



Transform workflow and customer experience

# connectx



ideas that change everything

**oak**   
innovation

# ConnectX

## ...smarter ways to do business

Transform workflow, professionalise service, and improve the customer experience. ConnectX brings everything together.

### Fuel effective communications

More and more organisations are prioritising digital transformation to drive a competitive edge, choosing solutions that work together seamlessly for greater speed, accuracy, productivity and connection with their customers.

ConnectX is a contact management solution that brings static data to life through telephony integration\*. It makes data easy to access, use and add information to your CRM during day-to-day interactions with customers and colleagues, simplifying workflow, reducing errors and improving service.

### Tools to keep you on target

#### 1. Provide a personal service

When a call arrives, ConnectX previews the caller's telephone number and name. The call handler can click through to the full client record or integrated application to provide an efficient and helpful service.

#### 2. Keep records up to date

When receiving a call from an unknown telephone number, ConnectX makes it easy to identify new numbers and update records. Accurate customer information saves wasted time when making outbound calls or sending texts.

#### 3. Call recording integration

When deployed with Oak's award-winning call recording, voice records can be indexed with customer account data to simplify search for compliance and dispute resolution purposes.

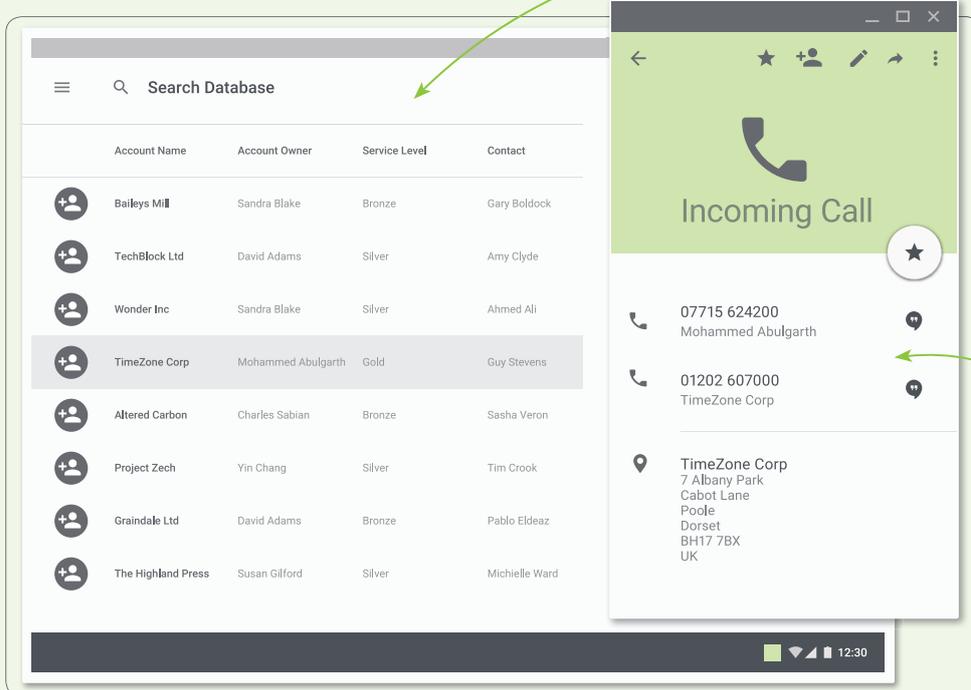
#### 4. Get in touch fast

On-screen click-to-dial simplifies outbound calling to reduce errors and save time in a busy customer-focused environment. Dial from call history, shared address book, CRM database, supported applications, web pages or clipboard.

\* Available for Unify OpenScope Business, Avaya IP Office and Mitel/ShoreTel ShoreGear



## CRM integration



**Customer Database**  
Automatically open the customer record with a single click.

**Phone Window**  
Incoming call with demographic information to verify caller.

Choose from 100's of CRM integrations.

Here are a few examples:

### ACT!

Connectwise  
eGroupware  
Address Book  
Goldmine  
Google Contacts  
IBM Notes  
LDAP  
Maximiser  
Microsoft Access  
Microsoft Dynamics  
Microsoft Outlook  
National Directories

### NetSuite

ODBC  
Sage  
Salesforce  
SalesLogix  
Sugar CRM  
SuperOffice CRM  
vTiger  
Xing  
Zoho CRM

### GP Practices

EMIS Web  
TPP System One  
Vision Health  
Dental Practices  
Software of Excellence  
Carestream Dental R4  
Schools  
SIMS  
Facility  
iSAMS

### Recruitment

Bond Adapt  
RDB Pronet  
Colleague  
Microdec  
Hospitality  
ResDiary  
OpenTable  
Housing  
Aareon QL  
Property  
Reapit  
Dezrez

Need an integration not listed here?

Please contact your account manager to discuss your requirements.

## With Oak it's different

Oak has been capturing vital communications data for more than 30 years, with a passion for creating innovative solutions that provide critical information for strategy, service improvements and growth.

### Innovation is at our core

We combine technical knowhow and creative flair in products anyone can use. We ground big ideas in real solutions allowing businesses to do things they couldn't before, or to do them better.

### We put our customers first

We take time to understand the goals and needs of each of our customers, and design our solutions accordingly. We're known for our friendly yet highly professional staff who are there for you at every step of the process: initial consultation and product demonstration to ongoing support from our UK helpdesk.



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