



blueButler Telephony Integration

sigXP User Guide



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Conventions and Features Used in this Guide

This guide uses special text and design convention to make it easier for you find the information you need.

Text Conventions

| Convention | Meaning |
|---------------------------|--|
| Abbreviated menu commands | For your convenience, this guide uses abbreviated menu commands. For example, "Click File, Preferences, Customer Tab" means you should click the File menu, then click Preferences and click the Customer Tab, |
| Boldface type | Boldface type is used to indicate text that you enter or type. |
| Initial Capital Letters | The first letters of the names of menus, dialog boxes, dialog box elements and commands are capitalized. Example: the Save As dialog box. |
| <i>Italicized type</i> | <i>Italicized</i> type is used to indicate new terms. |
| Plus sign (+) in text | Keyboard shortcuts are indicated by a plus sign (+) separating two key names. For example, Ctrl+Alt+Delete means that you press the Ctrl, Alt, and Delete keys at the same time. |

Design Conventions

Tip Tips provide helpful hints, timesaving tricks, or alternative procedures related to the task being discussed.

Caution Cautions identify potential problems that you should look out for when you're completing a task or problems that you must address before you can complete a task.

Note Notes offer additional information related to the task being discussed.

Overview

sigXP®, Keal's flagship application for P&C Insurance Brokers, includes a full featured policy module that includes all the applications you need to effectively manage your policy information.

blueButler iDR represents a breakthrough in affordable digital call recording technology. Recording calls is now standard industry practice. blueButler iDR enables continuous identification and immediate response to effective and ineffective interaction with your customers and key business partners. It enables quick and efficient resolution of "He Said - She Said" disputes that otherwise use up valuable management time leaving customers and staff to their own devices to deal with their frustrations.

blueButler delivers all the core high-end recording features needed to keep your front line workers performing at their professional best. Calls are stored securely on the blueButler server in convenient MP3 or WAV format.

With blueButler you get all of the high-end features you expect without the high-end cost. Features like SQL database reporting and data mining, Live Monitor for listening to active calls, Quality ratings and evaluations, Selective recording to allow privacy on personal calls, On-demand recording from any phone, DNIS call segmentation and Broadcast messaging.

The integration between blueButler and sigXP provides a link from Customer Activity to access recorded calls stored in blueButler. After installation and setup are completed, you can:

- Link a phone call to a Customer Activity while you are still in conversation or after the conversation has completed.
- Review recorded conversation using the Playback feature from Customer Activity.

This guide describes:

- Setup and Configuration Procedures.
- How to link recorded phone calls to Customer Activity
- How to listen to recorded phone calls from Customer Activity.

Integration Setup and Configuration

The following sigXP setups need to be completed once blueButler is installed and configured.

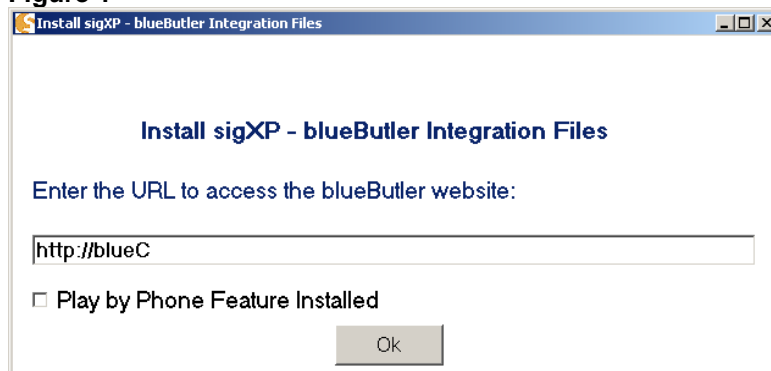
- Server Setup
- Service Setup
- Activity & Suspense Setup

Server setup

Run the blueButler_install.exe file provided by Keal to install the server components. The install file must be run on the server where liveupdate is configured.

All fields shown below must be entered to complete the installation. Check the blueButler installation for the correct values. Check the Play by Phone feature only if it has been installed at your site.

Figure 1



Service Setup

The following steps describe how to configure the blueButler Service in sigXP.

1. **Go to File, Setup, Service Setup** to open the Service Setup screen.
2. **Click on the first blank line on the list or press F3.**
3. **Type blueButler as the Service Name.**
4. **Type blueButler.cfg as the Service Config File.**
5. **Click Save** on the toolbar or press F2.
6. **For User Name, enter the blueButler User Name.**
7. **For Password, enter the blueButler User Name.**

Note: The User Name and Password must have administrative privilege access to blueButler. Check with blueButler for the correct username and password.

8. **Select Broker Based.**
9. **Select Launchable.**

Figure 2

| Service Name | FrService Name | Service Config | BrokerBased |
|--------------|----------------|----------------|-------------|
| premiumXP | premiumXP | Config File | Y |
| blueButler | blueButler | Config File | Y |
| | | | |
| | | | |
| | | | |

Service Information

English
*Service Name: blueButler
Description:

French
*Service Name: blueButler
Description:

Service Type

Config File Website URL / File Program

Configuration File

*Service Config File: blueButler.cfg Web Search

User Information
User Name: someone Broker Based
Password:

* Required fields Launchable Enabled

10. **Click Save** on the toolbar or press F2 and **exit**.

Activity & Suspense Setup

This integration utilizes three Activity descriptions:

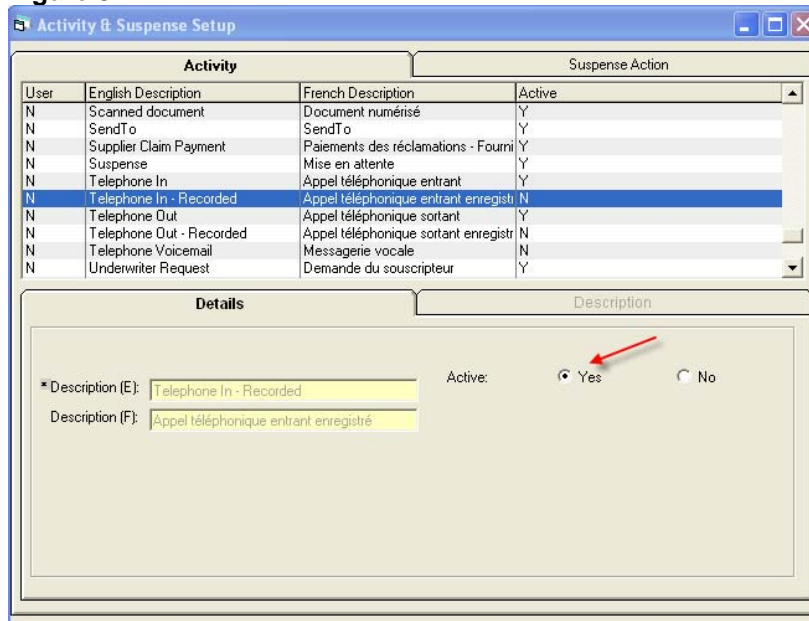
- Telephone In – Recorded
- Telephone Out – Recorded
- Telephone Voicemail

These Activity descriptions are automatically added to the Activity list when sigXP is updated to Release 2009.02.047 or newer. Currently, it is not possible to add descriptions to these Activities. This will be possible in a future release.

The following steps describe how to activate these Activities.

1. **Go to File, Setup, Activity & Suspense** to open the Activity and Suspense Setup screen.
2. On the Activity tab, **select Telephone In – Recorded.**
3. On the Details tab, **select Yes.**

Figure 3



4. **Click Save** or press F2.
5. **Repeat steps 2 to 4 for the Activities, Telephone Out – Recorded and Telephone Voicemail.**
6. **Exit.**

Activating the Integration

You must have updated to sigXP Release 2009.02.047 or newer to use this integration and blueButler must be installed.

- Start up and login to both sigXP and blueButler. Both applications must be open in order to establish and maintain the link between blueButler and sigXP.

Figure 4

The screenshot displays the sigXP application window. On the left, there are two panels: 'Control Panel - Recent Customers' and 'Control Panel - Suspensions'. The 'Recent Customers' panel contains a table with columns for Out No., Last Name, First Name, and Phone Number. The 'Suspensions' panel has columns for Priority, Due Date, and Reason. In the center, there is a calendar for the year 2009, with the month of April selected. Below the calendar is a 'Refresh' button and a 'Reference Number' input field. On the right side, a 'blueButler' window is open, displaying a call log table with columns: Linked, Subject, Play, Start Time, Formatted Digits, Duration, In/Out, Custom 1, and Custom 2. The call log shows a list of calls with their respective details.

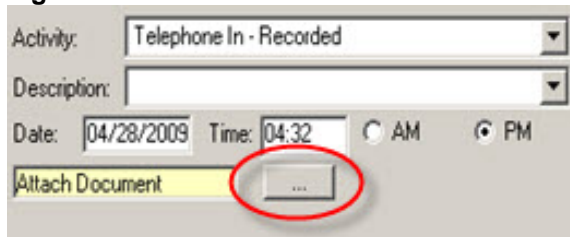
| Linked | Subject | Play | Start Time | Formatted Digits | Duration | In/Out | Custom 1 | Custom 2 |
|-------------------------------------|---------|-------------------------------------|-----------------------|------------------|----------|--------|----------|----------|
| <input type="checkbox"/> | | <input type="checkbox"/> | 4/28/2009 2:44:34 PM | | 0:08 | In | | |
| <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 2:27:39 PM | | 2:27 | In | 034444 | test |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 2:20:17 PM | 021-4753 | 7:12 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 2:18:19 PM | 9-1-506-382-7238 | 1:26 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 2:10:12 PM | | 0:06 | In | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 2:04:14 PM | 9187746424331 | 4:09 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 1:44:51 PM | 02147530 | 11:04 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 1:39:50 PM | 9-1-506-204-2810 | 2:37 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 1:14:33 PM | | 0:06 | In | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 1:02:50 PM | | 0:16 | In | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 12:01:41 PM | 78400 | 0:06 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 11:23:48 AM | 163200011 | 2:20 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 11:22:16 AM | 94730374 | 1:30 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 11:21:10 AM | 94731434 | 1:04 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 11:17:42 AM | 16320001 | 3:27 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 11:16:44 AM | 162-0002 | 0:56 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 11:05:26 AM | | 8:46 | In | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 10:41:30 AM | | 4:27 | In | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 10:24:43 AM | | 0:10 | In | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 10:06:24 AM | 99506473109117 | 0:48 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 10:06:20 AM | | 0:02 | Out | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 9:47:18 AM | | 0:06 | In | | |
| <input type="checkbox"/> | | <input checked="" type="checkbox"/> | 4/28/2009 9:39:56 AM | | 0:07 | In | | |

Link the Current Phone Call

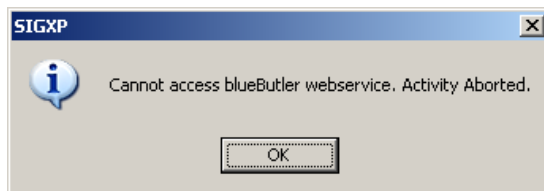
The following steps explain how to link a phone call you are currently recording in blueButler to the Customer Activity.

1. **Open the Customer.**
2. **Select a policy on the Policy Tab or a blank line if the policy does not exist.**
3. **Click Activity** on the toolbar or press F6.
4. **Choose an Activity Type of either: Telephone in: Recorded or Telephone Out: Recorded.**
5. **Type applicable comments.**
6. **Click Browse** beside the text Attach Document to establish the link with blueButler and then go to the next step.

Figure 5

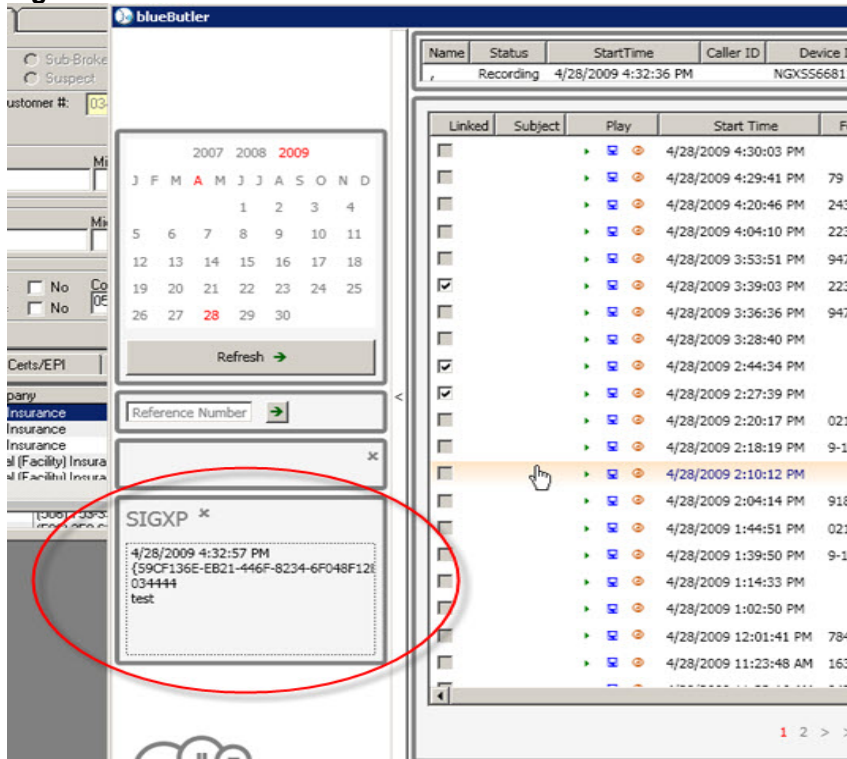


Note: If the link is unsuccessful, the message below displays.



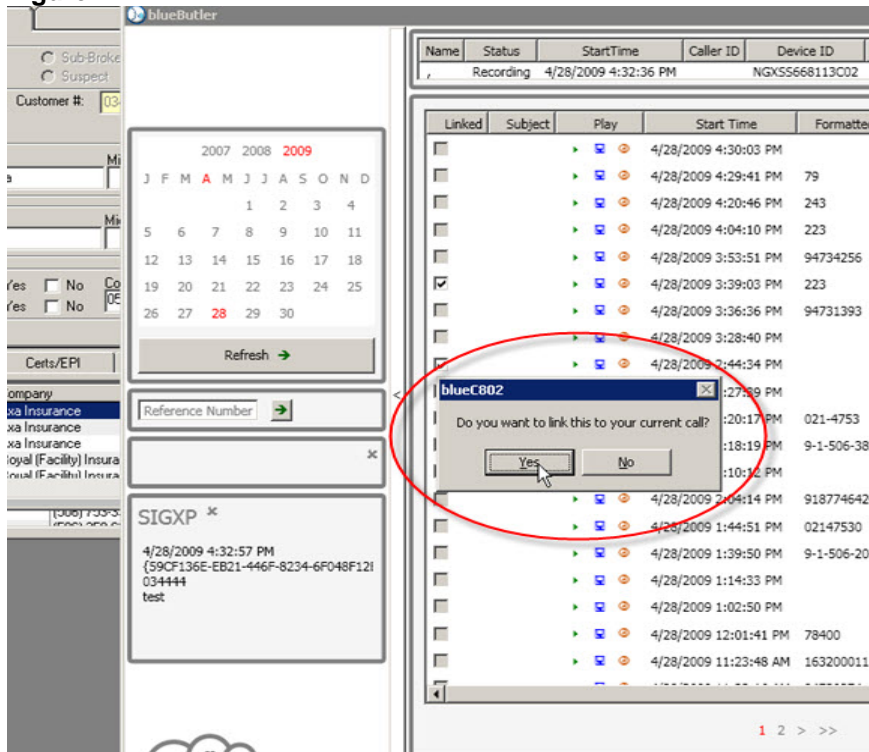
7. **Select the blueButler screen** to see the sigXP Activity link in the bottom left corner.

Figure 6



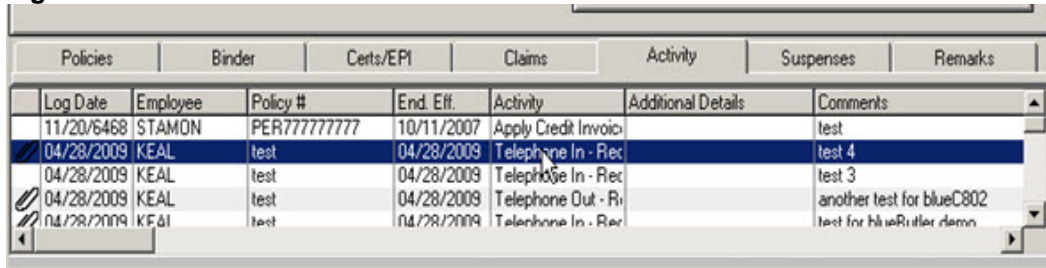
8. Click Yes to the question 'Do you want to link this to your current call?'

Figure 7



The recorded call is automatically linked and that link is saved in the Customer Activity with a paperclip displaying in the first column.

Figure 8



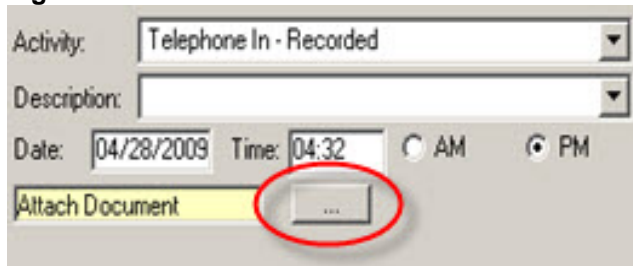
| Log Date | Employee | Policy # | End. Eff. | Activity | Additional Details | Comments |
|------------|----------|-------------|------------|---------------------|--------------------|---------------------------|
| 11/20/6468 | STAMON | PER77777777 | 10/11/2007 | Apply Credit Invoic | | test |
| 04/28/2009 | KEAL | test | 04/28/2009 | Telephone In - Rec | | test 4 |
| 04/28/2009 | KEAL | test | 04/28/2009 | Telephone In - Rec | | test 3 |
| 04/28/2009 | KEAL | test | 04/28/2009 | Telephone Out - R | | another test for blueC802 |
| 04/28/2009 | KEAL | test | 04/28/2009 | Telephone In - Rec | | test for blueButler demn |

Link a Previously Recorded Phone Call

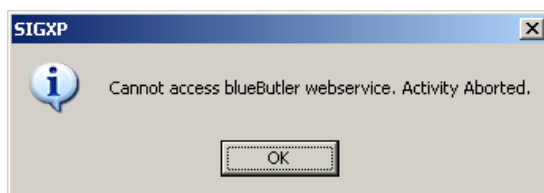
The following steps explain how to link a phone call you previously recorded to the Customer Activity.

1. **Open the Customer.**
2. **Select a policy on the Policy Tab or a blank line if the policy does not exist.**
3. **Click Activity** on the toolbar or press F6,
4. **Choose an Activity Type of either: Telephone in: Recorded or Telephone Out: Recorded.**
5. **Type applicable comments.**
6. **Click Browse** beside the text Attach Document to establish the link with blueButler and then go to the next step.

Figure 9

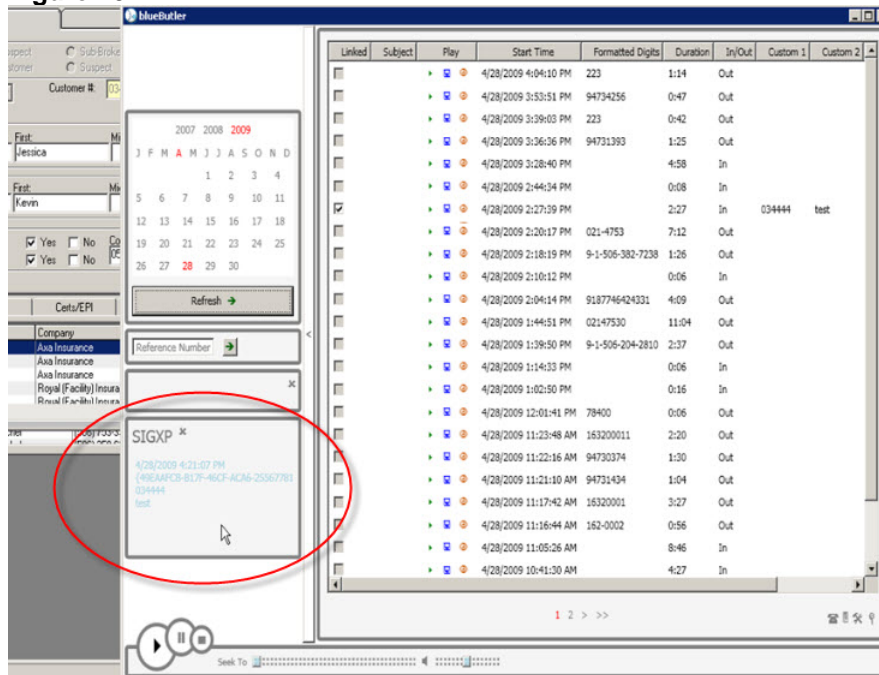


Note: If the link is unsuccessful, the message below displays.



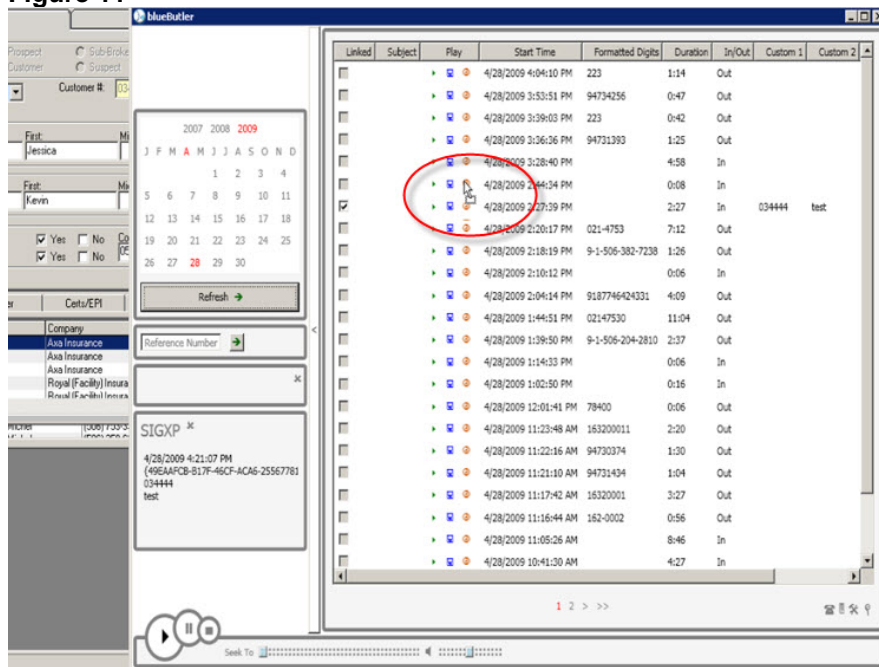
7. **Select the blueButler screen** to see the sigXP link in the bottom left corner.

Figure 10



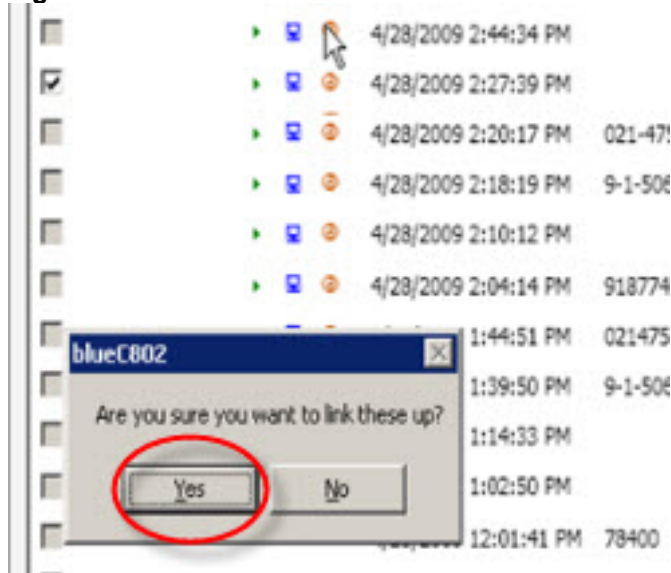
8. Select the sigXP Link and drag and drop it on top of a previously recorded phone call on the right.

Figure 11



9. Click Yes to the question 'Are you sure you want to link these up?'

Figure 12



The recorded call is automatically linked and that link is saved in the Customer Activity with a paperclip displaying in the first column.

Figure 13

| Policies | | Binder | Certs/EPI | Claims | Activity | Suspenses | Remarks |
|------------|----------|-------------|------------|---------------------|--------------------|--------------------------|---------|
| Log Date | Employee | Policy # | End Eff. | Activity | Additional Details | Comments | |
| 11/20/6468 | STANON | PER77777777 | 10/11/2007 | Apply Credit Invoic | | test | |
| 04/28/2009 | KEAL | test | 04/28/2009 | Telephone In - Rec | | test for blueButler demo | |
| 04/28/2009 | KEAL | test | 04/28/2009 | Telephone In - Rec | | test for blueC802 demo | |
| 04/28/2009 | KEAL | PER77777777 | 10/11/2006 | Telephone Out - R | | | |
| 04/28/2009 | STANON | test | 04/28/2009 | New business | | | |

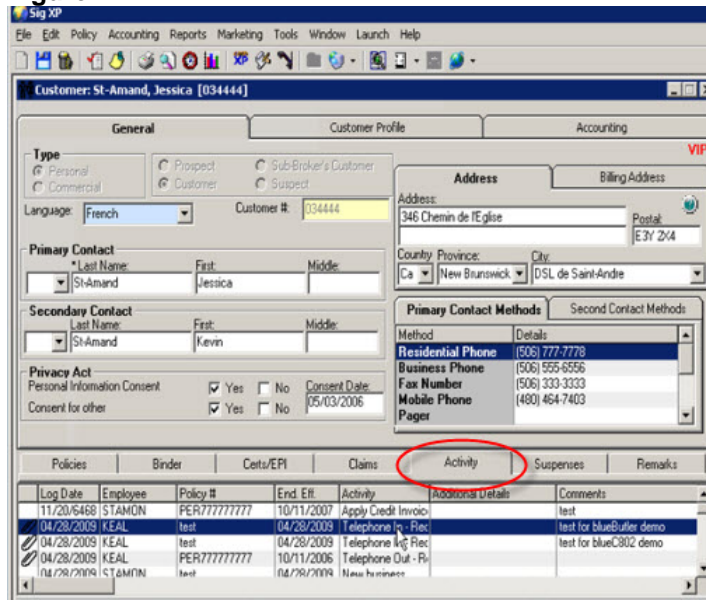
Playback of a Recorded Phone Calls

Links to recorded phone calls are saved in Customer Activity with the Activity types of either Telephone in: Recorded or Telephone Out: Recorded with a paperclip displaying the first column.

The following steps explain how to listen to a recorded phone call linked to a Customer Activity.

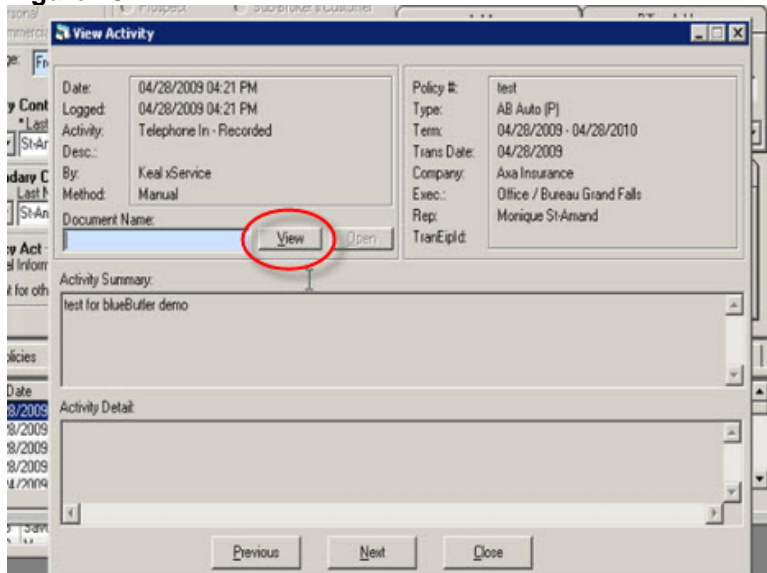
1. Open the Customer, Activity tab.

Figure 14



2. Open the Activity and click View to open the link and play the call.

Figure 15



3. **Type an extension** to listen to the call through your phone and **click OK** if you are configured for this, or the Window Media Player will start on your computer.

Figure 16

Note: If the call is not found, the following message is displayed.

Figure 17