

DATA SHEET



"...Using caller ID or a numeric account number, Screen Pop can 'pop' your existing CRM, Helpdesk, or other similar application ..."

Screen Pop works with all contact channels, providing caller information to agents in conjunction with an inbound call, outbound call, an Agent eMail message, or Agent Chat session ...

About Screen Pop

The base Screen "Pop" package displays:

1. Account number*
2. Name of caller*
3. Miscellaneous field such as social security number, etc.*
4. DNIS/Pilot and optionally, DNIS/Pilot name
5. Type of call (Inbound, callback, campaign call)

*Provided we capture that data from a custom application, touchtone input from the caller or an ANI lookup from the TFB ANI database.

ScreenPop	
Station ID	5555
DNIS	4764 Customer Support
Caller ID	3104913800
Account	100106
Name	Richard Grimes
Misc	New York

Instant Application Integration

Right out of the box, Screen Pop also offers users options for popping an existing desktop CSR application, populated with caller data.

- The account number can be placed in the windows clipboard for quick paste into an application as the call arrives.
- For thin client applications that use embedded arguments in a URL, Screen Pop can be configured by the user to send the URL, embedded with any combination of the Account Number, Name, or Miscellaneous fields.

The above options work right out of the box assuming a single application is to be popped to the same 'view' or screen for each call.

Customization of Screen Pop

For desktop applications that do not allow instantiation by one of the out of the box methods above, screen pop can be customized to pass the account, name, or miscellaneous field via a data exchange standard such as DDE.

To define customization we should determine the following,

1. What application is running at the desktop?
2. What options are available to pass data to the desktop application
3. What is the 'data' key that determines which customer record is shown, ie, account number, PIN, and so forth, and how do we get that data key (touchtone input, etc)
4. What if any different 'views' or applications must be popped at the arrival of the call.
5. A description of agent workflow that includes what simultaneous screens may already be open at the call arrival and so forth

Note: Data entered by touch tone input must be numeric.

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Screen Pop FAQs

- Q** What does the base package display when a call arrives at the agent?
- A** The screen pop display shows basic call information including ANI, DNIS, and any of the optional fields – account number, caller name, or miscellaneous – if data is available and populated from custom or packaged applications.
- Q** What options does the base package include for integrating with our existing CRM, helpdesk, or similar caller information application?
- A** The real power of TFB Screen Pop is its integration to the service applications your agents already use at the desktop. The biggest misnomer about screen pop is that it displays your customer data in its own window. No! Screen Pop streamlines agent work flow without changing it significantly. Aside from showing basic call information, mechanisms are included to integrate with your existing applications at the desktop. The interface can be configured pass any of the above data to your existing web based application, via a URL. There is also the option to have the account number placed in the Windows clipboard for paste into your existing application.
- Q** What if we want to pop a screen from our existing CRM, helpdesk, or similar application, but it doesn't support any of the integration methods offered by your product?
- A** Provided there is support for an open data standard such as DDE, or an open API, TFB professional services can customize the integration to send caller ID, DNIS, or numeric account number to your existing CRM, Helpdesk, or similar application. The custom integration is for fee should it be required.
- Q** What if we want to pop caller information from our database, but we don't have an existing application to display it at the desktop?
- A** Based on evaluation of requirements, TFB custom considers custom desktop application development, however typically screen pop integration is for existing desktop applications.

About Installation

TFB packaged applications install quickly and with minimal hassle. With the switch in place and configured, a typical installation happens in 1 to 2 days! Want more details? TFB can put you in touch with one of hundreds of satisfied customers who have already experienced installation.

About Purchase

TFB sells through authorized dealers across North America. Ask your dealer about TFB or call us toll free at 1-877-612-4832 for a dealer near you.

About TFB

TFB offers packaged and custom solutions for NEC, Nortel, Mitel, and Avaya ACDs, providing software enhancements and features that are scaleable, modular, and open. Applications include agent tools and automated call handling for contact centers of any size, as well as targeted solutions for healthcare, hospitality, government, education, and nearly every industry.

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