

# NETHAWK CRM WITH TELEPHONY



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# SOFTWARE FEATURES

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CRM and Telephony used to be two different islands far from each other. The gap between CRM and Telephony is shrinking. As your customer data and leads always store in CRM therefore dialer must be capable to utilize that data and vice versa CRM need to know what dialer is doing eg after call work and call disposition

We have broken down CRM and Dialers features as if they work together and in the end give you better reporting for training and improvement of agents, overall sales and customer support strategy makeover in positive way.



## Click-to-Call

Ability to call a customer from CRM screen. Rather than copying data from CRM To dialer software or exporting CSV files Our solution enables you seamlessly call from CRM.

Inbound screen popping

While sitting in live session an agent will receive a pop-up on screen along with inbound call. Pop-up screen contains all the necessary information eg first name, address, phone no, email etc so Agent can provide personalized calling experience. Same time Agent can correct, update or add records against inbound calls.



## After-Call Work ACW

Our integrated CRM solution enables you wrap-up after call activities without navigating to different programs screens. ACW wizard takes you to appropriate actionable screens / programs and tabs. In nearly unified fashion. This will save your time. Everything is done within minutes.



## Call Analysis

in outbound marketing campaign, A campaign report shows lead nurturing to actual sales numbers. Likewise in inbound Service / support activity Dashboard is available which shows analytic like completeness of SLAs. Dashboard is extremely customizable. We can include different matrices, KPIs (Key performance indicators) according to your performance objectives.



# TELEPHONY FEATURES

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## Call Recording

Record all calls forcefully or give choice to agent to record the call. Recordings of calls are easily available. Call recording is an essential part of Quality Assurance. Moreover such type of recordings are required for compliance purposes.



## Inbound automatic call distribution (ACD)

Automatic Call Distribution is method of distributing inbound calls among available agents. There are different savors, depending upon your policy calls can be distribution to achieve maximum efficiency or customer satisfaction. For example you may have two different products then calls will be distributed among two different group of corresponding agents. An other example priority banking you can set two different campaigns based on customer CLI or any other parameter calls can be distributed to highly available agents.



## Live Call Monitoring

Supervisor can monitor calls for various purposes eg training of an agent or enhancing performance of existing agents. Superior can dictate an agent in whisper-mode, only agent can listen toin order supervisor and customer at the same time. Supervisor can also barge in and intervene a call in order to resolve the matter.



# LEAD GENERATION IN CX (DIALER) TRANSPOSE TO CRM

Lead generated in Telephony window automatically gets created in CRM as well.

**CRM WINDOW**  
 Logged in as User: 1001 on Phone: SIP/1001 to campaign: DEFAULT  
 2019-02-26 12:07:00 session ID: 8600051  
 Calls in Queue: 0  
 GROUPS LOGOUT  
 NO LIVE CALL  
 seconds: commit

**STATUS:**  
 YOU ARE PAUSED  
 DIAL NEXT NUMBER  
 LEAD PREVIEW  
 RECORDING FILE:  
 START RECORDING  
 WEB FORM  
 WEB FORM 2  
 PARK CALL  
 TRANSFER - CONF  
 HANGUP CUSTOMER  
 SEND DTMF

**Customer Information:**  
 Customer Time: Channel:  
 Title: Mr First: Kamran MI: Last: Rao  
 Address1: #13, St 99, G-9/1  
 Address2: Address3:  
 City: Islamabad State: PostCode:  
 Province: Vendor ID: Gender: U - Undefined  
 Phone: DialCode: Alt. Phone: 03445900150  
 Show: Email: kamranrao@gmail.com  
 Comments:

MANUAL DIAL FAST DIAL VIEW CALL LOG

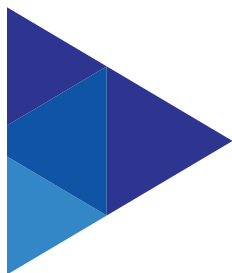
VERSION: 2.14-554c BUILD: 180224-1433 Server: 192.168.1.111  
 Show Calls In Queue  
 Show conference call channel information  
 MUTE Agents View +

**TELEPHONY WINDOW**  
 LEADS SALES SUPPORT ACTIVITIES QUICK ALL  
 CREATE Q A P

Recently Viewed  
 Mr. Kamran Rao  
 Mech Quote  
 Quotes New Ways  
 Invoice tax ...  
 Invoice New ...

OVERVIEW MORE INFORMATION OTHER ACTIONS

Name: Mr. Kamran Rao Office Phone:  
 Title: Mobile: 03445900150  
 Department: Fax:  
 Account Name: Website: http://  
 Primary Address: #13, St 99, G-9/1 Islamabad Other Address:  
 Email Address: kamranrao@gmail.com (Primary)  
 Description:



# OUTBOUND MARKETING CAMPAIGN BINDING IN TELEPHONY AND CRM

We can create same campaign name (ID) in both Telephony & CRM while creating leads the CRM leads can be associated with particular campaign name for campaign management and performance tracking.

**TELEPHONY WINDOW**

HOME | Timeclock | Chat | Logout (master) Tuesday February 26, 2019 13:08:32 P

Show Campaigns | Add A New Campaign | Copy Campaign | Real-Time Campaigns Summary

**ADMINISTRATION**

- Reports
- Users
- Campaigns**
  - Campaigns Main
  - Statuses
  - HotKeys
  - Lead Recycle
  - Auto-Alt Dial
  - List Mix
  - Pause Codes
  - Presets
  - AC-CID
- Lists
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin

**ADD A NEW CAMPAIGN**

Campaign ID: 1013

Campaign Name: Outbound Marketing Campaign 1

Campaign Description:

Admin User Group: All Admin User Groups

Active: Y

Park Music-on-Hold: moh chooser

Web Form: http://10.10.0.183/campaign1/agentform.php

Allow Closers: Y

Minimum Hopper Level: 1

Auto Dial Level: 1 (0 = off)

Next Agent Call: random

Local Call Time: 12pm-5pm - default 12pm to 5pm calling

Voicemail:

Script: NONE

Get Call Launch: NONE

SUBMIT

VERSION: 2.14-661a  
BUILD: 180222-0017

**CRM WINDOW**

HOME | CAMPAIGNS | SALES | SUPPORT | ACTIVITIES | QUICK | ALL CREATE | Search | Notifications | Profile

Create Campaign | View Campaigns | Create Email Template | View Email Templates | Set Up Email | View Diagnostics | Create Person Form

Recently Viewed: Outbound Mar..., Headway Tech..., Student Regl...

**OUTBOUND MARKETING CAMPAIGN 1** ☆

VIEW STATUS | VIEW ROI

OVERVIEW | BUDGET | OTHER | ACTIONS

Name:	Outbound Marketing Campaign 1	Status:	Planning
Start Date:		Type:	Telesales
End Date:			
Description:	Testing phase		
Assigned to:	Rao Kamran		



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# CALL DISPOSITION IN TELEPHONY IS RECORDED AS ACTIVITY IN CRM

When agent finishes the call by giving it appropriate disposition status. This activity is recorded in CRM as Activity as you can see below. Activity help you measure progress of a lead.

**TELEPHONY WINDOW**

**CALL DISPOSITION**


<a href="#">A - Answering Machine</a>	<a href="#">N - No Answer</a>
<a href="#">B - Busy</a>	<a href="#">NI - Not Interested</a>
<a href="#">CALLBK - Call Back</a>	<a href="#">NP - No Pitch No Price</a>
<a href="#">DC - Disconnected Number</a>	<a href="#">SALE - Sale Made</a>
<a href="#">DEC - Declined Sale</a>	<a href="#">XFER - Call Transferred</a>
<a href="#">DNC - DO NOT CALL</a>	

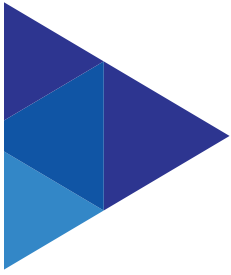
PAUSE AGENT DIALING  
[CLEAR FORM](#) | [SUBMIT](#)  
[WEB FORM SUBMIT](#)

**CRM WINDOW**

ACTIVITIES

Create Task (1 - 1 of 1)

Subject	Status	Contact	Due Date	Assigned User	
 Student Registration	Planned		09/21/2018 01:00pm	Rao Kamran	<a href="#">EDIT</a>



# CRM FOR QUOTES, INVOICES, PRODUCTS, SERVICES ETC AN EXAMPLE

Based on customer query CRM help you create Quote super quickly in your defined pdf formal (template). This saves agent time and increases customer engagement.

The screenshot displays a CRM window titled "CRM WINDOW" with a navigation menu including QUOTES, SALES, SUPPORT, ACTIVITIES, QUICK, and ALL. The main content area shows a quote for "STUDENT REGISTRATION" with the following details:

- Quote Number:** BBB
- Valid Until:** 03/26/2019
- Assigned to:** Rao Kamran
- Approval Status:** Approved
- Opportunity:** (Empty)
- Quote Stage:** Draft
- Invoice Status:** Not Invoiced
- Payment Terms:** (Empty)
- Approval Issues:** (Empty)
- Notes:** (Empty)

The account information is as follows:

- Account:** Headway Technologies
- Contact:** (Empty)
- Billing Address:** Sector 1-B Markaz Islamabad Pakistan
- Shipping Address:** Sector 1-B Markaz Islamabad Pakistan

The **LINE ITEMS** section shows a table with the following data:

Group Name	Quantity	Product	List	Discount	Sale Price	Tax	Tax Amount	Total
Training	1	Asterisk Training Using Gateways for VoIP Project	Rs42,000.00	-	Rs42,000.00	0%	Rs0.00	Rs42,000.00
<b>Total:</b>								Rs42,000.00
<b>Discount:</b>								Rs0.00
<b>Subtotal:</b>								Rs42,000.00
<b>Tax:</b>								Rs0.00
<b>Grand Total:</b>								Rs42,000.00

Summary values:

- Total:** 42,000.00
- Discount:** 0.00
- Subtotal:** 42,000.00
- Shipping:** 0.00
- Shipping Tax:** 0.00
- Tax:** 0.00
- Grand Total:** 42,000.00

At the bottom, there are sections for **CONTRACTS**, **INVOICES**, and **PROJECTS**, each with a "Create" button and a table header. The contracts table has columns for Contract Title, Account, Contract Value, Status, and Contract Manager. The invoices table has columns for Num, Title, Account, Grand Total, Status, and User. The projects table has columns for Name, Project Manager, Start Date, and End Date.



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# IN-BUILT TICKETING SYSTEM FOR CUSTOMER SUPPORT

CRM has an in-built ticketing system. Ticketing system is integrated with Customer accounts and Agents who resolve the issue or other office staff too this module can also be used organization wide. Ticket is defined with its proper priority level. Agent can change status of ticket from created to resolved when it is solved.

CRM WINDOW

Create ▾ [1 - 1 of 1]

Num.	Subject	Status	Type	Priority	Assigned User	
1	Emails are being declared spam	New	Defect	Urgent	Rao Kamran	EDIT ▾

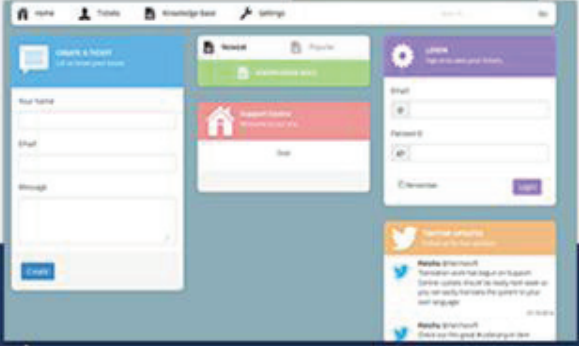
CRM WINDOW

## Support Centre

V1.4

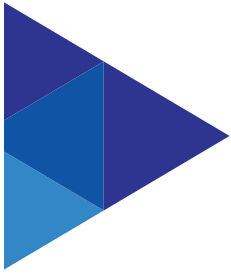
- + Advanced Ticket System
- + Knowledge Base
- + Manage by powerful Admin Panel
- + Check Envato Product Keys
- + Twitter Integration
- + Create your own Support Team

- + Translation Ready
- + HTML Validated
- + PHP CodeIgniter Framework



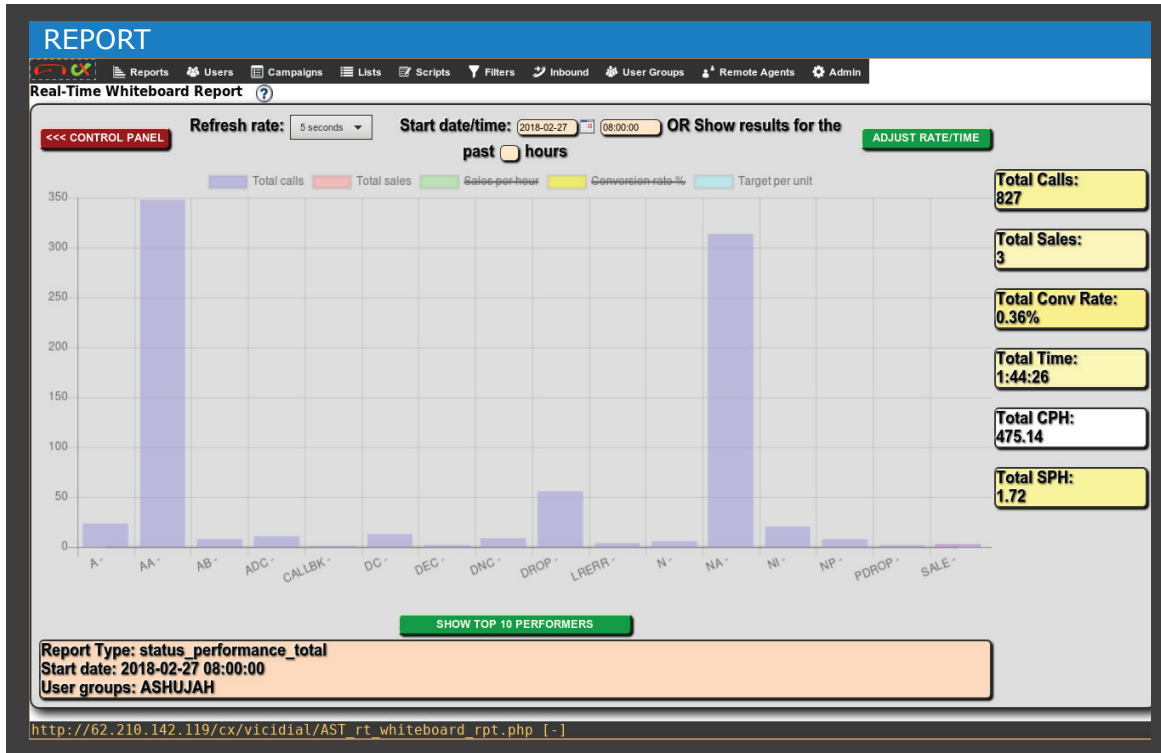
PS





# REPORTING TELEPHONY

Telephony offers real-time and campaign states reporting. White board reporting help floor manager or supervisor optimize Call center campaign in real-time fashion. Here is some overview of commonly used reports



**REPORT**  
 Real-Time Whiteboard Report

Refresh rate: 5 seconds Start date/time: 2018-02-27 08:00:00 OR Show results for the past 0 hours

**TOP 10 PERFORMERS**

RANK	NAME	Count
1.	AA	348
2.	NA	314
3.	DROP	56
4.	A	23
5.	NI	20
6.	DC	12
7.	ADC	11
8.	DNC	9
9.	AB	8
9 (tie).	NP	8

Summary Statistics:

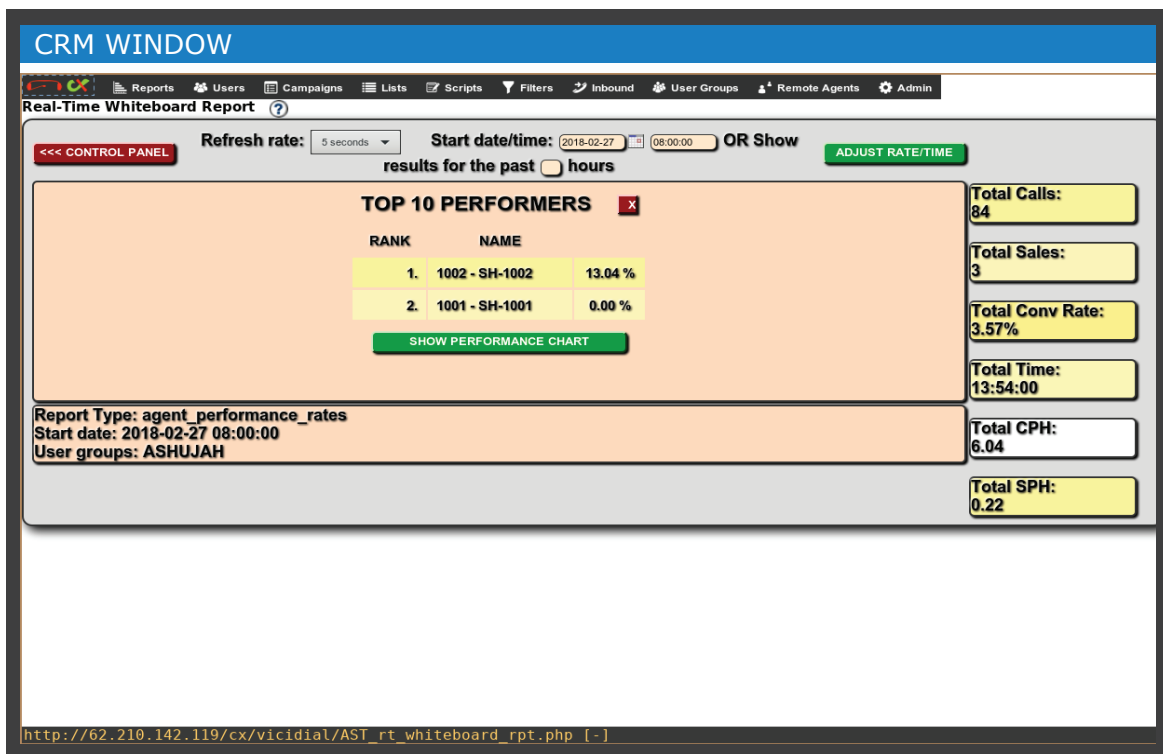
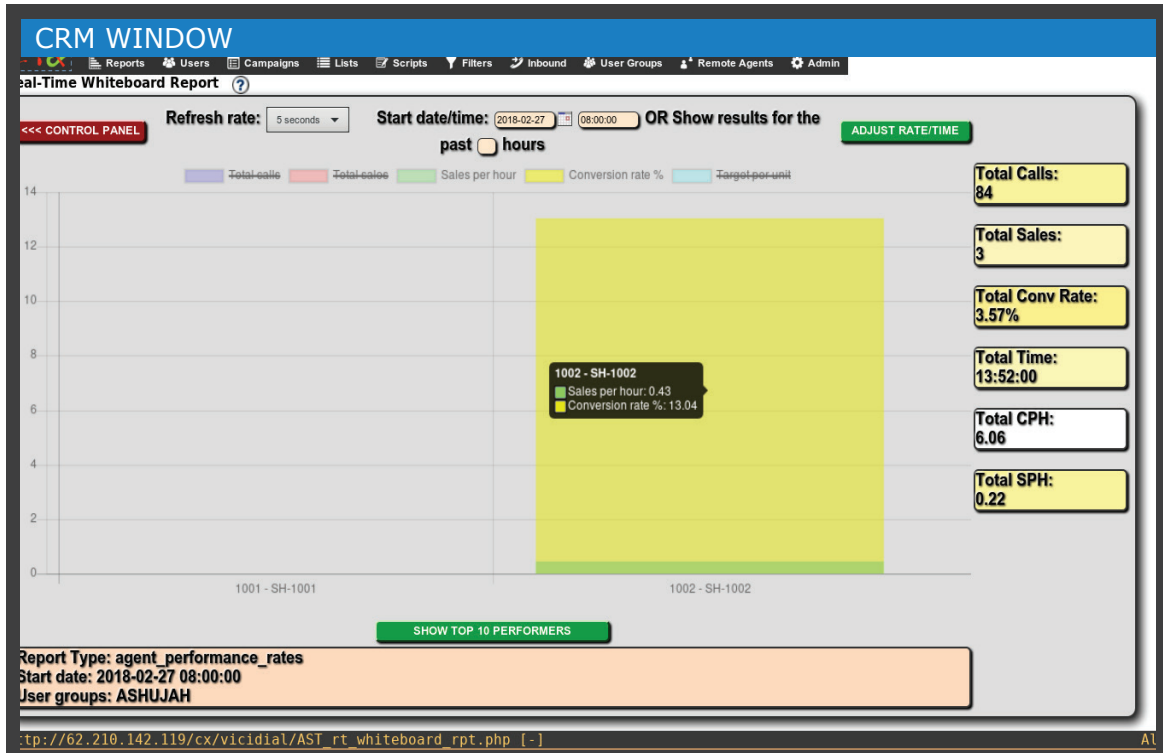
- Total Calls: 827
- Total Sales: 3
- Total Conv Rate: 0.36%
- Total Time: 1:44:26
- Total CPH: 475.14
- Total SPH: 1.72

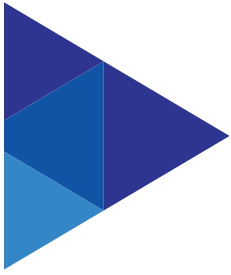
Report Type: status\_performance\_total  
 Start date: 2018-02-27 08:00:00  
 User groups: ASHUJAH

http://62.210.142.119/cx/vicidial/AST\_rt\_whiteboard\_rpt.php [-]

# CONVERSION RATE, SALES PER HOUR REPORT

Sales is challenging. If you can measure it you can improve. This report help you measure sales activity.





# REPORT

## TELEPHONY WINDOW

1 2 3 4 5 6 7 opensips video course at DuckDuckGo opensips video tutorial at DuckDuckGo Daily Express Urdu Newspaper | Latest Pakis... Real-Time Main Report: ALL-ACTIVE Tue Feb 04, 03:54

Users Campaigns Lists Scripts Filters Inbound User Groups Remote Agents Admin Reports

Real-Time Report Choose Report Display Options RELOAD NOW MODIFY | SUMMARY refresh: 14

DIAL LEVEL: 5.750 TRUNK SHORT/FILL: 0/0 FILTER: NONE TIME: 2014-02-04 03:55:00  
 DIALABLE LEADS: 29267 CALLS TODAY: 22602 AVG AGENTS: 6.75 DIAL METHOD: RATIO  
 HOPPER (min/aut): 2000/0 DROPPED / ANSWERED: 391/3150 DL DIFF: 0.97 STATUSES: B, AA, A, N, CALLBK, DROP, AB, ERI, NEW  
 LEADS IN HOPPER: 1593 DROPPED PERCENT: 12.41% DIFF: 14.44% ORDER: DOWN

108 current active calls 106 calls ringing 2 calls waiting for agents 0 calls in IVR  
 25 agents logged in 16 agents in calls 0 agents waiting 1 paused agents 4 agents in dead calls 4 agents in dispo

VICIDIAL: Calls Waiting 2014-02-04 03:55:00

STATUS	CAMPAIGN	PHONE NUMBER	SERVER_IP	DIALTIME	CALL TYPE	PRIORITY
LIVE	AUTOL	573859429	192.168.1.12	1.04	OUT	50
LIVE	TEST1	8147257119	192.168.1.12	0.24	OUT	50

VICIDIAL: Agents Time On Calls Campaign: ALL-ACTIVE 2014-02-04 03:55:00

STATION	USER	SHOW ID	INFO	SESSIONID	STATUS	SERVER_IP	CALL_SERVER_IP	HM_SS	CAMPAIGN	CALLS	HOLD	IN-GROUP
SIP/6955	6955			8600060	DEAD	A	192.168.1.12	192.168.1.12	0:27	TEST1	01	
SIP/6924	6924			8600052	DEAD	A	192.168.1.12	192.168.1.12	0:00	AUTOL	97	
SIP/6936	6936			8600068	INCALL	A	192.168.1.12	192.168.1.12	3:28	AVTOL	131	
SIP/6927	6927			8600056	INCALL	A	192.168.1.12	192.168.1.12	3:08	AUTOL	113	
SIP/6952	6952			8600068	INCALL	A	192.168.1.12	192.168.1.12	3:03	TEST1	159	
SIP/6957	6957			8600071	INCALL	A	192.168.1.12	192.168.1.12	0:32	TEST1	134	
SIP/6928	6928			8600057	INCALL	A	192.168.1.12	192.168.1.12	0:28	AUTOL	114	
SIP/6930	6930			8600059	DEAD	A	192.168.1.12	192.168.1.12	0:00	AUTOL	125	
SIP/6926	6926			8600055	INCALL	A	192.168.1.12	192.168.1.12	0:23	AVTOL	126	
SIP/6925	6925			8600065	DEAD	A	192.168.1.12	192.168.1.12	0:00	AUTOL	146	
SIP/6954	6954			8600074	INCALL	A	192.168.1.12	192.168.1.12	0:10	TEST1	123	
SIP/6958	6958			8600076	INCALL	A	192.168.1.12	192.168.1.12	0:13	TEST1	147	
SIP/6937	6937			8600061	INCALL	A	192.168.1.12	192.168.1.12	0:13	AUTOL	141	
SIP/6933	6933			8600063	INCALL	A	192.168.1.12	192.168.1.12	0:08	AUTOL	165	
SIP/6931	6931			8600067	INCALL	A	192.168.1.12	192.168.1.12	0:07	AUTOL	125	
SIP/6939	6939			8600069	INCALL	A	192.168.1.12	192.168.1.12	0:07	AUTOL	115	
SIP/6953	6953			8600075	INCALL	A	192.168.1.12	192.168.1.12	0:06	TEST1	127	
SIP/6956	6956			8600072	INCALL	A	192.168.1.12	192.168.1.12	0:05	TEST1	153	
SIP/6922	6922			8600078	INCALL	A	192.168.1.12	192.168.1.12	0:01	AUTOL	94	
SIP/6921	6921			8600064	INCALL	A	192.168.1.12	192.168.1.12	0:00	AUTOL	127	
SIP/6949	6949			8600054	DISPO		192.168.1.12		3:59	AUTOL	128	
SIP/6929	6929			8600060	DISPO		192.168.1.12		0:05	AUTOL	84	
SIP/6934	6934			8600061	DISPO		192.168.1.12		3:28	AUTOL	97	
SIP/6923	6923			8600066	PAUSED		192.168.1.12		0:09	AUTOL	96	
SIP/6938	6938			8600062	DISPO		192.168.1.12		0:09	AUTOL	147	

25 agents logged in on all servers  
 System Load Average: 0.09 0.13 0.13 M

Agent waiting for call  
 Agent waiting for call > 1 minute  
 Agent waiting for call > 5 minutes

[Cmd] => [100% 1181 done 0%] \_onitor\_phone=6ALLINGROUPstats=6DROPPINGROUPstats=6NOLEADSalert=6CARRIERstats=6PRESETstats=6AGENTtimeSTATS=0

## CRM WINDOW

Users Campaigns Lists Scripts Filters In-Groups User Groups Remote Agents Admin Reports

Real-Time Choose Report Display Options STOP | SLOW | GO MODIFY | SUMMARY

DIAL LEVEL: 2.083 TRUNK SHORT/FILL: 0/0 FILTER: NONE TIME: 2009-03-30 23:11:16  
 DIALABLE LEADS: 16580 CALLS TODAY: 73406 AVG AGENTS: 4.56 DIAL METHOD: ADAPT\_TAPERED  
 HOPPER LEVEL: 500 DROPPED / ANSWERED: 906 / 10281 DL DIFF: 0.34 STATUSES: NA, A, DROP, N, A4, B  
 LEADS IN HOPPER: 540 DROPPED PERCENT: 8.81% DIFF: 7.46% ORDER: DOWN COUNT 4 NEW  
 CONTACTS: 6230

19 current active calls 11 calls ringing 2 calls waiting for agents 0 calls in IVR  
 23 agents logged in 15 agents in calls 5 agents waiting 2 paused agents 1 agents in dead calls

VICIDIAL: Calls Waiting 2009-03-30 23:11:16

STATUS	CAMPAIGN	PHONE NUMBER	SERVER_IP	DIALTIME	CALL TYPE	PRIORITY
LIVE	INBOUND2	305553543	192.168.1.100	0:23	IN	0
LIVE	INBOUND2	305553450	192.168.1.100	0:24	IN	0

VICIDIAL: Agents Time On Calls Campaign: TESTCAMP 2009-03-30 23:11:16

STATION	USER	USER GROUP	SESSIONID	STATUS	CUST PHONE	HM_SS	CAMPAIGN	CALLS	
Sep/14-1	1302	RODM	8600068	READY		0:14	TESTCAMP	828	
Sep/23-1	2339	RODM	8600067	READY		0:03	TESTCAMP	838	
Sep/16-1	2331	RODM	8600064	READY		0:16	TESTCAMP	838	
Sep/13-1	2331	RODM	8600061	READY		0:15	TESTCAMP	904	
Sep/13-1	2029	RODM	8600057	READY		0:04	TESTCAMP	904	
Sep/9-1	1741	RODM	8600055	INCALL	A	6:15559031	5:02	TESTCAMP	834
Sep/4-1	1359	RODM	8600072	INCALL	A	209553066	3:39	TESTCAMP	88
Sep/5-1	1626	RODM	8600066	INCALL	I	661555187	3:08	TESTCAMP	84
Sep/6-1	1625	RODM	8600066	INCALL	I	209553364	2:48	TESTCAMP	88
Sep/21-1	1013	RODM	8600069	INCALL	A	661555245	2:03	TESTCAMP	87
Sep/13-1	2067	RODM	8600075	INCALL	A	7075554268	2:09	TESTCAMP	862
Sep/20-1	1823	RODM	8600068	INCALL	A	3235553758	1:28	TESTCAMP	898
Sep/12-1	2035	RODM	8600052	INCALL	A	323555813	1:23	TESTCAMP	868
Sep/22-1	2234	RODM	8600056	INCALL	A	323555934	1:23	TESTCAMP	860
Sep/16-1	2348	RODM	8600063	INCALL	A	323555138	1:03	TESTCAMP	827
Sep/2-1	1080	RODM	8600074	INCALL	I	7075559714	1:00	TESTCAMP	86
Sep/24-1	2342	RODM	8600070	INCALL	A	323555118	0:34	TESTCAMP	872
Sep/17-1	2244	RODM	8600058	INCALL	A	7345550864	0:28	TESTCAMP	827
Sep/17-1	224	RODM	8600053	INCALL	A	2605552073	0:04	TESTCAMP	861
Sep/16-1	1057	RODM	8600062	INCALL	I	707555210	0:04	TESTCAMP	11
Sep/10-1	1531	RODM	8600063	PAUSED		6:30	TESTCAMP	88	
Sep/7-1	1809	RODM	8600055	PAUSED		0:06	TESTCAMP	88	

23 agents logged in on all servers  
 System Load Average: 1.76

Agent waiting for call  
 Agent waiting for call > 1 minute  
 Agent waiting for call > 5 minutes  
 Agent on call > 10 seconds  
 Agent on call > 1 minute  
 Agent on call > 5 minutes  
 Agent Paused > 10 seconds  
 Agent Paused > 1 minute  
 Agent Paused > 5 minutes  
 Agent on a dead call



# FEATURES WE OFFER

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**Click-to-Call Direct from CRM**

**Inbound Screen Pop alert with link to contact record**

## Call Recording Features

- Set playback permissions at user level
- Access recording from inside CRM
- Forward outside of the CRM system
- Pause recording (important for businesses with compliance or privacy requirements)

## Add Details to Call Records

- Notes
- Categories
- Create future follow-up task or event
- Set call record field requirements

## Inbound Automatic Call Distribution

- Create multiple campaigns for inbound calls
- Agent prioritization

## Dialer Type

- Preview
- Power
- Predictive

## Call Analytics

- Real-time dashboards
- Ability to report on call activity from CRM
- Schedule automated reports
- Granular data reporting, i.e., call duration, call type

## Flexibility

- Can I use my existing phone system?
- Can you provide a phone system if I need it?
- Can I keep my existing number?

## Support

- 24/7 help availability
- Support in my working hours and time zone

## Training

- Training materials, i.e. quick start guides, videos, etc.
- On-site training available



CX+CRM by Nethawk integrates your phone and CRM system to help you make more calls and close more deals with features like click-to-dial, call recording and real-time performance analytics.

Make calls directly from your CRM with click-to-dial

- Record calls for training and compliance
- Prioritize your important inbound calls
- Personalize conversations with screen popping



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