



## Product Description



### REVISIONS

Version	Date	Updated by	Update description
1.0	01/01/2009	Giuseppe Arena	Initial Version
1.1	09/10/2010	Didier Wielemans	Minor Updates: Smile 3.0.5
1.2	15/01/2010	Nathalie Rodts	Template update
1.3	31/05/2010	Didier Wielemans	Minor Updates: Smile 3.0.8
1.4	15/10/2010	Didier Wielemans	Minor Updates: Smile 3.0.9



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## 1 EXECUTIVE SUMMARY

Despite the arrival of Direct Inward Dialing in the early 1990, the installation of Interactive Voice Response Units and Automated Attendant systems, the role of the receptionist or human attendant is still key to provide companies with a state-of-the-art welcome process for callers and visitors.

Most of the time the first contact an individual has with a company will determine his impression about it. When calling a company you would like to get a quick, polite and accurate answer to your request making you feel comfortable with that company's capacity to deliver high quality services.

Therefore companies are interested in implementing a professional welcome process enabling their customers and prospects to experience a First Good Impression that will reassure them about the capabilities of that company to serve them according to high level standard.

Some of the expectations of companies are as follows:

- Provide a professional welcome to their customers and prospects
  - Company welcome messages
  - Specific company welcome messages for VIP customers (CC6 based)
  - Provide the right information to the caller on the first try
- Get some metrics to measure the provided quality of service
  - Historical and real-time
- Get some flexibility in the solution they implement
- Be able to make quality monitoring in order to always improve their service

Receptionists/Operators/Attendants are looking for a tool that is:

- Easy and efficient to use for dealing with high volumes of incoming calls
  - Get relevant information in a twinkling of an eye
  - Activation of features using handy shortcuts
- Integrated with the Enterprise business tools
  - Internal LDAP corporate directories
  - E-mail and calendaring systems
  - Voicemail system
- Addressing their mobility needs
- Alleviate them from repetitive tasks
- Customizable interface to feel comfortable with

Smile 3 provides a suitable answer all of these requirements, as you will understand from the following highlights of the solution.

Smile 3 is an evolution of our Smile 2 screen based attendant console solution. It builds on Smile 2 strengths being simplicity, reliability, efficiency and user-friendly interface. It keeps going on the cockpit philosophy enabling the attendant to get all relevant information in one unique interface to deal efficiently with incoming calls.

Smile 3 adds the support for IP based attendant consoles on the Nortel CS1000 IP PBX as an alternative to the traditional M2250 or Console Interface Units equipped with Smile 2 application that, by the way, will continue to be available for new sales requiring such TDM solutions.



Smile 3 has clearly been developed with the idea to realize the best possible integration with the CS1000 IP PBX. CS1000 is robust and efficient to route and queue calls. It has years of experience in doing well this kind of work. Therefore Smile 3 will not route and queue calls but will rely on the CS1000 to do so.

Smile 3 will also leverage the possibility to up-sell some Nortel solutions for improving the attendant job. We describe in this document how Smile 3 perfectly integrates with Contact Centre 6 and Contact Recording solutions available from Nortel.

Smile 3 is a soft-client application that will focus on providing the attendant with all relevant information he/she needs to serve incoming calls efficiently and help your company to make a First Very Good Impression when dealing with incoming calls.



## 2 SMILE 3 USER INTERFACE OVERVIEW

The cockpit philosophy that has made the succes of Smile 2 has been reused by Smile 3.

The screenshot displays the Smile 3 user interface. At the top, there is a menu bar with 'File', 'Directory', 'Profiles', 'Tools', 'Configuration', and 'Help'. Below the menu is a navigation bar with tabs for 'Directory', 'LDAP', and 'WEB'. A search bar on the right contains the number '107'. The main area features a table with the following data:

Lastname	Firstname	Phone	Mobile	Forward1	email1
Ampère	André	2223	047523452314	2230	Andre.Ampere@Company.com
Celcius	Anders	2237	046612345678	2230	Anders.Celcius@Company.com
Curie	Marie	2234	047898763456	2230	Marie.Curie@Company.com
Curie	Pierre	2235	047566554433	2230	Pierre.Curie@Company.com
Darwin	Charles	2233	047998763242	2230	Charles.Darwin@Company.com
Einstein	Albert	2230	0477666555	11	Albert.Einstein@Company.com
Faraday	Michael	4206	048532149987	2230	Michael.Faraday@Company.com

Below the table are sections for 'Operator Note' and 'Personal Note'. The bottom part of the interface includes a 'Redirection' section with a '1581 Didier Wielemans' call, a 'Busy Lamp Field' area showing a call from 'ACD SYLVIE' to 'MARTINE' at '2530' with a duration of '1:49', and a 'Status' window with the following data:

Status	Ext.	Name
2541	Newton Isaac	
2540	Volta Alessandro	
2550	Meitner Lise	

The status bar at the bottom shows 'Microphone', 'Speakers', 'administrator', '1', '17 Oct 2008', and '15:52'.

It provides the operator with all relevant information for dealing with incoming calls in a twinkling of an eye.

No need to swap between multiple windows to search the directory or to answer calls.

The main screen is divided into several zones that we briefly describe hereafter:

- Main Menu Bar
- Browse Windows Area
  - Directory Tab
  - LDAP Directory Tab
  - Web tab
- Current Call Zone Area
- Busy Lamp Field Area
- Status Bar Area



## **2.1 MAIN MENU AREA**

This menu will provide Smile Users and Administrator to configure their Smile 3. Some of these menus will only be available to administrators for the configuration of Smile 3 to work with the CS1000 IP PBX .

Menus available to the User will enable him/her to choose the Smile 3 interface flavour as well as the personal picture.

## **2.2 BROWSE WINDOWS AREA**

The Browse Windows Area has 3 tabs providing access to the Smile 3 Directory, an alternate LDAP Directory server and a Web browser area.

### **2.2.1 Directory Tab**

This tab contains the Smile 3 telephone book that can be updated with your corporate directory server using LDAP or a .CSV file.

The operator can search this directory using native multi-criteria search to find out the record associated to the requested person in the company. This directory contains several fields from which some are mandatory and others are optional.

The directory is populated with company specific information that will enable the operator to provide the caller with the best-suited information. ( DID number, Mobile Number, Secretary Number, personal note, attendant note, Busy lamp field, calendar look up, ...)

### **2.2.2 LDAP Directory Tab**

LDAP stands for "Lightweight Directory Access Protocol"

Here you can directly perform a lookup into an external LDAP directory containing information, stored on other platforms, other locations (e.g. the human resources database).

This provides an alternate directory to find out information that would not be available into the Smile 3 directory.

### **2.2.3 Web Tab**

This tab provides the operator with an easy to use, integrated web browser from within the Smile 3 interface. He/She can define up to 5 websites that he/she regularly consults for his/her work.



### 2.3 CURRENT CALL ZONE AREA

This is the telephony zone. It provides the operator with all the telephony features needed to deal with incoming and outgoing calls.

The attendant will find information on call handling such as:

- Amount of calls waiting to be answered
- Call information area
- Call on hold information area
- Exclude Source/Destination
- Release Source/Destination
- On/off hook knob
- Shortcut knobs to enable telephony features such as:
  - Transfer to alternative 1 or 2
  - Transfer to Mobile
  - Transfer to Express messaging
  - Hold/Unhold a call
  - Enable the play of an attendant greeting
  - Enable call recording
  - Call Intrusion
  - Call park, ...

### 2.4 BUSY LAMP FIELD AREA

This area provides the operator with status information about a predefined number of telephone sets (max 36 in this release of Smile 3). As soon as one of these phones is busy, the operator will see it appear in that BLF area. It can be used to supervise key extensions in the company.

### 2.5 STATUS BAR AREA

The Status bar provides the operator with the following information:

- Volume adjustment of the microphone and speakers of the headset used by Smile 3 softphone.
- Type of user logged in the Smile 3 (Administrator, User)
- Number of Smile 3 users actually logged in on the CS1000
- Date & Time



### 3 ARCHITECTURE OVERVIEW

#### 3.1 DESCRIPTION

Smile 3 is a soft-client application that requires 2 IP users licenses and 2 ACD ISM parameters in the CS1000. In other words, each Smile 3 attendant console will use 2 ACD and 2 IP users ISM parameters.

The 2 terminal numbers used by Smile 3 will be configured as ACD agents that Smile 3 application will pilot and manage to handle incoming and outgoing calls. Each terminal number is configured in the CS1000 as a 2050PC position.

When launching Smile 3, the application logs 2 ACD positions configured in the Attendant Queue Directory Number and provides the attendant with Login/Logout, Not Ready and MakeSetBusy commands.



##### 3.1.1 Smile 3 as an ACD agent of the CS1000 IP PBX

When logged in, the attendant is ready to receive incoming calls queued and routed from the Automatic Call Distribution software of the CS1000 to the Smile 3 agent positions.

Standard first RAN and Second RAN messages, provided by e.g MIRAN cards, can be used to provide Welcome messages to the calling parties.

In case of failure of the PC on which Smile 3 is running several possibilities are available to deal with incoming calls:

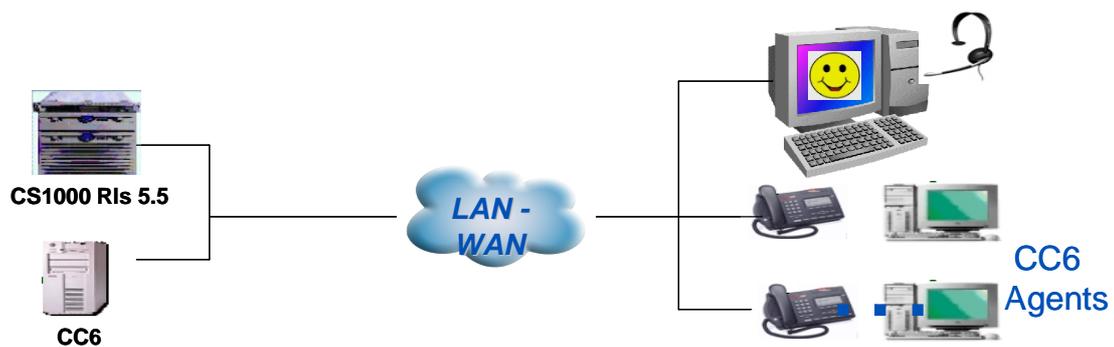
- When multiple Smile 3 positions are working, another logged in Smile 3 position receives automatically calls queued in the ACD queue.
- When only 1 Smile 3 position is working, one can configure a desktop phone or a DECT or WIFI phone as being an ACD agent of the Smile 3 queue. The attendant can then logging onto that backup phone and continue to deal with incoming calls as an ACD agent would do.
- Due to the Smile 3 license manager feature, it is possible to pre-install Smile3 softclient on another PC allowing for backup solution in case of failure or Attendant temporary absence.



### 3.1.2 Smile 3 as an ACD agent controlled by Nortel Contact Centre 6.0

Smile 3 can also be used in a Contact Centre 6.0 environment and act as an ACD Agent controlled by CC6. In conjunction with CC6, some more features can be provided in order to improve the way calls are routed to the attendant.

CC6 scripting allows to provide specific call routing for VIP customers based on CLID or DNIS. It also provide the possibility to play welcome messages according to time of day and holidays.



It could also provide information about the position in queue and the estimated waiting time before being answered.

Moreover Smile 3 supports Duplicate Media Stream and can therefore also be integrated with Nortel Contact Recording and Quality Monitoring solution. This enable the company to record calls for training purposes but also in case of threat or malicious calls.



## 4 SMILE 3 FEATURES OVERVIEW

### 4.1 TELEPHONY FEATURES

- GIPS (Global IP Solutions) VoiceEngine
- Attendant Status (Logged In, Not Ready, Logged Out, Make Set Busy)
- Make Call, Answer Call, Hold Call, Audible reminder of held calls, Label on Hold
- Mute/UnMute
- Incoming call lookup in the directory (based on CLID or DNIS)
- Transfer Call (Blind –Screened), Conference
- Exclude Source/Destination
- Release Source/Destination
- Call Park, Call Intrusion, Camp on (package 121 and 186 required)
- Direct access to Express Messaging on Voicemail
- Basic Busy Lamp Field
- Operator greeting
- Local Call recording
- Calls waiting indicator (Thermometer)
- Night service Status Indication

### 4.2 TELEPHONY FEATURES IN COMBINATION WITH NORTEL CONTACT CENTRE 6

- Specific calls treatments based on CLID/DNIS
- Welcome messages, prioritization, ...
- Time of day and holidays calls routing
- Skilled based routing
- Extended real-time and historical reporting
- Call recording via Nortel Contact Recording 6 (Duplicated Media Stream)



#### 4.3 DIRECTORY FEATURES

- Smile 3 directory automatically updated from:
  - In-house main LDAP directory (LDAP Update) or Telephony Manager RIs 3.x
  - .csv file
- Direct access to LDAP directory (LDAP LookUp)
- Sort Smile 3 directory on whatever field
- Search based on whatever directory field
- Multicriterias search engine intrinsically enabled
- Operator and Personal notes associated with each directory record
- Smile 3 directory contains both internal employees and external contacts

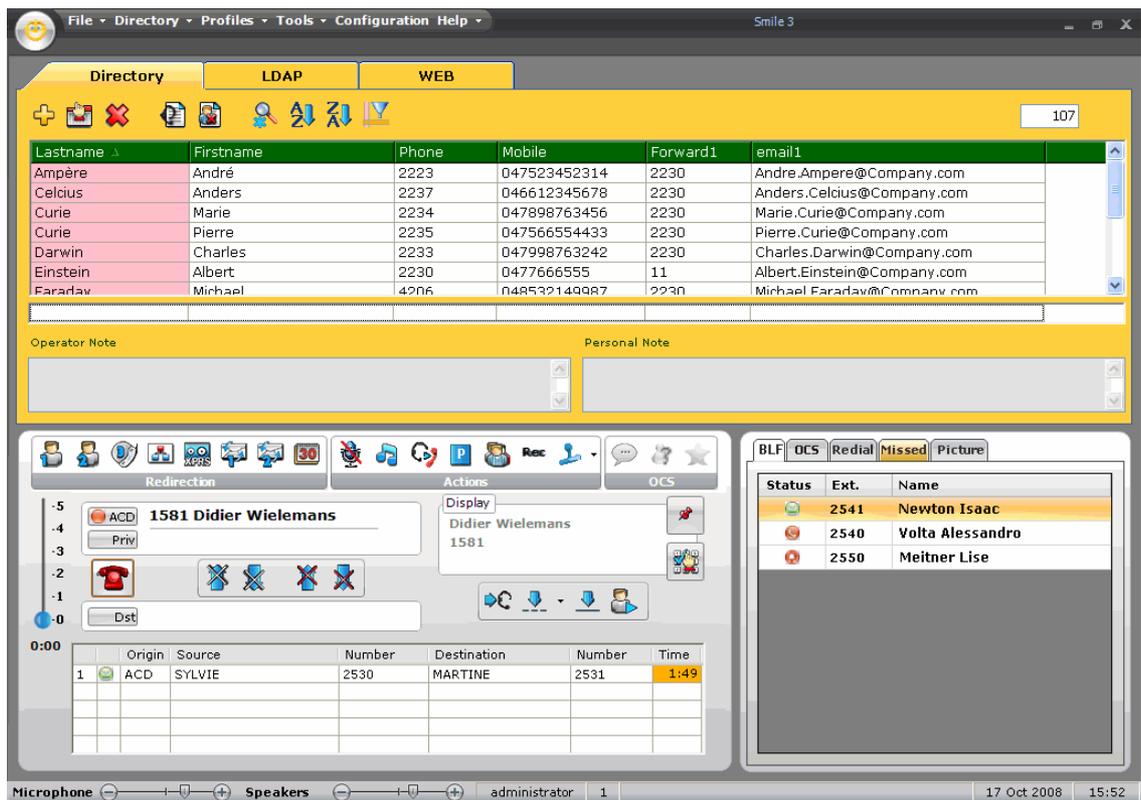
#### 4.4 PRODUCTIVITY FEATURES

- Automatic on top, Automatic maximize (Screen PopUp)
- License Manager (a 'Pool of users' can share the same license)
- Shortcuts to activate Smile 3 features
- Operator greeting
- Send/receive e-mail (phone call notification, automatic personal note update)
- Open MS Outlook calendar
- Express messaging access
- Call Secretary or Mobile phone numbers
- Internet/Intranet access through Smile interface
- Busy Lamp Field , Microsoft OCS presence integration
- Profile management (choice of Operator greeting, interface flavour, Personal logo/photo, Language, Audio device/settings, Directory browsewindow settings...)
- Smile 3 licensing model
- Basic Statistics (RIs 3.1)



**5 PRODUCT DESCRIPTION**

**5.1 USER INTERFACE**



The Smile 3 user interface has been specially designed to provide on a single window all the relevant call information, no need to swap between multiple windows (Cockpit concept).

Icons are available for call handling: off/on hook, Forward, Redial, Hold, Conference, Email, etc...

By placing the mouse pointer on an icon of the Smile user interface, the operator will get a tip containing the name of the icon and the corresponding shortcut key.



## 5.2 CALL HANDLING

The Smile 3 screen based console interfaces directly to the CS1000 E/M. With advanced call handling capabilities, operators can answer, transfer, announce, park, hold and place calls using their Personal Computer.

The Smile 3 main screen holds all information related to a call: name, number, origin and status.

A thermometer indicates the number of calls waiting and the age of the oldest call in the operator queue. It will change from blue to red if the number of calls waiting exceeds a predefined number

Multiple alternatives are available: Forward1, Forward2, Mobile, ESN, Express Messaging, Email1, Email2.

	Origin	Source	Number	Destination	Number	Time
1	ACD	SYLVIE	2530	MARTINE	2531	1:49

Each feature or function can be accessed via mouse click and shortcut keys.

## 5.3 HOLDING A CALL

If needed, the operator can place a call on hold and assign a label to it. This label containing information about the called and/or calling party remains permanently visible for the operator. The Smile keeps also the name and the telephone number of the person to whom the operator has tried to extend the call. A timer shows how long a call is already on hold. A reminder will indicate to the operator if a call stays too long on hold.

All this information contributes to guarantee a more efficient call handling.



**5.4 MULTI-CRITERIA SEARCH**

It happens that one criterion is not sufficient to find the correct person in the database (e.g.: the database contains 10 persons whose last name is Smith). The Smile program allows you to perform a multi-criteria search: a combination of different criteria allows the operator to find the required information in no time.

The operator will be in position to find immediately the most qualified person for each call, without shuttling your customer from extension to extension.

**5.5 EXPRESS MESSAGING**



The Express Messaging icon  allows the operator to easily extend the caller to the voice mailbox of the called party.

To forward a call to the voice mailbox of the destination, the operator will press <Ctrl-5> or click on the 'Express Messaging' icon. A dialog box containing the phone number of the active record will appear. The operator will have to accept or to change it by entering another mailbox number. The Smile application will automatically call the Voice Mail system, wait an answer and enter the mailbox number. When this is done, the operator has just to press the Release key to allow the caller to leave his voice message.

**5.6 BUSY LAMP FIELD**

The purpose of the BLF (Busy Lamp Field) is to provide the status of the internal phone sets. This real-time information is very useful. At any moment the operator knows the status of the looked up person and thus is able to handle correctly the incoming call. (Do it right the first time).

Status	Ext.	Name
	2541	Newton Isaac
	2540	Volta Alessandro
	2550	Meitner Lise



## 5.7 DATABASE INTEGRATION

### 5.7.1 SmUpdate

It allows you to update the Smile database with a simple text file as source. This update can be started manually or scheduled.

### 5.7.2 The LDAP Lookup

Allowing you to consult the LDAP directory of the company, it gives you the same features as with the local Smile directory:

- Looking up names and phone numbers
- Multi-criteria search
- Placing a call using the phone numbers found in the LDAP directory

### 5.7.3 The LDAP Update

The LDAP Update is used to update the content of your local Smile database with the information retrieved from an external LDAP directory. This update can be scheduled or can be initiated by the user.

This means there is only one centralized database to maintain!

Maintaining your database up-to-date via the import routines or automatic update from a LDAP server is a reality offered to simplify the most important role of Smile, which is « Improve Customer Service ».

## 5.8 NETWORKING

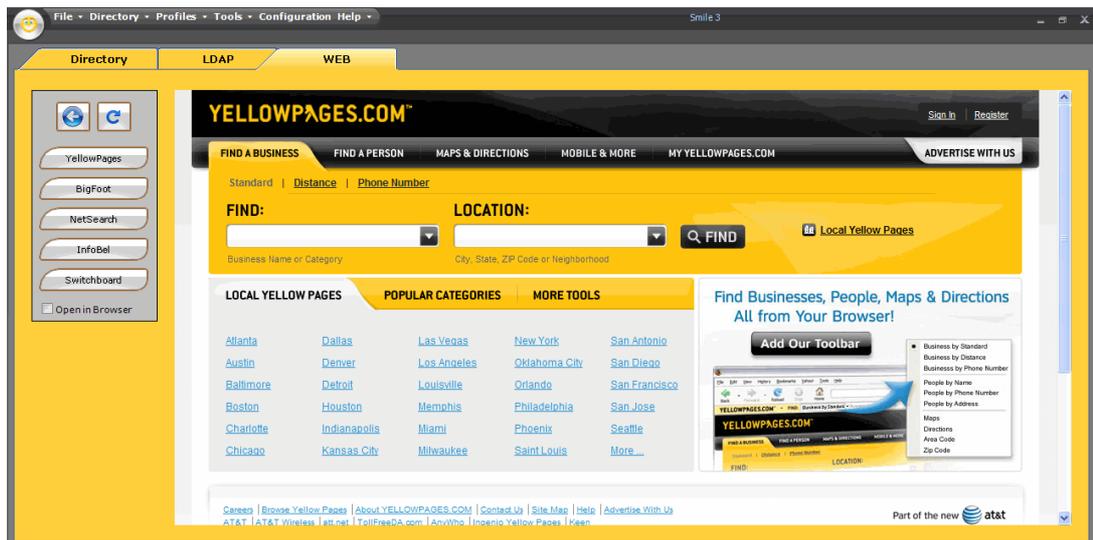
When you have two or more Smile applications running on your network, you can use the Networking function to centralize all the records in one master database that will be used by all the applications. Every time an operator makes a modification in the database (e.g. updating the information of a memo field), it will be automatically visible for all the operators working in the same Smile network.



## 5.9 WEB BROWSER

Open a web site within the smile interface (5 quickly selectable favorites) allowing the operator to use the phone number found on the web to place a call.

(Requires Internet explorer 5.0 or higher)



## 5.10 E-MAIL

### 5.10.1 The Personal Notes

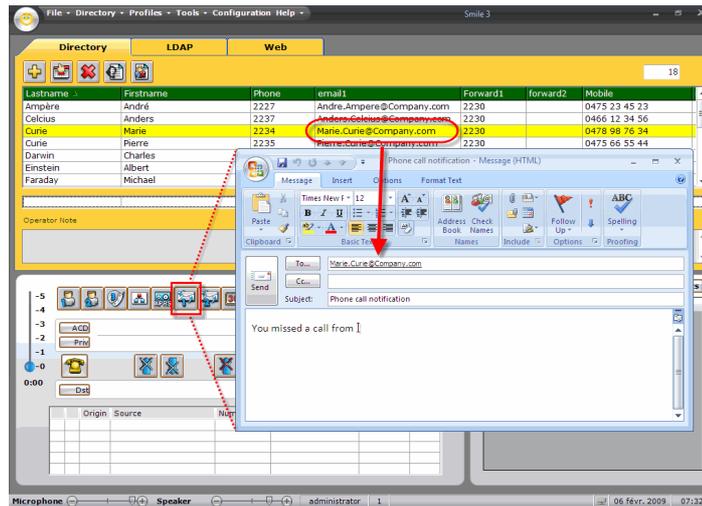
The employees of a company can send a mail to a predefined Smile e-mail account (e.g.: [Smile@company.com](mailto:Smile@company.com)), with a short message. This message will appear on the Smile interface in the 'Personal Notes' field. The notes are specific to each person stored in the repository and show up when this particular person is filtered out.

(Requires a POP3-SMTP compliant e-mail server and a dedicated Smile mailbox)



### 5.10.2 The Send Mail

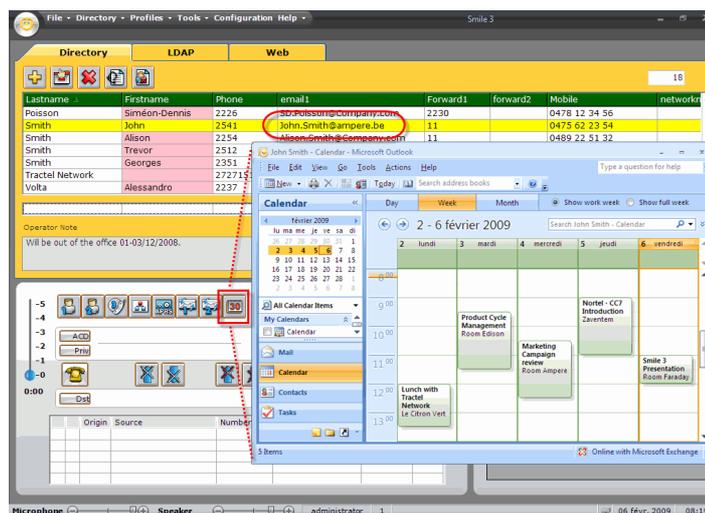
The operator can send a mail to the person in focus assuming that his e-mail address has been filled in. (Requires an E-mail client)



### 5.10.3 The Open Calendar

The operator can open the agenda of a looked-up person in the local repository, when clicking the 'calendar' button. This way the operator can verify the person's agenda.

(Requires MS Outlook)





**6 PACKAGING**

Product code (Quentris)	Description
<b>New systems</b>	
4001-04-030000-00001	Smile 3 Operator Console License – 1 Seat
4001-04-030000-00002	Smile 3 Operator Console License – 2 Seats
4001-04-030000-00003	Smile 3 Operator Console License – 3 Seats
4001-04-030000-00005	Smile 3 Operator Console License – 5 Seats
<b>Expansions</b>	
4001-70-000000-00001	Smile 3 Expansion Oper. Cons. Lic. – 1 Seat
4001-70-000000-00002	Smile 3 Expansion Oper. Cons. Lic. – 2 Seats
4001-70-000000-00003	Smile 3 Expansion Oper. Cons. Lic. – 3 Seats
4001-70-000000-00004	Smile 3 Expansion Oper. Cons. Lic. – 4 Seats
<b>Upgrades</b>	
4001-90-030000-00001	Smile 2 Major Upgrade to Smile 3.0 - 1 Seat
4001-71-000000-00001	Smile 2 Upgrade to one Seat on existing Smile 3
<b>Options</b>	
4000-01-000100	Smile Quentris Generic parallel Dongle
4000-01-000200	Smile Quentris Generic USB Dongle
4001-00-030000	Smile 3 Software on CD



## 7 SYSTEM REQUIREMENTS

### 7.1 HARDWARE

- Pentium IV – 3 GHz
- 1GB Ram
- 1GB free on hard disk. ( + 4 KB by additional record in the phonebook)
- 1 network card
- 1 USB port for the headset
  
- Video card with 1024 x 768 - 256 colours (minimum)
- 1 Display SVGA 17"
  
- 1 USB port for the OPTIONAL Dongle on License Manager

### 7.2 SOFTWARE

- Windows XP Prof., Windows Vista and Windows 7 (32 bits)
- Internet Explorer 5.0 or higher
- .NET Framework 2.0 (minimum)

Extra requirements:

- Send e-mail: e-mail client installed on the Smile workstation
- Open Calendar: e-mail client MS Outlook and e-mail server MS Exchange
- Personal Note: e-mail server compliant with POP3 and SMTP.
- OCS Presence & IM: Microsoft Office Communicator 2007 R2

### 7.3 PBX

- CS1000 RIs 5.0, RIs 5.5, RIs 6.0 or RIs 7.0 (\*)
- 2 IP Users (not basic) and 2 ACD Agents licenses by Smile Operator Console
- 2 CC6 Agent Licenses (if CC6 is used)
- Package 121 and 186 recommended (Automatic Forced CampOn)

Smile 3 is compliant with CC6 and CC7 AML

(\*)The patch 'nortel-cs1000-tps-7.00.20-03.i386' is required for the call waiting thermometer.



## 8 SMILE 3 BENEFITS

### 8.1 INCREASE OPERATOR PRODUCTIVITY AND FLEXIBILITY

- Smile cockpit philosophy; Operator is in control of incoming calls in a twinkling of an eye
- Personalized operator automatic greeting played on each incoming call
- Smile 3 directory is synchronized with in-house LDAP directory
- Smile 3 is integrated with MS Outlook calendar – Operator can inform customer about availability of called person
- Smile 3 is integrated with E-mail server to send and receive e-mails
- Smile 3 Operator Console is a softphone configured as an ACD agent from the CS1000 or from Contact Centre 6.
- Smile 3 operator can work from anywhere in the company or from home provided that the right network connection is available
- Smile 3 allows flexible and multi task environment for the operators: different operators can share the same Smile license at different time schedules of the day
- Smile 3 operator can record calls on demand in case of threat or abusive call
- Smile 3 operator console Graphical User Interface (GUI):
  - is available in several languages
  - exists in 4 color flavours
  - allows the operator to add a personal picture or logo

### 8.2 INCREASE CUSTOMER SATISFACTION

- Smile 3 Operator is a softphone configured as an ACD agent on CS1000 or Contact Centre 6. Therefore it can take benefit of all high available and resilient features from a state-of-the art IP PBX, always providing the best service
- ACD hardphone (Desktop, DECT or WIFI) can be used as failover in case of a Smile 3 outage
- Welcome messages are provided from the ACD RAN routes (first ran route, Second ran route) when using MIRAN cards
- When integrated to Contact Centre 6, Smile 3 provides following added value features:
  - Based on DNIS or CLID, incoming calls can be given a personalized treatment (specific welcome message, high priority for quicker answer, route to same operator)
  - Time of day and holiday treatments
  - Average time before answer message, ...
  - Extended range of reports for measuring delivered quality
- Call monitoring and recording provide tools for improving customer service + Smile 3 operator gets all relevant information about the availability of the requested person à accurate customer information



### **8.3 INCREASE REVENUES/DECREASE COSTS**

- Smile 3 Operator Console helps your company to deliver a better customer service therefore increasing your customers' loyalty
- Smile 3 operator can work from home: no need to add an office space for them

### **8.4 DECREASE TOTAL COST OF OWNERSHIP**

- Smile 3 Operator Console is completely integrated with CS1000, Contact Centre 6 and Contact recording
- No need to invest in specific hardware to let it work ( no console, no CIU, no gateway,...)
- Smile 3 is a softphone solution working with a licensing mechanism allowing for flexibility (eg: Smile 3 licensed for 4 simultaneous operator consoles: the 4 consoles do not need to run always from the same PC)
- Smile 3 is easy to install, to maintain, to use,...



Did you know that Smile 2 software for Meridian 1 and CS1000 attendant console solutions has been a bestseller in the market for several years?

More than 6.500 systems are already installed across Europe, Middle East and Africa.

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