



MITEL

## Agent Portal Screen Pop Enhanced CRM

### Customer Relationship Management Screen Pop

Mitel® Agent Portal is a screen pop application that provides agents with instant access to customer information. It triggers the display of relevant caller and account information based on a wide range of call parameters, such as ANI and DNIS, as well as customer entered information such as account numbers. An agent can instantly be “popped” the correct database entry form to quickly update records – greatly reducing the cost per interaction while improving service levels.

#### Application Integration Options

The Agent Portal client can work with a variety of applications to initiate screen pops on voice calls.

- **Call Pad Text Editor:** Agents can make and save notes on any call
- **Microsoft® Outlook®:** Caller data can be used to automatically perform a contact lookup and screen pop information in Microsoft Outlook based on phone numbers or names. Agents can create a journal entry in Microsoft Outlook for each call they receive
- **Dynamic Data Exchange (DDE):** Data can be automatically launched and sent to any third-party application that supports DDE, such as Microsoft Excel®

- **Web Page Launch:** Automatically launches and sends data to any third-party application that supports Active Server Pages (ASP) scripts, such as a web page
- **Command Line Arguments:** Automatically launches and sends data to any third-party application that supports command line arguments, such as BMC® Remedy®
- **Stand-alone OLE / COM / OC:** Automatically incorporates any application that supports OLE / COM, such as Microsoft Visual Basic® or Microsoft Office applications

Screen pops with email and interactive web chat contacts are also available with customized development from Mitel Professional Services.



### Intelligent Queue Integration, IVR Integration

Agent Portal can be integrated with the Mitel Intelligent Queue application to enable data to be transmitted between Intelligent Queue, Agent Portal, and agent desktops. This valuable integration ensures the customer entered data or queried information that pre-qualifies callers can be used to provide timesaving screen pop information to agents. It eliminates the need for customers to provide information multiple times. This capability can also be used to integrate with third-party interactive voice response (IVR) systems.

### Customer Relationship Management Integration

Agent Portal supports customized screen pop integration with several industry-leading Customer Relationship Management (CRM) databases. This service is offered through Mitel Professional Services. Supported CRMs include, but are not limited to, the following:

- Microsoft Dynamics™ CRM
- ACT! by Sage
- Amdocs ClarifyCRM
- Salesforce® CRM
- Sage SalesLogix
- Microsoft® Outlook®
- Oracle® Siebel CRM
- FrontRange Solutions GoldMine®
- FrontRange Solutions HEAT®
- BMC® Remedy®
- Oracle® PeopleSoft™
- CDC Software Pivotal CRM
- BMC® IT Service Support (Formerly Magic)

### Supported Mitel 3300 IP Communications Platform (ICP) System Configurations for Agent Portal

Configuration	Description
Stand-alone Contact Center Gateway Configurations	Single site, single Mitel 3300 IP Communications Platform (ICP) controller Scaled Contact Center: Single or multi-site deployment comprised of two or more 3300 ICP queuing gateways with a single 3300 ICP agent controller Resilient / Virtual Contact Center: Single or multi-site deployment comprised of one or more 3300 ICP queuing gateways with 3300 ICP primary and secondary agent controllers
Enterprise Configuration	Networked Contact Center: Interconnection of two disparate contact centers for overflow and load balancing*

\* supported only with Mitel MSDN trunking

### Intuitive Interface, Flexible Operation

The Agent Portal client user interface is highly intuitive, making agent login and setup fast and easy. Agents simply select options from a menu to make calls, review a log of received calls, and display applications on screen along with the values and parameters for each. In addition, contact centers can develop their own custom agent applications using the Agent Portal toolkit API.

### Return on Investment

Customer satisfaction should be the main goal of every company. Agent Portal equips employees to assist customers immediately upon call arrival and to provide effective service. It helps employees answer customer inquiries in a single transaction and significantly reduces call handling times and costs. Prompt, efficient service results in greater customer satisfaction and loyalty, as well as immediate and ongoing business success.

### Tool Kit Features

The Agent Portal toolkit interface exposes application functionality to third-party developers for custom client development.

Features	Description
Log in / Log out an Agent	Enables agents to log in or out of ACD queues from their PC desktops
Make a Call	Enables agents to dial from their contact lists
Provide Call Receipt Notification	Allows agents to see lists of all calls received and return any call received
Provide Call Information	Allows information pertaining to callers to be presented to agents as screen pops
• ANI	
• DNIS	
• Customer Entered Information or Additional Data	
• Caller Name	
• Agent ID	
• User's Extension	

## System Requirements

### Communications Platform

- Mitel 3300 ICP Release 7.1 or later
- Mitel SX-2000® LIGHT Release 34.2.6.3 or later

### Servers

- Microsoft Windows Server® 2003 / Windows XP / Windows 2000
- 1 GHz+ Processor
- 1 GB RAM
- 20 GB+ HDD
- Network Card

### Workstations (optional)

- Microsoft Windows XP / Windows 2000
- 600 MHz+ Processor
- 256 MB RAM
- 5 GB+ HDD
- Network Card



THIS DOCUMENT IS PROVIDED TO YOU FOR INFORMATIONAL PURPOSES ONLY. The information furnished in this document, believed by Mitel to be accurate as of the date of its publication, is subject to change without notice. Mitel assumes no responsibility for any errors or omissions in this document and shall have no obligation to you as a result of having made this document available to you or based upon the information it contains.

M MITEL (design) is a registered trademark of Mitel Networks Corporation. All other products and services are the registered trademarks of their respective holders.

© Copyright 2008, Mitel Networks Corporation. All Rights Reserved.

GD 392\_901 PN 51011432RB-EN