



CONVERTec Inc.

CRM Integrator combines BCM/Norstar with Contact Relationship Management applications

Today's business environment means juggling between multiple applications on the desktop. CRM Integrator solves this by integrating the two most often used tools in the office, the Contact Relationship Management (CRM) application and the Nortel telephone. This user-friendly integration offers Nortel's BCM/Norstar users increased efficiency, while enhancing customer service.

thus allowing a user to stay focused on their desktop.

CRM Integrator features and capabilities include the ability to:

- Answer calls on a Nortel BCM or Norstar telephone
- Place calls on hold
- Release (hang-up) a call
- Enable/disable Do Not Disturb
- Display Caller ID (CLID) name & number. A maximum of 2 concurrent calls can be displayed
- Display intercom calls including extension and name
- Search, using CLID number, for contact record(s). The search can be configured to be automatic, manual, upon ring, or upon answer
- Add a new contact. If not found during a search the CLID name and number can be used to automatically populate the Company and Business telephone fields respectively
- Display all contacts that contain a match for a telephone number search. A specific contact can then be selected and opened from this list
- Display Call History, including missed calls with "click to call"
- Perform outbound dialing using ConverTec's TAPI Service Provider. The ConverTec TAPI Service Provider is standards



Leveraging the strengths of its Developer Partners and their Compatible Products, the Developer Program has become a key contributor in the success of Nortel by broadening its reach and responsiveness in meeting the needs of its channels and customers. Each Nortel Compatible Product has met established requirements for integration, functionality and stability, further reducing total cost of ownership.

Overview

CRM Integrator eliminates the need to juggle multiple applications and simplifies the user desktop by integrating the BCM or Norstar telephone to an unobtrusive desktop toolbar. Through the use of CRM Integrator, Norstar and BCM users are more efficient, and able to convey a sense of competency to their colleagues and customers, resulting in higher quality interactions and improved customer satisfaction..

Features and Benefits

CRM Integrator is supplied as a plug-in to many popular CRM products including Outlook® and ACT!™. Inbound and outbound calls are displayed in the CRM Integrator toolbar along with call control functionality,

based, thereby providing outbound dialing capabilities from any TAPI compatible application such as ACT!™ and GoldMine®.

- Presence information as reflected in other ConverTec applications such as Console.NET and CALL Navigator. i.e. "out for lunch". Note that when an individual calls a colleague with presence defined, the presence status is displayed on the telephone of the calling person. This feature is available across the enterprise.
- Perform most common call control operations through the use of a headset

CRM Integrator simplifies the desktop, enabling users to focus on quality customer interactions and convey a sense of competency, thus improving overall customer satisfaction.

Ideal For

CRM Integrator is ideal for people who utilize a contact relationship management application on a daily basis in conjunction with a Nortel BCM or Norstar telephone. "Heavy" telephone user positions, such as Sales, Contact Centre Agent, Support Desk, Telemarketer and Reception, would realize significant efficiency & customer satisfaction benefits from the deployment of CRM Integrator.

Larger businesses, particularly those in a campus environment, can use CRM Integrator to improve internal communications through the provision of presence information to all employees.

Dialing efficiency is improved by up to 35% in businesses requiring extensive outbound dialing when calls are placed directly from the CRM application. As well, mis-dialed numbers are also eliminated through the use of the Outlook "Dial" button. The Outlook record is also available for note-taking during the call.

CRM Integrator is part of ConverTec's Enterprise Office Suite which enables businesses to easily and economically add additional ConverTec applications, when needed, and build upon the original investment. The ConverTec Communication Server (CCS) platform is the engine that drives all ConverTec applications in the Enterprise Office Suite, including CRM Integrator, Console.NET (PC based Attendant Console) and CALL Navigator (Desktop Call Control).

Business Challenges

How can today's small to medium businesses meet the challenge to optimize existing technology and resources while maximizing efficiency?

CRM Integrator solves this dilemma by uniting the two most frequently utilized tools in the office, the CRM application and the Nortel BCM or Norstar telephone on the desktop!.

Company Information

Company Name:

ConverTec Inc.

URL: www.convertecinc.com

Technical support email: support@convertecinc.com

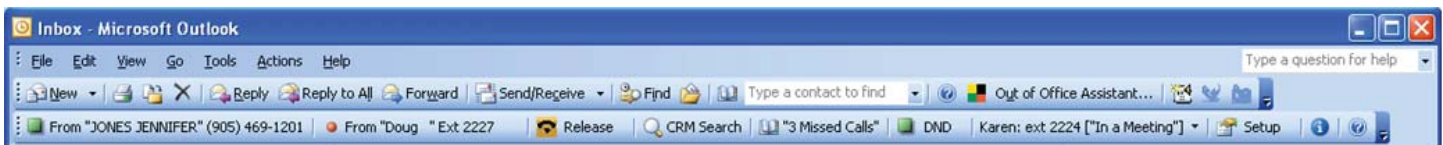
Technical support phone: 1-877-937-8228

Sales Contact: Mike McEwan

Sales phone: 1-877-937-8228

Sales email: sales@convertecinc.com

For all inquiries on this product, please provide the following reference code: CRMNortel



Answer both internal and external calls from within Outlook. Place callers on hold. Caller ID and intercom information is provided.

Release or "Hang-up" your Nortel phone from within Outlook

Incoming calls are logged including missed calls. Click on a number to return a call

Enable/Disable "Do Not Disturb" on your Nortel phone from within Outlook

Configure CRM Integrator to search for a contact manually or automatically upon your phone ringing or upon answering a call.

Set your Status or "Presence" which appears on the displays of Nortel phones calling you along with other ConverTec applications such as Console.NET and CALL Navigator

Multiple Contact Folders may be selected to be searched including Public Folders.

Compatibility Information:

CRM Integrator release 1.0 was verified as compatible in a controlled laboratory environment. For complete compatibility details, including specific Nortel platforms and releases, please refer to the Certificates of Compatibility at:

www.nortel.com/prd/dpp/product/prodpages/z6392.html

NORTEL
Compatible Product

www.nortel.com/compatible

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