

Phone System Overview

Phone System Features:

- AMS and Phone System Data Synch
- Click to Call from AMS Client File
- Click to Call Insurance Company Contacts
- Team Member Status View with Click to Call
- New Communication Notifications
- Switch to Conference Call with a Click
- Voicemails Saved in AMS
- After Call Notes Created and Saved in AMS Client File
- Call Transfer to Outside Phone Number
- Individual User Call Forwarding
- Create Contact in AMS
- Click to AMS Client File
- Set your own AMS Discussion Titles for Notes
- Separate Marketing Number with Round Robin Assignment and Voicemail
- Caller ID and Caller ID with CSR name when Transferring Call to Agent
- Presence Integration with Microsoft Teams
- Reassign General Voicemails to another User
- One Click Call History
- Fax – Automatic Cover Page Creation
- Fax – Drop and Drag to Send Multiple File Types
- More!

Text/SMS/MMS

- Click to Text from AMS Client File
- Quick Send Prewritten Text Messages
- Text Conversations Archived in AMS
- Drop and Drag Multiple File and Types to Send
- Receive Multiple File Types
- Click to Call from Text Conversation
- Out of Office Text Auto Responder
- Agency Group Text Channel
- Reassign Agency Text Messages to another User
- Send vCards



Phone System Overview

CRM Features

- Send Text Messages from your CRM
- Click to CRM Contact Record
- Send Webhooks for new Communications to other programs
- Save and Click Webforms to Trigger Automation in your CRM

Admin Features

- Multiple Round Robins for CSRs and Agents
- Agency General Voicemail
- Simple Switch – Permission Based Switch to another User to handle Texts and Voicemails
- User Roles and Multiple User Role Assignment
- Easily Set or Change Office Hours
- Simple Audio File Management for Office Hours, On Hold, and Holidays
- Inbound Lead Distribution Using a Dedicated Marketing Number
- Super User Link to Users Out of Office
- Call Recording Available

Reporting

- Everything you want to know and need is visible
- Call and Text Reporting by Team Member, Department, or Agency
- CSR Call Cue Reporting
- Inbound/Outbound Call and Text Message Reporting
- Time Card Reporting Based on User Presence
- More!

