

ShoreTel NetSuite Integration Application



Automating key enterprise functions and data-intensive business processes



BENEFITS

- *Seamlessly integrates the ShoreTel® IP telephony system with the NetSuite enterprise application suite*
- *Automatically links calls to existing customer account records to enhance productivity, shorten response times and improve operations*
- *Facilitates account creation for first-time callers*

Overview

The ShoreTel NetSuite Integration Application combines two industry leading products into a single interface, enabling NetSuite® system users to improve their customers' experience through more personal, efficient telephone response. Moreover, enhancing NetSuite with ShoreTel's Unified Communications can boost individual and organizational productivity, and reduce call response times and duration.

Intuitive interface streamlines communications

With the NetSuite Integration Application, your company can leverage NetSuite's out-of-the-box IP communications readiness with a rich set of embedded call center capabilities.

When a NetSuite user receives a call that matches one or more numbers stored in the NetSuite database, the NetSuite Integration Application automatically displays a window on the desktop with options that are linked directly to the NetSuite Integration Application (see Figure 1). From this window the user can access the caller's record, log the call, add notes, create a new case or search additional records. Regardless of the option that is selected, the related NetSuite screen is automatically populated with pertinent contact details to reduce errors and speed processing (see Figure 2).

If a telephone number is not found in the NetSuite database, the Netsuite Integration Application presents two options to a NetSuite user: create a New Contact, or create a New Customer. With either choice the automated window puts application users one click away from the desired screen, helping to maximize employee productivity and minimize wait time for the customer.

Click to call

Using NetSuite's built-in support for outbound dialing, users can place calls directly from their Web browsers with the click of a button, enabling them to handle a higher volume of calls. This functionality works for all phone number occurrences, whether the phone number is underlined or has an adjacent button, as is the case when viewing or editing records. Inbound calls trigger NetSuite screen pops that contain related account information.

All together, these capabilities enhance a ShoreTel IP telephony system user's 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.

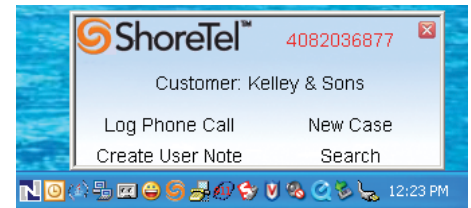


Figure 1: Record found single match pop-up

Seamless integration with existing processes

The NetSuite Integration Application is easy to install and intuitive to use, ensuring a smooth transition into daily business operations. Once installed, the integration is seamless, allowing your company to realize the benefits of Unified Communications without changing established procedures, roles or workflows.

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.

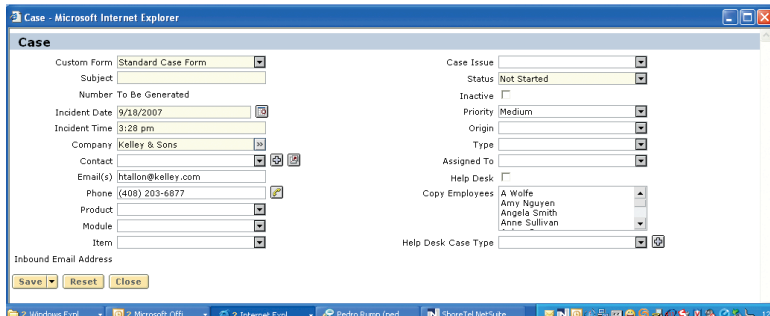


Figure 2: New Case page with date, time, company, e-mail and phone automatically filled

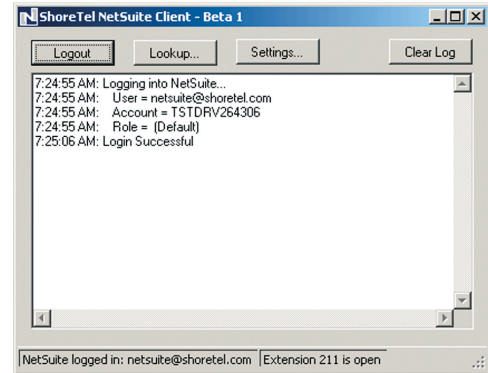


Figure 3: Double clicking the tray icon displays the application's main window.

SPECIFICATIONS

Requirements

- Microsoft Internet Explorer Version 6.0 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
- ShoreWare Call Manager (Personal, Advanced or Operator) must be installed for application to function; does not need to be running
- ShoreTel Version 6.1 or higher
- A NetSuite account

Operation

- The NetSuite Integration Application runs on each user's desktop as a Windows tray resident application
- Floating pop-ups display applicable actions, allowing the user to navigate with a single click

Tray icon menu

- The log view in the main window shows past lookup results as well as any errors or problems (see Figure 3)

Client settings

The client settings (see Figure 4) provide end user flexibility by allowing control over:

- The types of calls handled by the application
- The tables searched when looking up a phone number
- How the application reacts when it finds a matching record

NetSuite searches

Configurable search behavior allows for "intelligent" discovery options:

- Searches are conducted in the order determined by the NetSuite Integration Application configuration
- The Contacts table takes precedence: If a single entry is found, no additional searches take place and this record is offered in the pop-up or automatically opened
- If multiple records are found the search stops and the "Search" link is offered in the pop-up
- If either no or multiple records are found then the additional selected tables are searched in order
- If all enabled tables are searched and no matching records are found the "New Contact" or "New Customer" pop-up is shown

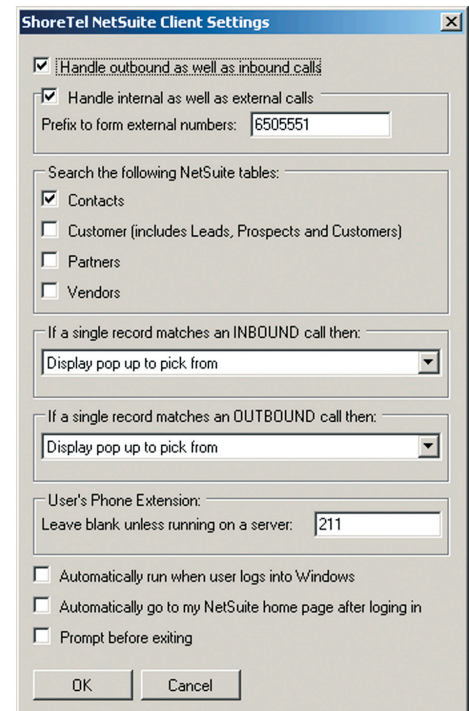


Figure 4: Client Setting Box

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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