



# advanceintegrate

## Call Connection & Integration

Oak's CRM integration software helps you manage customers more professionally, more efficiently, and more helpfully.

**Advance Integrate** works with your customer database or CRM system to bring a range of important benefits to your customer interactions. It does this by matching incoming or outgoing phone numbers to a corresponding CRM record, then displaying the client details on screen before the call is even answered. Depending on your CRM system, staff can instantly see the client's name and their history with the company, including any ongoing issues, what they have bought from the company and so on. This will help them handle the call more confidently and appropriately from the moment the call is answered, whether there's a problem to tackle or a sales opportunity to be seized.

### Choose Advance **Integrate** to:

#### ○ Improve service

By knowing who the caller is before answering a call you can offer a more personalised service.

#### ○ Improve productivity

By automatically opening your customer database or CRM system on the correct screen, you can enter call related notes right away without losing seconds finding the correct screen or tab to use.

#### ○ Increase sales

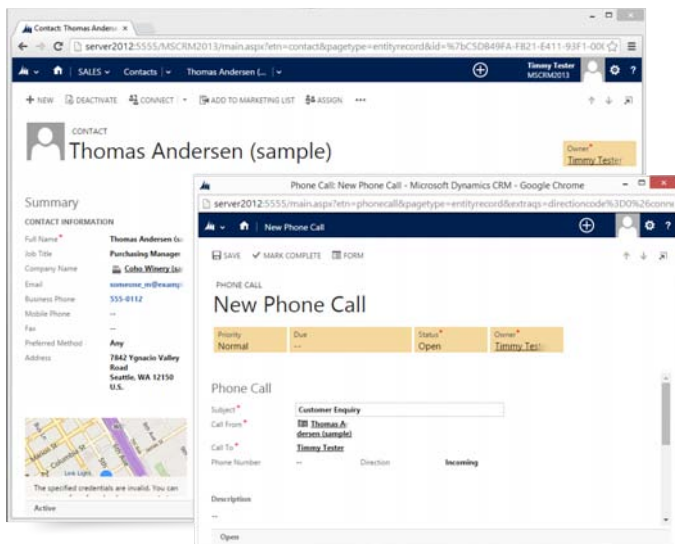
Make sales calls automatically from your customer database or CRM system thus speeding up connection and avoiding mis-dialling.

#### ○ Reduce costs

Call handling times are reduced because you have the caller's details to hand and don't need to ask for them again. By reducing call handling times you are saving on staff costs.

#### ○ Drive business improvement

A big part of Advance Integrate is automation, automation that can improve the way that you do business.



Screen Popping Microsoft Dynamics.

Find out more at: [www.oak.co.uk/integrate](http://www.oak.co.uk/integrate)

Integrate helps you do  
more business faster  
than ever before.

# Customer Service Automation

integrate brings your business and application data to life allowing you to deliver a faster and better service to your callers.

Options	Standard	Premium	Enterprise	Options	Standard	Premium	Enterprise
<b>Store &amp; Backup Calls</b>				<b>Bespoke Application Support</b>			
CTI Server running as a Windows Service	✓	✓	✓	Adapt (Bond, Recruitment)	x	x	✓
Connection Server running as a Windows Service	✓	✓	✓	EMIS (EMIS, Medical)	x	x	✓
Maximum number of desktop clients	15	100	Unlimited	Sage 50 (Sage, Accountancy)	x	x	✓
<b>Desktop Phone</b>				Salesforce (Salesforce, Marketing)	x	x	✓
Address Book with manual import	✓	✓	✓	SIMS (Capita, Education)	x	x	✓
Call History	✓	✓	✓	Database (Oracle/SQL/ODBC)	x	x	✓
Extension Status	✓	✓	✓	SDK (Software Development Kit)	x	x	✓
Preview Dialling, Call Answer	✓	✓	✓	More on demand...	x	x	✓
Simple Screen Popping on incoming CLI	✓	✓	✓	<b>Installation</b>			
<b>Standard Application Support</b>				Helpdesk support available	✓	✓	✓
Access (Microsoft, Database)	x	✓	✓	Remote diagnostic support available	✓	✓	✓
		No scripting	With scripting	Installation service available	x	✓	✓
ACTI, ACTI Professional (Sage, CRM)	x	✓	✓				
MS CRM (Microsoft, CRM)	x	✓	✓				
Goldmine (Frontrange, CRM)	x	✓	✓				
Lotus Notes (IBM, Contact Management)	x	✓	✓				
Maximiser (Maximiser Software, CRM)	x	✓	✓				
Outlook (Microsoft, Contact Management)	x	✓	✓				
Exchange (Microsoft, Contact Management)	x	✓	✓				
SuperOffice (SuperOffice, CRM)	x	✓	✓				

## advancerecord

Integrate is fully integrated with Record.

Record complements Integrate by providing a comprehensive call recording solution that's integrated with your business and your customers. Together they provide the complete customer service solution.

Record will enable you to:

- Demonstrate legal compliance
- Resolve disputes
- Monitor quality of service
- Improve staff performance
- Drive business improvement



Call Recording, Reporting & CRM Integration

