CT CRM

The versatility of designing your own front-end

Fantastic features:

- ☑ **Setup your own campaigns.**
- ☑ **Establish parameters for each campaign.**
- ☑ **Design front-end screens, unique to each campaign.**
- ☑ **Flag required fields.**
- ☑ **Program the Submit button to take specified actions and check that required fields have been populated correctly.**
- ☑ **Create speed dial lists per campaign.**
- ☑ **Use for inbound or outbound campaigns.**
- ☑ **Integrate with CT Dialler for powerful outbound campaigns.**
- ☑ **Retrieve data from your database.**
- ☑ **Write data entered by agents to your database.**
- ☑ **Integrate with CT Logger.**
- ☑ **Write data entered by agents to the logger database to make finding recordings easier.**

CT CRM WAS BORN OUT OF CLIENT REQUIREMENTS TO CREATE A CRM FOR THEIR OWN UNIQUE PURPOSES, WITHOUT EXPENSIVE DEVELOPMENT COSTS.

Using **CT CRM** you are able to create campaigns and develop the front-end screens that your agents will use. **CT CRM** integrates with the RealConnect Logger for voice recordings and our contact centre solution including **CT Dialler**. Therefore, both inbound, outbound and dialler campaigns can be managed from **CT CRM** – and you have complete control. When leads are dialled out of a database the lead information will be populated on the agents' screens so they will know who they are talking to as each lead is presented to them.

Setup your own speed dial numbers, call result disposition codes and agent state codes. Agents will answer, transfer and end calls from the front end as well as disposition the call and place themselves in different states like Ready and Not Ready.

Full reporting is available through CT Reporter and real-time reporting is presented by Agent View.

Below are some examples of the functionality available when creating CT CRM fields and pages:
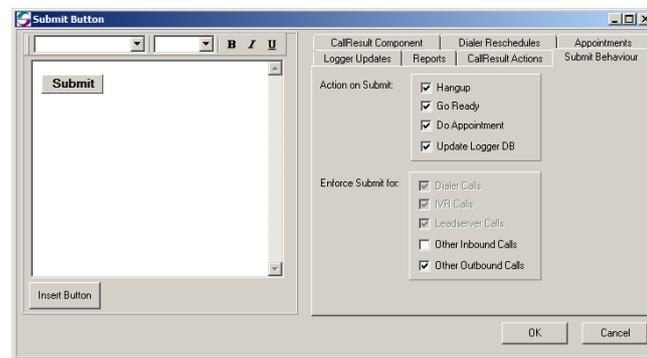
Submit Button

Assign campaign-specific actions to the 'Submit' button. For example cause the system to force agents to reschedule call backs when certain call results are selected or to check that required fields have been filled in or even update Logger fields to make it easier to find voice recordings.

Setup Quick Dial Numbers

The quick dial list is a list of extensions, land line or cell phone numbers the agents regularly call or to which they transfer calls.
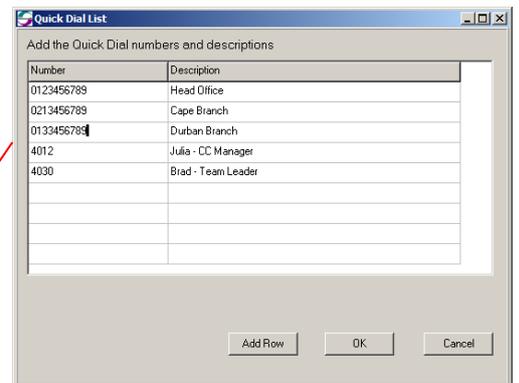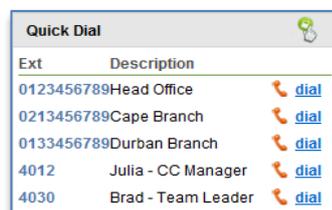
Creating the speed dials in CT CRM Manager (above) provides a list for agents to use (left)

**RealConnect** – *Creating* **REAL** *Solutions* - **CONNECTING** *People*

Create Not Ready Reason Codes

You are able to create your own "Not Ready Reason Codes" for your environment. Codes can be created for all users across the board or customised for each campaign. This information is available in CT Reporter reports.
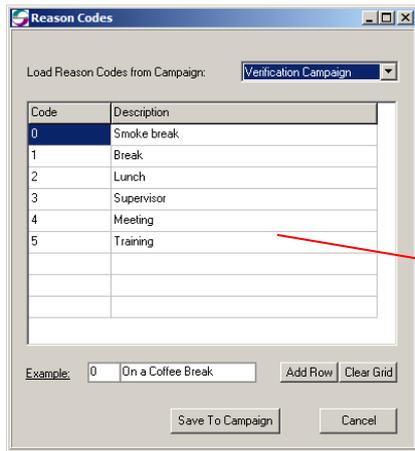
Creating customised 'Not Ready Reason Codes' in CT CRM Manager (left) provides codes for agents to use (below).

When an agent clicks the "Not Ready" button in CT CRM, a popup window appears. The agent must select the reason they are leaving their desk. This information is shown live in Agent View and in historical reports in CT Reporter.
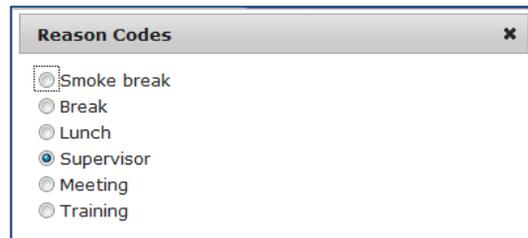
CT CRM Agent Screen Example

Additional pages inserted, create tabs for easy agent navigation

Agent State buttons

Call management buttons include the ability to transfer calls and set up conference calls.
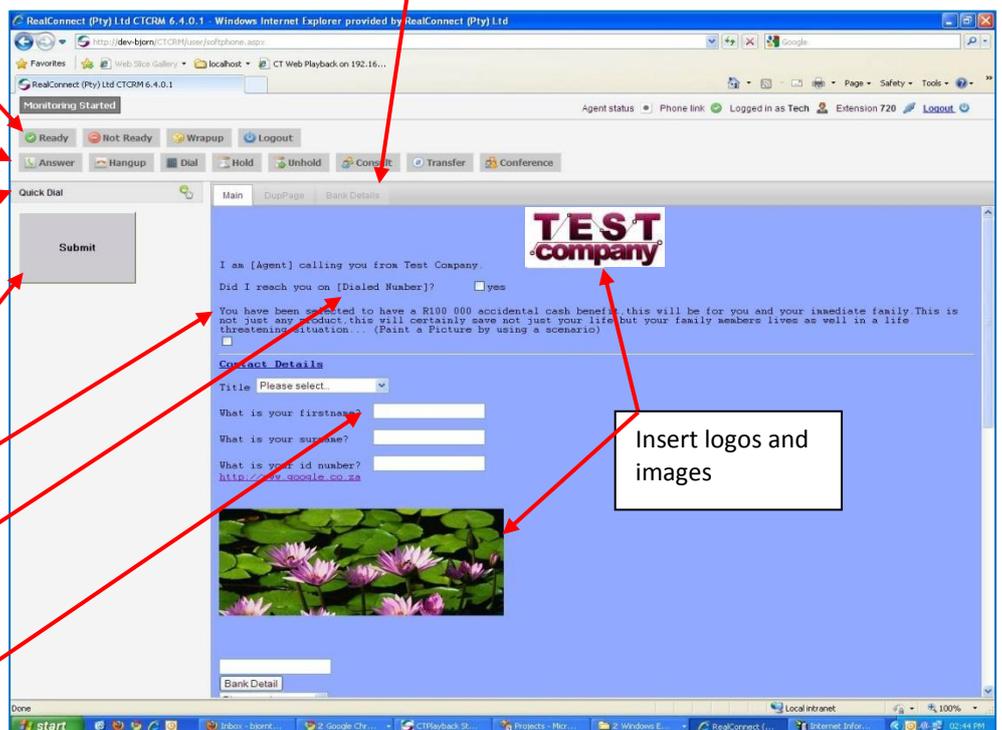
Insert speed dial numbers.

When the agent clicks on "Submit", data validity and required field checks are made.

Create your own agent scripts.

Field mapping capability: Data can be retrieved from your database

or

Data added in fields is added to your database

Insert logos and images