

blueButler
for Applied Epic



Short Video Liks:

[blueButler - Applied Epic
Integration Video](#)

[blueButler – Applied Epic \(with
thought clouds\)](#)



blueButler is Integrated with Applied Epic to provide Automated Call Content Management and Embedded Call Recording extended to your Work@Home teams

blueButler *for* Applied Epic

“By adding blueButler to our suite of digital products which included EPIC we increased our ability to effectively and efficiently document conversations, update files in real-time, record conversations and implement audio signature strategies. blueButler afforded us the opportunity to provide a Customer Experience and an Employee Experience that directly impacted our level of professionalism and bottom line.”

Karen Hoflin
Vice President
Go Auto Insurance Brokers Ltd.



Will provide:

- Staff self – accountability
- Management oversight and insight, “as if managers were present with staff”
- Collaboration among staff and management as if you never left the building.
- Automated E & O protection



Key blueButler features



Window into Epic Customer screen Pop

Your customized blueButler interface pops open at the start of every call and provides instant access to Epic customer and policy information



Automated Epic Pop and Activity creation / addition

Enables automated Epic Activity creation or addition during the phone call (without entering Epic) Click Pop to directly enter Epic!



Daily Call Activity Manager

Provides an automated company-wide audit trail to view all calls made through the system: Staff sees their own calls – Management sees everyone's calls. Sort calls by customer; staff; subject matter for instant reference and recording playback. Instant visual of whether calls were linked to an Activity or not.



Automated workflow scripts, checklist, and call content tags

Use customized, scripts, checklists and call content tags to accelerate workflows and guide calls while capturing key information for any given workflow.



Embedded Call recording

blueButler automatically embeds the recorded call in the blueButler data base and links the recorded calls into Epic with a click



More blueButler features

[Click here for a comprehensive feature review](#)



Automated Call Content Drill Down Reports

Automated reports will show number of calls / staff / subject content / time period / with drill down playback feature – right from the Report!



Automated daily “Linked Call” Report

Linked call reports will show any insurance subject calls for which an Activity was not created or added to in Epic. (with easy to fix – just click on the record and click “Save” to create the Activity)



Audio Signature

blueButler enables you to bind the business over the phone using a secure “audio signature” when the quote is given to the client. You book the business ahead of the time it would take to receive the signed documents from the client, and you eliminate the chance of that business going to the competition.



Real time Carrier Portal Links

One-click access to your web portals / carrier portals, website links and inhouse documents.



Call content search query

Search for calls from any point in time on any search criteria. No call can ever fall through the cracks.

Contact **blueC** for more **blueButler** information

blueC 



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