



**HANSEN**  
CALL RECORDING

CASH+ Hansen Call Recording  
for  
Insurance Agencies



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SOFTWARE



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CALL RECORDING

## Call Recording for Insurance Agencies



- **Protect** yourself from Errors & Omissions claims or lawsuits.
- Call Recording can allow for contracts to become **binding** during telephone conversations.
- Securely **review** and share conversations where disputes have arose due to information exchanges over the phone.
- **Increase productivity** naturally due to agent awareness that new accountability measures are in place.
- Meet **regulatory compliances** for such requirements as Do Not Call Lists for the Telemarketing Sales Rule (TSR), and the Truth in Lending Act (TILA).
- **Track** and create minimum agent performance goals. Track, grade and analyse agent performance.
- Included with the purchase is our **Software Assurance Coverage** which includes software installation, unlimited user training, 1 year of unlimited technical support and semi-annual software updates.

## Benefits of CASH+ Hansen Call Recording



### Quality Control

Record and monitor the quality of calls to ensure that every agent is being professional and meeting customer service standards.



### Performance Review

Call Records can be analyzed to improve agent performance and share relevant information with colleagues.



### Compliance

Many organizations are required to comply with regulatory requirements regarding sensitive information.



### Dispute Resolution

If issues arise between an agent and a client, the call records can be easily extracted and reviewed to resolve the dispute.



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## CALL RECORDING

Hansen Software offers the CASH+ Hansen Call Recording product with a Web interface. Install the program on any Windows 7 or newer PC and then your data will be accessible on other web enabled devices such as PCs, tablets and Phones that can reach your network. No need for multiple client application installs.

Reports Scheduled Reports Stored Reports Dashboard ▾

- ▶ All Lines Busy Reports
- ▶ Call Reports
- ▶ Company Reports
- ▶ Department Reports
- ▶ Divisional Reports
- ▶ Specialty Reports
- ▼ Station Reports

Station Overview  
Station Summary  
Station Detail  
Station By Hour  
Station By Day  
Station By Month

Reports Scheduled Reports Stored Reports Dashboard ▾ Admin ▾

ACTIVE	REPORT	CRITERIA
<input checked="" type="checkbox"/>	Station Overview Daily Overview	Departments List = Administration
<input checked="" type="checkbox"/>	Station By Hour Reception	Station Name List = Chelan Davis
Save View Log Historical Report Delete Change Criteria		

● Minutes  
● Daily  
● Weekly  
● Monthly  
● Yearly

☒ Mon ☒ Fri  
☒ Tue ☒ Sat  
☒ Wed ☒ Sun  
☒ Thu

Runs at:  
14:05:00  
Offset Hours:

Starting at:  
00:00:00  
Ending at:  
23:59:59

### TICKER TAPE

DATE	TIME	STN NAME	CALL TYPE	PHONE	DURATION	CR
7/20/2017	11:20:00 AM	Tyrel Hansen	Long Distance	1- (469)-234-9100	00:04:51	<a href="#">Listen</a>
7/20/2017	11:19:00 AM	Katrina Doroschuk	Incoming	1- (613)-382-4752	00:04:44	<a href="#">Listen</a>
7/20/2017	11:16:00 AM	Natasha Nicholls	Incoming	1- (604)-988-6550	00:01:54	<a href="#">Listen</a>

### Call Recording

Date: 7-20-2017 at 11:20 AM Outgoing call from Extension: 506 (Tyrel Hansen) Phone: 1- (469)-234-9100 for 291 seconds

▶ 0:00 / 4:56 🔊 🔍 ⬇

Save Email



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## **Annual Software Assurance Coverage**

One year of Software Assurance Coverage includes:

- ✓ Remote Installation Assistance
- ✓ Unlimited New User and Refresher Training
- ✓ 1 year of Unlimited Technical Support
- ✓ 24/7 Support for Technical Emergencies
- ✓ Remote Online Training, Support or Upgrade Assistance
- ✓ Semi Annual Software Updates
  - Automatic Maintenance Routine
  - Product Enhancements
  - Area Code Updates
  - Additional Reports
  - New Telephone Systems Additions
  - Microsoft Windows Compatibility Upgrades

The CASH+ Hansen Call Reports upgrade CD's that we send you not only update the software, but repair any potential problems. This is a critical process that ensures the software runs at a high level of speed and efficiency. Without these updates the software may eventually become obsolete and unusable. This support and maintenance package ensures that your software is always current and reliable to protect your investment.



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CALL REPORTS

**The Preferred Call Management Solution**

**1.877.795.2274**



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## CALL RECORDING

Incorporated into our CASH+ Hansen Call Recording is the Dashboard. This Dashboard is a live, dynamic status display. This innovative dashboard allows you to select a wide variety of charts, tables and graphs where you can define the content to suit your needs.

HSC TICKER TAPE							
DATE	TIME	DEPT NAME	STN	STN NAME	PHONE	DURATION	CR
7/4/2017	3:51:00 PM	Technical Support	500	Mike Dzakic	(250)-469-3609	00:17:39	<a href="#">Listen</a>
7/4/2017	2:41:00 PM	Sales	503	Natasha Nicholls	1- (800)-268-0764	00:04:37	<a href="#">Listen</a>
7/4/2017	2:36:00 PM	Administration	518	Katrina Doroschuk	1- (780)-484-2266	00:00:42	<a href="#">Listen</a>
7/4/2017	2:28:00 PM	Technical Support	501	Chris Pizio	1- (604)-307-6764	00:22:05	<a href="#">Listen</a>
7/4/2017	12:12:00 PM	Technical Support	501	Chris Pizio	1- (416)-364-4444	00:02:21	
7/4/2017	11:31:00 AM	Technical Support	501	Chris Pizio	1- (705)-313-4919	00:16:38	

Click to play call recordings!

OVERVIEW					
SOURCE	INCOMING	OUTGOING	TOTAL CALLS	TOTAL DURATION	GOAL
Grand Total	31	62	93	08:37:33	0
Alyssa Regier - Hansen	0				35
Chris Heiss - Hansen	5				0
Chris Pizio - Hansen	7				0
Katrina Doroschuk - Hansen	6				0
Natasha Nicholls - Hansen	3				35
Mike Dzakic - Hansen	2				10
Tyrel Hansen - Hansen	3				25

ALERTS

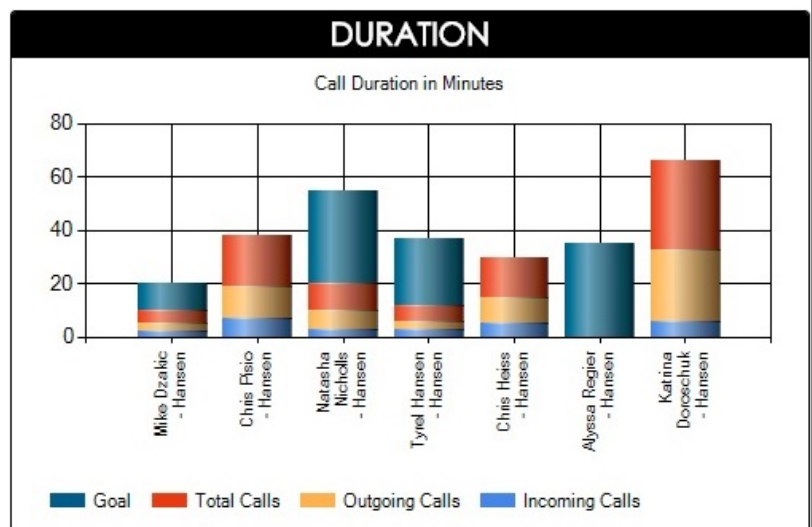
MESSAGE

Date: 7/3/2017  
Time: 10:44 AM  
Alert: (After Hours Pager - Chris Heis)  
2505754776 was called from station: 2999: Voicemail 3 for 23 seconds

Date: 7/3/2017  
Time: 10:46 AM  
Alert: (After Hours Pager - Chris Heis)  
2505754776 called station: 2510: Voicemail 1 for 2.28 minutes

The Ticker Tape displays individual calls as soon as the call is disconnected. Call Summaries allow you to monitor any combination of total volumes, call direction and duration on either individual extensions or groups. Call Alerts notify you if any predefined alert is triggered.

All window options are fully customizable to meet your needs!





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CALL RECORDING

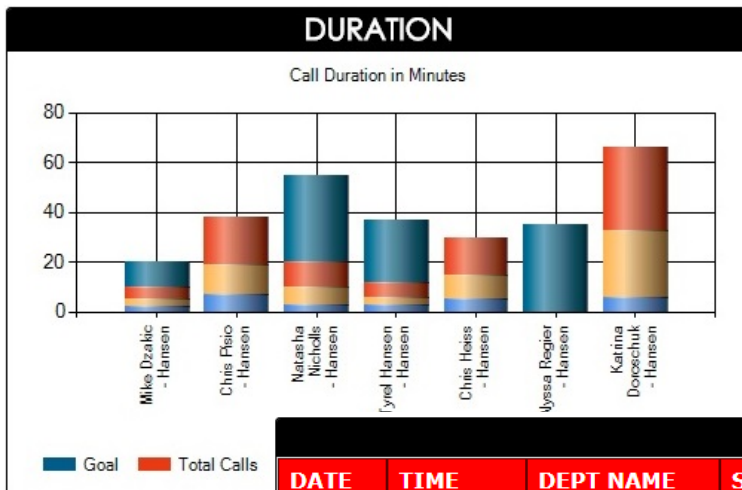
## Call Recording with Integrated Call Accounting

When you purchase our CASH+ Hansen Call Recording, you get the CASH+ Hansen Call Reports and all its reporting capabilities for free! For example, if you have 100 extensions, there will be a savings of \$1,875.00.

With the CASH+ Hansen Call Reports embedded in the CASH+ Hansen Call Recording, call records are quickly and easily accessible. The powerful reporting functionality of CASH+ Hansen Call Reports allows you to run reports on any data you want to review which can;

- Create detailed reports to see specific facts on each phone call to increase productivity and detect misuse and abuse
- Allocate Communication costs to specific departments
- Provide Real-time telephone cost recovery
- Generate revenue
- Monitor Trunk Activity to analyze line requirements
- Search for calls by station, telephone number, call type, duration, date and much more.

Not only is CASH+ Hansen Call Reports included, you also receive the Dashboard which enables you to monitor current telephone activity through graphs and chart for the day.



HSC TICKER TAPE							
DATE	TIME	DEPT NAME	STN	STN NAME	PHONE	DURATION	CR
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7/4/2017	2:36:00 PM	Administration	518	Katrina Doroschuk	1- (780)-484-2266	00:00:42	<a href="#">Listen</a>
7/4/2017	2:28:00 PM	Technical Support	501	Chris Pizio	1- (604)-307-6764	00:22:05	<a href="#">Listen</a>
7/4/2017	12:12:00 PM	Technical Support	501	Chris Pizio	1- (416)-364-4444	00:02:21	<a href="#">Listen</a>
7/4/2017	11:31:00 AM	Technical Support	501	Chris Pizio	1- (705)-313-4919	00:16:38	<a href="#">Listen</a>



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## CALL RECORDING

Recordings are accessed through the CASH+ Hansen Call Reports. Once you find the call record you are looking for, you can listen to the call by clicking the speaker icon beside it.

Date	Time	Duration	End Time	Stn	I/O	Phone Number	Location	
05/18/2018	11:05:00 AM	00:00:04	11:05:04 AM	518	I	1- (416)-847-5240	TORONTO, ON	
05/18/2018	11:31:00 AM	00:00:49	11:31:49 AM	518	I	(250)-470-1061	KELOWNA, BC	
05/18/2018	11:38:00 AM	00:07:55	11:45:55 AM	506	O	(250)-470-1061	KELOWNA, BC	
05/18/2018	11:42:00 AM	00:01:44	11:43:44 AM	503	O	(778)-478-1001	KELOWNA, BC	
05/18/2018	11:48:00 AM	00:04:00	11:52:00 AM	501	I	1- (508)-356-7662	CATAUMET, MA	
05/18/2018	11:51:00 AM	00:00:03	11:51:03 AM	506	O	1- (800)-736-5740		
05/18/2018	12:11:00 PM	00:29:53	12:40:53 PM	500	I	1- (530)-865-0298	ORLAND, CA	
05/18/2018	12:44:00 PM	00:19:07	1:03:07 PM	500	I	1- (519)-433-3033	LONDON, ON	
05/18/2018	1:36:00 PM	00:22:37	1:58:37 PM	501	I	1- (780)-809-1666	EDMONTON, AB	
05/18/2018	1:49:00 PM	00:03:47	1:52:47 PM	506	O	1- (800)-736-5740		
05/18/2018	1:57:00 PM	00:11:40	2:08:40 PM	500	I	1- (250)-572-0738	SOUTH KAMLOOPS, BC	
05/18/2018	2:03:00 PM	00:27:03	2:30:03 PM	501	O	1- (408)-550-2800	SAN JOSE WEST, CA	



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## CALL RECORDING

### Call Player

By clicking the speaker icon, you are taken to the Call Player. This useful tool allows you to listen to the call as well as manipulate it by cropping it or fading out sections. You also have the ability to email the call record or save it as an MP3.

#### Call Recording

Date: 8-10-2017 at 8:09 AM Incoming call to Extension: 500 (Mike Dzakic) Phone: 1- (418)-387-4623 for 501 seconds



Save Email

#### Playback History

ACTION	DATE	USER NAME	MACHINE NAME
Web Playback	8/10/2017 2:42:42 PM		192.168.0.137

#### Call Grading

Nothing selected Save

Review who listened to calls and when by reviewing the Playback History window

Create and choose your own grading scheme for tagging individual calls by importance, or quality. Include notes regarding individual calls for further clarification.





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## CALL RECORDING

### **Hardware Requirements for Single Site Call Recording**

CASH+ Hansen Call Recording runs as a service which allows the host computer to be logged off

#### **CALL RECORDING DOES REQUIRE A DEDICATED COMPUTER**

- Compatible with 32 bit or 64 bit Windows operating systems:  
Windows 7, Serv 2012, Serv 2012 R2, Serv 2016, Serv 2019, 8, 8.1 or 10
- Telephone System must be capable of providing SMDR/CDR (Serial\*, IP, API etc..)
- Intel Core i5 Processor or better
- Minimum of 8 GB RAM
- 1 NIC card required for remote assistance and client/server functionality
- 2 TB of Hard Disc Space \*\*
- Must be installed with full "Administrator" rights
- Cash+ Web may require port forwarding and/or a port opened on the firewall

Virtual Environments (Please call HSC if you have any questions or concerns):

- PCIe Call Recording cards are **not** compatible in Virtual Environments.
- USB Call Recording devices are compatible in Virtual Environments.
- Voice Packetizers Call Recording devices are compatible in Virtual Environments.

Analog Call Recording requires:

- Active Caller ID service on the lines
- Line Voltages: On Hook 48v, Off Hook 12v

SIP Trunk Call Recording requires

- 2 NIC cards are required for SIP installations
- Only compatible with G.711, G.722 and G.729 Codec
- Must be SIP Trunks. Not compatible with SIP Extensions.

All cabling & wiring for PRI and Analog line taps must not exceed 8m (25 feet)

\* Serial Port required to collect SMDR/CDR data via RS232 connection; not required if via TCP/IP.

\*\* Requirements may vary depending on call volume (1 TB will hold on average 4 years of calls on 1 PRI)

**Our PCIe cards have a height of 4.2 inches and length of 7.5 inches. They fit in slots up to 16X.  
Please ensure your computer has sufficient room for the card to fit when installed.**



## **Hardware Requirements for CASH+ Hansen Call Recording Multi Site Call Recording**

CASH+ Hansen Call Recording runs as a service which allows the host computer to be logged off.

### **CALL RECORDING DOES REQUIRE A DEDICATED MAIN SITE COMPUTER**

Compatible with 32 bit or 64 bit Windows operating systems:

Windows 7, Serv 2012, Serv 2012 R2, Serv 2016, Serv 2019, 8, 8.1 or 10

#### **Main Site:**

- Telephone System must be capable of providing SMDR/CDR (Serial\*, IP, API etc..)
- Intel Core i5 processor or better
- Minimum of 8 GB RAM
- 1 NIC card required for remote assistance and client/server functionality
- 2 TB of Hard Disc Space \*\*
- Must be installed with full "Administrator" rights
- CASH+ Web may require port forwarding and/or a port opened on the firewall

Virtual Environments (Please call HSC if you have any questions or concerns):

- PCIe Call Recording cards are **not** compatible in Virtual Environments.
- USB Call Recording devices are compatible in Virtual Environments.
- Voice Packetizers Call Recording devices are compatible in Virtual Environments.

#### **For each remote site:**

- Telephone System must be capable of providing SMDR/CDR (Serial, IP, API etc..)
- Minimum of 4 GB RAM
- 500 GB of Hard Disc Space
- Must be installed with full "Administrator" rights

Analog Call Recording requires:

- Active Caller ID service on the lines
- Line Voltages: On Hook 48v, Off Hook 12v

SIP Trunk Call Recording requires:

- 2 NIC cards are required for SIP installations
- Only compatible with G.711, G.722 and G.729 Codec
- Must be SIP Trunks. Not compatible with SIP Extensions.

All cabling & wiring for PRI and Analog line taps must not exceed 8m (25 feet)

\* Serial Port required to collect SMDR/CDR data via RS232; not required if via TCP/IP.

\*\* Requirements may vary depending on call volume (1 TB will hold on average 4 years of calls on 1 PRI)

**Our PCIe cards have a height of 4.2 inches and length of 7.5 inches. They fit in slots up to 16X.  
Please ensure your computer has sufficient room for the card to fit when installed.**