

# Interaction Tracker® 4.0

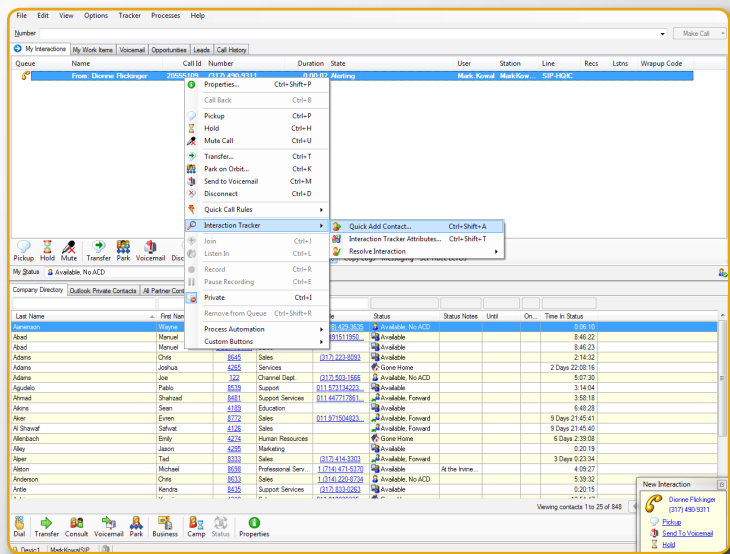
## Know more about your customers to deliver service that earns their loyalty and wins more business

Business starts with contacts. But winning sales and converting customers into champions for your business means knowing each customer in order to deliver exceptional, personal service. Interaction Tracker 4.0 is an intelligent solution to track individuals, contact information and interactions more precisely – and ensure that every person in your company has exactly what they need to make each customer know they're important.

## Customer info, interaction history, and service options in one place

Interaction Tracker is an installed feature in the Interaction Client® .NET Edition, the desktop interaction management interface in the Interactive Intelligence Customer Interaction Center® (CIC).

**At the user level,** users easily add, search and quickly identify information for a customer. Information includes the customer's organization, department, and location. The Tracker menu bar in the Interaction Client lets users also see interactions by media type: phone calls, emails, web chats, faxes, social media alerts, and custom objects.



Using Interaction Tracker from the Interaction Client, users can quickly add contacts, view Interaction Tracker Attributes and resolve interactions.

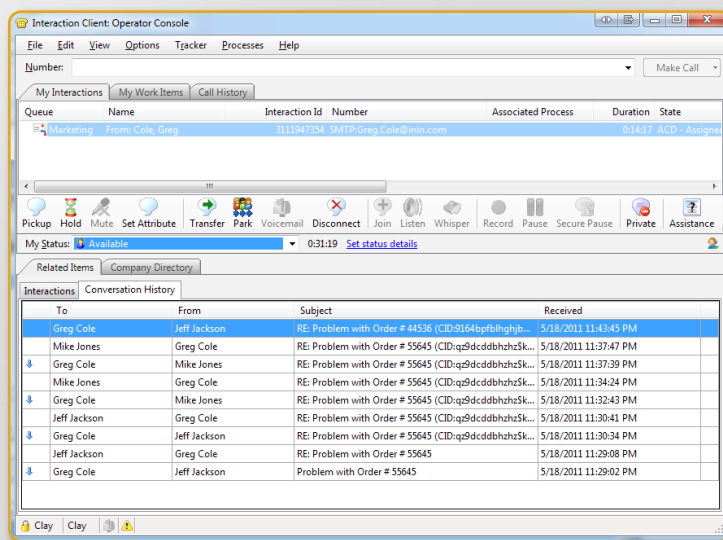
**At the organizational level,** Interaction Tracker lets your business effectively trend and analyze the contact patterns of customers. Say you start a new ad campaign – you see how many customers are calling and how frequently, in addition to how many members of certain demographics prefer web chat or email over making a phone call. With such differentiators in full view, your business is better able to adjust the parameters of its campaign accordingly.

## Interaction Tracker 4.0 Call Resolution

When a new call comes into the Interaction Client, a Reverse White Pages lookup is automatically performed against the incoming Caller ID. If one or more matches are found, the call is then resolved (either automatically or manually) to one unique Interaction Tracker contact.

### Bringing all your interactions together – *Related Interactions.*

Customers don't like having to repeat themselves or explain what's already occurred. Interaction Tracker helps prevent that from happening. *Related Interactions* automatically provides a list of all previous interactions with a contact, getting users quickly up to speed on previous history and helping your company deliver better service more quickly – resolving issues faster, reducing hold times, and avoiding frustrating repetition for the customer. A collapsible notes pane allows users to also view and edit notes about a related interaction.



### Know the history of your customer – *Conversation History.*

Customer satisfaction increases when an agent is prepared for the call and knows the history of the customer. *Conversation History* conveys interaction data along with a collapsible notes view, giving agents automatic search capabilities based on a Tracker contact, organization or location history of all interactions in which a given contact was involved.

### Customize Tracker to your needs – *Interaction Tracker 4.0*

**Configuration.** With Interaction Tracker configuration options directly within the Interaction Client, users can configure the match criteria that specifies how the related interactions relate to the external caller, the date range in which to search for interactions, and the maximum number of interactions to return and display. Users can additionally choose which columns are visible in the related interactions list view.

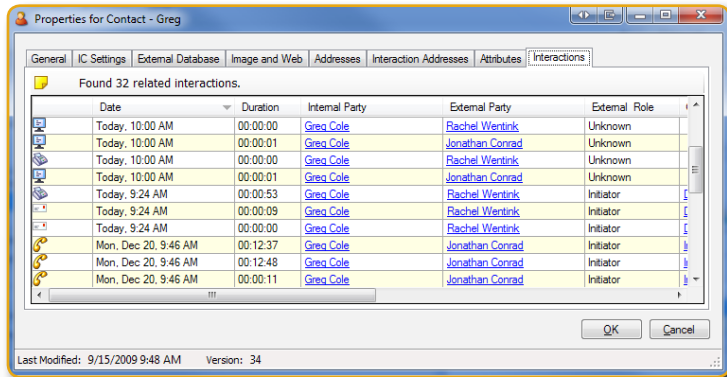
## Speed the process to organize and search for tracked interactions

### Quickly locate your interaction – *Find Interaction, Basic.*

Locate interactions quickly based on the given criteria.

### Target your interaction search – *Find Interaction, Advanced.*

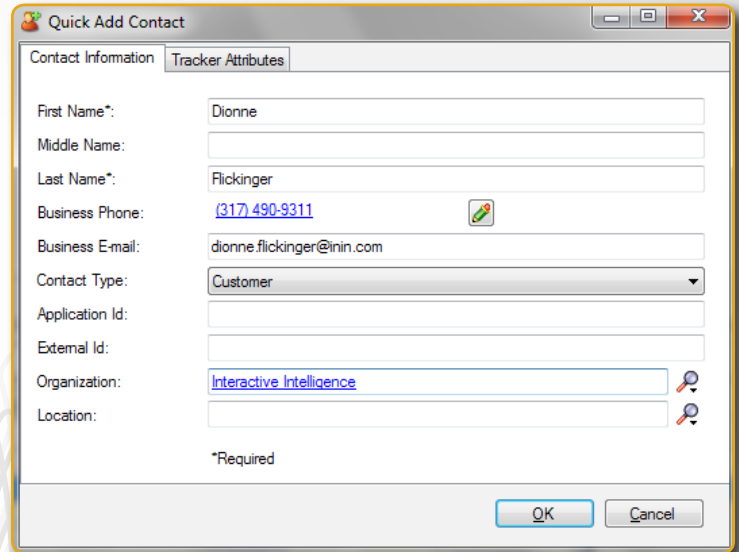
Perform more targeted searches by specifying additional criteria specific to interactions, contacts, organizations or locations. Query results allow a user to review the matching interactions, and drill down to details on each interaction if desired.



Date	Duration	Internal Party	External Party	External Role
Today, 10:00 AM	00:00:00	Greg Cole	Rachel Wentink	Unknown
Today, 10:00 AM	00:00:01	Greg Cole	Jonathan Conrad	Unknown
Today, 10:00 AM	00:00:00	Greg Cole	Rachel Wentink	Unknown
Today, 10:00 AM	00:00:01	Greg Cole	Jonathan Conrad	Unknown
Today, 9:24 AM	00:00:53	Greg Cole	Rachel Wentink	Initiator
Today, 9:24 AM	00:00:09	Greg Cole	Rachel Wentink	Initiator
Today, 9:24 AM	00:00:00	Greg Cole	Rachel Wentink	Initiator
Mon, Dec 20, 9:46 AM	00:12:37	Greg Cole	Jonathan Conrad	Initiator
Mon, Dec 20, 9:46 AM	00:12:48	Greg Cole	Jonathan Conrad	Initiator
Mon, Dec 20, 9:46 AM	00:00:11	Greg Cole	Jonathan Conrad	Initiator

### Create your customer database – *Quick Add Contact.*

Simplify the process of adding customers to a contact database. With Interaction Tracker's Quick Add Contact feature, users add a new contact quickly by right-clicking on an interaction in the Interaction Client, which launches a screen automatically populated with the data from the interaction. Users can then complete any remaining data fields as needed: Name, Organization, Location, etc. Doing so builds the contact database for your entire enterprise to see during future interactions.



Quick Add Contact

Contact Information | Tracker Attributes

First Name\*: Dionne  
Middle Name:   
Last Name\*: Flickinger  
Business Phone: (317) 490-9311  
Business E-mail: dionne.flickinger@inin.com  
Contact Type: Customer  
Application Id:   
External Id:   
Organization: Interactive Intelligence  
Location:   
\*Required

OK Cancel

The Quick Add Contact screen, automatically populated with the data from an incoming interaction

### Get to know your customers – *Interaction Tracker Attributes.*

Understand exactly "who" your business is engaging, when and why. While many businesses use common demographics such as age, income levels, etc. to segment customers, *Interaction Tracker Attributes* helps you identify customers with customizable attributes, assigned in the context of contact segmentation. By also automatically logging interactions (unlike CRM systems, which rely on voluntary logging), your business knows all available data about your customer, such as ANI (phone number) or, if resolved to a contact record, the specific caller and whom in your company the person interacted with previously.

### Know exactly who's calling from that number – *Resolve Interaction.*

Many times, multiple contacts share the same phone number. Use the *Resolve Interaction* feature in Interaction Tracker to associate an interaction with the appropriate contact within a company.

## INTERACTIVE INTELLIGENCE®

Interactive Intelligence offers unified business communications solutions for contact center automation, enterprise IP telephony, and business process automation, based on our open standards, all-in-one software suite. More than 4,000 organizations worldwide currently benefit from our on-premise solutions and cloud-based Communications as a Service (CaaS) offerings, including value-added services for software, hardware, implementation, consulting, support and education.

At Interactive Intelligence, it's what we do.

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