



## blueButler – VoIP and Call Recording integrated with Applied Epic

blueButler is the first fully integrated phone application designed for Applied Epic users!

- Pop Applied Epic Client Data
- Structured Pre-Form Checklists
- Automated Call Activities
- Call Recordings in Epic
- Playback Calls from Epic
- Drill-down Call Tag Reports
- Click-to-call\*
- Route Calls to Servicing Teams\*

### Brokers Trust Insurance Group

*"In leveraging the integration, we have successfully streamlined workflows and processes, leading to more efficient training practices, increased staff productivity, and increased customer satisfaction – all contributing to an increase in revenue and profitability."*

### Willis Insurance

*"This recording solution is now fundamental to our business efficiencies ..."*

Choose the VoIP phone system or hosted VoIP service that best meets your needs.

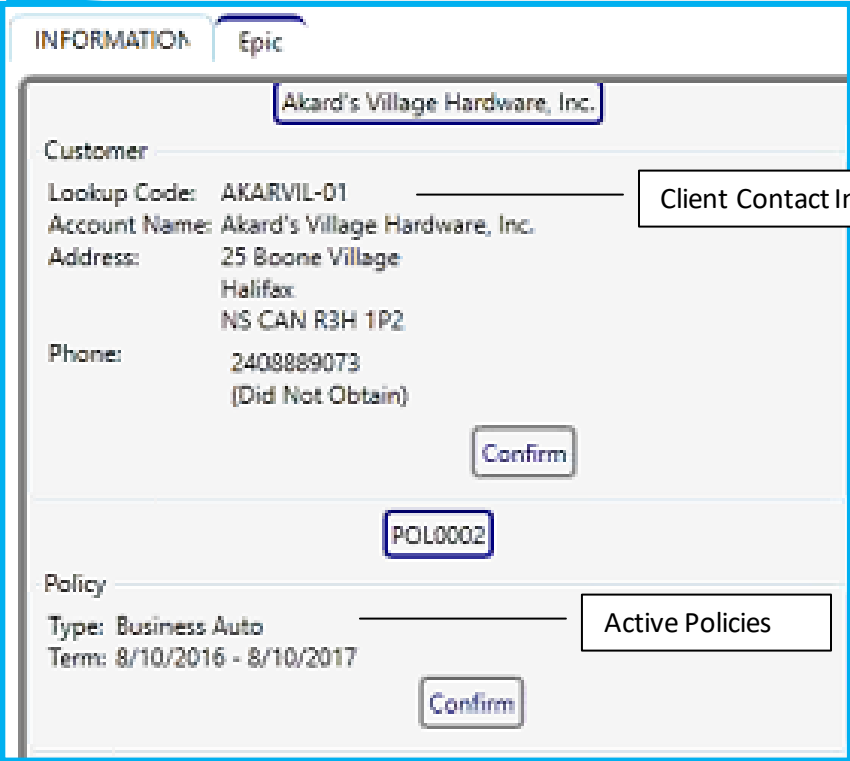
blueButler works with all leading systems\* including Avaya, Cisco, Mitel, Shoretel, Broadsoft, SIP, & others.



\* Some blueButler for Applied Epic integration features are only available for select VoIP systems. Call blueC for details.

## blueButler Pops Open with Applied Epic Client Data

At the start of every call, the blueButler real-time interface pops open with data from your Applied Epic client file based on the phone number (or client name). blueButler provides workflow tags, guides, checklists, audio signature scripts, upsell/cross-sell reminders, and client call histories to ensure agency staff deliver a superior customer experience when servicing clients live on the phone.



The screenshot displays the blueButler interface with the following sections:

- Client Contact Information:**
  - Customer: Akard's Village Hardware, Inc.
  - Lookup Code: AKARVIL-01
  - Account Name: Akard's Village Hardware, Inc.
  - Address: 25 Boone Village, Halifax, NS CAN R3H 1P2
  - Phone: 2408889073 (Did Not Obtain)
  - Buttons: Confirm
- Active Policies:**
  - Policy: POL0002
  - Type: Business Auto
  - Term: 8/10/2016 - 8/10/2017
  - Buttons: Confirm
- Accounts Receivable Table:**

#	Code	Balance	Due Date	Description	Amount
28	NEWB	4589.00	9/11/2015	New CIA Effective 11/1/2015	4589.00
29	AUTO	435.96	9/11/2015	Auto Tax	435.96
30	HOME	114.73	9/11/2015	NS Property Tax	114.73
31	PFEE	150.00	11/1/2015	Policy Fee for CIA	150.00
32	AUTO	14.25	9/11/2015	Auto Tax	14.25
33	HOME	3.75	9/11/2015	Home Tax	3.75

## Automated Activities & Call Recordings Created in Applied Epic

blueButler automatically creates Activities in Applied Epic for every call with links to recorded calls for playback directly from Applied Epic.

The image displays a screenshot of the Applied Epic software interface. A large window titled "View All Notes" is open, showing a list of notes with various details. A smaller window titled "Open Activity" is also visible, showing details for a call activity. A third window titled "Links" is open, showing a list of links for playback.

**Applied Epic**

**Time & Note**

**Checklist data**

**Tags, Call Ref #, User & Note**

**Playback a call**

Code	Description	Who/Owner	Entered	Last updated
CALL	Occasional driver	BISER1 - Eric Bl	2016-08-10 9:54 AM - EPIC	2016-08-10 12:43 PM - EPIC

Description	Pass Info
Applied Systems Client Portal	No
blueButler Playback >	Yes



## The blueButler – Applied Epic integrated solution will drive revenue and bottom line while enabling an awesome new customer experience

blueButler drives performance in all areas critical to agency success including Customer Retention, Revenue Growth, Coaching & Training, Staff Productivity, and E&O Protection. This powerful software is customizable to reflect your agency's phone call workflows:

- Real-time Checklists; Consent / Compliance Scripts; Upsell Reminders
- Current Lead Campaign Prompts
- “Second Set of Eyes” and other Call Workflow processes
- Automated Lead Forwarding and Collaboration
- Coaching / Training / Quality Review Scorecards
- Call Content Metrics and Management Drill-Down Reports

Interested in learning more?

[www.blueC802.com/epic](http://www.blueC802.com/epic)

blueButler has been embraced by hundreds of agencies where it is having a major impact in their businesses. If you would like a one-on-one discussion to see how blueButler can help your agency, please contact us:

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