

# CTI with RMAAdvanced

## *Introduction*

RMAAdvanced has integrated telephony functionality that allows incoming callers to have their account information displayed on the screen. In addition, there is an optional module called *Route Voice 2000* that allows for outbound calling. This document will address the CTI (Computer Telephony Integration) functionality for inbound calls.

## *How it works*

By connecting the RMAAdvanced system to a network telephone server, it will allow inbound callers to have their account automatically recalled to the screen of the customer service representative handing their call. To do this is a multi-step process.

1. Caller makes a call to the call center
2. Call is received in call center and directed to an available representative
3. In the phone switch, it will use a TAPI interface to pass the Caller ID number read from the inbound line to the workstation that is connected to the extension of the customer service representative.
4. Then, the Caller ID number is matched with account data in RM2000/RMAAdvanced.
5. If there is a match, the first account number that is located is brought up on the screen for the customer service representative. It can then be viewed or edited according to the security privileges of the user.

## *What is required...*

In order for the CTI to work, it will be necessary to have the following:

1. Caller ID on incoming phone lines
2. A phone system that complies with the TAPI interface
3. The phone system must be connected to the network.
4. There must be phone numbers in the RMA system for customers. This will match up with the CALLER ID so that a match can be made.
5. In the RMA system, there is set up required. Both in the Branch and local settings. See the document to install and utilize CTI.

## *Pros and Cons*

CTI is not perfect. While it can be a tool to help save time, there are some things you should be aware of:

- ▶ Generally the caller ID functions better from a residence than a business. Often times businesses have multiple lines and the one used to call may not be the one recorded on the customer account information.
- ▶ If a caller has their Caller ID blocked, then it will not be able to look up an account.
- ▶ If the caller dials from another number (like a neighbor's phone), it will not be able to find the account and in some cases may retrieve the wrong account.

- ▶ Be sure to capture cell phones, and alternate phone numbers in the customer information. This will increase the odds of finding the correct account when the customer calls in.

### *Summary*

CTI functionality can be successfully used with Route Manager Advanced. For it to work properly, it is necessary to have each component correctly in place. In addition, the expectation for performance should be tempered with the technology available.