

ShoreTel Cost Recovery Integration Application



Seamlessly incorporate accurate telephone time tracking into your legal and professional business cost recovery infrastructure



BENEFITS

- Works out-of-the-box with Copitrak and Equitrac, the leading legal and professional services cost recovery systems
- Automatically matches inbound and outbound phone numbers to account tracking codes
- Supports both client/matter and single account code structures
- Allows code assignment during or after calls

Overview

Legal, architecture, accounting and professional services organizations that bill clients by the project or hour can now combine their account code tracking application with ShoreTel's Unified Communications solutions, capturing all telephone communication for reimbursement.

Out-of-the-box, ShoreTel Cost Recovery Integration Application works seamlessly with Copitrak™ and Equitrac™, leading cost recovery systems in the legal and professional services industries. It can also be customized to work with time and billing systems to automatically track users' time spent on phone calls, and has a built-in ShoreTel® account code database for standalone operation.

Maximizing cost recovery, seamlessly

The Cost Recovery Integration Application associates inbound and outbound calls with appropriate billing codes, allowing busy professionals to easily and accurately account for their time. Automated viewing screens, prompts and search features that are included in the Cost Recovery Integration Application work out-of-the-box whether the account code database is maintained in the ShoreTel IP telephony system, or resides in specialized cost recovery systems like Equitrac or Copitrak.

Fast deployment and streamlined operations

The Cost Recovery Integration Application can be up and running quickly; installation consists of server and client components that can typically be installed, configured, tested and ready to use the same day.

Once installed, the integration software automatically imports up-to-date billing codes from a firm's cost recovery application database, according to a pre-defined schedule. The ShoreTel IP telephony system maintains call detail records annotated with assigned billing codes. The cost recovery system then automatically retrieves the ShoreTel call records for future use, eliminating the need to reconcile

disparate records. The result is a seamless incorporation of telephone time billing with minimal administrative overhead.

This two-way data synchronization between the IP telephony and billing systems creates a single point of administration, greatly simplifying time accounting and billing management.

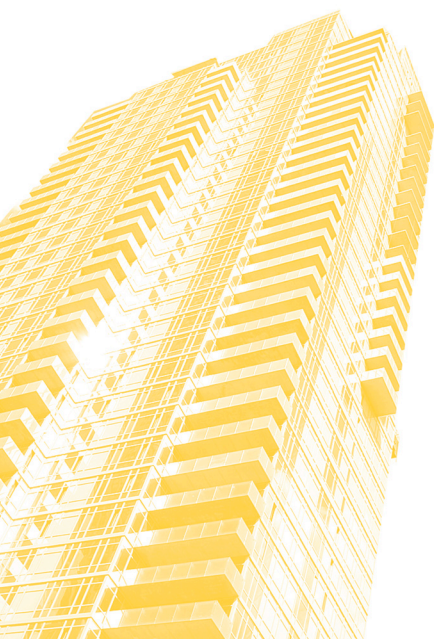
Convenient desktop interface

The Cost Recovery Integration Application's graphical interface lets users assign appropriate codes during or after calls by clicking on a screen that automatically appears whenever a call is placed or received. The user is prompted to confirm the proposed code or select from a menu of alternatives, including the individual's most frequently used codes, which are dynamically kept up to date. If none of the suggested codes are a match, the user can employ the Cost Recovery Integration Application's intuitive search capabilities to perform an extended search. All of these features help to ensure that a code will be entered for each call, maximizing cost recovery.

For mobile professionals, the application is fully compatible with the Office Anywhere feature in the ShoreTel IP telephony system, giving users access to all of the Cost Recovery Integration Application's capabilities when traveling or working out of a home office. All calls are captured, including calls made or received when the ShoreTel user's computer is not operating. Calls made when computer is powered down are available under the Calls Unaccounted tab the next time the application is accessed. The user, at their convenience, can then assign the appropriate codes or make notes on the calls.

Learn more

For additional information or to obtain a quote, please contact your authorized ShoreTel reseller. To contact ShoreTel Professional Services directly, call 800-425-9385, ext. 3331 or send e-mail to ProfessionalServices@shoretel.com.



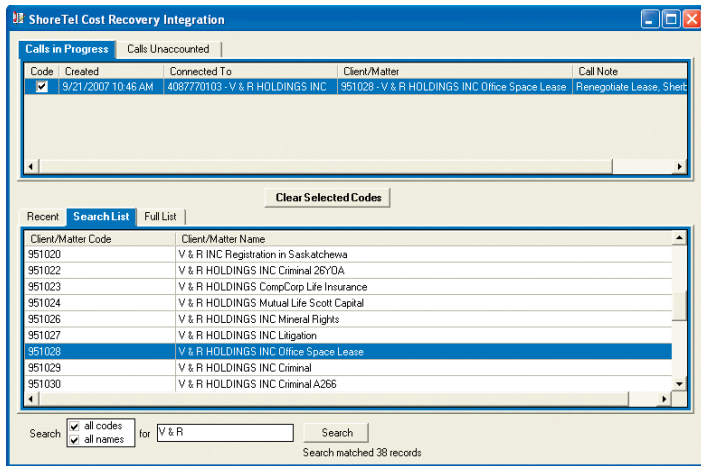


Figure 1: "Calls In Progress" tab depicting a live call with the search options and the selected code confirmed by the user.

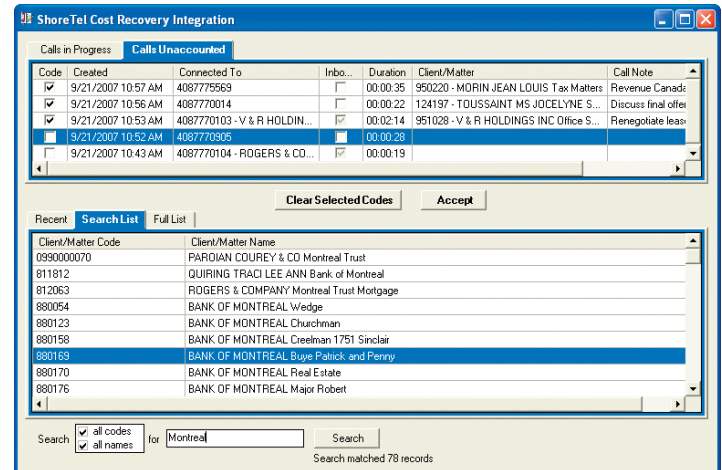


Figure 2: "Calls Unaccounted" tab depicting a call in need of a code assignment and the search options that are available.

SPECIFICATIONS

Requirements

- 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
- ShoreWare Call Manager (Personal, Advanced or Operator); must be installed for the application to function; it does not need to be running
- ShoreTel Versions 6.1 or higher
- With Equitrac version 3 or higher
- Integrates with Copittrak all versions

User interface

- "Calls in Progress" screen displays automatically during connected calls (see Figure 1)
- Client/matter code is suggested based on individual usage patterns
- "Recent" list presents last and frequently used codes for easy selection
- Full list is always available for browsing or searching
- The server tracks all calls; the "Calls Unaccounted" list saves calls for later code assignments (see Figure 2)
- Includes optional telephone-based code entry via voice prompt and keypad input
- Users can enter codes either through the telephone keypad (when enabled) or the desktop interface

Administration

- Built-in selections for account code source: Equitrac, Copittrak, or ShoreTel's account code database (standalone mode)
- Time and frequency of imports are configurable
- The ShoreTel Cost Recovery Integration maintains a dedicated code-annotated Call Detail Records (CDR) database
- Support for direct connection by Equitrac and Copittrak for call detail record export
- ShoreTel code-annotated CDR are included to support standalone operation
- Server Configuration Utility allows administrators to dictate site-wide policies (see Figure 3)
- User administration is accomplished via ShoreWare® Director
- Forced and Optional modes are set per User Group
- User client settings allow customization according to personal preferences (see Figure 4)

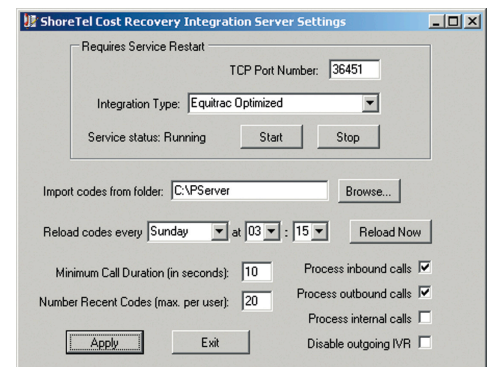


Figure 3: Server Settings

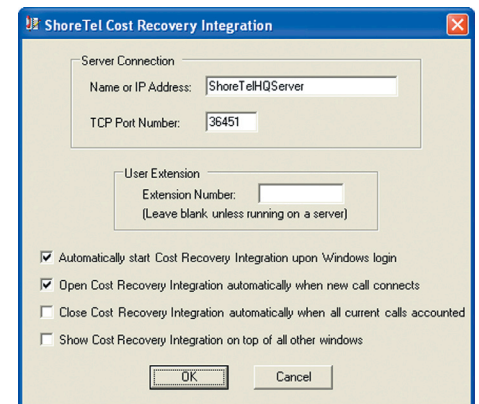


Figure 4: Client Settings

About ShoreTel

ShoreTel is a leading provider of enterprise Pure IP telephony solutions. ShoreTel voice systems provide customers with a number of key benefits, including ease of use, manageability and lower total cost of ownership than alternative solutions. ShoreTel's distributed software architecture and switched-based hardware platform extend enterprise-class voice services to every office and outpost, keeping employees fully connected wherever they go. Founded in 1996, ShoreTel has achieved broad industry recognition for its technology and high customer satisfaction. For more information, visit www.shoretel.com or call 1-800-425-9385.



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