

SPECIFICATIONS

ShoreTel Cost Recovery Integration

For organizations that bill their clients by the project or hour, such as legal, architecture, accounting and professional services, capturing communication information for reimbursement is key to ensuring smooth and efficient operations. ShoreTel unified communications (UC) solutions let organizations easily integrate their account code tracking application for brilliantly simple automated tracking and reporting.

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

Streamlining cost recovery

The ShoreTel 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, such as Equitrac or Copitrak.

Fast deployment to optimize operations

As a result of ShoreTel's brilliant simplicity, installation of the ShoreTel Cost Recovery Integration application consists of server and client components that can typically be installed, configured, tested and ready to use the same day. Once installed, up-to-date billing codes are automatically imported from the cost recovery application database, according to a pre-defined schedule. The ShoreTel UC system maintains call detail records annotated with assigned billing codes, and the cost recovery system retrieves them for future use. This eliminates the need to reconcile disparate records, and streamlines telephone time billing with minimal administrative overhead.

In addition, 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 ShoreTel 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 ShoreTel 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 ShoreTel Office Anywhere feature of the ShoreTel UC system, giving users access to all of the application's capabilities when traveling or working out of a home office. All calls are captured, regardless of whether the user's computer is running.

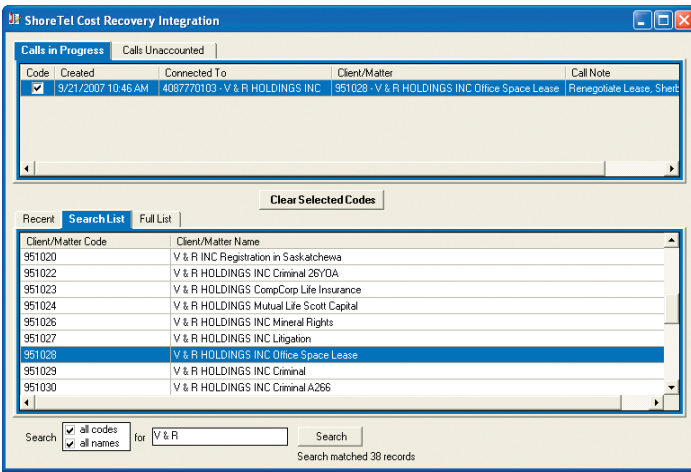


Figure 1: "Calls in Progress" tab depicting a live call with the search options and the selected code confirmed by the user

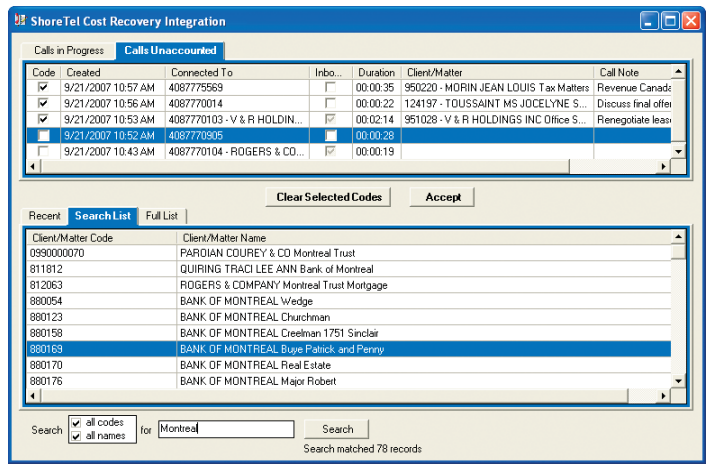


Figure 2: "Calls Unaccounted" tab depicting a call in need of a code assignment and the search options that are available

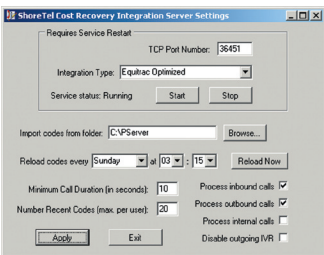


Figure 3: Server settings

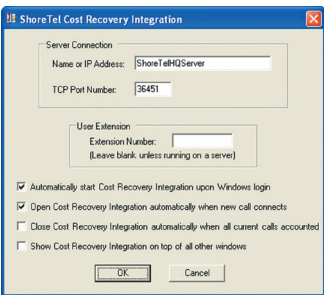


Figure 4: Client settings

Technical notes

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 the ShoreTel account code database (standalone mode)
- Time and frequency of imports are configurable
- The ShoreTel Cost Recovery Integration application 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 ShoreTel Director

- Forced and Optional modes are set per User Group

- User client settings allow customization according to personal preferences (see Figure 4)

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
- ShoreTel Communicator (formerly ShoreTel Call Manager) 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

About ShoreTel

ShoreTel is the provider of brilliantly simple Unified Communication (UC) solutions based on its award-winning IP business phone system. We offer organizations of all sizes integrated, voice, video, data, and mobile communications on an open, distributed IP architecture that helps significantly reduce the complexity and costs typically associated with other solutions. The feature-rich ShoreTel UC system offers the lowest total cost of ownership (TCO) and the highest customer satisfaction in the industry, in part because it is easy to deploy, manage, scale and use. Increasingly, companies around the world are finding a competitive edge by replacing business-as-usual with new thinking, and choosing ShoreTel to handle their integrated business communication. ShoreTel is based in Sunnyvale, California, and has regional offices and partners worldwide. For more information, visit shoretel.com.

WORLD HEADQUARTERS 960 Stewart Drive, Sunnyvale, CA 94085 USA. shoretel.com
 +1 (800) 425-9385 Toll Free +1 (408) 331-3300 Tel. +1 (408) 331-3333 Fax
 EMEA +800 408 33133 Freephone +44 (1628) 826300 Tel.
 ASIA PACIFIC +61 (0)2 9959 8000 Tel.

