

# Mitel Phone Manager

Control your phone from your computer screen! Phone Manager speeds up and simplifies making and receiving calls, enables you to access all your directories and call records, listing incoming, outgoing and missed calls on your personal Call Logger and enabling you to call them at the click of a button!

Phone Manager can integrate to your in-house CRM system so that customer details are displayed on your screen before you answer the call and so much more

There are three different levels of Phone Manager License available dependent upon the requirements of the user, these are set out below.

## Outlook

Outlook Phone Manager dashboard showing call statistics and controls:

- Calls Answered: 107
- Calls Active: 4
- Calls In Progress: 4
- Calls Lost: 6
- Time In DND: 00:55:16
- Total Call Time: 04:27:43
- ACD Login/out
- End Wrap
- Sale
- Complaint

## Professional

Professional Phone Manager interface for Sarah Buttler:

- User: Sarah Buttler
- Status: In the office
- Extension: 1622
- Search or Dial: Search bar with Dial button
- Buttons: Announ, Acc Cod, Change, P & R, RecordA
- Contacts List:
  - Jane Smith: 9011 | In the office (Free)
  - Trevor Goldsmith: 9036 | In a meeting (IN MEETING)
  - Marco Banitez: 9081 | In the office (ON HOLIDAY)
  - Martin Crystal: xxxx | In the office | xxxxxx
  - Lucy Baker: 9024 | In the office (Busy) | 9012
  - Tony Donnerly: 9039 | In the office (Free)
  - Trevor Michael: 9068 | Working from home (Free)

## Team Leader

# Mitel Phone Manager - Outlook

## Call Control, Presence & IM for MiVoice Office 250

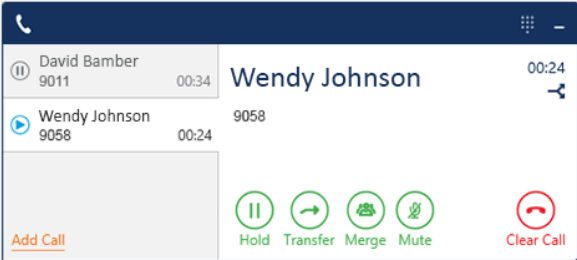
Phone Manager Outlook is the entry point license, it makes day-to-day office communications simple by giving users complete control over their telephone. And as its name suggest, it enables integration to Microsoft Outlook © (and Office 365 ©) out of the box.

### Call Control, Call Forward & Do-Not-Disturb

Making and transferring calls is a simple process using Mitel Phone Manager: a single mouse click replaces a multistep process on the handset. Up to 4 calls can be easily controlled at any one time with clear information showing which call you are connected to. In addition, users can easily manage their forward, divert and do-not-disturb status.

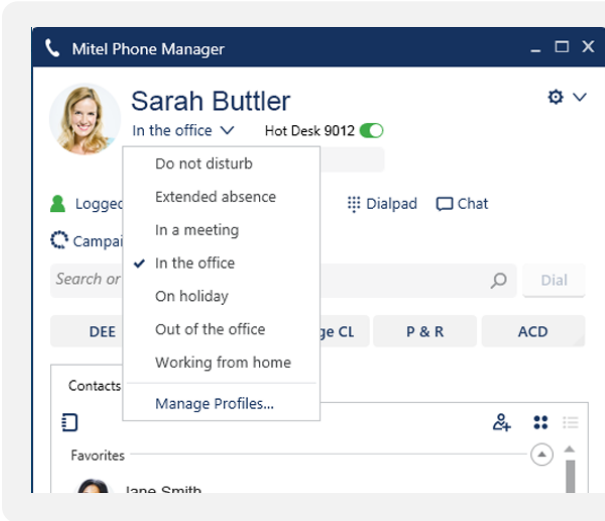
### Call Identification

Not every call a user takes will be about the same topic and in some circumstances, you may want to prioritize certain calls over others. Mitel Phone Manager gives you this ability by clearly showing users the source of each call they take with a colored title bar and caption. If required, the caption can be expanded to include more information about the call to enable them to answer it in a specific way.



### Presence

Clear visibility of other users within the organization makes it much easier to find colleagues to help with queries. Mitel Phone Manager displays the status of other users, extensions and agents on the system as well as presenting preconfigured views based on departments and teams.



### Call History

Each user is presented with a comprehensive history of all calls they have been involved with and can redial any with a button click. Missed calls are clearly defined as are calls from contacts in the centralized or personal directories.

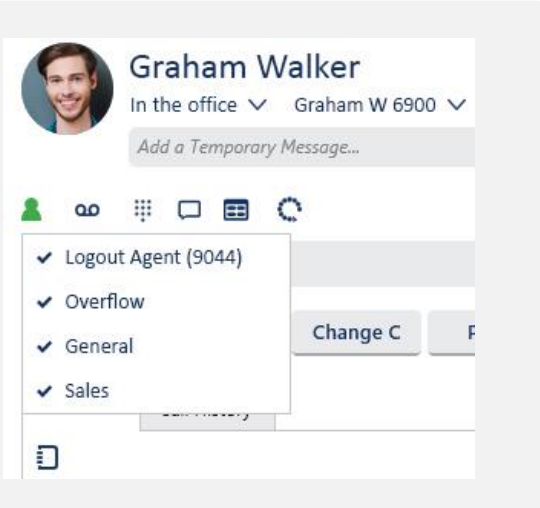
# Mitel Phone Manager - Professional

## Call center ACD control & CRM integration for MiVoice Office 250

The Professional version of Mitel Phone Manager builds on all the great features of Mitel Phone Manager Outlook and introduces a range of features designed to put all your contact center tasks at your fingertips as well as offering integration to the most popular CRM applications.

### ACD Agent Control

Whether you belong to 1 or 10 inbound hunt groups, Mitel Phone Manager Professional gives you a simple way to see which groups you are a member of and then change the status in any group with a simple mouse click.

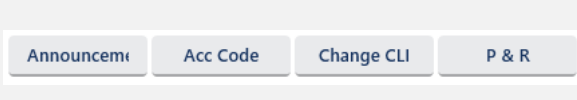


### CRM Integration

As well as support for 1st Party TAPI, the Professional license provides screen pop integration to more than 15 of the most popular CRM applications on the market. Simply configure the user's login credentials and set to pop when ringing or on answer. In most cases the Mitel server database can be configured to synchronize with your CRM to display your customer data on the Mitel Phone Manager call control toaster which can change color to alert staff to incoming VIP calls.

### Soft Keys

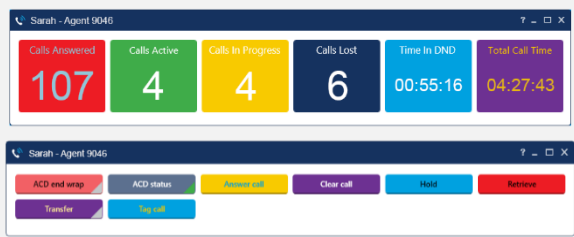
To automate common tasks, 5 user configurable soft keys are included. Allow users access to the phone system feature codes and speed dials which helps to streamline interaction with the telephone.



### Toolbar Features

In more formal call center scenarios, toolbars can be centrally designed and assigned to users to maintain a standardized interface for all users. Buttons can be designed to dial popular numbers with one click, launch your Windows applications quickly and easily or be set-up to use any telephony features available.

Note: Statistics tiles require an ACD Reporting License



### Macro and API support

If you have a custom or in-house designed CRM then take advantage of the Professional license's integration tools such as VB Script Macro Design, .NET DLL and COM controls. If your CRM user interface is a browser, it's even easier to screen pop with the use of a query string.



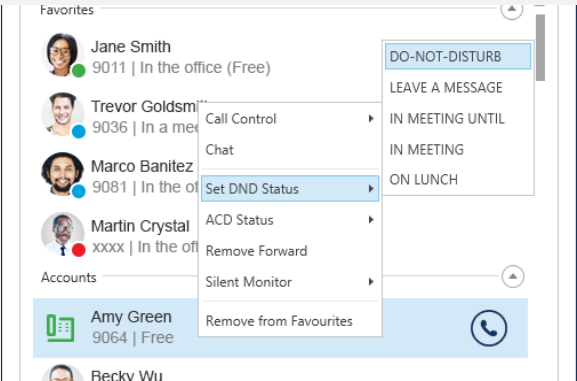
# Mitel Phone Manager – Team Leader

## User control, alarm notification & hunt group visibility for MiVoice Office 250

With the Mitel Phone Manager Team Leader license, you can build on the features of the Professional license to view, manage and interact with your team more efficiently.

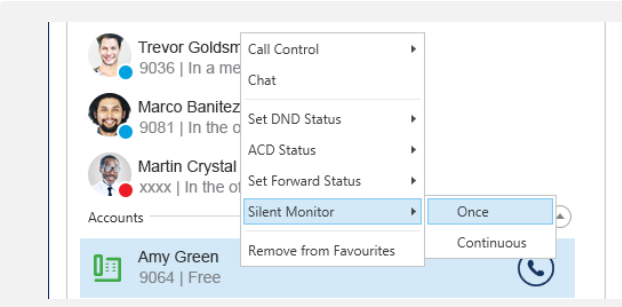
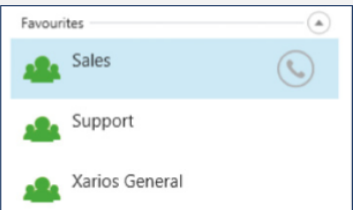
### User Control

If your staff belong to more than one ACD Agent hunt group, you can use your Mitel Phone Manager Team Leader license to log your team into the groups, straight from your desktop. If they forget to set Do-Not-Disturb (DND) when they leave for lunch, you can manage their DND state remotely. If necessary, you can remotely change their call forwarding for non ACD Agent calls.



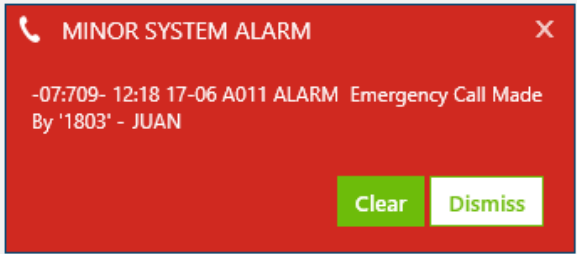
### Silent Monitoring

If quality monitoring is a regular part of your role, take advantage of the silent monitor feature to listen to calls in progress. The silent monitor function can be set for a one time or continuous silent monitor. If you need to send your team member a message, use Mitel Phone Manager's Instant Message feature to start a chat session.



### Alarm Notification

As a Team Leader you may be responsible for support and safety. The Alarm Notification feature will provide you with a pop-up alert should staff dial an emergency number or if your telephone system reports an alarm. If permitted, you can clear the alarms and take the appropriate action.



### Staff, Hunt Group and Message Visibility

In addition to the ability to see the status of your staff in icon or detail views, Team Leader allows you to display the status of all the ACD Agent hunt groups you manage, so that you can see when all staff logged in to a group are busy on calls. If your MiVoice Office 250 ACD Agent group has an outstanding voicemail message, your Mitel Phone Manager software will alert you in addition to your personal voicemail notification.

## Enhanced Functionality Options

- Mitel Phone Manager Softphone (not available in terminal environments)
- Add Phone Manager Mobile to get mirrored functionality on your smartphone
- Integration available to Microsoft Dynamics CRM, Goldmine, Salesforce.com, Zendesk and many more
- Customizable toolbar for task automation
- APIs available for .NET, COM & event-driven VBScript Macros
- Play calls directly from call history with MiVoice Office Call Recorder or Xarios Call Recorder
- 1st party TAPI driver (not available in terminal environments)
- Team Leader license offers control of other users on the system and visibility of hunt groups
- Add a Mitel Phone Manager Softphone (requires a CAT F device license on MiVoice Office 250)
- Add an ACD Reporting license to view personal ACD statistics on a toolbar tile

## Key Features

### Outlook

- Highlight & dial numbers from desktop and web applications
- Mitel hot desk status and control
- Call control from the desktop (answer, hold, transfer...)
- Microsoft Outlook add-in for dialing & meet-me conference booking
- Control of do-not-disturb and forward state
- Real-time presence of all users in the organization, grouped by department
- Detailed individual call history
- Searchable directory of internal and external contacts
- Windows integrated logon with minimal user-side configuration
- event-driven VBScript Macros

### Professional

- All the features of Mitel Phone Manager Outlook license
- ACD agent control (hunt group Login)
- UCD status notification and control
- Integrated soft keys (5 buttons), user customizable
- Multiple toolbars supported, centrally configured
- 1st party TAPI, (call control events)
- Macros, VB scripting engine for custom integration work
- CRM application support (see CRM datasheet for more details)
- API access (.NET DLL/ COM/ VBScript)
- View personal ACD, Global Agent based statistics and information from External Data Sources when combined with an ACD Reporting license

### Team Leader

- All the features of Mitel Phone Manager Professional
- MiVoice Office 250 alarm notification, real-time popup alerts of phone system and CT gateway alarms
- Hunt group status icons, view quantity of calls waiting
- 3rd Party Presence, ACD Agent, Do-not-disturb & forward control
- Silent monitoring, one off or continuous mode

## Host System Requirements

OS	Windows 7, 8.1, 10 (Professional / Enterprise / Ultimate) 32/64-bit
OS	Windows Server 2008 SP2, 2008 R2, 2012, 2012 R2, 2016, 2019 (Standard / Enterprise / Datacenter) 32/64-bit
CPU	Intel Core Duo 1.8GHz or faster (or equivalent)
RAM	Minimum: 1GB, Recommended 2GB
Network	IPv4, 100Mb/1Gb
Graphics	<b>Minimum:</b> DirectX v9 compatibly graphics cards with 120MB RAM. <b>Recommended:</b> DirectX v9 compatibly graphics cards with 1024MB RAM
.NET Framework	4.5.2
Environments	Supports Terminal service environments (except TAPI & softphone features, RAM, CPU & Graphics requirements need assessment)



# Mitel Phone Manager – CRM Integration

## Release 5.2 CRM Integration

APPLICATION	VERSIONS	SCREEN POP	CALENDAR SYNC	CALL HISTORY
<b>OUTLOOK PLUGINS</b>				
Microsoft® Outlook®	2010, 2013, 2016	•	•	•
Microsoft Office 365™	N/A	•	•	•
<b>PROFESSIONAL PLUGINS</b>				
Goldmine	2015.1, 2016.1, 2017.1	•	•	•
Maximizer	2015 (v13.0) Desktop Client	•		•
Microsoft® Dynamics CRM	2011, 2013, 2015, 2016	•	•	•
Microsoft® Dynamics NAV Classic Client	4.0 SP2, 5.0 and 6.0 (2009)	•		
Microsoft® Dynamics NAV Role Tailored Client	7.0, 8.0, 9.0, 10.0	•		
Microsoft® Dynamics NAV Web Client	7.0, 8.0, 9.0, 10.0	•		
Microsoft Internet Explorer	9, 10, 11	•		
Microsoft Office 365™	N/A	•	•	•
Microsoft® Outlook®	2010, 2013, 2016	•	•	•
Netsuite	2014.1	•	•	•
Sage CRM	5.7-7.0, 7.1, 7.2 <b>Note:</b> Sage CRM Essentials Edition (Cloud) is not supported	•		
Salesforce Classic	Professional, Enterprise, Performance (Group and Contact Manager versions not supported)	•		•
Salesforce Lightning (Call Center Adapter / Open CTI)		•		•
SalesLogix	7.0 – 7.5 SP2, 8.1	•	•	•
Swiftpage Act!	15 (2013), 16 (2014), 17 (2015), 18 (2016), v19 (2017)	•	•	•
SugarCRM	6.4 – 7.9 (on-premise & cloud)	•		•
Tigerpaw CRM	14.1.20, 16.1.07	•	•	•
ZenDesk	N/A	•		
Zoho CRM	Version 2014	•		•

# Mitel Phone Manager – License Comparison

## Release 5.2 License Comparison

Feature	Outlook	Professional	Team Leader
Call control (up to 4 calls)	•	•	•
Highlight & Dial	•	•	•
Desktop presence	•	•	•
Presence Profiles	•	•	•
Call History	•	•	•
Do not disturb & Forward control	•	•	•
Hot Desk Control	•	•	•
Instant Messaging (chat)	•	•	•
Personal Directory	•	•	•
Call Recorder Playback *	•	•	•
Group Mailbox Notification	•	•	•
Hot Keys	•	•	•
Call banners including profiles	•	•	•
Softphone †	•	•	•
ACD/UCD Control	-	•	•
Integrated Toolbar	-	•	•
Full Toolbar † <sup>2</sup>	-	•	•
TAPI (1st Party)	-	•	•
Macros	-	•	•
Application Support	Outlook Only	•	•
API Access (.NET/VB)	-	•	•
Kuando Busylight Support	-	•	•
Alarm Notification	-	-	•
Hunt Group Status	-	-	•
Silent Monitoring	-	-	•
Call Centre Agent Management	-	-	•

\* Requires MiVoice Office Call Recorder or Xarios Call Recorder 3.0 or higher

† Requires add-on license, also includes integrated toolbar

†<sup>2</sup> Personal Wallboard Requires ACD Reporting Licenses

**Note:** Phone Manager Standard licenses can no longer be purchased and are only available when upgrading from a version 3 Application Server.