

# Xchange Sales Presentation

# SAMSUNG XCHANGE

# Introducing Xchange

- Multi-platform CTI product
- Designed to help users make optimal use of their Samsung business telephone system.
- Full control of their handset from their computer.
- Integration with a wide range of CRMs and other applications.

Compatible with  
Samsung OfficeServ  
and  
SCM Express  
communication  
platforms.

# SAMSUNG XCHANGE

Samsung OfficeServ



SCM



## Samsung Xchange Benefits

- Know who is calling (before the call is answered).
- Quick access to the caller's full details.
- Improves call handling and the caller's experience.
- Find contacts quickly from "recent dial" and "call history" lists.
- Store regular contacts in a shared address book.
- Locate and dial contacts from CRM databases and other integrated applications.
- Improve collaboration between office and mobile users.



# What's New in Version 2.5?

- **PRESENCE window**

- Multi-device users (“+” sign)
- Combined view \*
- Docking
- Send Email
- Groups

- **Availability status and actions**

- User Selectable
- Auto Sense
- **Availability-based actions \***

- **MULTI-DEVICE users**

- Preferred device \*
- All Device caller preview \*

- **Address Book** (Transfer and Consult)

- **Operator Console** (Scripts)

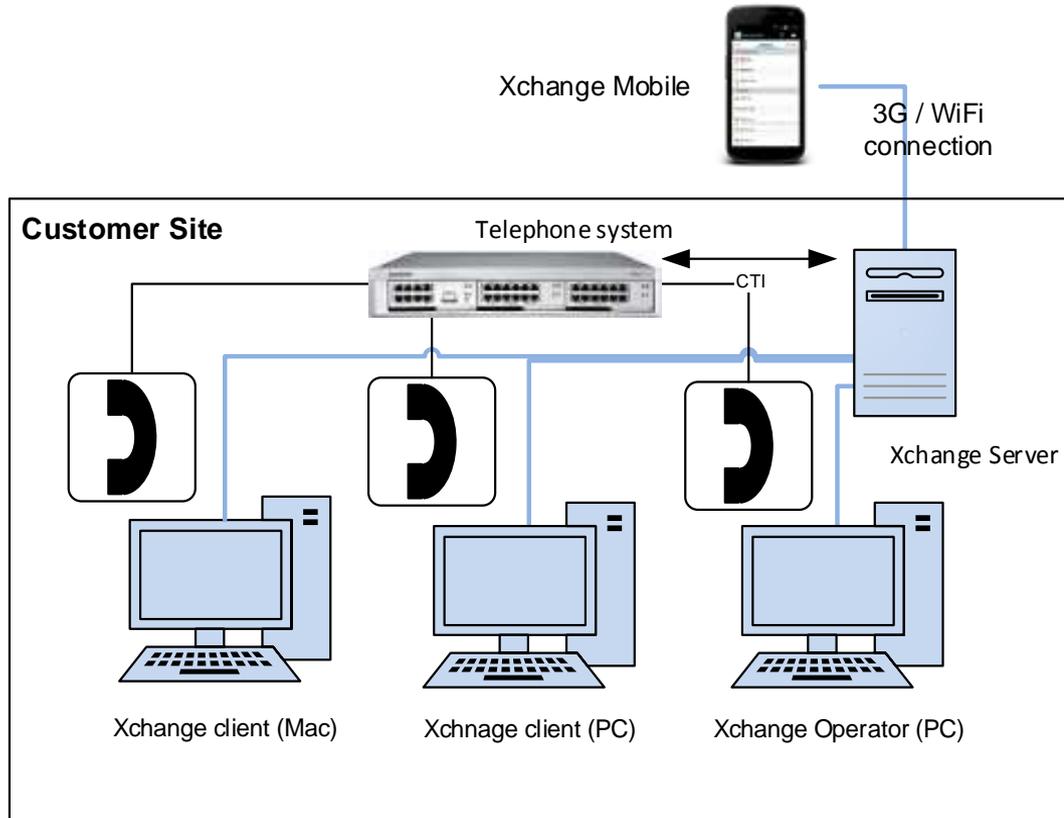
- **Miscellaneous**

- Preview screen positioning
- Busy Light integration
- Lync Support
- Online help

*\* Available in “Presence” and “CRM” versions*

# Xchange Product Architecture

# Product Architecture



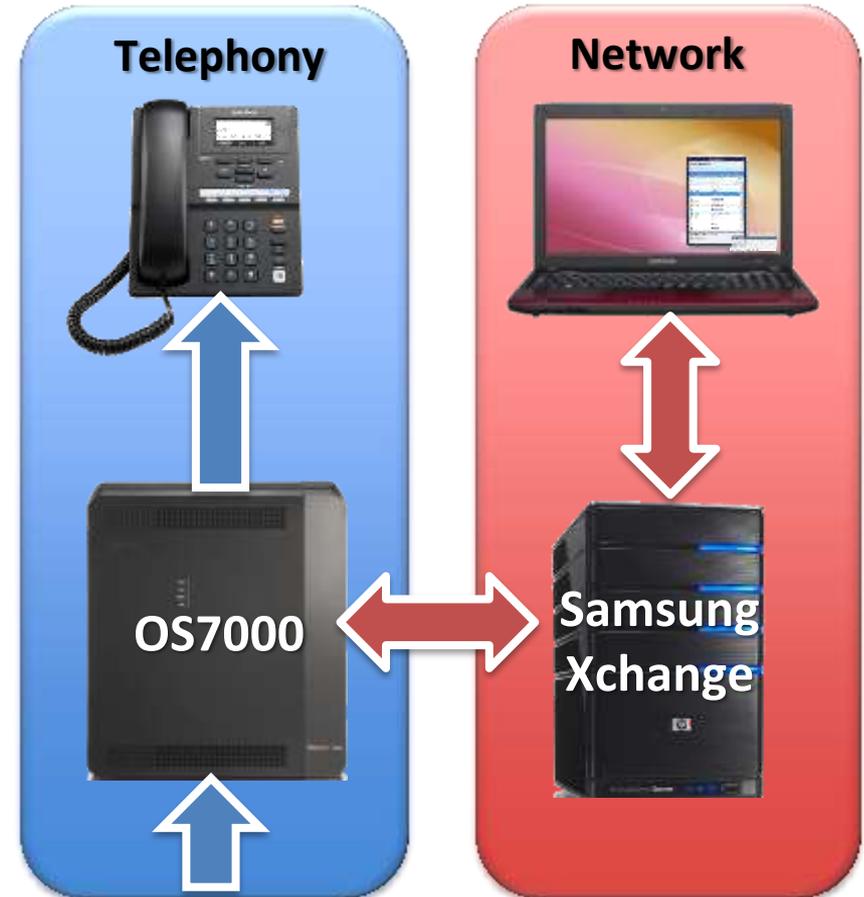
Compatible with  
Samsung OfficeServ  
and  
SCM Express  
communication  
platforms.

*This presentation is primarily focused on the OfficeServ platform*

## Product Architecture OfficeServ (Option 1)

### Single CTI application

- Samsung Xchange server connects to the OS7000 through an IP network.
- Samsung Xchange client connects to Xchange server through an IP network.
- Digital or IP handset connects in the normal way.
- OS Link and Open TSP are **NOT required.**

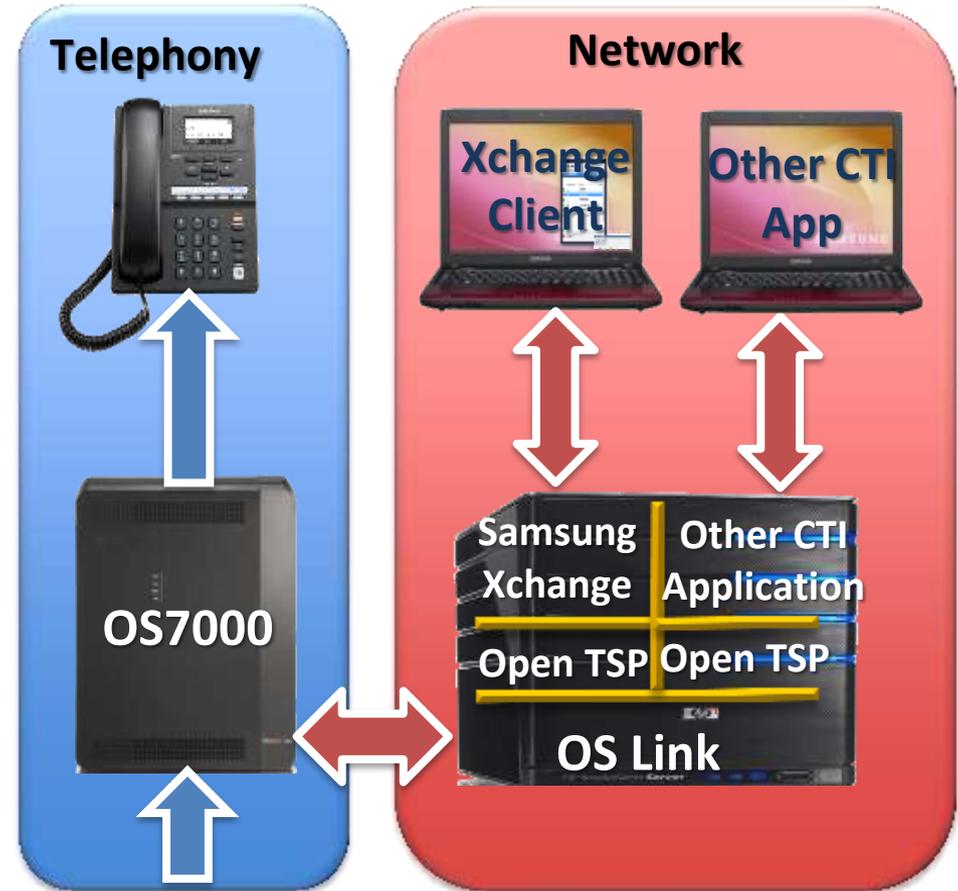


## Product Architecture OfficeServ (Option 2)

### Multi CTI applications\*

- OS Link and OS Open TSP **required**.
- Xchange server connects to OS Open TSP.
- Xchange client connects to Xchange server through an IP network.
- Digital or IP handset connects in the normal way.

\* Any other application used that requires OS Link; e.g., EasySet, OS Operator (not Xchange Operator), OS Messenger, OS Call, OS Call Center Agent, requires this configuration.



Xchange  
PC Client

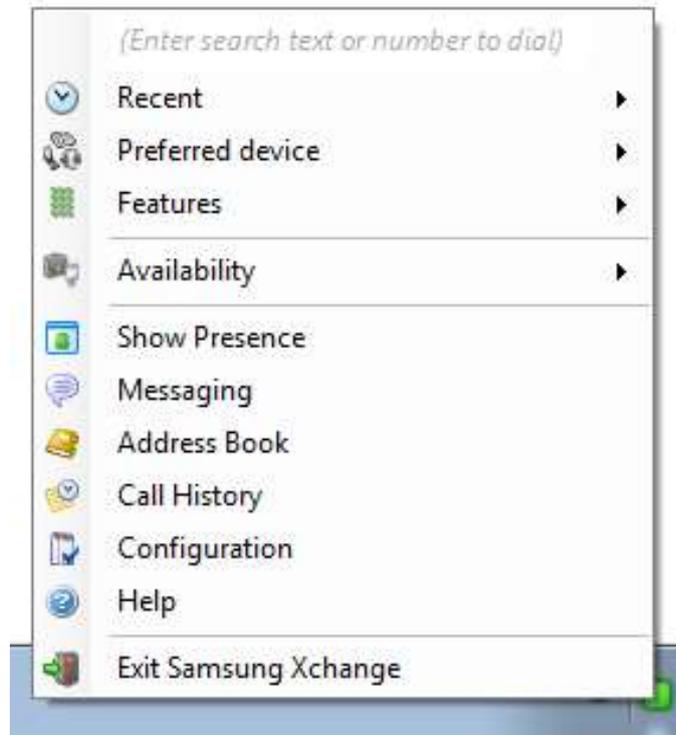
# PC Client

- Available as “Dial”, “Presence” and “Integrator” versions.
- Same basic functionality available in all versions, including Microsoft Outlook, Lotus Notes and Google Contacts.
- Most new features in 2.5 are available in all three, but some are exclusive to “Presence” and “Integrator” (e.g. preferred device, presence combined, all device preview, availability-based actions).
- “Integrator” version offers integration to supported applications.
- PC client interfaces include: System tray menu, Preview window, Presence window...



## PC Client: System Tray Menu

- Right clicking on the application icon in the system tray.

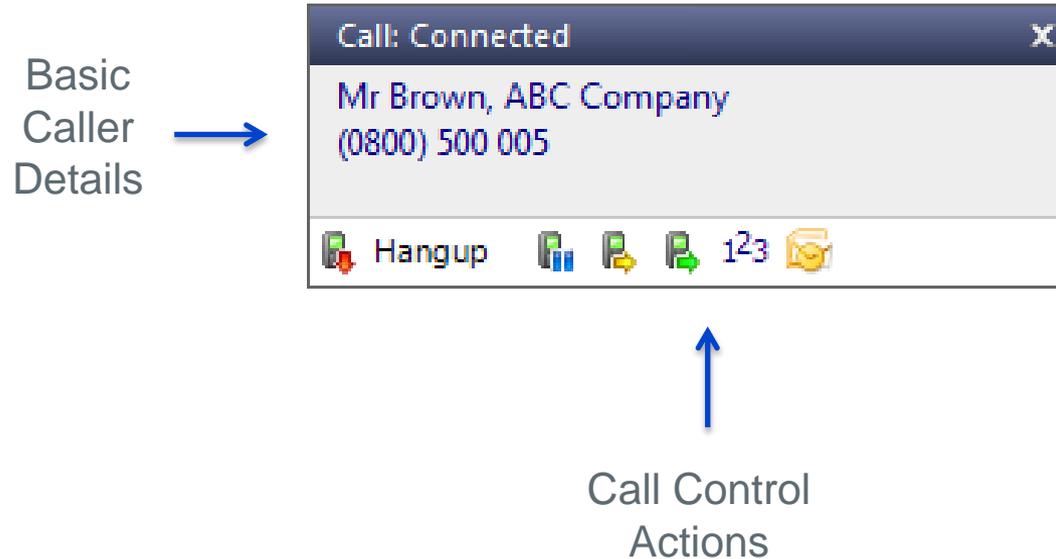


**New in Version 2.5**

The icon for  
Xchange users is  
now square

## PC Client: Preview Window

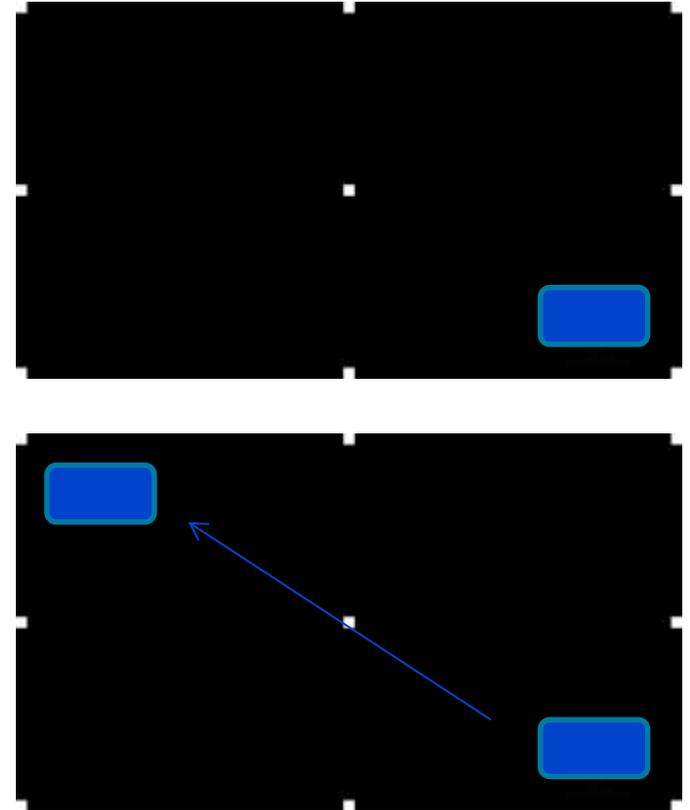
- Appears on inbound/outbound call (disappears shortly after call connects).
- Compact and unobtrusive.



## PC Client: Preview Window (Positioning)

- Can be re-positioned into any of the four quarters of the screen.
- Simply drag-and-drop into the desired screen quarter and the position will be remembered.
- The eventual positioning will always be in the far extreme corner of the quarter

**New in  
Version 2.5**



## PC Client: Call controls

- Actions vary if the call is connected or not -
  - **Hangup**
  - **Hold** (pause the call, user can hear “hold” music)
  - **Consult** (speak to person you are transferring the call to)
  - **Transfer** (transfer call to someone else without first speaking to them)
  - **Show Contact** (“pop” the contact details if they are in the shared address book).

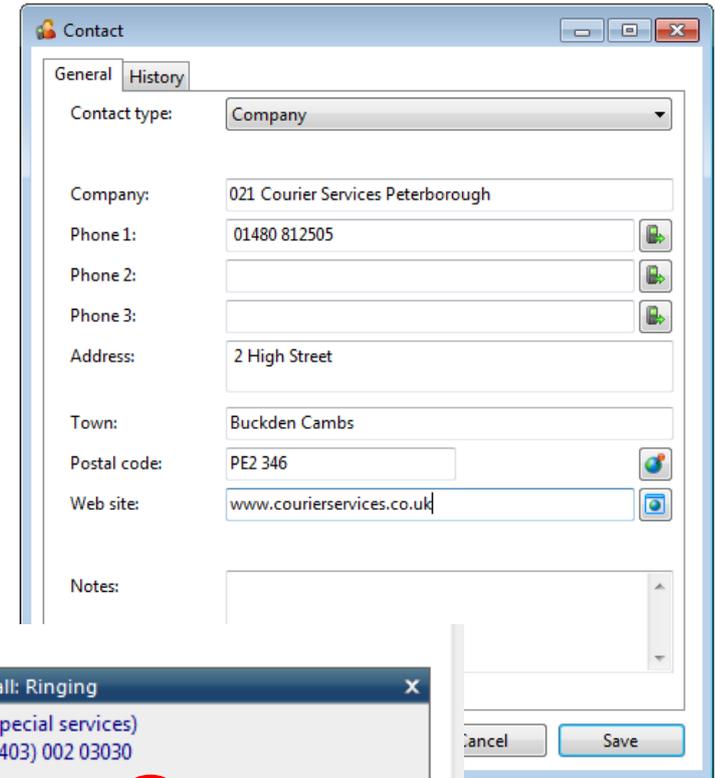


Optional integration  
into other  
applications.

See “Application  
Integration” later.

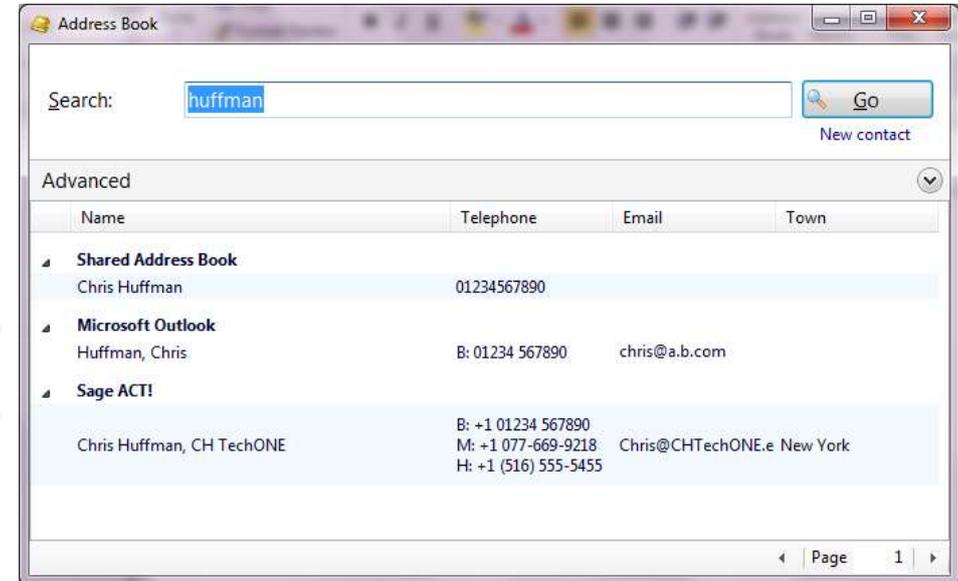
## PC Client: Shared Address Book

- Stored in a shared central location for access by all Xchange users.
- Create, edit and delete details of regularly used contacts.
- When talking to a known contact, click “Show Contact” to view their contact record.
- If they are not in the address book, click “New Contact” to add their details while on the call.
- Or you can add contacts afterwards via call history.



## PC Client: Contact Searching

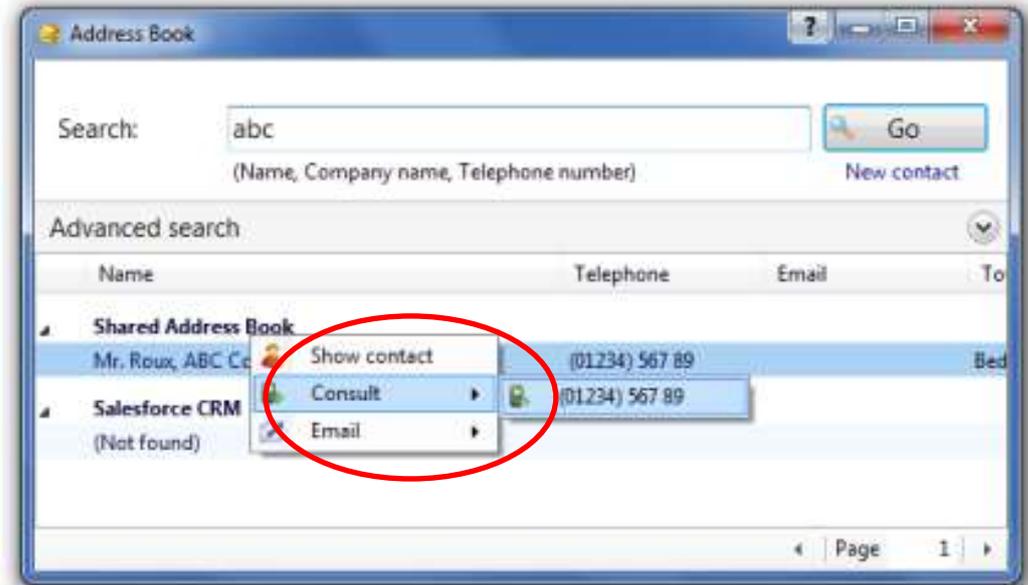
- Easy searching for contacts in the shared address book.
- All three version of the client can also search MS Outlook, Lotus Notes and Google Contacts.
- The “Presence” and “Integrator” versions can also search for contacts in any integrated CRM databases or applications.
- Once a contact is found, just click the required number to dial



## PC Client: Call Controls (from Address Book)

- “Consult” and “transfer” are available directly from the address book.
- Just right-click on any name in the search results

New in  
Version 2.5



## PC Client: Presence

- Check status of colleagues in the Presence window.
- If they are “off hook”, you can see who they are talking to.

Telephone	Name	Department	State	Direction	Availability
<b>Administration</b>					
210	Clarence Roberts	Administration	On hook		
203	Patrick Mace	Administration	On hook		
204	Phil Driver	Administration	On hook		Available
<b>Reception</b>					
212	Libby McIntyre	Reception	On hook		
<b>Sales</b>					
211	Daniel Evans	Sales	On hook		
201	Ian Deacon	Sales	On hook		
202	Wendy Rowell	Sales	On hook		
<b>(None)</b>					
	Peter Welch		Offline		
	System		Offline		

## PC Client: Presence (Combined View)

- The “combined” view shows –
  - Users (square icon)
  - Extensions associated with users
  - Extensions *not* associated with users
  - Call Groups

The screenshot shows the Samsung Xchange PC Client interface. The main window displays a list of users and their extensions, grouped by department. The columns are Telephone, Name, Department, State, Direction, and Availability. The list is organized into sections: Administration, Reception, Sales, and (None). A context menu is open over the list, showing options for 'View', 'Group by', and 'Sort by'. The 'View' menu is currently set to 'Combined'. A yellow sticky note indicates 'New in Version 2.5'.

Telephone	Name	Department	State	Direction	Availability
<b>Administration</b>					
210	Clarence Roberts	Administration	On hook		
203	Patrick Mace	Administration	On hook		
204	Phil Driver	Administration	On hook		Available
204	Phil Deskphone	Administration	On hook		Available
304	Phil Softphone	Sales	On hook		
504	Phil Mobex	Sales	On hook		
303	Patrick Mace (Softphone)	Administration	On hook		
<b>Reception</b>					
212	Libby McIntyre	Reception	On hook		
200	Receptionist	Reception	On hook		
<b>Sales</b>					
211	Daniel Evans	Sales	On hook		
201	Ian Deacon	Sales	On hook		
201	Ian Deacon	Sales	On hook		Meeting
301	Ian Deacon (Softphone)	Sales	On hook		
501	Ian Deacon (Mobile)	Sales	On hook		
202	Wendy Rowell	Sales	On hook		
302	Wendy Rowell (Softphone)	Sales	On hook		
<b>(None)</b>					
	Peter Welch		Offline		
	System		Offline		

New in  
Version  
2.5

## PC Client: Presence (Multi-Device Users)

- A “+” sign next to a user indicates that multiple devices are associated with that user.
- Click the “+” to show all of the user’s devices and their statuses.

New in  
Version  
2.5

The top screenshot shows a user 'dea' with a '+' icon next to their name in a table, circled in red. The bottom screenshot shows the expanded view of the user's devices, including a mobile phone and softphone.

Telephone	Name	Department	State	Direction	Availability
+ 201	Ian Deacon	Sales	On hook		
201	Ian Deacon	Sales	On hook		Meeting
301	Ian Deacon (Softphone)	Sales	On hook		
501	Ian Deacon (Mobile)	Sales	On hook		

# PC Client: Presence (Docking)

- Available only on Windows 8 systems.
- The Presence window can be “docked” to the right-hand side of the user’s primary monitor.
- Set the width when normalized...and then click the maximise button.
- When other applications are maximised, they fill the left-hand portion of the screen, up to the left edge of the docked presence window

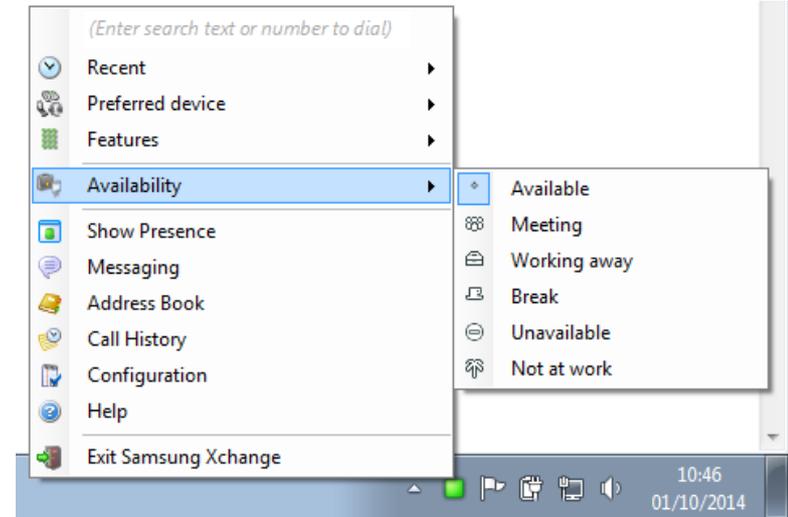


New in  
Version  
2.5

## PC Client: Availability (User Selectable)

- Users can set their own “availability”.

Availability State	Meaning
 Available	<i>Available</i>
 Meeting	<i>In a meeting</i>
 Working away	<i>Working but not in normal place of work</i>
 Not at work	<i>Not working, holiday.</i>
 Break	<i>Working but taking a break</i>
 Unavailable	<i>Not contactable</i>



New in  
Version  
2.5

# PC Client: Availability (Auto-Sense)

- Additional “auto-sense” states also now available.
- These states are not user selectable.



Availability State	Meaning
 Online Meeting	<i>User currently on an active online meeting or webinar (e.g. with GoToMeeting, TeamViewer meeting, Lync call, Webex or Skype call)</i>
 Away from desk	<i>User is working, but is temporarily away from their desk</i>
 Outside working hours	<i>It is currently outside the user’s “normal working hours”, as set in Exchange calendar</i>

# Microsoft® Exchange Calendar Integration

- An Xchange user's availability and status can be connected to their appointments and out-of-office settings in Microsoft® Exchange.
  - Also possible via standard Outlook integration, but only updates the user's status when PC Client is connected.
  - With Exchange Connect Calendar Integration, updates to availability are visible even when PC client is not connected.

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**XCHANGE**



## PC Client: Availability (Outlook Mapping)

- Outlook states map to Xchange states as follows -

Outlook	Xchange
Free	<i>Available</i>
Busy	 <i>Meeting</i>
Tentative	 <i>Meeting</i>
Working elsewhere	 <i>Working away</i>
Out of office	 <i>Not at work</i>
Outside working hours	 <i>Outside working hours</i>



## PC Client: Availability-Based Actions

- Program actions, based on availability state.
- Action can be programmed for *entering* (“on enter”) or *exiting* (“on exit”) the availability state.
- Configured on the “Availability” page of EVENTS section

*\* Available in “Presence” and “Integrator” versions*

New in  
Version  
2.5

**Availability**

Microsoft Lync

Update Lync state when on a call

---

BusyLight

Status: Not connected

---

Update handset availability

Update availability on the display of the handset

---

Samsung Xchange can perform a series of actions when the availability state changes. Configure the actions in the grid below.

State	On enter	On exit
Available	...	...
Meeting	...	...
Working away	...	...
Break	...	...
Unavailable	...	...
Not at work	...	...
Online meeting	...	...
Traveling	...	...

Save Cancel

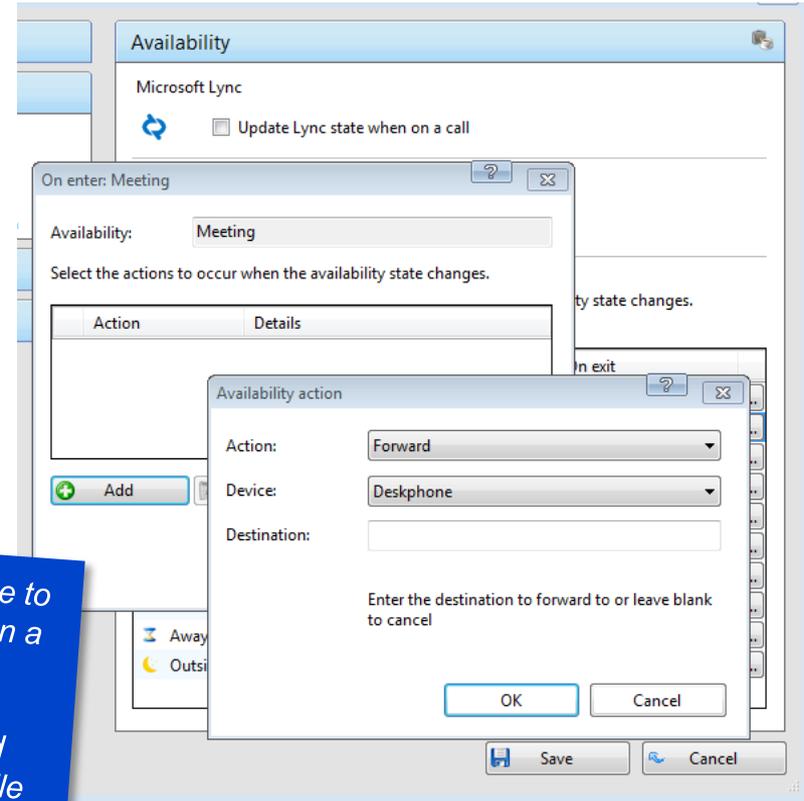
## PC Client: Availability-Based Actions

- Select the action
  - Forward to a device
  - Set DND
  - Select preferred device
  - Send feature code to the handset
  - Set Absence text
  - Send Message

*\* Available in “Presence” and “Integrator” versions*

*Set your desk phone to DND while you're on a webinar..!*

*Set your preferred device to your mobile when you are “working away”*



## PC Client: Availability (Busy Light Integration)

- Xchange now includes plug-and-play integration with Kuando Busy light.
- Now everyone in the office can see if you are available, busy on the phone, or simply do not wish to be disturbed...!



[www.busylight.com](http://www.busylight.com)

Xchange	<u>Busylight</u> colour
 - Available (Not on a call)	Green
 - Held	Fast flash yellow (250ms)
 - Busy ( On a call/Online meeting)	Red
 - Ringing	flashing red (500ms)
 - Do Not Disturb / Forward	Blue
 - Voice mail	Slow flash magenta (1000ms)

New in  
Version  
2.5

## PC Client: Receiving Forwarded Calls

- Calls forwarded to you from a busy colleague will display the origin of the inbound call.
- See the identity of the caller (and who they originally wanted to speak to) before you answer the call.
- In our example –
  - Inbound call to Wendy Rowell on Ext. 202 has been forwarded to you.
  - The inbound caller's details are also displayed.

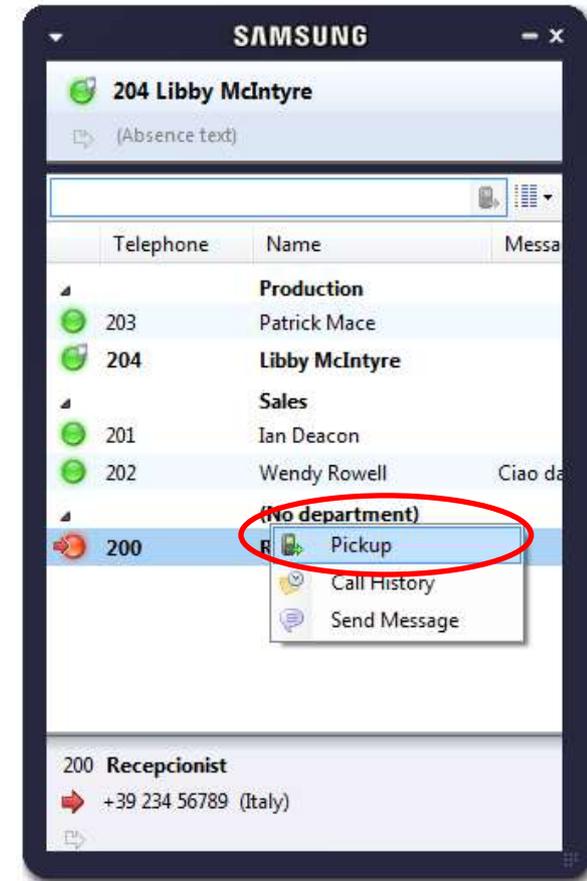


The inbound  
caller's details

Who they  
wanted to  
speak to

## PC Client: Pick Up

- You can also pickup an unanswered inbound call that is ringing on a busy colleague's phone.
- Reduce the number of missed inbound calls to you company.
- Reduce missed business opportunities...!

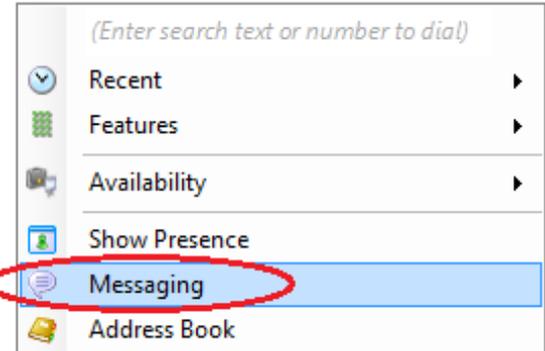


# PC Client: Messaging

- The PC client includes an integrated messaging window.
- Multiple windows are supported (one per conversation).
- Send a message to one or more of your colleagues.
- Rich text and hyperlinks are supported in the messages.
- Messages are displayed as a pop-up via the recipient's client.

Talk to colleagues even when they are on the phone!

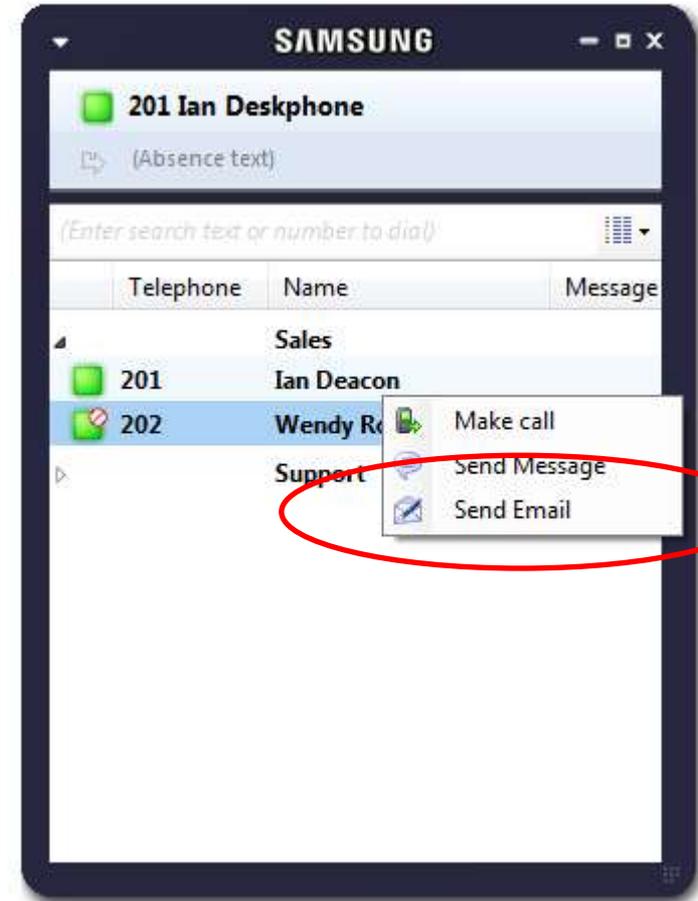
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## PC Client: Email (via Presence)

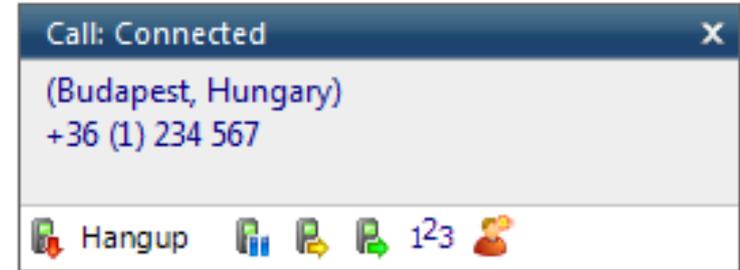
- You can also send emails to colleagues directly from the Presence window.
- Click “send email” and it will open a new Outlook email and insert the recipient’s email address.

New in  
Version  
2.5



## PC Client: Making Calls

- Similar call control options as Inbound
  - Hangup
  - Hold
  - Consult
  - Transfer
- Call recipient's details are displayed, including -
  - Telephone number
  - Location
  - Local Time

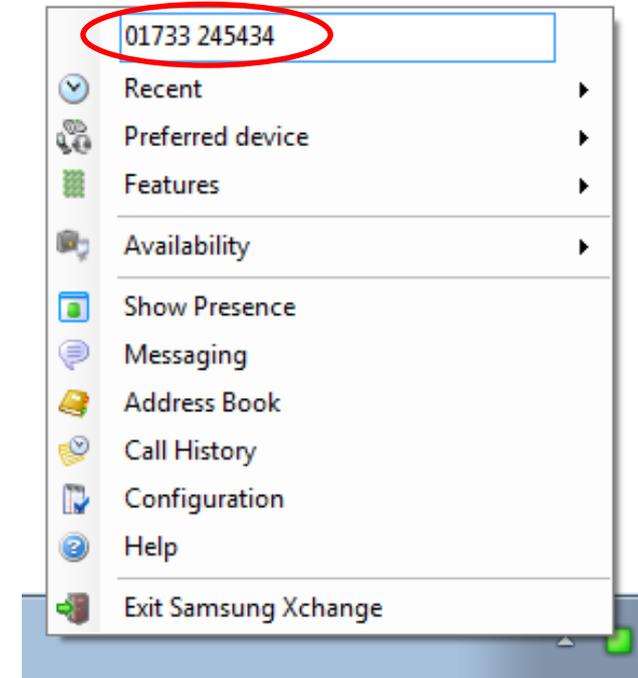


## PC Client: Click-to-dial

- Full range of “click-to-dial” options available –
  - Quick dial
  - Search-and-dial
  - Recent Dial
  - Call History
  - Clipboard
  - Web page
  - Application dialling
  - Focus dialling
  - Lync Dialling

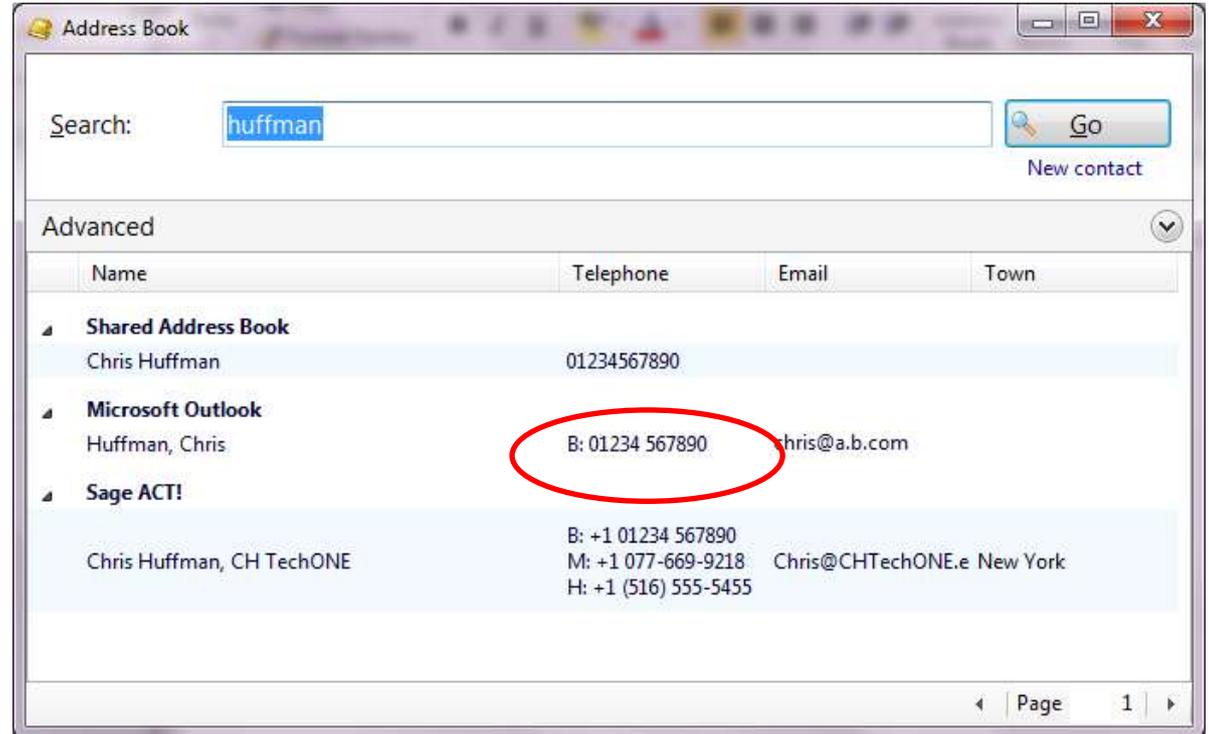
## PC Client: Quick Dial

- Various options for quick dialling from the system tray pop-up (or Presence) -
  - Type the **number** to dial.
  - Type partial **name** and the address book and integrated applications will be searched...



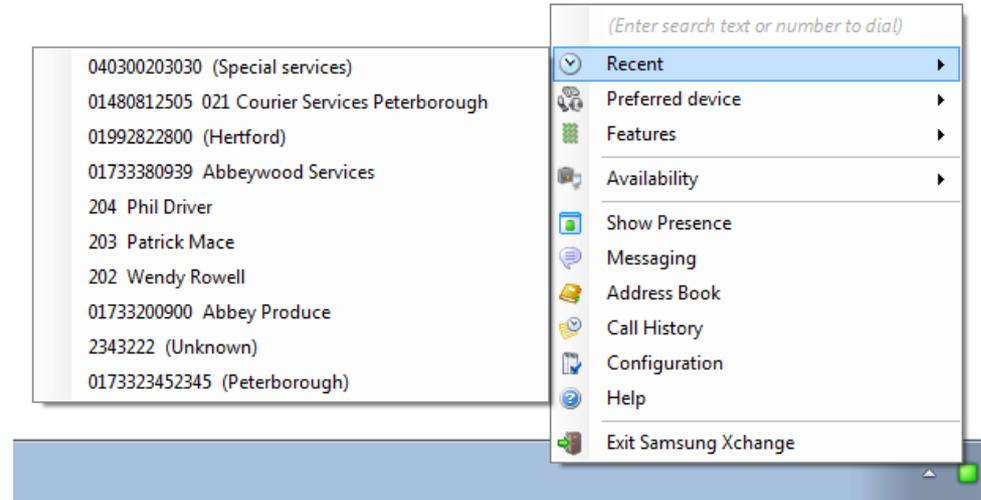
# PC Client: Search-and-dial

- Once the search has been completed and the results are displayed....just click the required number to dial.



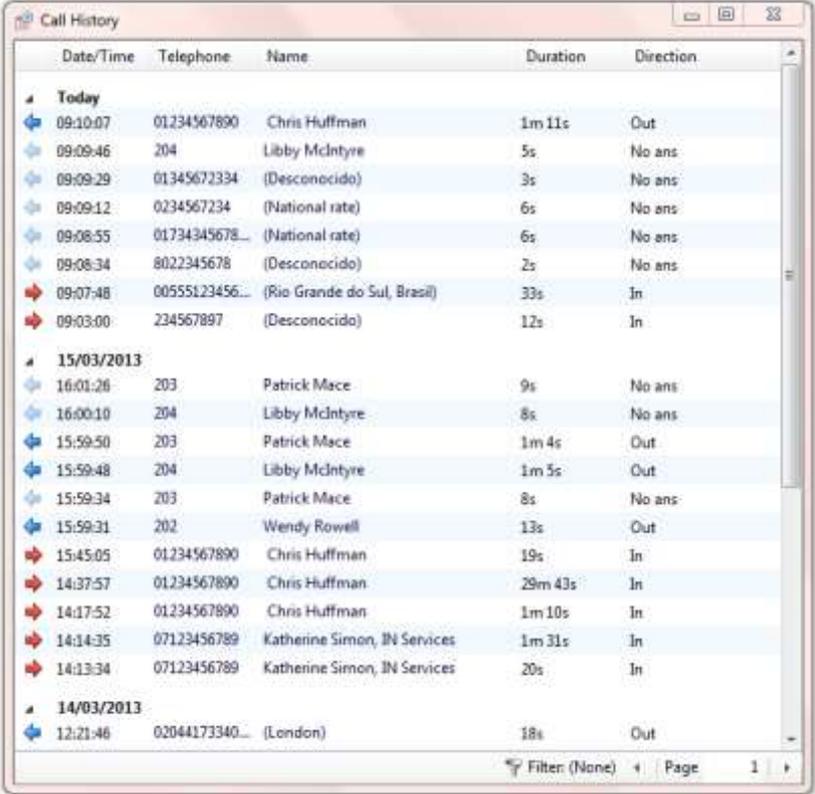
## PC Client: Recent Dial

- Overview of your recent call activity.
- Click any number to quickly re-dial a contact you recently spoke to.



## PC Client: Call History

- A log of all you recent inbound, outbound and missed calls.
- You can also view the call history for a colleague or another extension. ([security policy permitting](#))
- Filter by direction, answered, missed, call duration.
- Click on any number to quick dial.

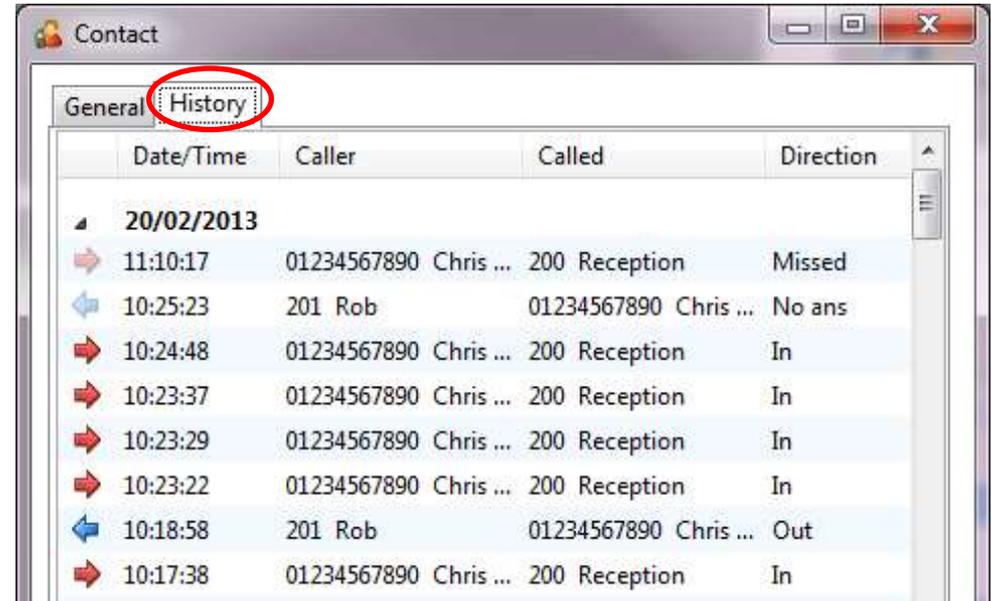


Date/Time	Telephone	Name	Duration	Direction
<b>Today</b>				
09:10:07	01234567890	Chris Huffman	1m 11s	Out
09:09:46	204	Libby McIntyre	5s	No ans
09:09:29	01345672334	(Desconocido)	3s	No ans
09:09:12	0234567234	(National rate)	6s	No ans
09:08:55	01734345678...	(National rate)	6s	No ans
09:08:34	8022345678	(Desconocido)	2s	No ans
09:07:48	00555123456...	(Rio Grande do Sul, Brazil)	33s	In
09:03:00	234567897	(Desconocido)	12s	In
<b>15/03/2013</b>				
16:01:26	203	Patrick Mace	9s	No ans
16:00:10	204	Libby McIntyre	8s	No ans
15:59:50	203	Patrick Mace	1m 4s	Out
15:59:48	204	Libby McIntyre	1m 5s	Out
15:59:34	203	Patrick Mace	8s	No ans
15:59:31	202	Wendy Rowell	13s	Out
15:45:05	01234567890	Chris Huffman	19s	In
14:37:57	01234567890	Chris Huffman	29m 43s	In
14:17:52	01234567890	Chris Huffman	1m 10s	In
14:14:35	07123456789	Katherine Simon, IN Services	1m 31s	In
14:13:34	07123456789	Katherine Simon, IN Services	20s	In
<b>14/03/2013</b>				
12:21:46	02044173340...	(London)	18s	Out

Filter: (None) Page 1

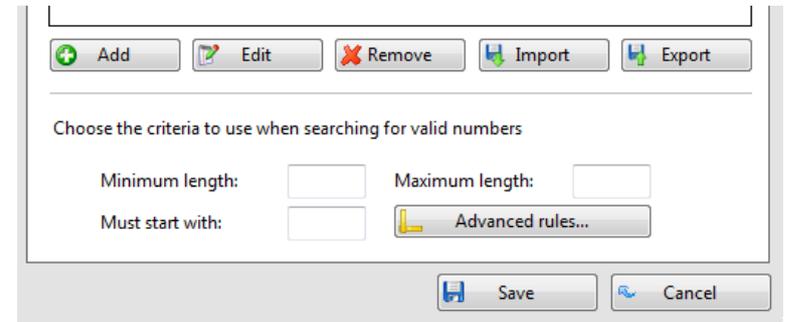
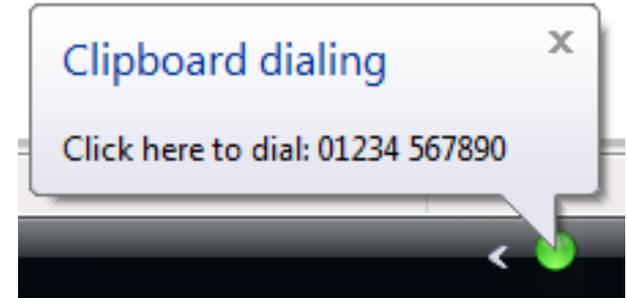
## PC Client: Call History (Address Book)

- You can also view the call history of any contacts in the shared address book.
- Just locate the contact and click on the History tab.



## PC Client: Clipboard Dialling

- The Clipboard is monitored by the Xchange client.
- If what appears to be a phone number is copied into the clipboard....a bubble is displayed from the tray icon offering the opportunity to dial the number.
- Click the number to dial it.
- Set options for min/max length and starting digit.



## PC Client: In-Application Dialling

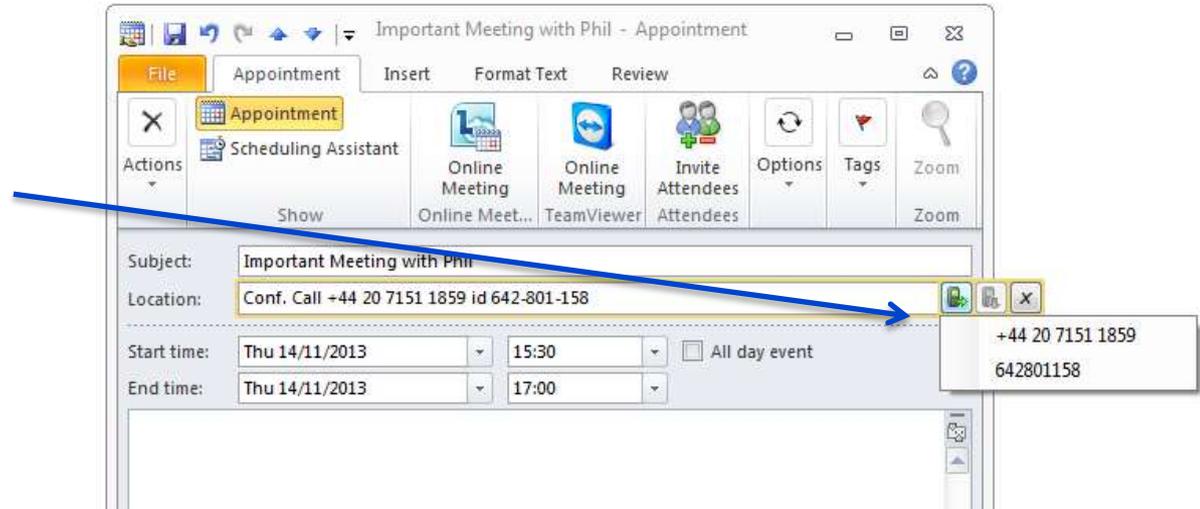
- Outgoing calls can be dialed directly from the application.
- The system will display an icon next to any phone numbers which, when clicked, will dial an outgoing call.

The screenshot shows the ACT! by Sage software interface. The main window displays a contact's details for Harry Palmer. The interface includes a menu bar (File, Edit, View, Lookup, Contacts, Schedule, Write, Reports, Tools, Help) and a toolbar with icons for New, Call, Meeting, To-Do, Note, and History. The contact details are organized into sections: Business Card, Address, and Related Tasks. The Business Card section includes fields for Contact, Company, Title, Department, Salutation, Phone, and Mobile. The Address section includes fields for Address 1, Address 2, City, County/Postcode, Country, and Fax. The Related Tasks section includes options like View All Contacts, Write Letter, Attach File, Print Current Screen, and Print Mailing Labels & Envelopes. A blue arrow points to a phone icon next to the phone number field in the Business Card section.

Business Card		Address	
Contact	Harry Palmer	Address 1	88 Jane W
Company	PRG Technologies	Address 2	Barkham
Title	Office Manager	City	Wokingha
Department	Corporate	County/Postcode	RG32 7YL
Salutation	Harry	Country	United Kin
Phone	(0)20 3179 030	Fax	(0)20 3179
Mobile		Personal E-mail	
E-mail	<a href="mailto:harry.palmer@prqtech.co.uk">harry.palmer@prqtech.co.uk</a>	Web Site	
Last Results	Qualified, OK to pursue		

## PC Client: Focus Dialling

- An additional “click to call” option.
- Automatically checks the contacts of a selected field for a dial-able number and, if found, provides a dial button.



# PC Client: Web Page Dialling

- Recognises telephone numbers on web pages.
- The number is displayed as a hyperlink.
- Click on the link to dial it..!

The screenshot shows a search results page on Yell.com for 'Hotels in Reading'. The search criteria are 'Hotels' in 'Reading'. The results list several hotels, with the first one being 'DONNINGTON HOUSE HOTEL'. The phone number '01845 347 7478' is highlighted with a blue arrow, indicating it is a clickable hyperlink for dialing. Other hotels listed include 'Elmhurst Hotel', 'Royal County Hotel', 'BULL INN HOTEL', and 'The Comfort Hotel Reading West'.

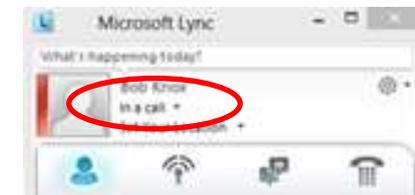
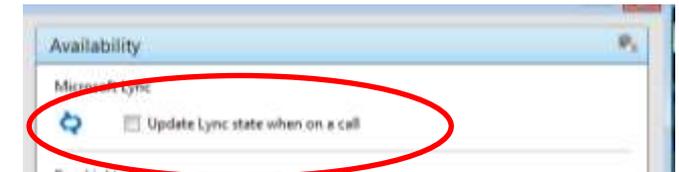
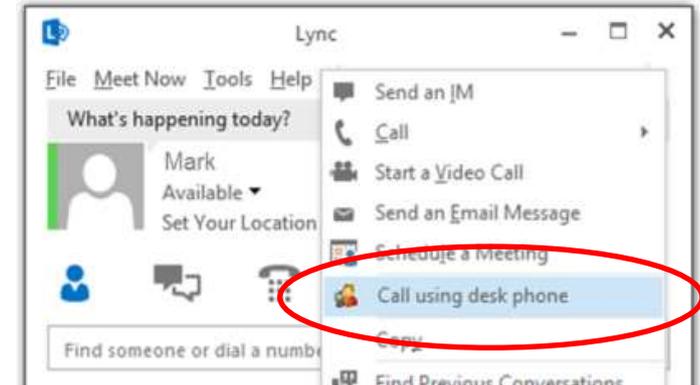
# PC Client: Lync Dialling and Integration

## Lync Dialling

- Users of Lync 2013 (and Office 365 versions of Lync) can make calls on their Samsung handset directly from the Lync client via “Call using desk phone”.
- This feature does not require the Lync Gateway (see later) and is enabled automatically.

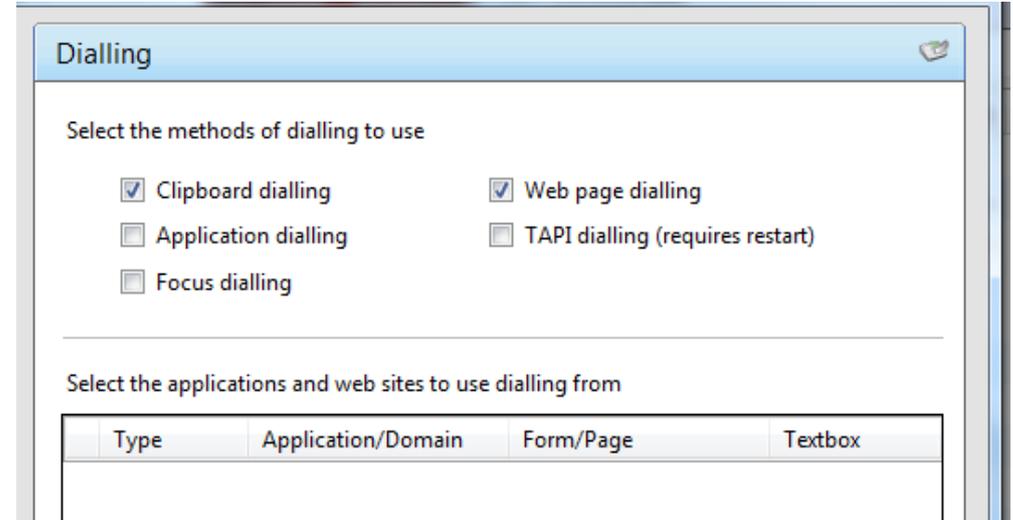
## “Update Lync state when on a call”

- An option in the PC Client configuration (in “Availability”) allows the Xchange client to update the status of a user’s Lync client based on the hook status of their Samsung handset – i.e. shows “in a call” when handset is busy or “Do not disturb” when handset set to DND.



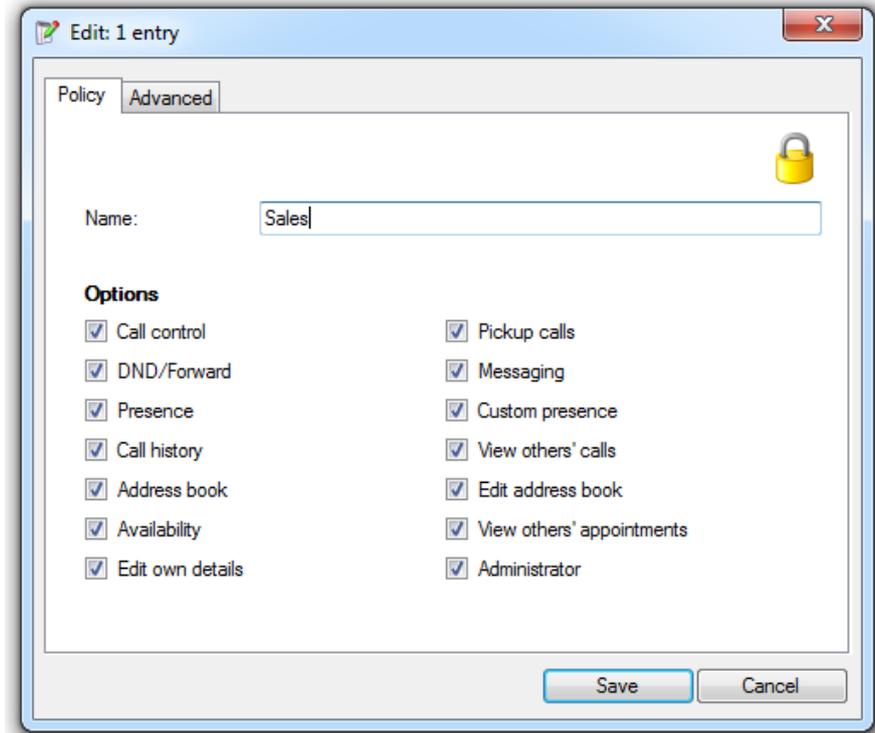
## PC Client: Client Configuration

- The dialling options available within the client can be tailored.



## PC Client: Security Policies

- Create a secure system tailored to security requirements of its users.
- Security policies allow client features to be enabled and disabled for a user or group of users.



# PC Client: Active Directory Integration

- Create Xchange users directly from users defined in Active Directory.
- Enables fast deployment of secured Xchange user accounts.
- Auto-populate Xchange user accounts with department name and internal and external numbers defined in Active Directory.
- Telephone numbers defined in Xchange can populate back to the Active Directory.

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# Language Support

Samsung Xchange is designed with a worldwide audience in mind and are available in a wide range of languages including:

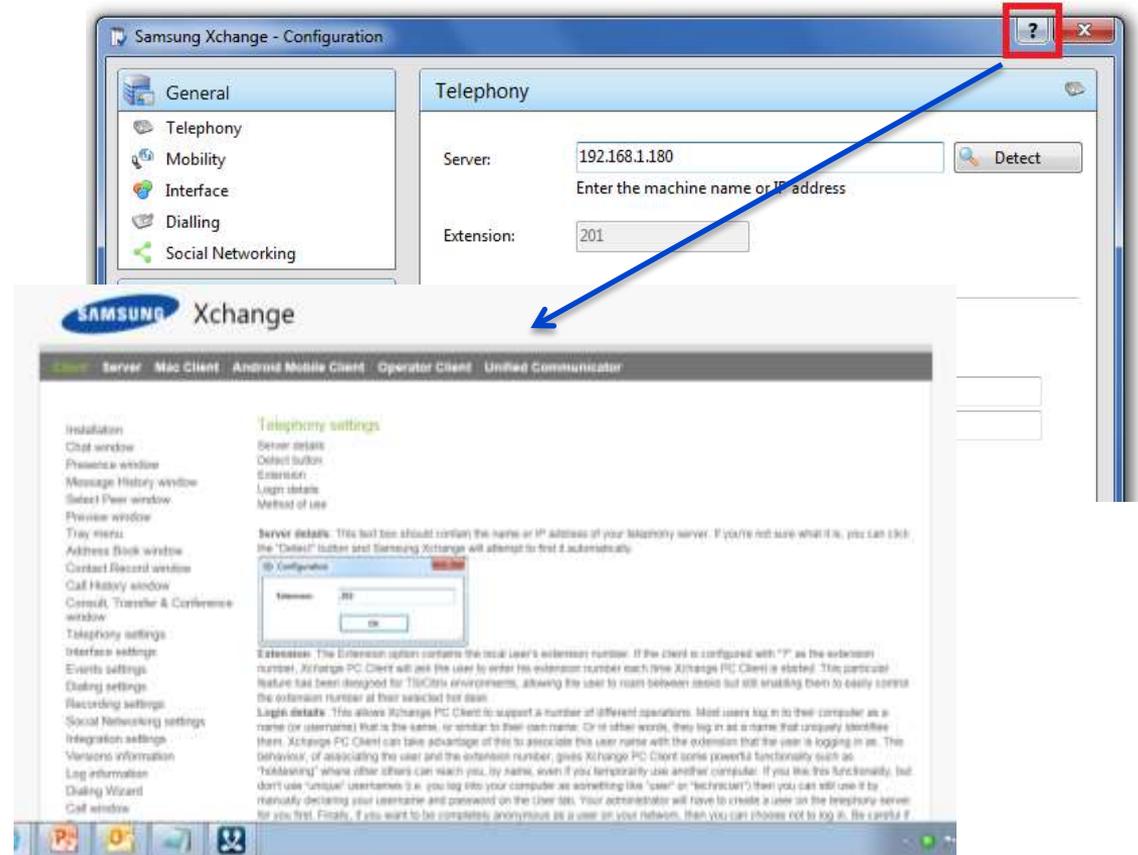


- English (UK & US)
- Arabic
- Bulgarian
- Chinese
- Czech
- Danish
- Dutch
- Finnish
- French
- German
- Greek
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Lithuanian
- Polish
- Portuguese
- Romanian
- Russian
- Serbian
- Spanish (Castilian)
- Swedish
- Welsh

## Online Help

- PDF manuals have been replaced with context-sensitive online help.
- Just click on the “?” icon at the top of any screen.
- A full online manual is also available to view.

New in Version 2.5



# MAC Client

# MAC Client

- Similar features to the PC Client.  
*Including: Call control, Presence, Chat, History, Browser Dialling (Safari), Clipboard.*
- No “Dial” client.
- “Presence” and “Integrator” versions both include integration to Apple Address Book.  
*Caller preview, add contacts, click to dial.*
- “Integrator” version also has integration to Salesforce (Enterprise edition)
- See website for full feature comparison



# Xchange for Mobile devices

# Xchange for Mobile devices

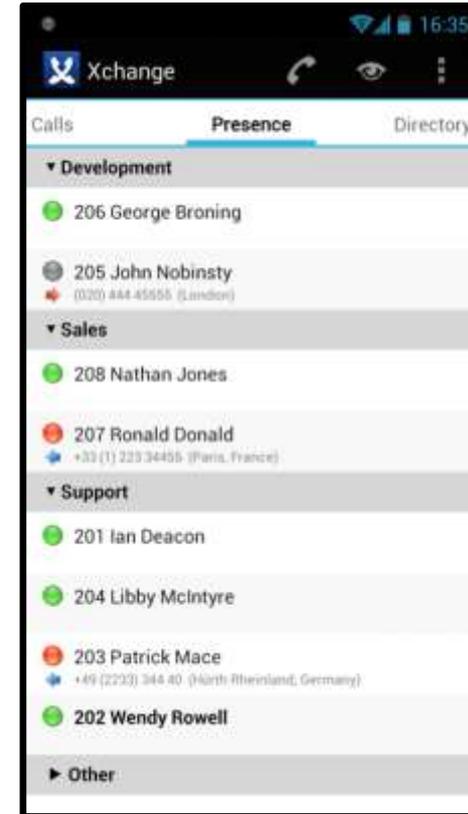
## Xchange Mobile

- For Android devices.

## Unified Communicator

- For iOS devices.
- For Windows Phone.

Mobile users can dial and check the availability and status of their office-based and other mobile colleagues.



## Xchange Mobile: Dialling

### Dial Office Extension

- Mobile users can directly dial office extensions.
- Direct Inward System Access (DISA) in Samsung telephone system.

### Dial External Contacts

- Locate and dial external contacts via the shared address book – no need to store numbers on the mobile device.
- Dialling through the office PBX (“dial through”) and with secure trunk access.



Mobile users can take advantage of cheaper (or even free of charge) calling rates.

# Xchange Mobile

## Inbound Calls (via PBX)

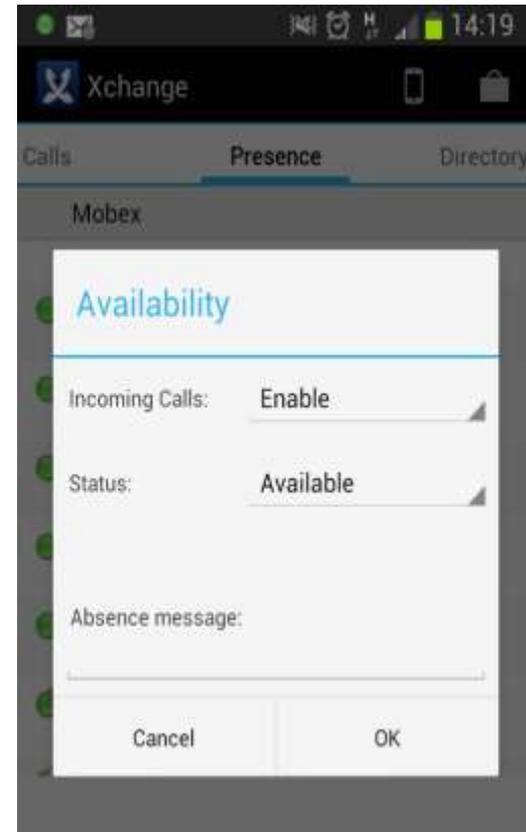
- For calls received on the mobile device via the PBX mobex (i.e. twinned) –
  - The original CLI is retained – missed calls properly identified.
  - A “call overlay” displays the name of the caller, plus caller’s details from the shared address book or the phone’s own contacts.
  - The call can be transferred to an office colleague directly from the mobile’s Presence screen.



# Xchange Mobile: Availability

## Availability

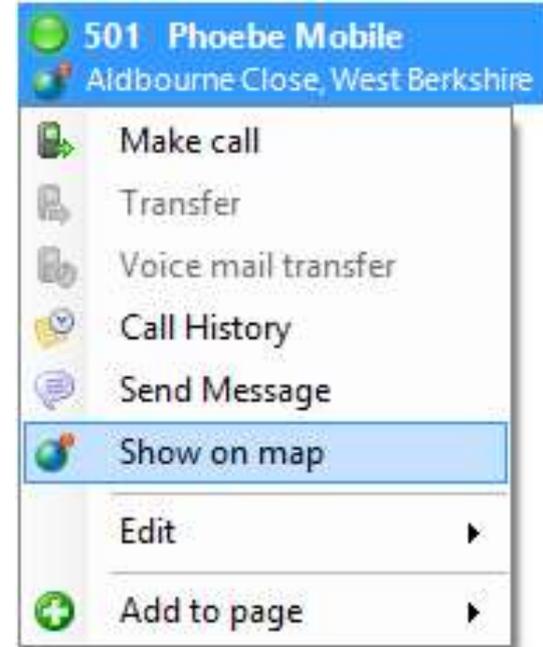
- Set your Xchange status from your mobile device.
- All office-based and mobile Xchange users will see your availability in Presence.



# Xchange Mobile: Show on Map

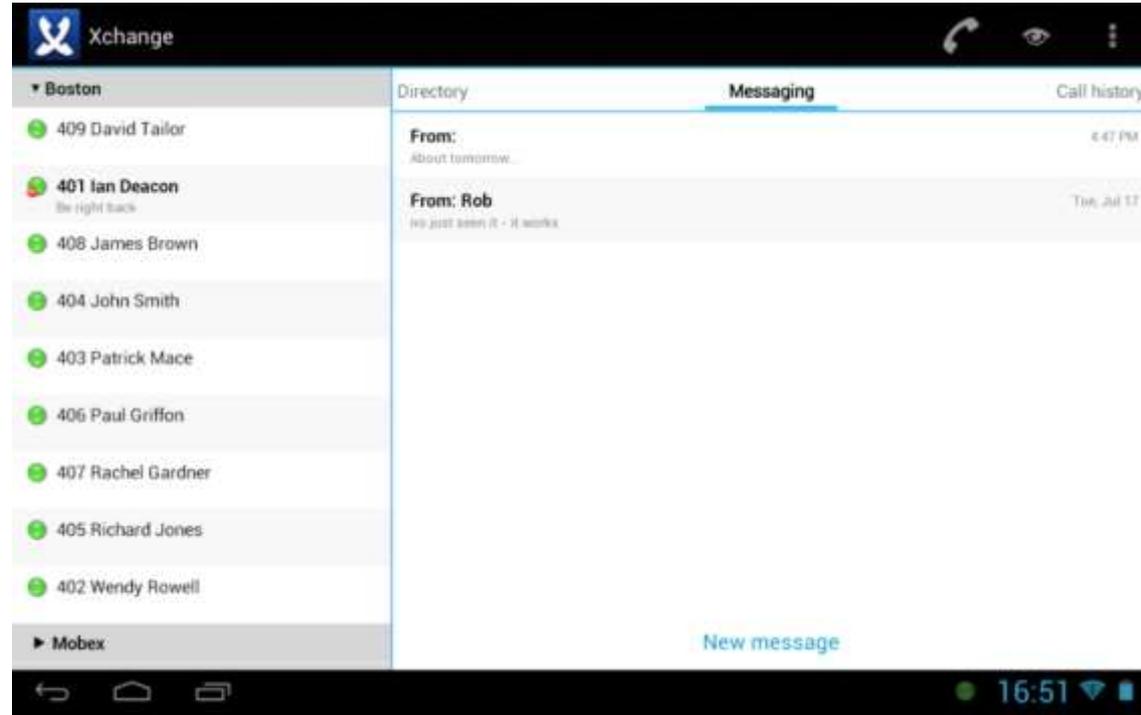
## Show on map

- See the physical location of mobile colleagues.
- Available on the PC client and Operator.
- Launches Google ® maps to display the mobile user's reported location.
- Requires –
  - Xchange mobile app installed on mobile device
  - GPS/GSM signal to calculate latitude/longitude
  - Data signal to report position to server



# Xchange Mobile: Messaging

Messaging is also available via the mobile client.



# Unified Communicator (iOS and Windows Phone)

- For iOS mobile devices (iPhone/iPad) and Windows Phone.
- Includes some of the features of the Android app.
- See website for full feature comparison.



# Multi-Device Users

## Preferred Device

- If you have more than one associated device.
- You can select the “preferred device” to use when making calls (or receiving calls, when called from the Presence window).
- The secondary and mobile extensions are set on the Xchange server (“telephony” tab in user definition).
- If secondary and mobile extensions not set on the server, you can edit in the client configuration (“mobility” section).

User **Telephony** Advanced

Current tel: 201

Internal numbers

Deskphone: 201

Deskphone 2: 301

Mobile extension: 501

External numbers

[On the Xchange Server](#)

Mobility

Mobility requires specific telephone system configuration. To use Mobility please configure the telephone system appropriately and enter the matching configuration below.

Use second extension

Extension: 301

Use Mobex device

Extension: 501

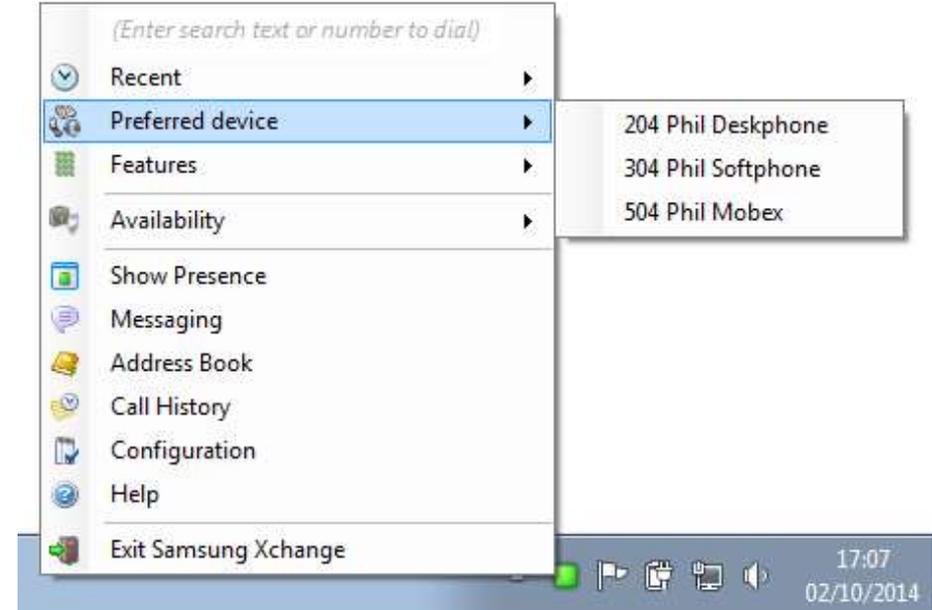
Enter the extension number of your Mobex device

In the Client configuration

*\* Available in “Presence” and “Integrator” versions*

## Preferred Device (Selecting)

- Select your preferred device from the system tray menu.
- The preferred device can also be selected from –
  - The Presence screen
  - Call History
  - Address book



*\* Available in "Presence" and "Integrator" versions*

## Preferred Device (Caller Preview)

- The standard “preview” window will automatically appear when a call comes in on any of your associated devices.
- Contact popping is supported from the preview screen as normal.

*\* Available in “Presence” and “Integrator” versions*



# Xchange Operator Console

# Operator Console

- A separate Xchange client application for “Operator” call control.
- When telephone system is configured appropriately, calls to the handset can be answered in any order.
- Other extensions can be monitored and controlled allowing “Boss/Secretary” type features.



# Operator Console: The Console Screen

The screenshot displays the Operator Console interface with the following components:

- Top Bar:** Dnd: Off, Forward: Off, Messages: 2, and tabs for Auto, Extensions, Contacts, History, and Messages.
- Call Log (Left Panel):**
  - Incoming calls:** John Tuley, JTu (01756) 234 5678, 18s, Called: 200 Javier, Direction: Inbound.
  - Held calls:** (Liverpool) (0151) 678 953, 7m 28s, Called: 200 Javier, Direction: Inbound; Susan Pollard (01443) 763 256, 6m 39s, Called: 200 Javier, Direction: Inbound.
  - Call Log (Bottom Left):** Call button, Maurizio Lucios, Italian Pasta (+39 123 45678), 34s, Caller: 200 Javier, Direction: Outbound.
- Extensions List (Right Panel):**
  - All extensions:** Administration (210-220), IT (205-208), Reception (200 Operator), Sales (201-204), Sales Mobex (301-304).
- Search Bar:** (Enter search text or number to dial)
- Bottom Bar:** Call controls (Hangup, Hold, Cancel, Complete) and navigation (Cancel, Complete).

## Operator Console: Scripting

- Automatically pop a script and associated notes on incoming call to a DDI/DID number.
- The script/notes appear in the Operator's auto tab.
- Great for Operator users in multi-tenant environments or using customer-dedicated DDI/DIDs

The screenshot displays the Operator Console interface. On the left, there is a 'Contacts' tab with a list of contacts. On the right, the 'Details' view for 'Chris Huffman, ACE Customer Corp' is shown. A red oval highlights the script text: '2345678 ACME Corporation' and 'Thank you for calling ACME Corp, how may I help?'.

Auto	Extensions	Contacts	History	Messages
111	Greg Stevens	302	Johnny Dean	
304	Claire Chambers		Tom Kitchen	
301	Kevin Fredericks	303	Fred Rainier	
101	Peter Griffiths	603	Ryan Eaves	
	Tom Kitchen	102	Ted North	
602	Dave Matthews	601	Pete Shaw	
401	Deborah Smith		3233029912 (Unknown)	
405	Phillipa Phorbes	406	Desmond Palmer	
203	Erica Tadulu	402	Tim Smith-Hyde	
		202	Jasmine Dugard	
			Joe Cartwright, Acma Ltd.	

**Chris Huffman, ACE Customer Corp**  
 (01234) 567 890  
 Notes: Please transfer straight to Ian  
 Details Call History  
 Shared address book  
 Display name: Chris Huffman, ACE Customer Corp  
 Contact: Chris Huffman  
 Company: ACE Customer Corp  
 Phone: 01234567890  
 Notes: Please transfer straight to Ian  
 Location: Bedford  
 2345678 ACME Corporation  
 Thank you for calling ACME Corp, how may I help?  
 Notes: CEO: Buzz Lightyear

New in  
Version  
2.5

## Operator Console: Extension Notes

- Personal notes can be added against an Extension.
  - Hover over the note icon in the console display to see the note.
- Operator can now edit other details stored for an Extension
  - Name
  - Department
  - DDI Number
  - Availability status
  - Absence text

Extension

Number: 201

Name: Ian Deacon

Department: Sales

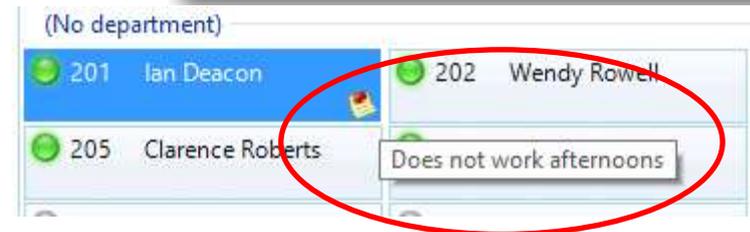
DDI number:

Availability: Available

Absence text:

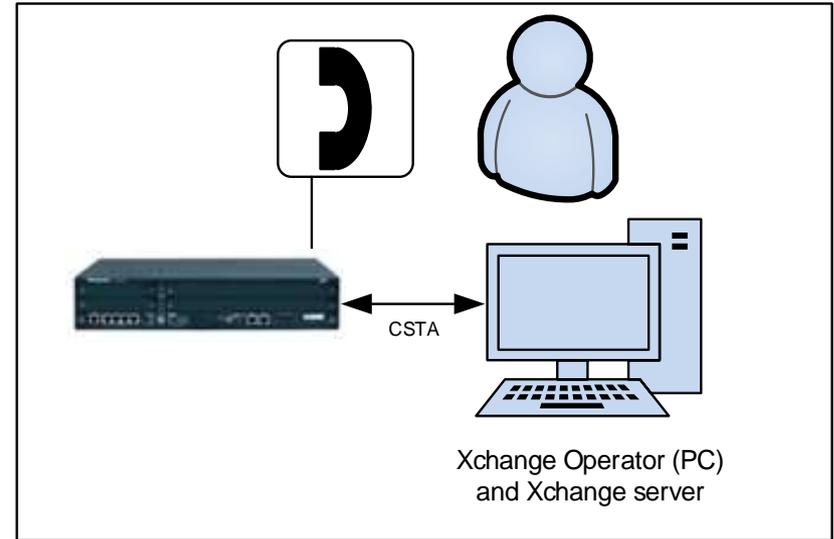
Notes: Does not work afternoons

OK Cancel



## Operator Console: Solo Operator

- For a single operator, single site.
- Xchange Server and Xchange Operator Client both installed on the Operator's PC, which is connected directly to the Samsung PBX.
- No other Xchange users.
- No support for chat messaging or multi-site operation.
- Designed for customers who want a basic “operator only” environment.
- Limited scope for growth.

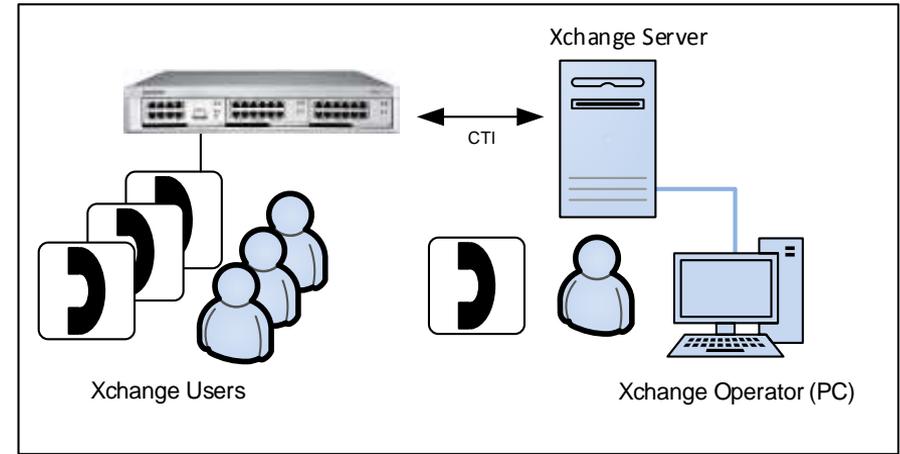


## Operator Console: Xchange Operator

- One or more operators at a single site...or...
- One or more operators at multiple sites \*, distributing calls to local or remote sites.
- Operator Client is installed on each operator PC, connects to the Xchange Server.
- Includes chat messaging and CRM Integration.

\* Requires Multi Site.

**Note: TS / Citrix not supported by Operator**



# Xchange Application Integration

# Application Integration

- Common elements of this integration include:
  - Caller Preview
  - Contact Popping
  - Contact searching
  - Click-to-dial
- Integration into –
  - CRM applications
  - Other contact databases and applications
  - Online resources (social media, web pages, directories)

## Application Integration

### Caller Preview

- Displays caller (or called party) name in the Preview or Phone window when a match against is found in the shared address book or integrated application(s).



### Contact Popping

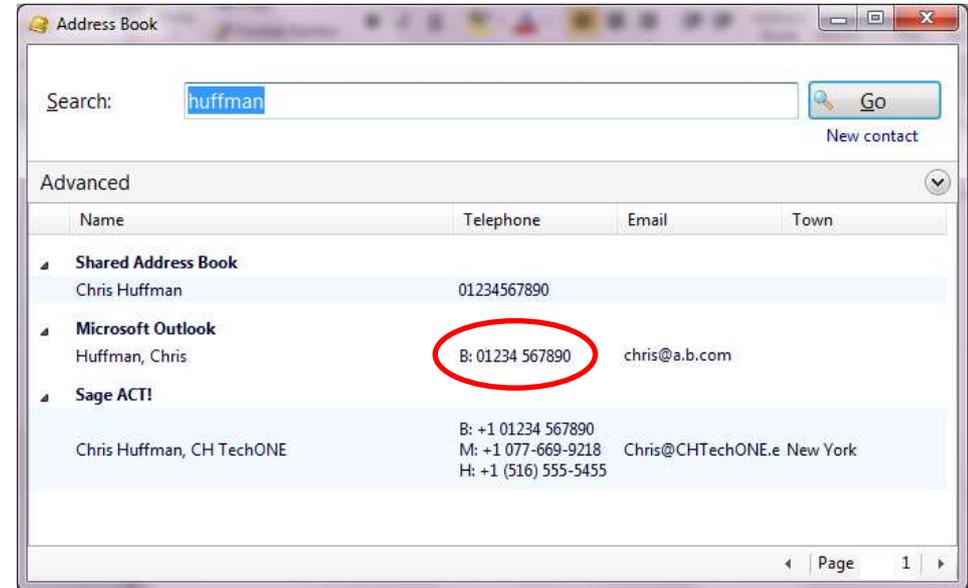
- Click the integrated application's icon in the Phone or Preview window.
- The caller's contact record is displayed in the integrated application.



# Application Integration

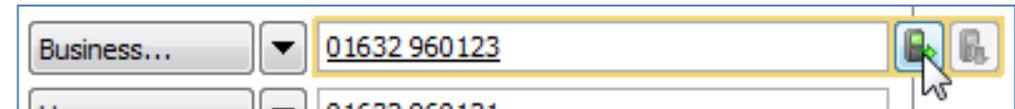
## Contact Searching

- Concurrently search the shared address book and any integrated applications, then click on the name in the results to dial them.



## Click-to-Dial (*within the application*)

- Transposes a “dial” symbol on a number field within an application.



# Application Integration: Standard Integration

- See the “Integrator” page on the website for details of applications supported by Standard Integration.



Welcome | Dial | Presence | Integrator | Operator | Mobile | By Industry | Enhancements | Resources | Contact Us

## SAMSUNG XCHANGE

### Integrator

- Xchange Integrator
- Voice Recording
- ConnectWise
- eGroupware
- LDAP
- Microsoft Dynamics CRM
- Microsoft Dynamics NAV
- NetSuite

#### Xchange Integrator

Integrator is the flagship of the Samsung Xchange family, a personal productivity tool designed to get more out of your telephone system by linking it to your computer. Samsung Xchange Integrator provides access to the same features as both Samsung Xchange Dial and Samsung Xchange Presence. It also allows more applications to be integrated into and provides the option of upgrading to a Samsung Xchange Integrator (for PCI) license.

Samsung Xchange Integrator can be configured to work with the following applications:

- ACTI
- ConnectWise

## Advanced Integrations

- The “Integrator” version also includes support for a range of industry-specific applications.
- See the “By Industry” section on the Samsung Xchange website for a list of supported applications.
- Other applications can be investigated on request via the online Application Integration Request Process (AIRP).



# Social Networking Integration

- E.g. Facebook...
  - If caller's contact record includes an email address, the Xchange user's Facebook member list is searched.
  - If a match is found, the caller's profile picture and a Facebook "pop" icon is displayed in the preview window.
- Similar integration also available for LinkedIn and Myspace (entire member lists are searched).



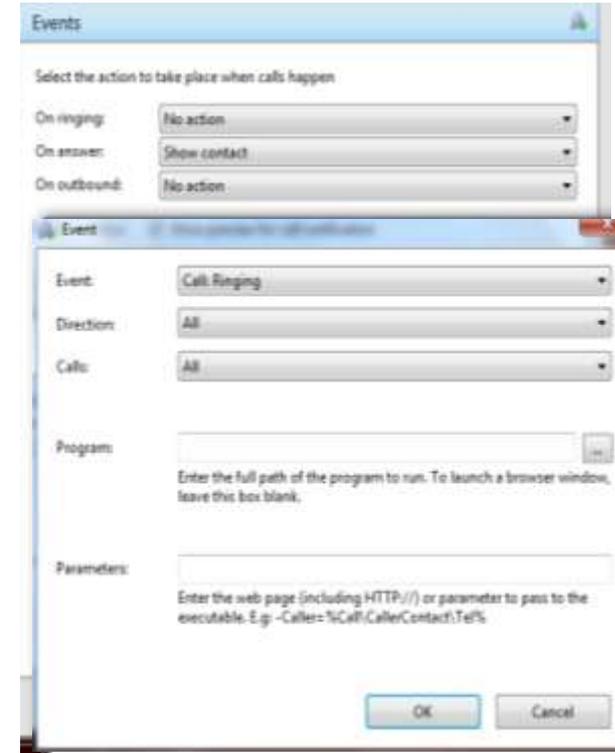
LinkedIn



*Note: not available in Xchange Dial*

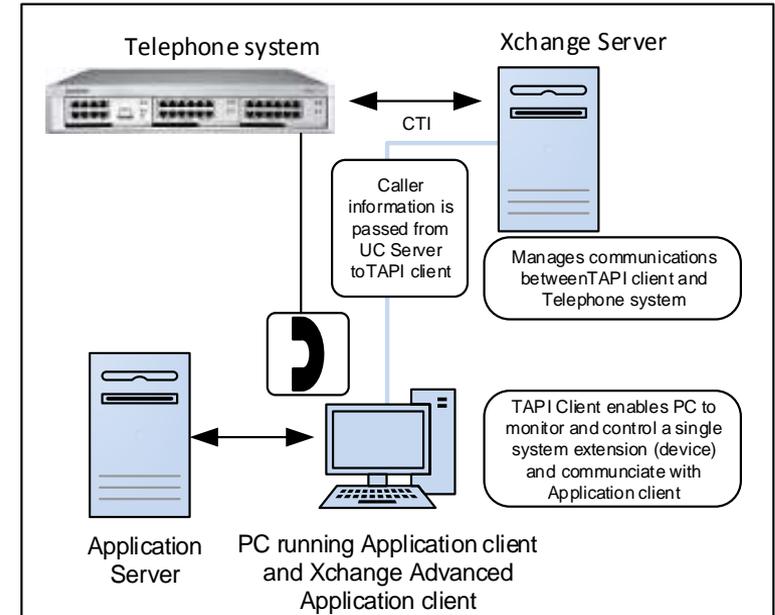
## Events & Custom Integration

- Control what automatically happens when a call rings, or when it's answered, or when a call is made -
  - Display Presence window.
  - Show contact details.
- Based on an event (call ringing, call connected etc), you can run a program or go to a web page



## Advanced Application API

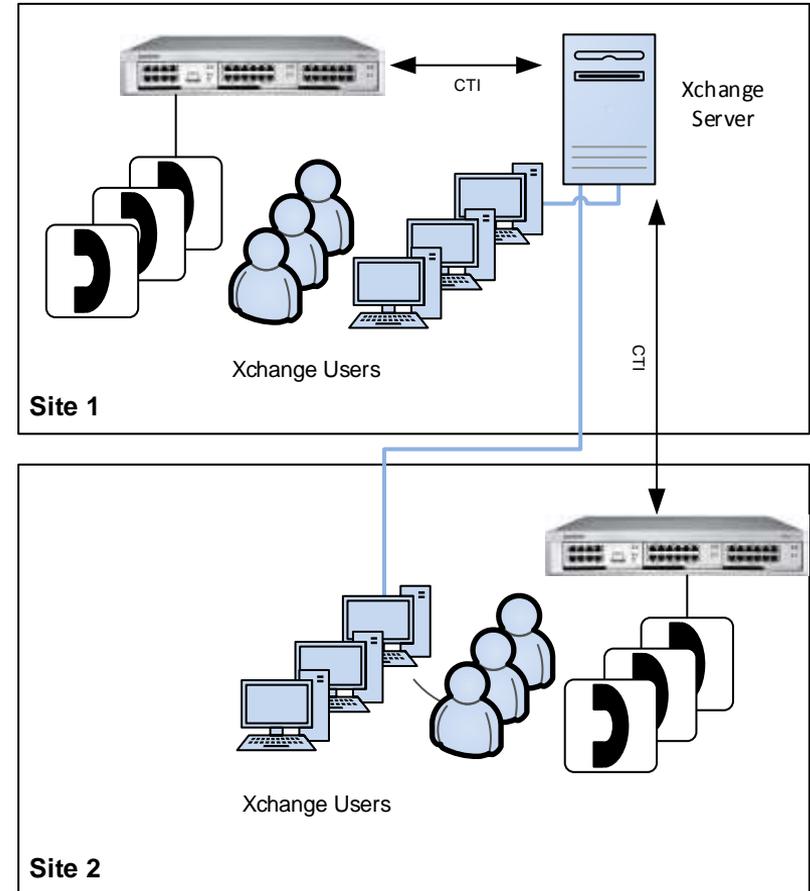
- Advanced license type for Xchange.
- Provides integration to wide range of approved TAPI compliant applications including a number of proprietary non-TAPI applications.
- Not a direct replacement for the Open TSP software, but is a reliable, easy-to-deploy alternative for the majority of situations where the Open TSP would have been used.
- There is both a server (3rd party) and client (1st party) variant of the driver. An Xchange server is required both variants.



# Multi-site and Federation

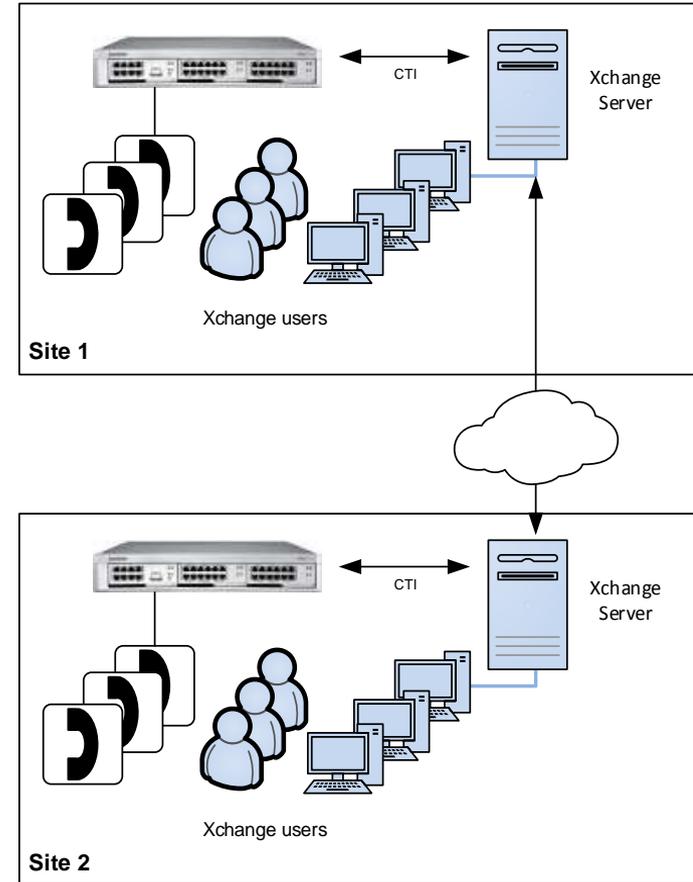
## Multi-site

- Integration of multiple sites, all accessing the same Xchange server.
- Shared facilities across all sites – Presence, Messaging and Address Book.
- Simultaneous connection of up to 6 Samsung PBXs.
- Supports multiple countries, time zones and languages.
- By adding DDI numbers, users can ring other sites even when no private network is present.



## Federation

- Integration of multiple sites, multiple Xchange Servers.
- Supports multiple countries, time zones and languages.
- Similar user experience to Multi-Site (e.g. shared features), but better suited to environments where a lower quality network connectivity exists between the various sites.
- By adding DDI numbers, users can ring other sites even when no private network is present.



# Xchange and Lync

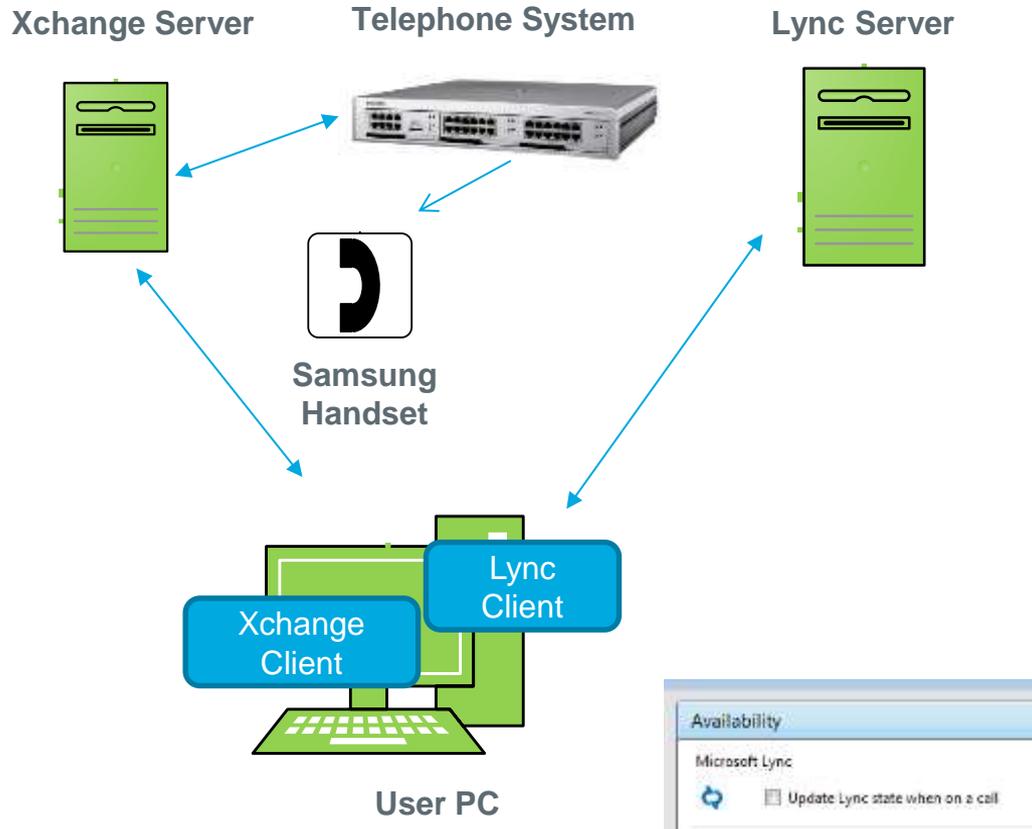
# Xchange and Lync

- Xchange offers two different and independent ways of interacting with Microsoft Lync.
- **Xchange PC Client** – Allows the user to dial directly from their Lync client, and also optionally update their Lync status based on the status of their handset (e.g. “in a call” or “dnd”).
- **Lync Gateway** – Allows the user full monitoring and remote call control of their Samsung handset through their Lync client.

**SAMSUNG  
XCHANGE**



# Xchange Client



## Platforms

- Premise-Based Lync Server 2013
- Office 365
- Any hosted variant

## Licensing

- Any Lync CAL (Per User)
- Any Xchange Client (Per user)

## Call Control

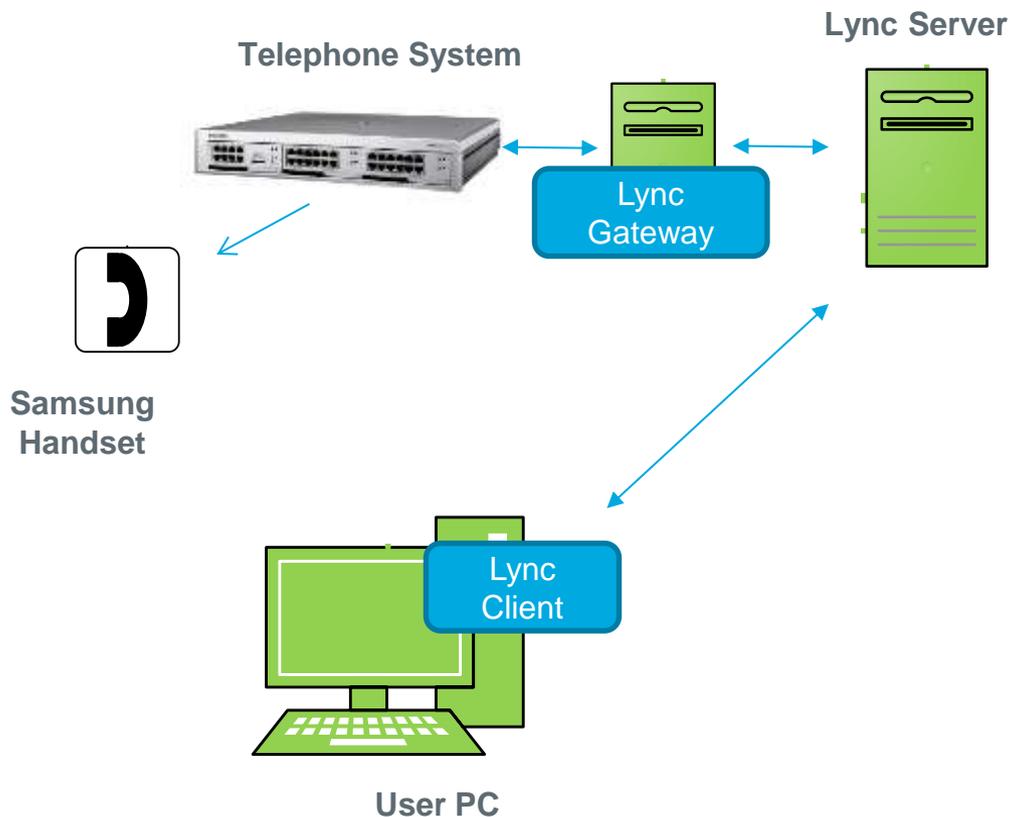
Answer handset?	From Xchange Preview pop-up
Make a call?	From Xchange or Lync client *
Call forward?	From Xchange Client
Call transfer?	From Xchange Client

\* Users of Lync 2013 (and Office 365 versions of Lync) can make calls on their Samsung handset directly from the Lync client via "Call using desk phone". This feature does not require Lync Gateway and is enabled automatically.

## Status Update

Set Lync client status to "in a call"	When handset makes or receives a call
Set Lync client status to "do not disturb"	When handset goes to DND

# Lync Gateway



## Platforms

- Premise-Based Lync Server (2010 or 2013)

## Licensing

- Lync Plus CAL (Per User)
- Lync Gateway

## Call Control

Answer handset?	From Lync toast pop-up window
Make a call?	From Lync client
Call forward?	From Lync client
Call transfer?	From Lync client

## Status Update

Set Lync client status to "in a call"	When handset makes or receives a call
Set Lync client status to "do not disturb"	When handset goes to DND

# Summary of Benefits

# Summary of Benefits

- **Increase Customer Satisfaction:**

- ✓ Reduce call response times
- ✓ Professional handling/transferring of calls
- ✓ Identify and return missed calls

- **Increase Staff Productivity and Collaboration:**

- ✓ Ideal for businesses with high inbound/outbound calls
- ✓ Leverage investment in CRMs and other applications
- ✓ Contact searching and “popping”, click-to-dial
- ✓ All staff, whether office-based or mobile, can see the availability of colleagues (through Presence) and set their own availability status



# Summary of Benefits

- **Bundling “Dial”:**

- ✓ The “Dial” client is entry point, but still feature rich. Its low price point means that it can potentially be bundled as standard with a PBX sale.
- ✓ Use the “Dial” client’s features to lead the sales process.



- **Minimal Hardware Requirements:**

- ✓ Smaller systems (e.g. one PRI, < 50 users) can run on an existing shared server.
- ✓ This eliminates the need for the client to invest in additional hardware to support Xchange



# Software Assurance

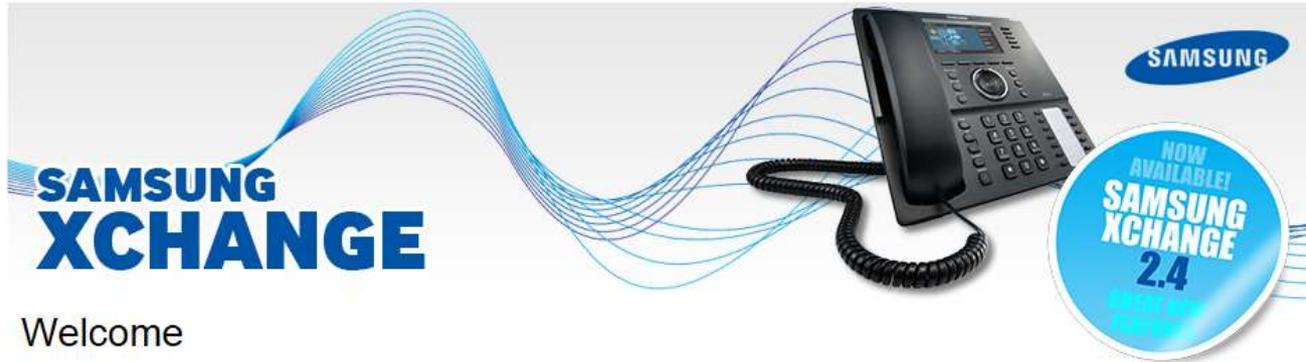
# Software Assurance

- Software subscription and support programme.
- Subscribers have access to “major” and “minor” upgrades for product enhancements, new features and functions.
- First year is free if the product is registered within three months of purchase.
- Two years available for the price of one year if cover is purchased during initial license sale.
- Additional re-instatement fees apply if Software Assurance is not registered or purchased within three months of initial license purchase.

*Any customer not subscribing to Software Assurance will still have access to the standard 3 month warranty.*



Website: [samsungxchange.com](http://samsungxchange.com)



## Welcome

Welcome  
What's New



### Welcome to the Samsung Xchange product portfolio pages.

Samsung Xchange has been developed to provide you with easy-to-use technology that enhances not just your organisation's productivity but also lets you work much more collaboratively. Whether you are a small office with one site or a large organisation with multiple sites, using Xchange always lets your users have access to everything they need to communicate efficiently.

The Samsung Xchange product portfolio includes:

## Questions & Contacts

### **Any questions...?**

Post-webinar questions: [marketing@samsungnw.com](mailto:marketing@samsungnw.com)

### **Contacts**

Sales enquiries: [marketing@samsungnw.com](mailto:marketing@samsungnw.com)

Technical enquiries: [samsungbusiness.com](http://samsungbusiness.com)

Thank you