

TeleVantage for Mortgage Companies

Open Systems IP-PBX

The telephone is your business' lifeline to current customers and a crucial sales tool with prospects. You know that a mishandled call or one that never gets returned can result in a negative impression and a lost opportunity. You need to prioritize your calls and messages, handling the important ones immediately while making sure that others don't disrupt pressing business. And if you are unable to take a call, you need the security of knowing that your phone system will handle it efficiently and professionally, 24 hours a day.

TeleVantage® maximizes your telephone interactions, helping you increase customer satisfaction and staff productivity. With TeleVantage, you can rest assured that your valued customers will receive the best service every time they call – a distinction that will result in repeat business and a steady flow of new referrals.



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

Key Benefits:

- **Increase productivity with point-and-click interface**
- **Enhance customer service with personalized call handling**
- **Track marketing effectiveness**
- **Integrate with customer databases**
- **Maximize call handling**
- **Shorten transaction time**
- **Monitor and improve employee performance**
- **Optimize staffing levels**
- **Simplify communications across multiple locations**
- **Protect today's investment and ensure future flexibility with open systems architecture**

A Powerful Solution to Maximize Your Business

"The cost savings were immediate and the value and features are endless."

*Victor Sanchez
President
Nationwide Home Loans*

Vertical's TeleVantage matches a robust feature set with an unparalleled ease of use and administration to provide your business with a competitive advantage. Designed on a flexible, open systems architecture, TeleVantage ensures that time-critical calls will reach you and that all calls are handled with courtesy, professionalism and care. And with virtually no learning curve, your business will begin seeing a return on its investment from the very first day.

Increase productivity with point-and-click interface

TeleVantage makes all of your phone tasks quicker and easier, increasing productivity and saving money. With the easy-to-use graphical interface, you can manage your calls visually. View your voice mail messages and play the important ones first rather than having to wade through them in chronological order, endlessly hitting the pound key. Easily transfer, forward or record calls with a simple mouse click. With TeleVantage, you don't need to remember or write down phone numbers, just point-and-click to quickly return calls or start a new call from your contact database.

Enhance customer service with personalized call handling

In the competitive mortgage market, personalized service is what sets you apart from the rest. TeleVantage lets you offer customers unique and individualized attention, demonstrating that you value their business. The system's automated attendant can be tailored to meet the specific needs of your business and your customers, such as adding menus and messages in multiple languages to reach particular customer segments. You can also provide VIP service to your most valued customer with personalized voice mail greetings.

Track marketing effectiveness

TeleVantage helps you expand your business and attract new customers. By assigning unique phone numbers or extensions to advertising campaigns, TeleVantage can track the response rate to help you determine the cost and effectiveness of a particular ad. With caller information displayed, sales associate can tailor their response based on the ad that prompted the inquiry to immediately establish rapport and deliver personalized attention and service. This is one more way that TeleVantage helps you make the most of a business opportunity.

Integrate with customer databases

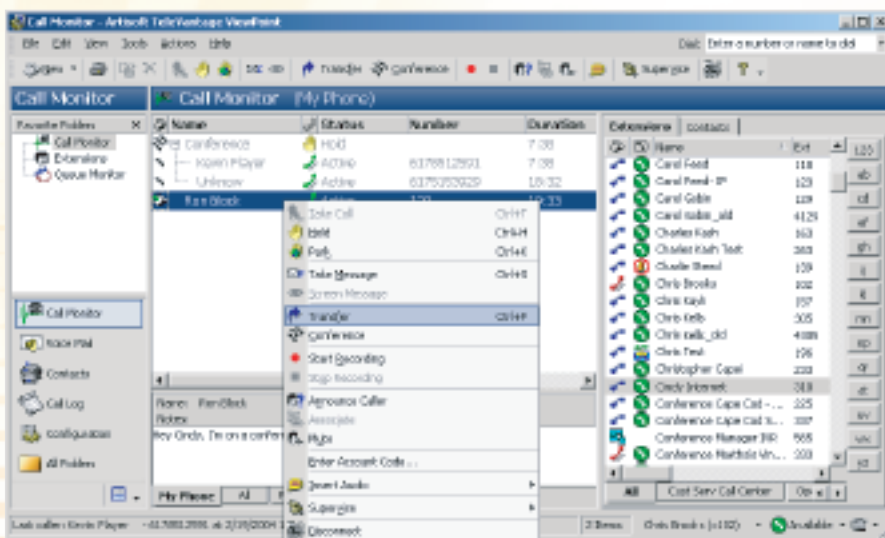
TeleVantage can easily integrate with CRM systems or contact databases. A customer's record can automatically pop up on your PC screen as the call is being answered, eliminating the time wasted in manually retrieving the information. This enables a sales associate to answer the call intelligently and quickly update a customer on the status of their loan application.

Maximize call handling

In a busy mortgage company, answering calls during peak times can be a challenge, but TeleVantage enables you to optimize customer service and handle more calls, easily and professionally. TeleVantage puts an end to dropped calls, long hold times or misdirected transfers as callers can dial an individual directly, speak with a receptionist or use the automa-

"We were able to increase the number of calls we answered by more than 40 percent in one week."

Martin Williams, CEO, Millennia Mortgage

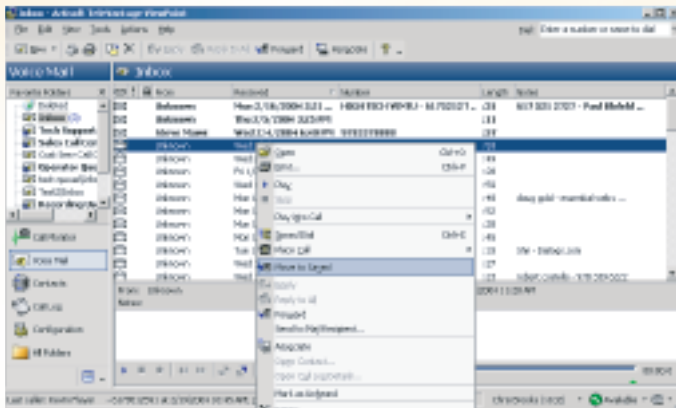


Descriptive Windows-based pull-down menus make it easy to perform any call handling command with the click of a mouse.

ed attendant for quick and easy access to the information they need about mortgage rates or the status of their loan. TeleVantage automates repetitive inquiries, such as responding to calls about business hours or directions, enabling staff to answer more sales calls and improve productivity.

Shorten transaction time

A missed phone call can mean a lost sale or dissatisfied customer – but TeleVantage lets you improve customer service and close sales faster by making sure that callers connect the first time. Call screening lets your staff know which calls to take, such as VIP customers or important prospects, eliminating the telephone tag that impedes sales. Follow-me call forwarding easily routes calls transparently to sales staff's cell or home phone, resulting in a quicker response to customers and a shorter sales cycle.



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.

Monitor and improve employee performance

Since most of the mortgage process is conducted over the phone, it is important that sales staff know how to respond professionally to all situations. With TeleVantage, it is easy to record all or a random sample of calls which can then be used to train sales staff in handling difficult situations, closing the sale or providing first-class customer service. Additionally, TeleVantage enables a supervisor to coach a sales associate in real-time. The supervisor can listen in on a call and prompt the sales associate when necessary while the caller is unaware of the supervisor's presence. These capabilities help increase sales and improve service, while also reducing the time new sales associates need to develop confidence and effective telephone procedures.

Optimize staffing levels

With TeleVantage, you will never have to guess if you need to make changes to your telephone staffing levels. TeleVantage provides comprehensive reports that track incoming call volume on an hourly, daily, weekly, or monthly basis, letting you identify peak times when additional staff is needed as well as slower times when resources can be best used elsewhere. It also allows you to measure in real-time how quickly calls are being handled and alerts you if calls are remaining on hold for long periods of time. TeleVantage helps you maximize staffing resources for efficiency and productivity.

Simplify communications across multiple locations

The benefits of TeleVantage can be easily expanded to multiple locations. You can link several offices on the same system, streamlining communications and service. And by utilizing site-to-site IP telephony, TeleVantage eliminates long-distance toll calls to your other locations, resulting in instant savings on your phone bill.

“For the same price that it was going to cost me to upgrade my existing system, I could buy TeleVantage — and now I have so many more features! It provided me the most for my money.”

Mike Miget, President, Shelter Mortgage Company

Protect today's investment and ensure future flexibility with open systems architecture

The open architecture of TeleVantage lets you choose the components that best meet your requirements. It also provides the flexibility you need as your business grows. No more getting locked into a single vendor or proprietary hardware – TeleVantage easily accommodates your preferences and changes, today and tomorrow. TeleVantage never becomes obsolete – it keeps getting better 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 is a leading provider of open systems IP-PBX and call center products that deliver advanced functionality, flexibility, and value to medium-size business, branch offices, and call centers. Vertical's innovative software products have consistently garnered industry recognition, winning more than 35 awards for technical excellence. The company distributes its products and services worldwide through a dedicated and growing channel of authorized resellers. For more information, please call 800-914-9985 or visit our website at www.vertical.com.

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About TeleVantage

TeleVantage is an open systems IP-PBX that delivers unprecedented communications capabilities to medium-size businesses, branch offices and call centers. The flexible software feature set makes it easy to customize and administer, allowing businesses to improve customer service and enhance productivity. Built on industry standards and supported by world-class Intel® technologies, TeleVantage eliminates the need for proprietary hardware, enabling it to grow and evolve as business needs change while maintaining a low cost of ownership.



Vertical Communications, Inc.
5 Cambridge Center
Cambridge, MA 02142
800-914-9985
www.vertical.com