PCS
PALITTO CONSULTING SERVICES

Abacus Law Integration

Updated 7/2016

Content

Learn more about maximizing your ShoreTel phone system

About PCS

Business technology is our passion! Since 1996 Palitto Consulting Services (PCS) has been providing expert LAN/WAN, integration and custom software development services to the small and mid-sized business community. Our focus is integrating business systems to enable efficient business processes! Our team of experts is able to assist clients when determining which technology to purchase, how to use it, and how to optimize the technology for their unique business needs.

At PCS we do not have a "one size fits all" approach; we strive to provide customers with a custom solution tailored to best fit their unique business needs.
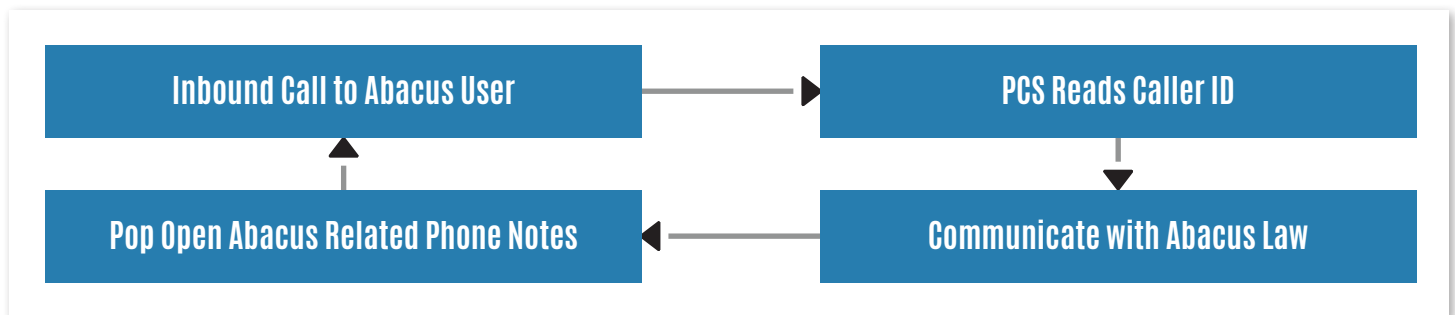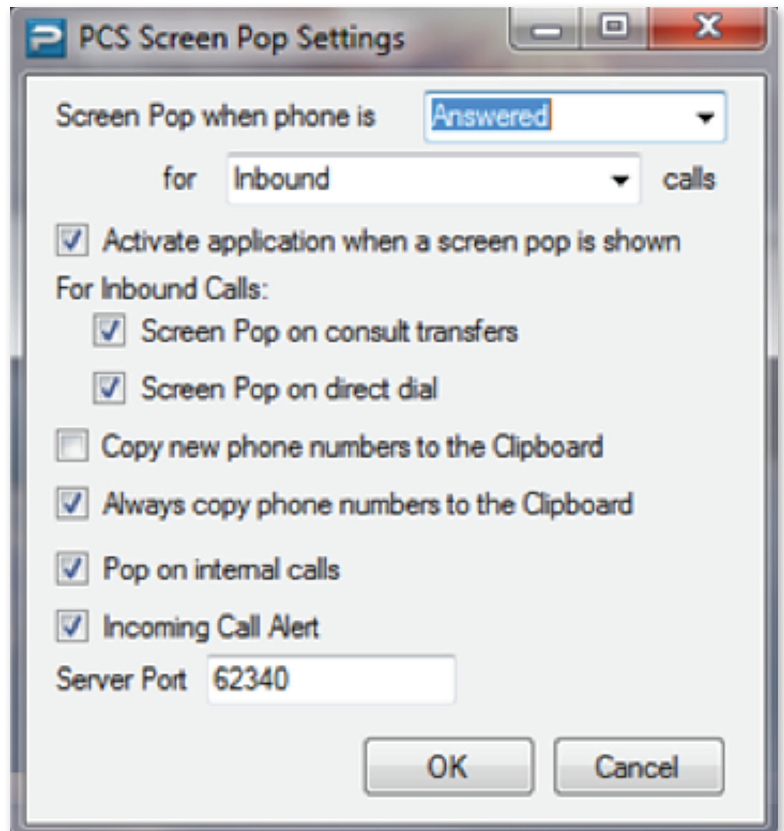
• PCS began working with the ShoreTel platform in 2002; we have over 50,000 hours of development time

• PCS team is ShoreTel Certified in both Installation and Support of Cloud, Onsite, Contact Center and Mobility Practices

• All of our team members reside in Ohio

• Our project history ranges from one location sites to large deployments with sites that span several states or countries

PCS Strives to be a World Class ShoreTel Partner!

Screen Pop

The screen pop application opens a new web browser tab pointing to a new Abacus Law call notes screen, based on the inbound caller ID. If there is no matching contact for the incoming caller ID, the system pops to the new client screen. The application automatically searches for the caller's phone number and provide the associated account information when the phone is answered.

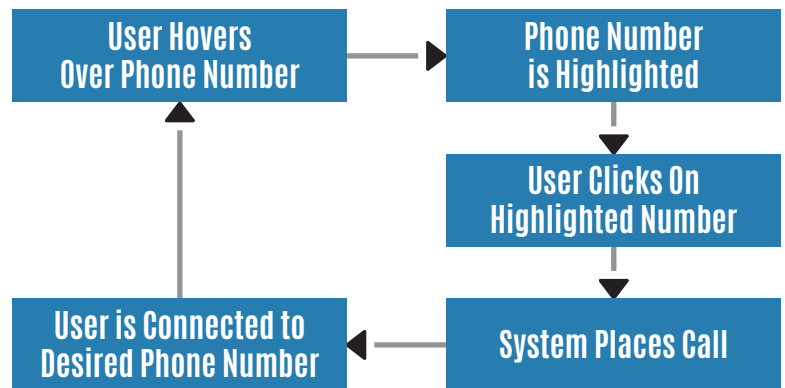A variety of settings are provided in order to customize the user experience on when the screen pop occurs.

Inbound Call to Abacus User → **PCS Reads Caller ID**

↑ ↓

Pop Open Abacus Related Phone Notes ← **Communicate with Abacus Law**

Click to Dial

Outbound dial from Abacus Law on customer service agent workstations. This will be accomplished using the PCS Universal Dialer application using our proprietary phone number sensing technology and custom integration into ShoreTel systems.

Click to Dial User Experience

```
User Hovers              →    Phone Number
Over Phone Number             is Highlighted
      ↑                              ↓
                              User Clicks On
                              Highlighted Number
                                     ↓
User is Connected to     ←    System Places Call
Desired Phone Number
```
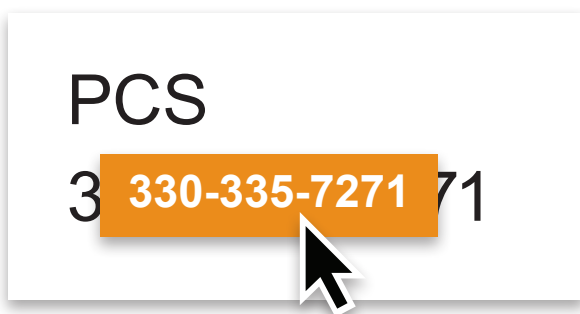
Universal Dialer

The Universal Dialer application is a client side application which provides the capability to hover over phone numbers in an application and click on them to dial. As users hover over a phone number, the system will automatically highlight the number and give options to dial the number on the user's extension Caller ID or System Dial-In Number.

Users click on the highlighted region and immediately place a call. There are also features available to manage outbound caller ID options.

The universal dialer is a Windows application that runs on Windows clients. Other operating systems are not currently supported.

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```
Agent Desktop
      ↓
Universal Dialer Application
      ↓
Click to Dial
      ↓
PCS Web Services
```

Notes

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