

Sage CRM CTI Framework

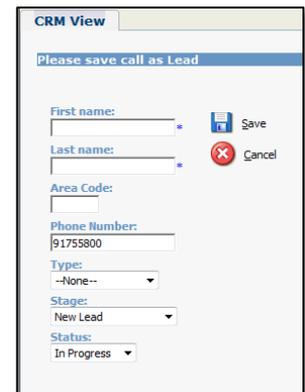
Driving value from Call Management with ease of use and customisation features

Greytrix has unrivalled, direct practical knowledge and experience with the Sage CRM system over many years.

The CRM CTI Framework is a flexible open ended infrastructure that is applied on top of Sage CRM to allow for a customisable and extendible CTI integrated system.

The current version of CTI within CRM does not include features such as

- customisable event handlers
- custom interfaces for each CTI event
- palette of actions per call in
- automatic lead creation
- interactive communication area
- open protocol enabled system
- post actions on incoming and outgoing events



These issues are directly addressed with the Greytrix CTI Framework.

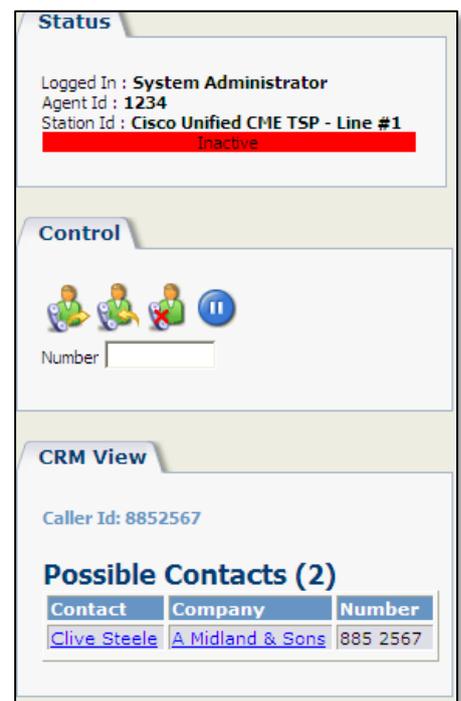
With the Greytrix CTI Framework, we introduce a platform that can be used to have completely customisable CTI integration with CRM. A standard feature set is delivered as part of the framework which is compatible with an appropriate CTI Provider of choice. Any telephony system which adheres to a client side event handle model can be easily configured with model.

The general concept is based around an external frameset built outside of CRM, which allows for a new CTI frame to be built outside of CRM, which is always visible. CTI events and actions are controlled through this frame which integrates with CRM through remote frame based calls back to CRM.

Dual CRM and CTI Login, and example of Framework contents.



User may now login through the CTI Framework login screen by hitting <ENTER> on the keyboard.



Contact	Company	Number
Clive Steele	A Midland & Sons	885 2567

Person: Clive Steele Phone: 44 1793 885 2567 Contracts: Status
 Company: A Midland & Sons E-mail: Clive.Steele@ATMintercapital.co.uk
 Logged In: System Administrator Agent Id: 1234 Station Id: Cisco Unified CME TSP - Line #1 Inactive

Summary Quick-look Marketing Notes Communications Opportunities Cases Addresses Phone/E-mail Self Service Documents Contracts ...

This is the Person Summary screen. If you want to change any of the details on this screen, select the Change action button on the right-hand side of the screen. You can change some Person details from the Summary tab in edit mode, but you need to select the Address, Phone, or E-mail, tab to change this type of company information.

Person

Send SMS

Last Name: Steele First Name: Clive Salutation: Mr.
 Middle: Suffix: Gender:
 Title Code: Manager Title: Call Centre Manager Department: Website:
 Territory: U.K. Account Manager:

Address

Street: Burnish Control House City: SWINDON State: Wiltshire
 Pipers Way Zip Code: SN3 1RE Country: United Kingdom

Phone/E-mail

Business: 44 1793 885 2567
 Business: Clive.Steele@ATMintercapital.co.uk

Supplier

Company Names: A Midland & Sons Type: Customer Status: Active
 Source: Region: Segment:

Control

Number: []

CRM View

Caller Id: 8852567

Possible Contacts (2)

Contact	Company	Number
Clive Steele	A Midland & Sons	885 2567

Frameset when in CTI Framework mode for Sage CRM

ENTRY 1
 Transfer & Close Window * **
 The transfer should escalate the incident into the 2nd tier, setting the STATE etc.
 Transfer to either a Team OR a specific extension number. If it is blank allow the user to enter a number into the box.
 * Update Communication with current company & person associated with call + incident, complaint or problem if one was identified
 ** Create Extra Communication of type "Transfer" & tracking note on incident (Reason field)

ENTRY 2
 CLI either has a single match or no match
 1.) Link Communication to matched company
 2.) Communication created to record the inbound call
 3.) Additionally if an Incident ID is passed to the call create a Tracking note against the Incident as well as linking the communication to the incident.

Once the correct CLI has been identified system continues as below

Allows search by name & acc no

Only shown if incident created/updated or incident ref passed in call (e.g. 2nd tier escalation) Able to search for Incident

Hyperlink to display details in Main Window Filter person by the selected company

- Allows search by serial number
- Needs to be filtered on the registered products for this customer (This may have to come from a Web Service)
- If CLI is blank customer information is blank.

Context Sensitivity for Channels - Email agents only see Email OR if there is nothing in the channel queue take it off the UI

E-Mail Channel - Go to Communication Detail for the Email which has the custom interface

Customer Information Frame

Telephone Number: [] Dial

Customer Information Frame

1 2 3
 4 5 6
 7 8 9
 # 0 *

Telephone Number: [] Dial

Customer Information Frame

Company: []
 Person: []
 Address 1: []
 Product: []
 Sage Cover: Sage Value: []
 CLI: [] Incident Ref: []
 Acc No: [] Password: []

With the CTI Provider SDK, it should be possible to integrate all events and functions for CTI and Email using this SDK on the client side of each workstation. This requires CRM to include a custom event and function framework which encompasses CRM and allows entry and exit points in and out of the CRM system and communication with client CTI agent on the workstation. This allows for the most flexible options on choice of Telephony provider, CTI environments and configuration of business process.

Example of how a Dialler queue can be set up and used as a point of integration with a CTI dialler application (not standard)

MME creates a filtered list for call out

Actions: New Document, New Task, Send E-mail, Export to Dialler, Include All, Exclude All

Fixed Length SDF → FTP → AVAYA Dialler → Outbound call pop's up in MME → User works with in MME → Repeated many times

(1) MME exports to CSV file
 (2) MME FTP the newly created CSV to the Dialler

MME creates a communication about the call
 User sets call back attributes if call back is needed

Marketing
 Log Off

A new main menu button allows the user to hide/unhide the CTI Framework area as required