



TeleVantage for Credit Unions

Open Systems IP-PBX

Exception quality of service and the personal touch are what distinguish credit unions from other banking institutions. Accordingly, you need a phone system that handles members' calls efficiently and effectively, allowing your staff to project the professionalism and maintain the member trust that is such an integral part of your business. You need to assure your members that they made the right banking choice — and that you value their business — with each communication.

TeleVantage® maximizes your telephone interactions and enables you to deliver the personal touch in a 24x7 environment. With TeleVantage, you will have the confidence that comes from purchasing a phone system that will best serve your members, while also providing a user-friendly experience for your staff.



TeleVantage is a flexible, affordable IP-PBX that enhances member service, increases productivity and improves the bottom line.

Key Benefits:

- Offer personalized service
- Increase productivity and efficiency
- Integrate with vital business applications
- Simplify communications across multiple locations
- Keep remote employees connected
- Reduce administrative expenses and service calls
- Record and archive calls without expensive add-on equipment
- Ensure quick disaster recover and security
- Optimize staff performance
- Protect your investment with open-systems architecture

A Member-Oriented Tool for Enhancing Services

"Once we integrated TeleVantage into our working environment, we realized this was something we had needed for a long time."

*Michael Landis
Colorado United Credit Union*

Vertical's TeleVantage maximizes telephone efficiency across your enterprise. Designed on an expandable, open-systems architecture, the system's menu of user-friendly features dramatically improves the quality of service you deliver to your members. And with virtually no learning curve, your business will begin seeing positive results from the very first day.

Offer personalized service

The confidence and trust that you have built with your members sets your credit union apart from other financial institutions. TeleVantage helps you nurture these relationships with individualized member service features, such as personalized voice mail greetings, and ensuring that a member's call is routed to a specific service representative every time. This specialized treatment reinforces each member's significance as a VIP and not just another account number.

Increase productivity and efficiency

TeleVantage turns the telephone into a time and money-saving tool, with an easy-to-use graphical interface that makes all your phone tasks quick and easy. Play (and replay) important voice mail messages first – no more wading through lists, or endlessly hitting the pound key. Easily transfer or record calls, or set up conference calls with a few simple mouse clicks. To help you juggle multiple incoming calls, TeleVantage identifies who is calling so you can always take important calls first. To return calls, simply point-and-click on the number. TeleVantage saves time and makes your entire organization more efficient and productive.

Integrate with vital business applications

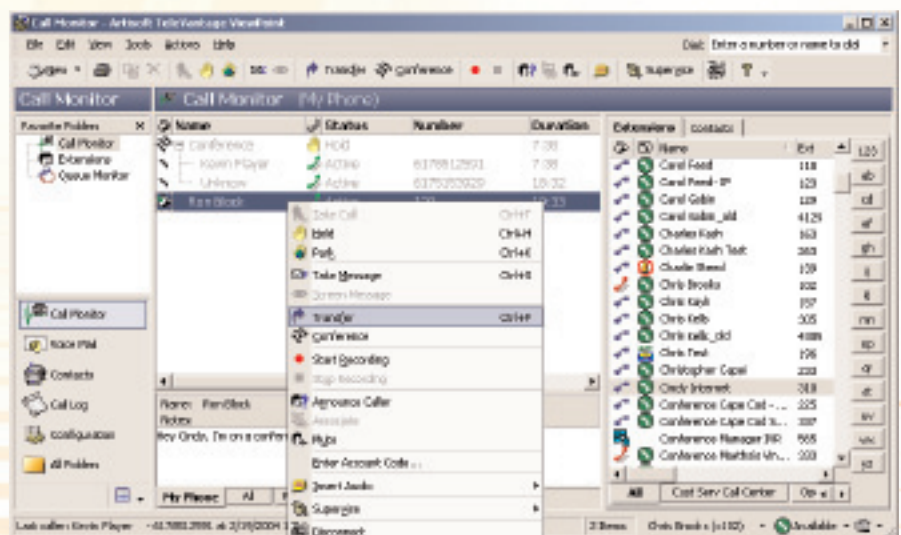
The open architecture of TeleVantage allows it to easily integrate with other software programs that are critical to your business, including popular host data processing systems. A member's account record or other business-related data can be pulled up automatically as a call is being answered. With TeleVantage, you can immediately have caller information at your fingertips, allowing your staff to answer questions efficiently and intelligently.

Simplify communications across multiple locations

The benefits of TeleVantage can easily be expanded to multiple locations. You can operate all of your branch locations as a single telephone system, streamlining communications and service. Administer your TeleVantage system from one central location, saving duplicate system costs and ensuring a consistent, positive experience for all of your members. And by utilizing site-to-site Voice-over-IP (VoIP), TeleVantage eliminates long-distance toll calls to your other locations, resulting in instant savings on your phone bill.

Keep remote employees connected

Whether they're working from home or visiting another branch, TeleVantage keeps all employees completely connected. With seamless call forwarding, callers simply dial one phone number and TeleVantage will try as many internal extensions or external numbers as needed to find you, sequentially or simultaneously. Eliminating "telephone tag" will dramatically improve member service and satisfaction. And home phones, cell phones, or home office IP phones are fully functional TeleVantage office extensions, providing the same powerful features no matter where you are located.



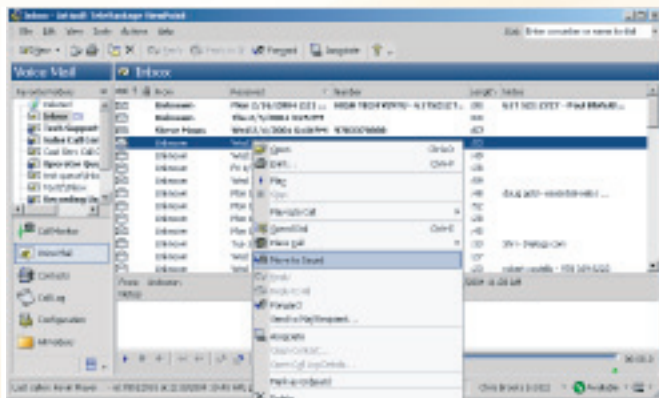
Descriptive Windows-based pull-down menus make it easy to perform any call handling command with the click of a mouse.

Reduce administrative expenses and service calls

TeleVantage is both simple and inexpensive to maintain. Changes such as adding or moving users or voice mailboxes can easily be made in-house, eliminating the downtime spent waiting for outside service vendors. TeleVantage is software-based, allowing you to modify it quickly and easily using basic point-and-click commands. The wide range of advanced, cost-effective features, easy administration and maintenance, and near-limitless expansion and flexibility make TeleVantage a quick return on your investment.

Record and archive calls without expensive add-on equipment

TeleVantage provides a flexible solution for recording and archiving telephone interactions, without invading the privacy of your members and employees. And, unlike other telephone systems, these capabilities can be performed without purchasing expensive add-on equipment. TeleVantage lets you specify only which



The easy to use PC interface lets you prioritize your voice mail, record and archive important messages and quickly access your call history - all with a point-and-click.

phone lines, extensions or queues to record, allowing others to remain private. You can also record and store conversations on demand with the click of a button.

Ensure quick disaster recover and security

The ability to quickly restore your communications capabilities is a critical component of a disaster recovery plan, and TeleVantage provides a stable solution for ensuring business continuity during emergency situations. In the event of an extended power outage, fire, or other circumstance that prevents business from being conducted from your usual location, TeleVantage makes it easy to carry on business as usual. All auto

attendant prompts, call recordings, voice greetings, voice mail messages, call rules, call logs, etc., can either be backed up locally or kept at a remote location in the same manner as your financial records. Additionally, automated call routing lets employees take calls from any temporary location. Calls can be re-routed from one branch location to another, and your members need never know where their call is being serviced. And since TeleVantage sits on your network server inside your firewall, your phone system, contact lists, and member information are just as secure as the other data on your server. This assures privacy for your members and the safety of their investments.

Optimize staff performance

TeleVantage ensures high quality service for your members while improving the productivity of your staff. With the optional TeleVantage Call Center, incoming calls are distributed intelligently and efficiently, ensuring that heavy call volume won't result in dropped calls or long hold times. It can generate a full suite of statistical reports that enable you to optimize staffing levels and measure service performance. TeleVantage can also help you train new service representatives quickly and effectively using the call coaching and monitoring features.

Protect your investment with open-systems architecture

The open architecture of TeleVantage lets you add and subtract features as your phone system needs change. It also provides the flexibility you need as your business grows. No longer will you be locked into using a single vendor or proprietary hardware. TeleVantage easily accommodates your changing system needs today and tomorrow. It never becomes obsolete – it only becomes more useful over time.

TeleVantage Features

Complete software-based phone system

- Full PBX functionality
- Phones stay up during power or server failure
- Built-in extended 911 service
- RAID drives and UPS support
- All trunk types supported (Analog, BRI, T-1, E-1, ISDN PRI/CAS, Internet)
- Expandable to 288 trunks, 720 stations
- Analog, digital, IP phones
- Built-in IVR Toolkit
- Multiple music on hold sources

Powerful call control

- Voice guided multi-lingual telephone interface
- Easy Windows-based desktop interface
- Cross-platform web browser interface
- Screen calls with PC or phone
- Visual multi-line call handling
- Caller ID display on PC or CLASS phones
- Drag-and-drop transfers and conferences
- One-click conference on call waiting
- High density (up to 60 party) conference calls
- Grab and hold ringing calls
- Park / unpark calls
- Ringback for calls left on hold or parked
- Pick up calls within workgroup or company
- Extensions pane with user "on phone" status
- Personal Call Log with notes
- Customizable ring patterns for call types
- Automated call handling by personal status
- Do Not Disturb, Out of the Office and other custom statuses
- Automated busy handling and camp on
- Intercom and paging through phones
- Whisper announce
- Hot line automatic off hook calling

Full-featured voice mail

- Visual voice mail display with caller name
- Click to reply, forward, or call back a message
- Export to .WAV file
- Password security, enforceable rules
- Screen messages as they're being left
- Pull callers out of voice mail
- Bookmark important sections of long messages
- Callers can specify callback number
- Multiple personal greetings
- Personalized greetings for special callers or dates / times
- E-mail/pager/call out notification of new messages
- Voice mail delivered to unified e-mail inbox
- Microsoft Exchange synchronization
- Urgent and private message flags
- Remote access via phone or Web browser
- Auto-delete old messages
- Custom, sharable message folders

- Adjustable maximum message length
- Message waiting light
- Stutter dial tone to indicate new messages
- Automatic dialing to return call

Integrated contact management

- Company, workgroup and personal contacts
- Contact identification w/o requiring caller ID
- One-click dialing
- Use existing contact databases
- Custom shareable contact folders
- Custom call routing and greetings by contact
- Screen-pops for contact calls
- Change language based on contact
- Predefine account codes per contact
- Act!, Outlook, Goldmine, FrontOffice support

"Follow-me" call forwarding

- Easily route calls to multiple internal or external locations
- One-key forwarding to where you are
- Forward calls differently by caller or personal status
- Screen forwarded calls using verbal prompts
- Password-protect forwarded calls

Multi-level auto attendants

- Automated or receptionist answering
- Extension dialing or DID
- Dial-by-name directory
- Schedulable greetings and routing for holidays and off-hours
- Record or import greetings and menu prompts
- Caller choices can deliver custom data to agent screen pops or change language (e.g. Spanish)
- English (US and UK), Spanish, French (Parisian and Canadian) and German language support
- Timeout routing to any extension or attendant
- Auto fax detection and routing

Point and click administration

- Windows-based administration from any location on the network
- Software-based trunk setup
- Device Monitor for real-time trunk/station status
- Comprehensive exportable call log
- Public and personal workgroups
- Easily add, delete and modify users
- Individual or role-based permissions
- Multiple tenant or department support
- Dialing and feature restrictions
- Account codes: forced, verified or optional
- Configurable routing services for least cost routing
- Trunk usage reports
- Monitor use of system space and resources
- E-mail notification of alerts, special events
- Context sensitive help, on-line manuals

Internet ready

- Easy-to-use Internet trunks and dialing services
- Standard H.323 VoIP support
- IP Gateways tie distant Servers together
- Call local numbers from remote servers
- Microsoft NetMeeting "Click to call" support
- Phone support

Remote access from anywhere

- Complete visual access via Web browser
- Graphical call control for remote, cell, IP phones
- Phone login for voice mail and account setup
- Remote call screening
- Change greeting, forwarding and personal status from any phone

Comprehensive call center

- Single-point access to create and manage queues
- Call distribution based on agent performance, top down, round robin, simultaneous ring
- Redirect calls if queue is too busy
- Inbound / Outbound/ Blended queues
- Coaching and monitoring to train new agents
- Real-time agent and queue statistics
- Full-featured Call Center Reporter based on Microsoft Excel
- Automatic call recording by queue or agent
- Multiple, threshold driven hold prompts
- Bail out options to voicemail, or any extension
- Priority routing for important callers
- Multi-tier overflow agents
- Individualized agent and supervisor permissions
- Queue sign in / out, break, unavailable status
- Customizable wrap-up time per agent

Extendable, open, standards-based

- Easy software-only upgrades
- MAPI and SMTP e-mail support
- TAPI service provider support
- SMDR interface support
- SQL Server database
- COM-based SDK for custom add-ons and IVR development
- Extendable user menus and toolbar

Minimum server requirements:

- Pentium 400 MHz PC
- 256 MB RAM
- Windows 2000 or 2003 Server, Windows 2000 or XP Professional
- Intel Dialogic telephony boards
- Any standard phone: speaker, corded, cordless or CLASS or ADSI feature phone

About Vertical

Vertical Communications, Inc. is a leading provider of next-generation IP-based voice and data communications systems for business. Vertical combines voice and data technologies with business process understanding to deliver integrated IP-PBX and application solutions that enhance customer service and business productivity. Vertical's customers are leading companies of all sizes -- from small to large and distributed -- and include CVS/pharmacy, Household International, and Apria Healthcare. Vertical is headquartered in Cambridge, Massachusetts and delivers its solutions through a worldwide network of systems integrators, resellers and distributors. Visit <http://www.vertical.com> for more information.

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About TeleVantage

Vertical's TeleVantage is feature-rich, software-based phone system that combines the power of desktop computing with the most advanced communications technology available. TeleVantage delivers greater functionality, flexibility, and value than proprietary PBXs to a variety of customers, from small offices to large enterprise organizations with sophisticated call centers. Built on open-systems architecture and supported by world-class Intel hardware, TeleVantage provides more value today while safeguarding investments for the future.



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