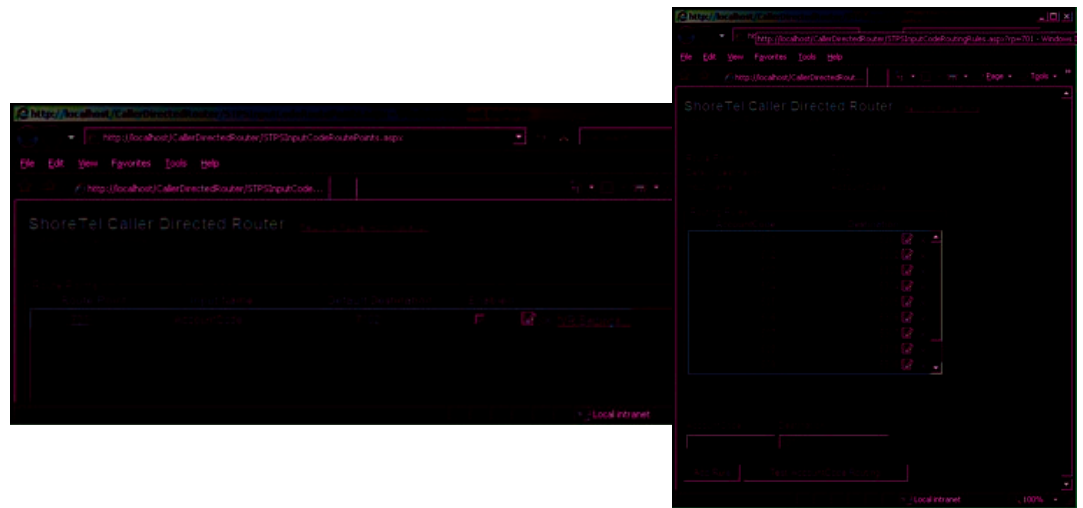
Benefits

- 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, social security number)
- 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
- Multi-lingual Support

Target Customers

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

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 Professional Services 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

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

Contact Center Agent Dashboard

Group Agents Report							Group Report [4] - Contact C Down			
Agent	ID	State	Start time	Code	DNIS	ANI	Queued	Max Wait	Int Max Wait	Aband
SHAWNEE	3477	Ry	10:11:14 AM	No Code			0	00:00:00	00:00:00	0
FRIDGER	3481	ACC	10:11:14 AM		TAC - Max	1717991930				
MURRAY	3477	Ry	10:11:14 AM							
WALTON	3443	Down	10:11:14 AM	Call Back						
SHEDDEN	3421	ACC	10:11:14 AM		TAC - Max	EMEA	5	0	3	0
WALTON	3443	Ry	10:11:14 AM	Escalation						
SHEDDEN	3421	Down	10:11:14 AM							
FRIDGER	3481	ACC	10:11:14 AM		TAC - Max	1414819420				
WALTON	3443	ACC	10:11:14 AM		TAC - Max	120810208 - ShoreTel, Inc				
MURRAY	3477	Ry	10:11:14 AM	Escalation						
SHEDDEN	3421	Ry	10:11:14 AM	Comput						
FRIDGER	3481	ACC	10:11:14 AM		TAC - Max	1602202710				
WALTON	3443	ACC	10:11:14 AM		TAC - Max	17011412570				
SHEDDEN	3421	Ry	10:11:14 AM	No Code						
MURRAY	3477	Ry	10:11:14 AM							
MURRAY Time in State 00:16:45 Login groups Advanced Support, EMEA Advanced,							Group Report [2] - IPBX Down Queued: 0, Max Wait: 00:00:00, Int Max Wait: 00:00:00, Aband: 0 Login: 7, ACC: 0, Release: 1, Idle: 0			
Group Report [3] - Advanced Support Queued: 0, Max Wait: 00:00:00, Int Max Wait: 00:00:00, Aband: 0 Login: 10, ACC: 0, Release: 7, Idle: 2							Group Report [1] - IPBX Queued: 5, Max Wait: 00:18:26, Int Max Wait: 00:18:13, Aband: 4 Login: 10, ACC: 3, Release: 4, Idle: 0			
Group Report [5] - TAC Emails Queued: 9, Max Wait: 02:17:17, Int Max Wait: 00:00:00 Login: 1, ACC: 0, Release: 1, Idle: 0										

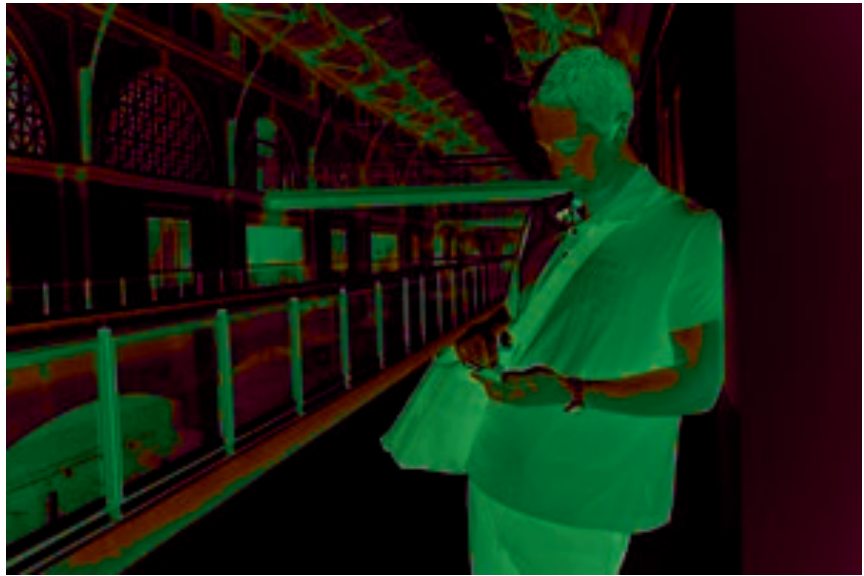
Overview

- Add-on application for ShoreTel Contact Center
- Communicates key metrics to agents in real time, empowering them to self manage
- Configurable reports focused on Agent and Group Performance Statistics
 - Agent State details include ACD state, start time, state code, DNIS, ANI
 - Group Performance metrics include calls waiting, average wait times, abandoned calls, agent state summaries
 - Both voice and e-mail ACD statistics available for a Group

Benefits

- Extends real-time performance monitoring capabilities to all agents
- Not intended to replace existing Supervisor or Wallboard Applications
- Easily managed single web application for designing, publishing, and viewing

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

Contact Center Interaction Viewer



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
- 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

Calls in Progress
Quickly and accurately make code associations and notes in real time

Unaccounted Calls
Review previous calls and assign codes and notes when it is convenient

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 Professional Services offers several packaged ShoreTel CDR reports (please reference the ShoreTel Enhanced Workgroup Reports and ShoreTel Enhanced Historical Reports entries in this catalog.) To ensure an economical solution, we generally advise that customer 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, ShoreTel Professional Services is happy to evaluate needs and provide a proposal with associated price quote.

Date	Total Calls	Total Duration	Average Duration	Dialed Number	Total Calls	Total Duration	Average Duration	
Wednesday, January 7, 2009				Country	6900-777-1234 Totals:	1	0:14	0:14
700 Totals:	1	0:24		State/Province	104 Totals:	2	1:02	0:31
January 7, 2009 Totals:	1	0:24		Area Code	1408-777-410 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:	2			
January 12, 2009 Totals:	4	1:34		Rate Center LA JOLLA Totals:	2			
				Area Code 858 Totals:	2			
				California Totals:	15			

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
- Fully compatible with ShoreTel releases 7.0 and greater
- Fully compatible with ShoreTel Web Reporting License

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 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 Historical Reports

Start Date: 02/1/2009		Call History Report				End Date: 02/1/2009	
Start Time: 1:00:00AM		Call Types: Est'd	Match Files: 402177		End Time: 1:00:00PM		
Dialled Nr							
Call Date	Dialled Nr	Caller ID	Last Estm		WOP		
Connecting Time & Party Connected	Duration	Talk	Hold	Time*	Reason for Connection		
Caller ID Number (Name)	Duration: total, all connections that rsk						
	** RHA						
8/1							
August 27, 2009							
9/27/09	501	+14087770103	440				Y
9/27/09	501 (Order Admin)	0:00:10	0:00:18	0:00:00	0:00:00		Called Party
9/27/09	430 (Gang Haysen)	0:02:29	0:02:25	0:00:00	0:00:00		Transfer by 501 (Order Admin)
9/27/09	440 (Eagan Martinez)	0:00:15	0:00:15	0:00:00	0:00:00		Transfer by 430 (Eagan Martinez)
Caller: +14087770103 (JONES JEFFREY)							
9/31/09	501	+14087770104	430				Y
9/31/09	501 (Order Admin)	0:00:14	0:00:14	0:00:00	0:00:00		Called Party
9/31/09	410 (Gang Haysen)	0:01:10	0:01:08	0:00:00	0:00:00		Transfer by 501 (Order Admin)
9/31/09	430 (Eagan Martinez)	0:04:05	0:03:55	0:00:10	0:00:00		Pushed by 410 (Gang Haysen)
Caller: +14087770104 (ANTHONY ALLEN)							

Overview

- Historical reports enhance 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
- See full specifications at: http://partners.shoretel.com/product_sales_tools/products/applications/enhanced_historical_reports.html
- Fully compatible with ShoreTel releases 7.0 and greater
- Fully compatible with ShoreTel Web Reporting License

Benefits

- Analyze business operations from new angles
- Track performance, improve operations, and anticipate problems

Target Customers

- Any company that leverages ShoreTel reports to drive their business

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

Enhanced ShoreTel Workgroup Reports

The image displays three overlapping screenshots of ShoreTel reports:

- Top Report: Workgroup Agent Detail Login/Logout Report** (labeled "Login/Logout Report"). It shows agent details for "Sales & Marketing Workgroup (SR)" on "June 18, 2006". Columns include Date, Workgroup, Agent Name, Agent ID, Logged In, Logged Out, Duration, Logged In, and Day. An arrow points to the "Day" column.
- Middle Report: Workgroup Exceptional Call Report** (labeled "Exceptional / Abandoned Call Report"). It shows call details for "Order Administration" on "June 18, 2006". Columns include Start Date, Start Time, Workgroup, Start Time, Duration, Call ID, Dotted Number, and Exit Reason. An arrow points to the "Exit Reason" column.
- Bottom Report: Workgroup SLA Target Report** (labeled "SLA Target Report"). It shows performance metrics for "Commercial WG (SR)" on "November 14, 2006". Columns include Start Date, Start Time, AKA Target, BIF Target, Agent, Agent Account, Agent Account, Agent Account, Agent Account, Agent Account, and Abandoned. An arrow points to the "Abandoned" column.

Overview

- Historical reports that enhance ShoreTel's standard Workgroup reporting capabilities
- Workgroup Exceptional Call Report (includes Abandoned Calls only view)
- Workgroup Target Service Level Agreement (SLA) Report
- Workgroup Agent Detail Login/Logout Report
- Fully compatible with ShoreTel releases 7.0 and greater
- Fully compatible with ShoreTel Web Reporting License

Benefits

- 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 uses ShoreTel Workgroups

ShoreTel Hospitality Connector for DuVoice



Overview

- Enables the Duvoice system to change the name and user group of guest room phones when guests check in and check out
- Software only Application loaded onto ShoreTel Director server
- This service is an enabler only that requires a compatible DuVoice system to initiate any changes.

Benefits

- 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

- All hotel/motel customers using the DuVoice Application Server for Property Management System Integration

Interactive Voice Response (IVR) Applications

ShoreTel Professional Services 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 system
- 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 LexisNexis Time Matters Integration Application

LexisNexis Time Matters represents a practice area specialty for ShoreTel Professional Services: 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

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 Small Business and Professional Editions version 4.0 or greater

ShoreTel NetSuite® Integration



Overview

- Automate key business functions
- A pop up window attempts to identify one or more numbers stored in the NetSuite database
- If the number is found a pop up window provides a series of options from displaying the contact screen to logging and creating notes
- If the number is not found in the NetSuite database the user has the option to either create a new contact or customer
- One click dials any phone number within the application
- A client settings box provides users control over the types of calls handled to how the application reacts when it finds a matching record

Benefits

- Seamlessly links the ShoreTel phone system and the NetSuite application
- Enhances productivity by automatically linking calls to existing customer account records
- Improves handling of new accounts by providing new customer creation options from the pop-up window
- Encourages collaboration with other agents by making it easy to attach call notes to customer records

Target Customers

- Any user of NetSuite CRM

ShoreTel Nuisance and Junk FAX Call Handler Application



Overview

- Call monitoring application that blocks incoming calls from designated phone numbers
- Calls from blocked numbers are automatically disconnected
- 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

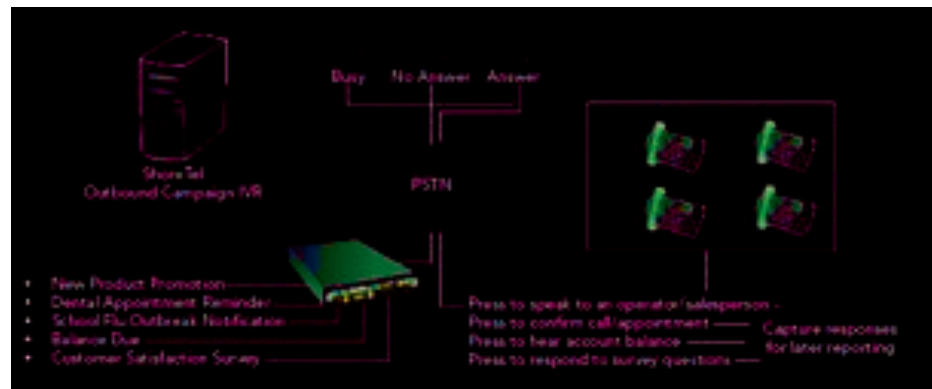
Benefits

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

Target Customers

- Wide variety of businesses that are harassed by nuisance calls

ShoreTel Outbound Campaign IVR Application



Overview

- Allows creation of automated calling campaigns for variety of purposes
 - Simple Announcements
 - Scripted Announcements with dynamic content
- Introduction and transfer to queue with associated desktop integration
- Enables efficient and accurate customer care
- Campaigns can be initiated manually or automatically (invoked from a script)
- Allows for headless, schedule based initiation

Benefits

- 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, WGs, & CC deployments
- Customers easily create Sophisticated Interactive Call Flows
- Graphical UI & Powerful Scripting

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
- Customizable thresholds for visual “red/yellow/green” status indication
- Software loaded onto ShoreTel Director server and associated client 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
- Offers At a Glance, Trend, and Abandoned Call Detail views

Target Customers

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

Report Scheduler Application



Overview

- Automatically runs ShoreTel built-in and customized 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 Professional Services: 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

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.

Schedule Based Routing ("On Call Router") Application



The screenshot displays the ShoreTel On Call Router application interface. At the top, there are navigation buttons for 'Month', 'Week', and 'Day', along with a date selector set to 'Tuesday, September 05, 2006'. Below this is a table with the following columns: 'Start Date/Time', 'End Date/Time', 'Name', and 'Number'. The table contains 14 rows of schedule entries, each with a specific date and time range, a name, and a number. At the bottom of the interface, there are several action buttons: 'Add', 'Edit', 'Delete', 'Copy', 'Configure On Call People...', 'Remove Expired Items', and 'Settings...'.

Start Date/Time	End Date/Time	Name	Number
Monday, September 25, 2006 8:00 AM	Monday, September 25, 2006 5:00 PM		
Monday, September 25, 2006 5:00 PM	Tuesday, September 26, 2006 8:00 AM	Eric	113
Tuesday, September 26, 2006 8:00 AM	Tuesday, September 26, 2006 5:00 PM		
Tuesday, September 26, 2006 5:00 PM	Wednesday, September 27, 2006 8:00 AM	Hary	115
Wednesday, September 27, 2006 8:00 AM	Wednesday, September 27, 2006 5:00 PM		
Wednesday, September 27, 2006 5:00 PM	Thursday, September 28, 2006 8:00 AM	Jeff	118
Thursday, September 28, 2006 8:00 AM	Thursday, September 28, 2006 5:00 PM		
Thursday, September 28, 2006 5:00 PM	Friday, September 29, 2006 8:00 AM	May	112
Friday, September 29, 2006 8:00 AM	Friday, September 29, 2006 5:00 PM		
Friday, September 29, 2006 5:00 PM	Saturday, September 30, 2006 8:00 AM	Maura	110
Saturday, September 30, 2006 8:00 AM	Saturday, September 30, 2006 5:00 PM	Mia	114
Saturday, September 30, 2006 5:00 PM	Sunday, October 01, 2006 8:00 AM	Sai	111
Sunday, October 01, 2006 8:00 AM	Sunday, October 01, 2006 5:00 PM	Wabe	117
Sunday, October 01, 2006 5:00 PM	Monday, October 02, 2006 8:00 AM	Zona	119
Monday, October 02, 2006 8:00 AM			

Overview

- Automatically routes inbound calls based on customer-defined schedule
- Administrative interface for editing schedules and routing destinations
- Automates contact of professionals according to on call schedule
- 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

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
- EasyPop or Contact Center Agent Toolbar required to drive

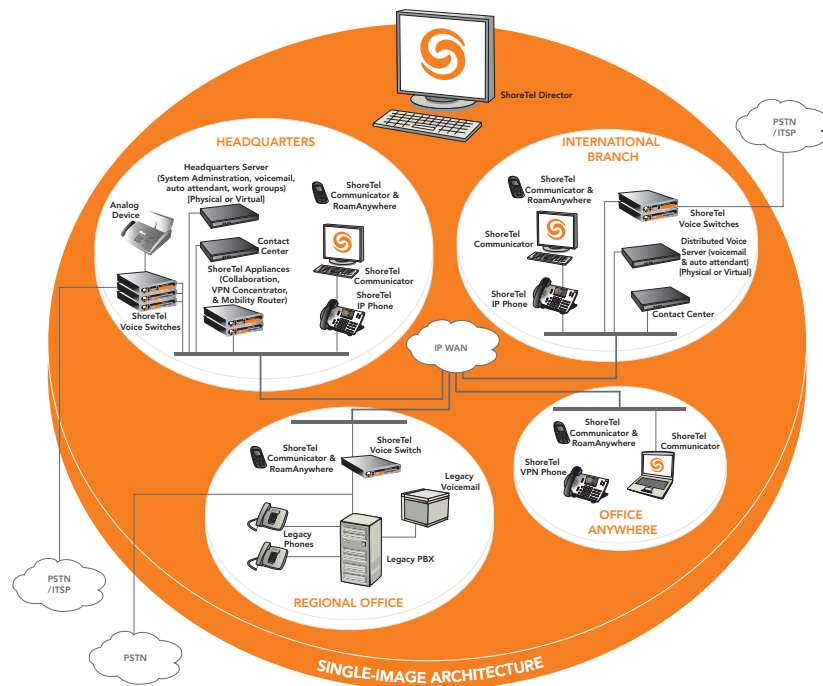
Benefits

- Rapid access to customer data upon call arrival
- Personalized call handling

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

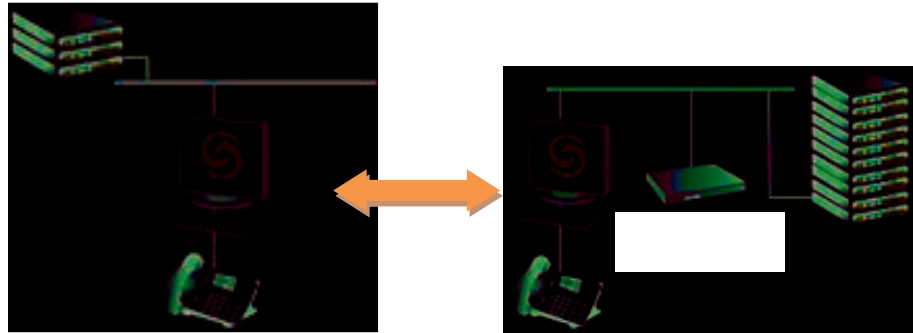
Benefits

- 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

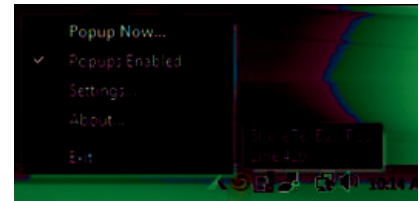
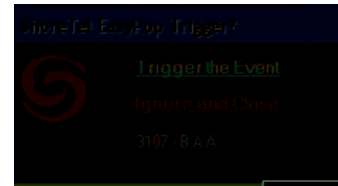
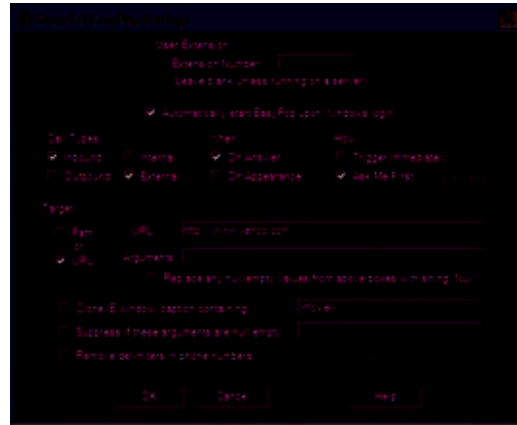
Benefits

- 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 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

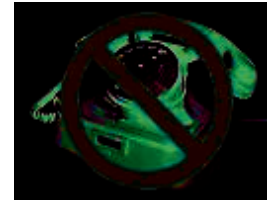
- Any customer desiring economical path to powerful desktop integration

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: Time: Restricted



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

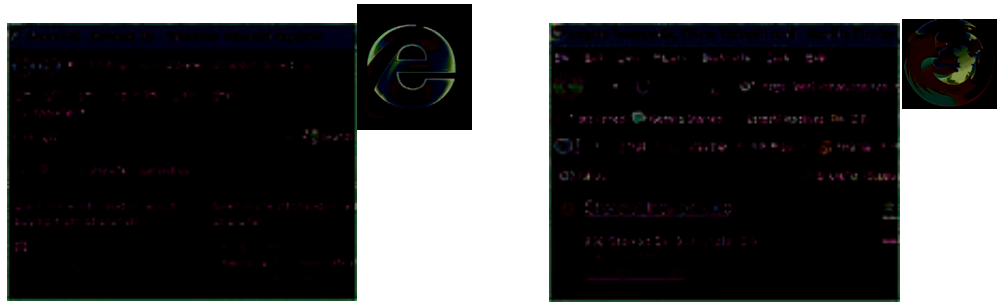
Benefits

- 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

- Highlights (in ShoreTel orange) & creates clickable links to phone numbers found on any Microsoft Internet Explorer or Mozilla Firefox web page
- Clicking on a phone number link 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.

Benefits

- Enhances user productivity by making communicating easier
- Rescan button (supported for IE only) to recalculate links for pages with dynamic content
- 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

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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