

# ShoreTel Cost Recovery Integration for ONSITE



## EASILY AND ACCURATELY TRACK TIME SPENT WITH CLIENTS

For organizations that bill their clients by the project or hour, such as legal, architecture, accounting and professional services, capturing communication information for reimbursement is key to ensuring smooth and efficient operations.

### Streamlining cost recovery

The ShoreTel Cost Recovery Integration application for ShoreTel Connect ONSITE systems associates inbound and outbound calls with appropriate billing codes, allowing busy professionals to easily and accurately account for their time. Automated viewing screens, prompts and search features that are included in the Cost Recovery Integration application work out-of-the-box whether the account code database is maintained in the ShoreTel IP telephony system, or resides in specialized cost recovery systems, such as Equitrac or Copittrak.

### Fast deployment to optimize operations

As a result of ShoreTel's brilliant simplicity, installation of the ShoreTel Cost Recovery Integration application consists of server

and client components that can typically be installed, configured, tested and ready to use the same day. Once installed, up-to-date billing codes are automatically imported from the cost recovery application database, according to a pre-defined schedule. The ShoreTel Connect system maintains call detail records annotated with assigned billing codes, and the cost recovery system retrieves them for future use. This eliminates the need to reconcile disparate records, and streamlines telephone time billing with minimal administrative overhead.

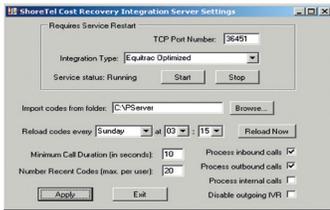
In addition, this two-way data synchronization between the IP telephony and billing systems creates a single point of administration, greatly simplifying time accounting and billing management.

### BENEFITS

- Works out-of-the-box with Copittrak and Equitrac, the leading legal and professional services cost recovery systems
- Automatically matches inbound and outbound phone numbers to account tracking codes
- Supports both client/matter and single account code structures
- Allows code assignment during or after calls

### REQUIREMENTS

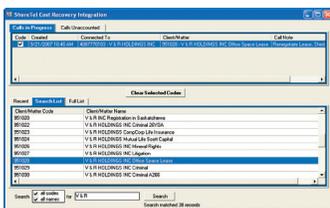
- Microsoft .NET Framework Version 2.0 runtime.
- ShoreTel Connect app must be installed but it does not need to be running
- ShoreTel Versions 6.1 or higher with Equitrac version 3 or higher.
- Integrates with Copittrak all versions



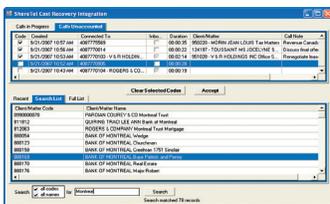
Server Configuration Utility allows administrators to dictate site-wide policies



User client settings allow customization according to personal preferences



“Calls in Progress” tab depicting a live call with the search options and the selected code confirmed by the user



“Calls Unaccounted” tab depicting a call in need of a code assignment and the search options that are available

## Convenient desktop interface

The ShoreTel Cost Recovery Integration application’s graphical interface lets users assign appropriate codes during or after calls by clicking on a screen that automatically appears whenever a call is placed or received. The user is prompted to confirm the proposed code or select from a menu of alternatives, including the individual’s most frequently used codes, which are dynamically kept up to date. If none of the suggested codes are a match, the user can employ the ShoreTel Cost Recovery Integration application’s intuitive search capabilities to perform an extended search. All of these features help to ensure that a code will be entered for each call, maximizing cost recovery.

The application is fully compatible with ShoreTel Connect mobility giving users access to all of the application’s capabilities when traveling or working out of a home office. All calls are captured, regardless of whether the user’s computer is running.

## Technical notes

### User interface

- “Calls in Progress” screen displays automatically during connected calls (see Figure 1)
- Client/matter code is suggested based on individual usage patterns
- “Recent” list presents last and frequently used codes for easy selection

- Full list is always available for browsing or searching
- The server tracks all calls; the “Calls Unaccounted” list saves calls for later code assignments
- Includes optional telephone-based code entry via voice prompt and keypad input
- Users can enter codes either through the telephone keypad (when enabled) or the desktop interface

## Administration

- Built-in selections for account code source: Equitrac, Copittrak, or the ShoreTel account code database (standalone mode)
- Time and frequency of imports are configurable
- The ShoreTel Cost Recovery Integration application maintains a dedicated code-annotated Call Detail Records (CDR) database
- Support for direct connection by Equitrac and Copittrak for call detail record export
- ShoreTel code-annotated CDR are included to support standalone operation
- User administration is accomplished via ShoreTel Director
- Forced and Optional modes are set per User Group

Want to know more?  
Talk to an expert.  
Visit [www.shoretel.com/findareseller](http://www.shoretel.com/findareseller)

## ShoreTel. Brilliantly simple business communications.

ShoreTel, Inc. (NASDAQ: SHOR) is a leading provider of brilliantly simple IP phone systems and unified communications solutions powering today’s always-on workforce. Its flexible communications solutions for on-premises, cloud and hybrid environments eliminate complexity, reduce costs and improve productivity.

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