

SPECIFICATIONS

ShoreTel NetSuite Integration

The ShoreTel NetSuite Integration application combines two industry-leading products into a single, easy-to-use interface, providing enhanced productivity, shorter response times and greater flexibility to companies that rely on these important business tools. This seamless connection enables NetSuite system users to enhance the customer experience through more personal and efficient telephone response.

BENEFITS

- Creates a seamless integration between the ShoreTel UC system and the NetSuite application
- Enhances productivity, shortens response times and improves operations by automatically linking calls to existing customer account records
- Facilitates account creation for first time callers
- Encourages collaboration with other agents by making it easy to attach call notes to customer records

Intuitive interface

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



Figure 1: Record found single match pop-up

If the telephone number is not found in the NetSuite database, the ShoreTel system presents two options to a NetSuite user: create a "New Contact" or create a "New Customer". In either case the automated window means users are just one click away from the desired screen, boosting productivity and minimizing wait time for the customer.

Click to call

Using NetSuite's built-in support for outbound dialing, users can call 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. See an example of the adjacent button following the phone number on a New Case page (Figure 2).

Increased return on investment

Through increased employee productivity, the ShoreTel NetSuite Integration application gives companies expanded leverage over their investments in ShoreTel and NetSuite technologies. This application works 'out of the box',

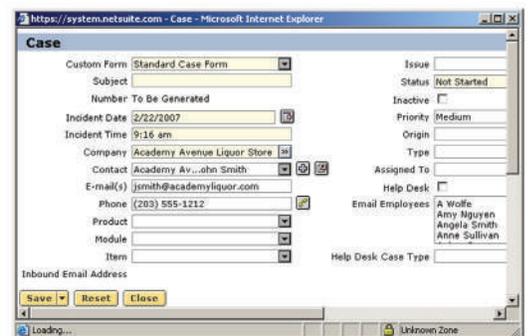


Figure 2: New Case page with date, time, company, e-mail and phone automatically filled

so organizations have the opportunity to quickly and easily realize the power of application convergence.

Seamless integration

The ShoreTel NetSuite Integration application is easy to install and intuitive to use, ensuring a smooth transition into daily business operations. Once installed, the ShoreTel NetSuite Integration is truly seamless so that companies can realize added benefits without changes to established procedures, roles or workflows.

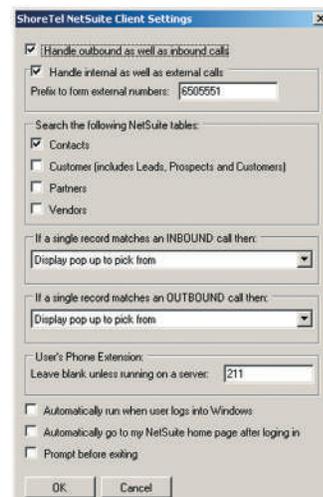


Figure 3: Client Setting Box

Technical notes

Operation

- The ShoreTel NetSuite application runs on each user's desktop as a Windows tray resident application
- Pop-ups display applicable actions allowing the user to navigate with a single click
- Any version of ShoreTel Communicator (formerly ShoreTel Call Manager) installed, but not necessarily running

Tray icon menu

- Log view in the main window shows past lookup results as well as any errors or problems

Client settings

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 (Figure 3)

NetSuite searches

Configurable search behavior leads to "intelligent" discovery options:

- Searches are conducted in the order determined by the 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 either no or multiple records are found then the additional selected tables are searched in order
- If one record is found then the search stops 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 all enabled tables are searched and no matching records are found the "New Contact" or "New Customer" pop-up is shown

Compatibility

- Supports all NetSuite products including NetSuite, NetSuite CRM, NetSuite CRM+ and NetSuite Small Business

Requirements

- Microsoft Internet Explorer Version 6.0 or later
- Microsoft .NET 2.0 Runtime Framework (free from Microsoft)
- Any version of ShoreTel Communicator (formerly ShoreTel Call Manager) installed, but not necessarily running
- A NetSuite account

About ShoreTel

ShoreTel is a provider of business communication solutions whose brilliantly simple unified communications platforms, applications and mobile UC solutions promise a new rhythm of workforce engagement and collaboration. With costly complexity eliminated by design from its award winning, all-in-one IP phone system, UC and contact center solution, and its industry leading hosted business phone system, workers enjoy a freedom and self-reliance that other providers can't match. Users have full control to engage and collaborate, no matter the time, place or device, for the lowest cost and demand on IT resources in the industry. ShoreTel is headquartered in Sunnyvale, California, and has regional offices and partners worldwide. For more information, visit shoretel.com or shoretelsky.com



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