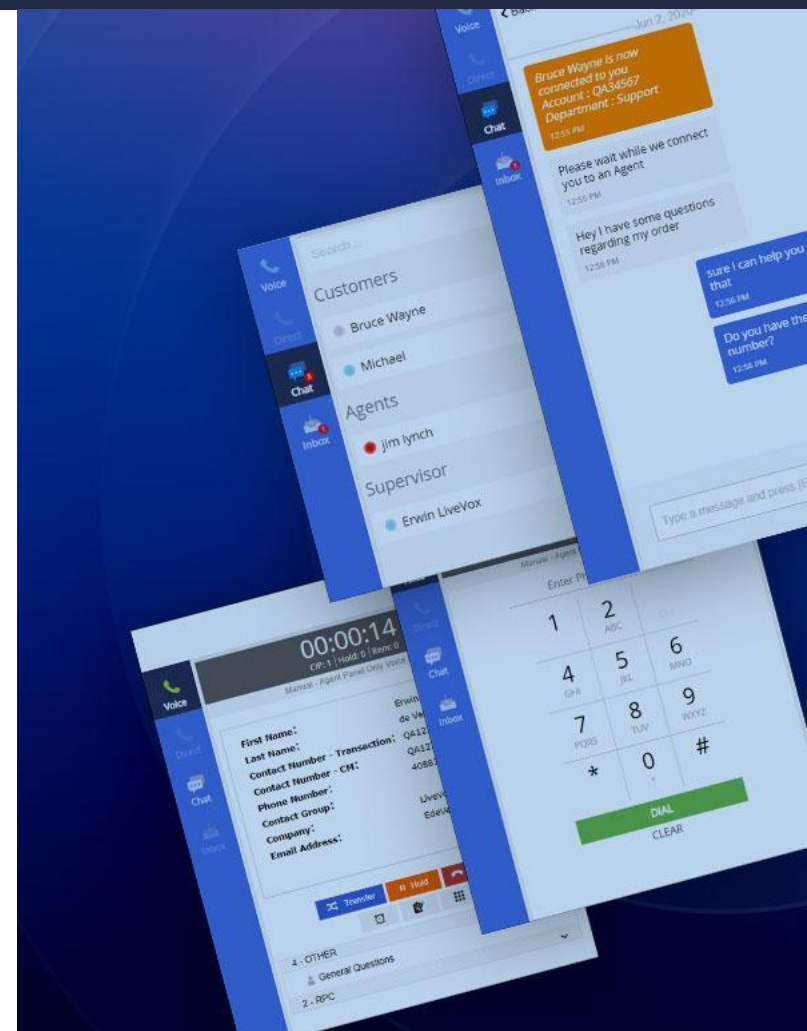**LiveVox U-15**

Introducing the latest and greatest version of our platform

March 10, 2020

LIVEVOX

On the Agenda

1. An overview of our approach to U-15

2. U-15's top new features and capabilities

3. Available Resources

4. Q&A

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Our Approach to U-15

- **Improving agent experience** by supporting collaboration and ensuring back-office employees are connected to customer service agents

- **Making the platform easier to use** by simplifying data and contact management, campaign flexibility, and file exchanges

- **Unlocking vital insight** by providing easy, comprehensive access to relevant data without the hassle of integration

- **Enhancing messaging channels,** empowering agents to provide a great customer experience

- **Investing in real-time performance** by providing instant access to the data and insights needed to improve contact center performance.

Agent Experience: CRM and Ticketing Updates

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U-CRM – Customizable Contact Views

- **Create customized contact, account, and ticket lists for agents** by creating view filters and assigning them to specific agents, agent teams or managers

- **Agents can sort and filter on any columns** they have displayed and work through their assigned list.

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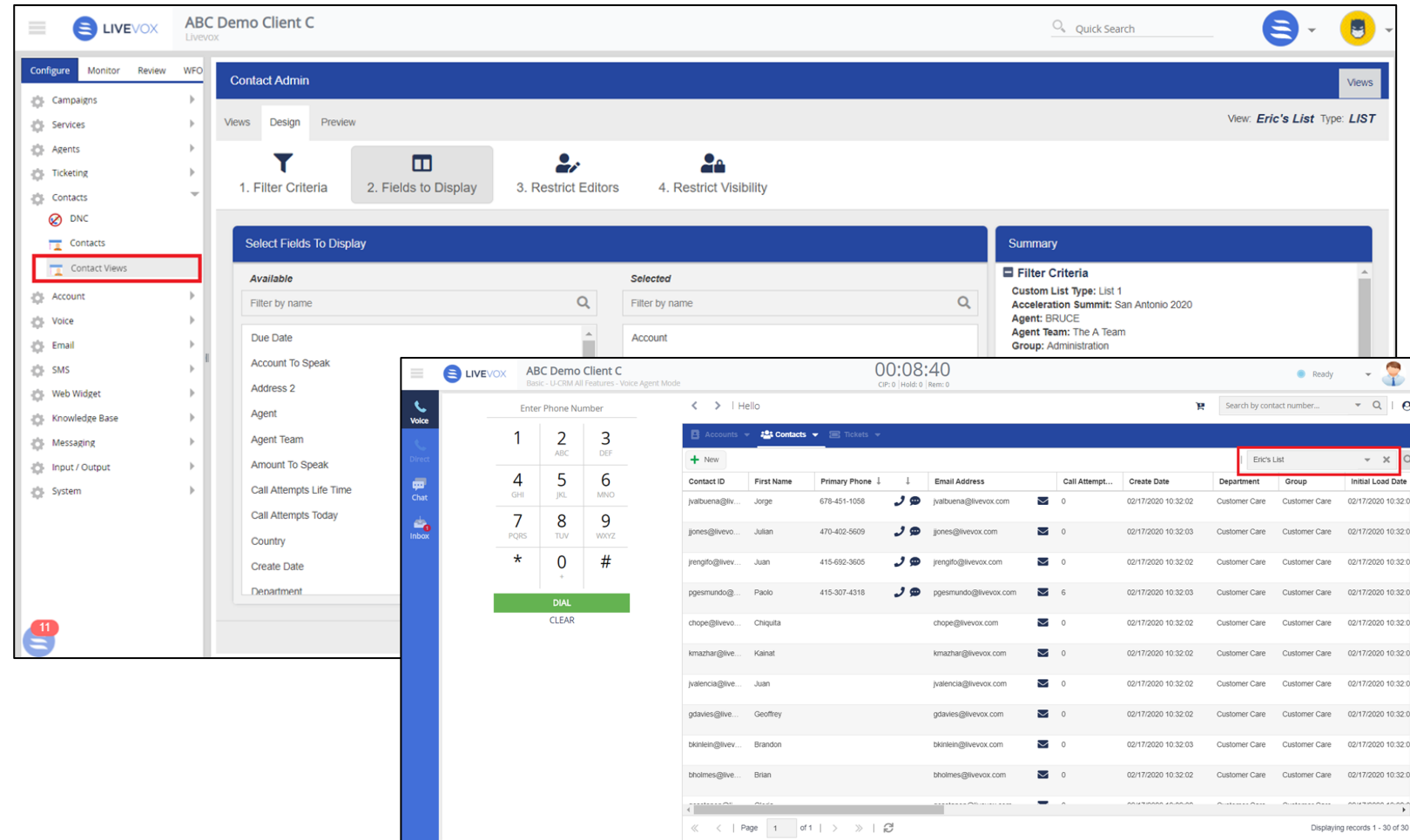
U-CRM – Highlight Component

- **Highlight component supports custom fields**

- **Allows users to always display important Contact information** while agent navigates through different U-CRM based tabs

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U-CRM – Directory Component Enhancements

- **Define which phone fields are displayed on the desktop**

- **Enable & disable consent fields** to enhance agent controls

- **Re-label all phone fields on any U-CRM desktop** regardless of what is labeled in Contact Manager

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U-CRM – Field Relabeling

- **Re-label all fields including System Fields for Contact, Accounts and Ticketing entities** within the U-CRM desktop

- Each U-CRM desktop can have **unique field labeling**

- **Gives great flexibility to clients with multiple business portfolios** – they no longer need to add additional custom fields or utilize the same field for different purposes

Selected

Order	Name	Data Index	Group	Type	Column
⋮	Member Number	account	Custom Grouping	Display Only	1
⋮	Original ID	originalAccountNumber	Description	Display Only	2
⋮	First Name	firstName	New Custom Group	Text	1
⋮	Last Name	lastName	New Custom Group	Text	2
⋮	Balance	balance	Banking Information	Number	1
⋮	Owed	amountToSpeak	Banking Information	Number	2
⋮	Active	active	General	CheckBox	1
⋮	Do Not Call	accountBlock	General	DropDown	2
⋮	Unique Identifier	ssn	Banking Information	Text	1

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🛒

Search by contact number... ▾ 🔍 | 👤

▾ 👥 Contacts ▾ 🎫 Tickets ▾

⌃ **ORDER-1**-Toy Showed Replacement OPEN

👤✓ Assign To Me | ➕ New ▾ | 🔗 Link ▾ | ⇄ Workflow ▾ | ◑ **Function Button** | ✕

High		Label:*	ORDER
Bruce Wayne (BRUCE)		Agent Team:	The A Team
		Contact:	Austin Wayne (QA12345)

☰ Interactions   📎 Attachments   💬 Comments   🕓

ustin Wayne (QA12345)   👁

408-839-0384

EdeVera@livevox.com   ✉   SLA Due Date: 08/24/2020

Confirm   ✕

❓   Are you sure you want to continue?

Yes   No

tion

U̲   T⁺   T

up broken. Issuing a rep

Method Editor *(Erwin-JIRA : Create JIRA)*   ✕

General   Request   Response

Parameter Editor

Headers

Function Editor Dynamic Response Insert

Name: ["fields"]["issuetype"]["name"]   ➕

Query Parameters

Value: ${responseData.key}CATs Entry   ➕

U-CRM – URL Pop

- **Configure a URL Pop from U-CRM**

- The event **can be triggered based on manual or automated events** such as agent state or termination of interactions

- **URLs can be structured with dynamic information** from the Contact, Ticket, Account, Call or Agent Property to open specific 3rd Party Platforms.
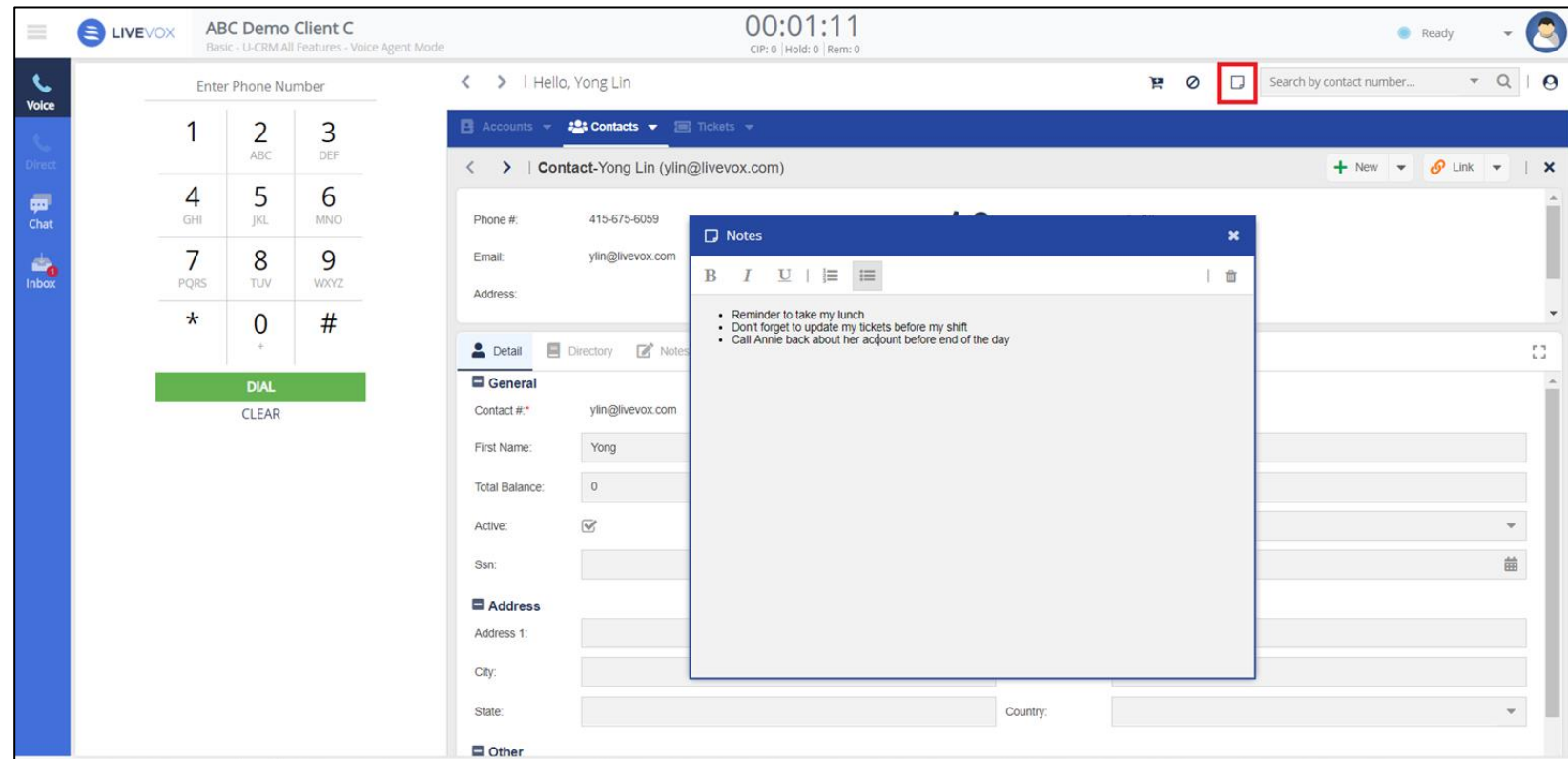
LIVEVOX
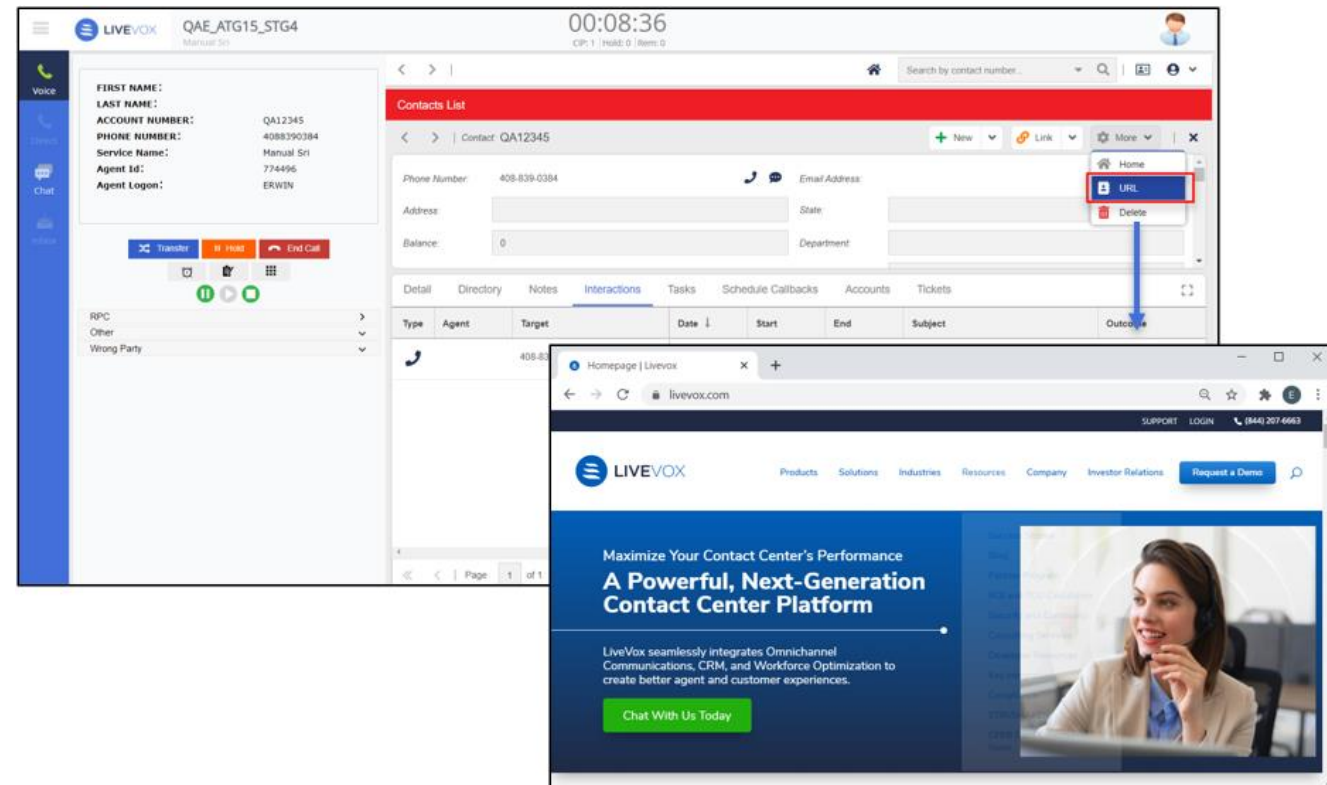
U-CRM – New Screen Pop Component

- **Add a floating screen pop on U-CRM desktops**

- The new screen pop component **can be added to the Home bar and displays the same information as it would on the Agent Panel**

- **Agents can maximize their screen's real estate** by easily hiding or minimizing any screen pop information.

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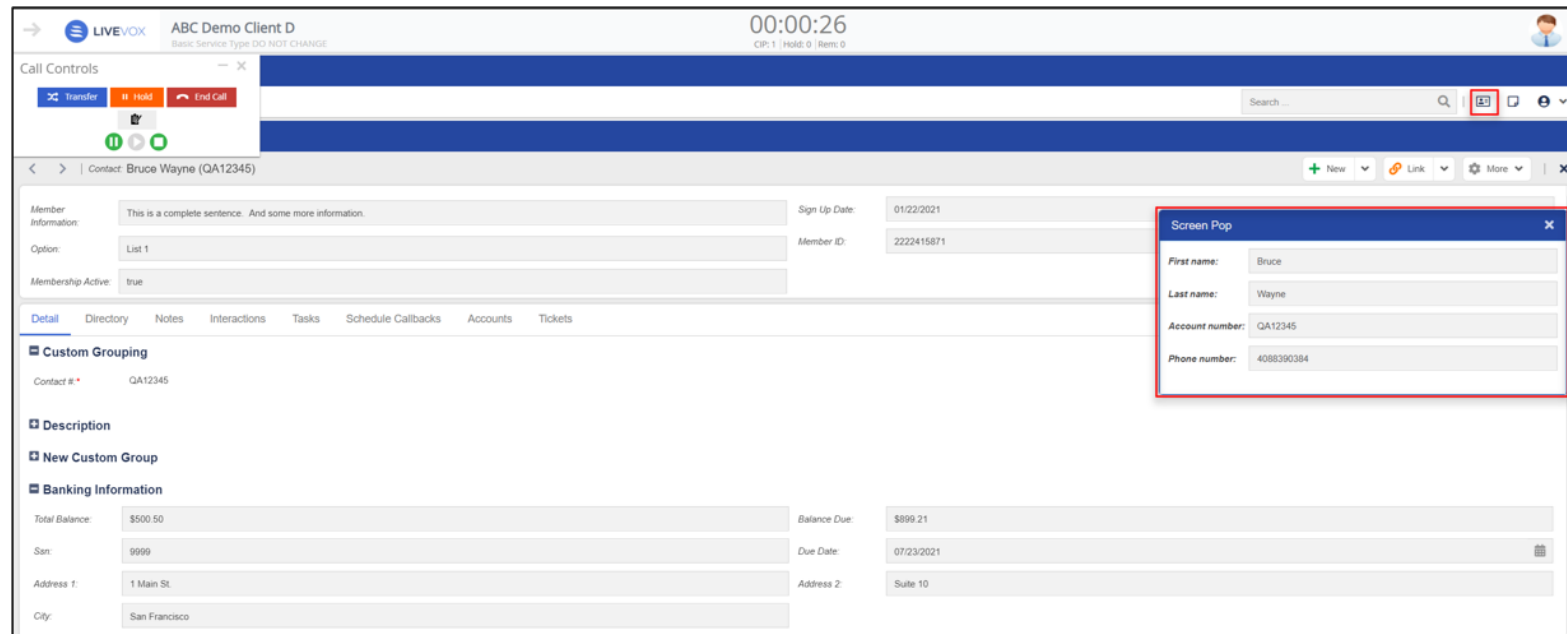
U-CRM – Notepad

- Managers can now **configure U-CRM desktops with a notepad for Agents**

- Enabled on the Home bar, the notepad **allows agents to write notes anytime while logged in**

- The notes are **retained as long as the Agent is logged in**

- The notes are always at the forefront and **can be resized or closed anytime.**

U-CRM – UI Enhancements

The user interface have been enhanced across our whole CRM, including:

- **Color-coded icons**

- **Default color schemes** in-line with LiveVox colors

- **Expandable Notes** in Ticketing, Accounts and Contact components

- **Updated tab design, background colors, and more**
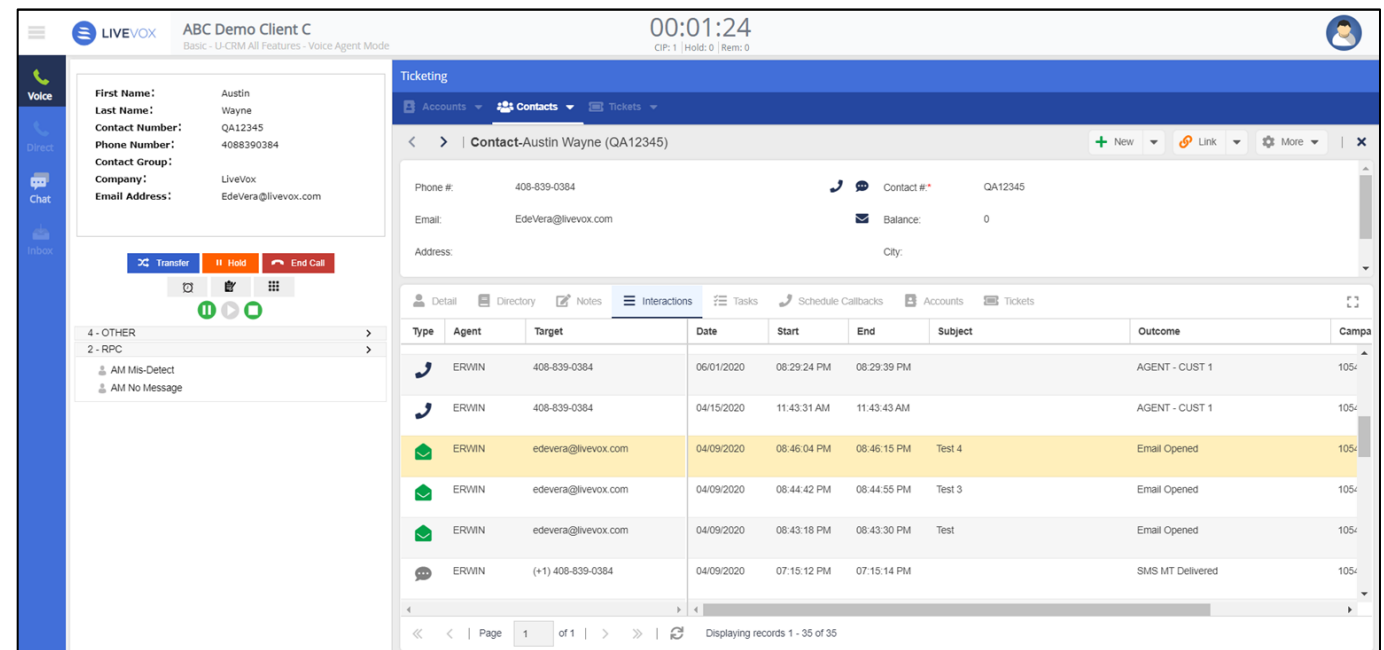
Additional Agent Experience Enhancements

Keep recording while staying secure

- Instead of pausing call and screen recording during Advanced Secure Payment Capture **we now suppress the DTMF tones.**

Don't miss customer callbacks

- IVR Scheduled callbacks without an assigned agent skill **will now launch and be sent to any available agent**

- **Resolves previous issue** where IVR scheduled callbacks without an agent skill and with strict classification would not be launched.
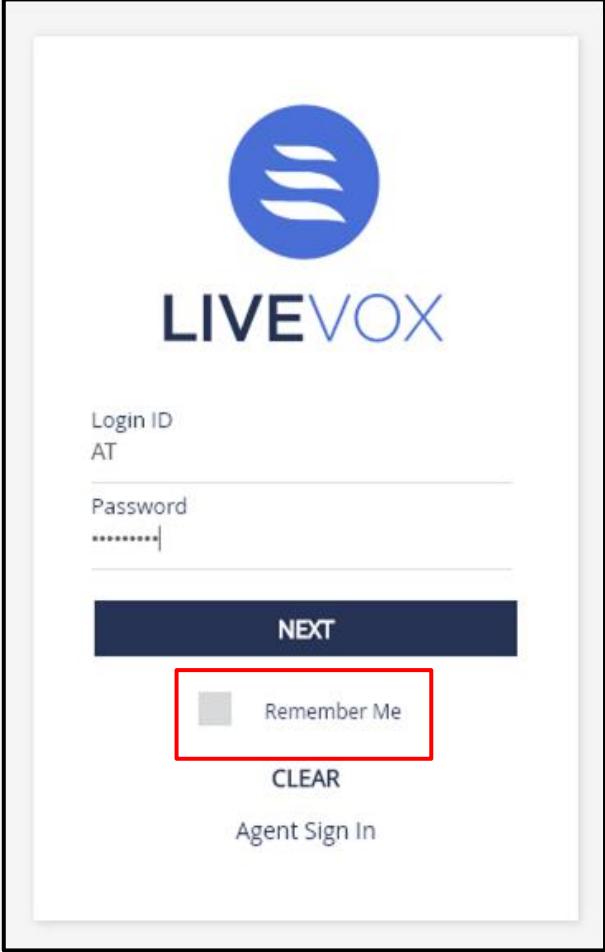
LIVEVOX
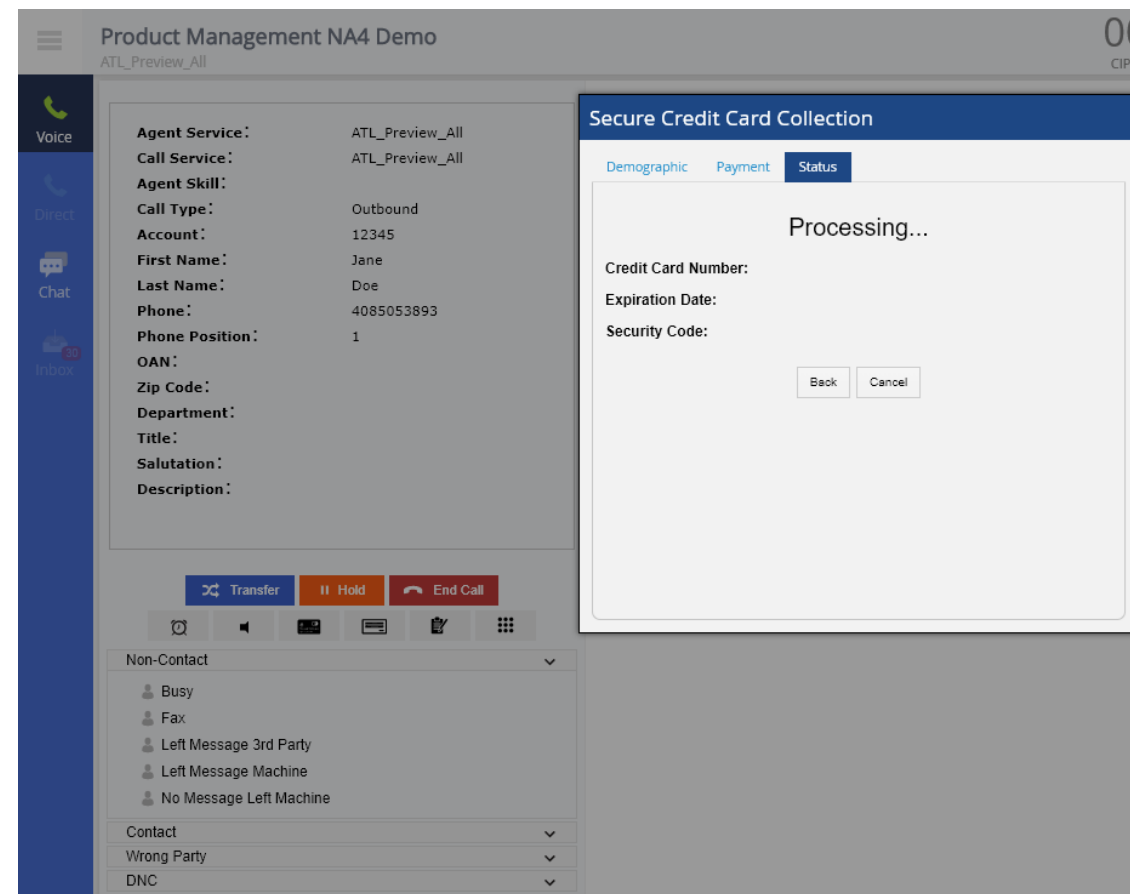
Agent Experience: Back Office Agents & PBX

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Agent Login – Remember Me

The "Remember Me" checkbox is now available on the Agent login screen

- This feature **works both in ADN and web browser**

- When enabled, an **agent's login ID will be remembered the next time they navigate to the login page**
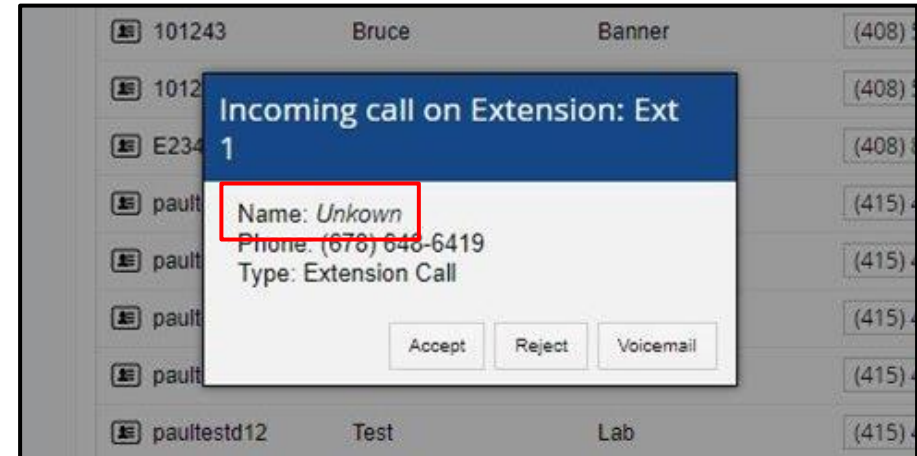
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Inbound CNAM

- **Agents will now see CNAM information for incoming calls.**

- This is in addition to the previously visible information: **the phone number and the option to accept, reject or send to voicemail**

- If CNAM is unavailable or blocked "Unknown" will display.

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Agent Desktop Native Enhancements

We've improved the usability of our ADN

- The ADN can now be set to **always be on top of other applications on the agent's system**

- **Closing the ADN window no longer closes the application,** instead it is minimized into the system tray.

- Agents will **still receive chat notifications** while the window is minimized and **if they received a call it will pop to the foreground.**

- **Agents can now perform the following actions** by right clicking the LV icon in the system tray :
    - Changing their state
    - Switching service
    - Setting 'Always on Top' functionality
    - Logging off
    - Quitting the application
    - Reopening the ADN window
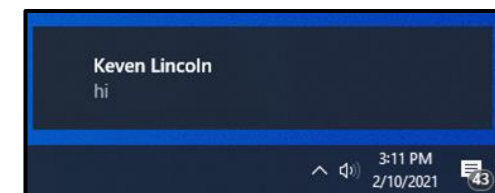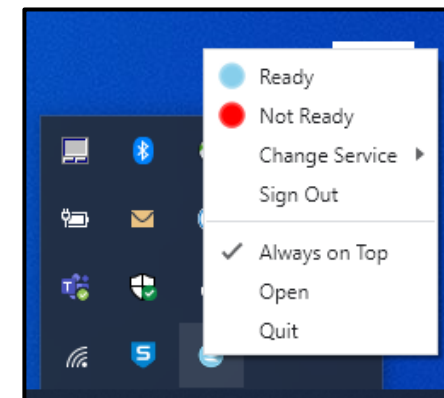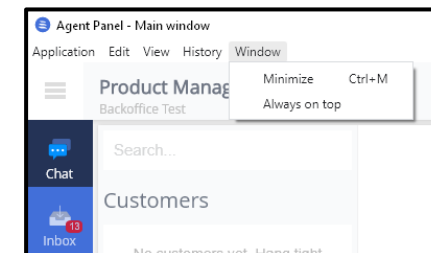
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Knowledge Worker – UX Enhancements

Its now much easier for LiveVox agents to function as 'Knowledge-Workers'

- These features only apply when the Agent Desktop is set to Knowledge Worker, there is **no change in functionality for normal agents**

- When the 'account number required' setting is disabled the account entry popup no longer displays after selecting a term code

- The state timer will **only display when the agent is 'In Call'**
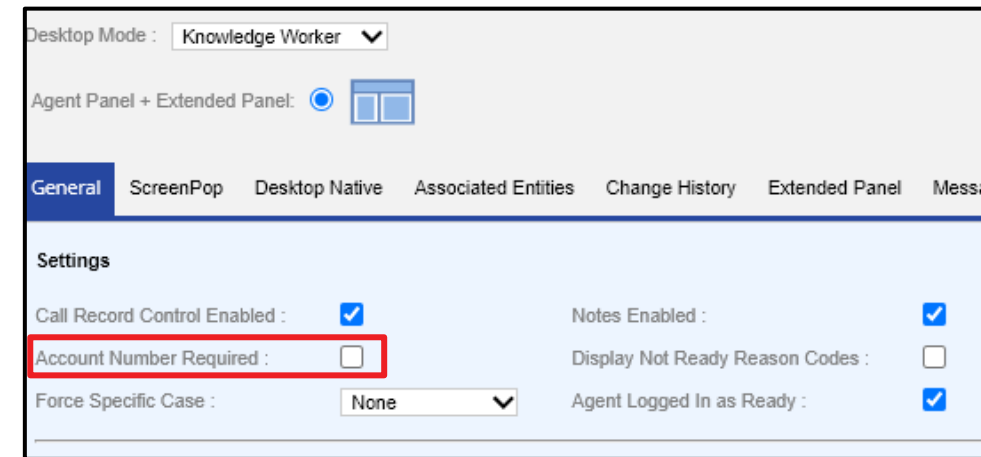

Regular Agent

Knowledge Worker

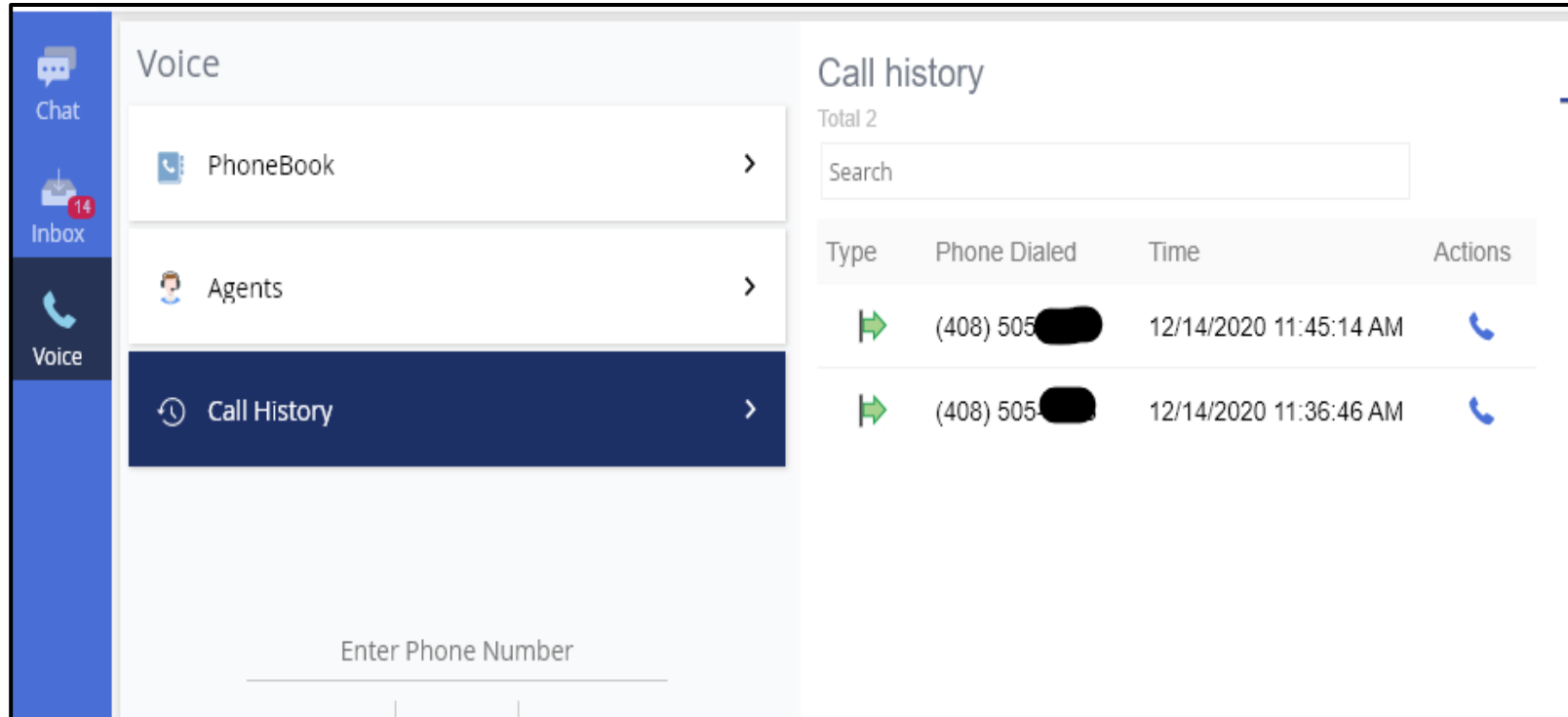LIVEVOX

Knowledge Worker – Auto Ready & Service Login

A streamlined log-in experience for Knowledge Workers

- For Knowledge Worker based desktops, agents they will be **automatically logged in if the only have access to one service,** after providing correct username and password

- After successfully logging in, **a Knowledge Worker will automatically be placed in ready** if the 'Agent Logged in as Ready' feature is enabled

- This **streamlines the Agent experience for back-office Agents.**
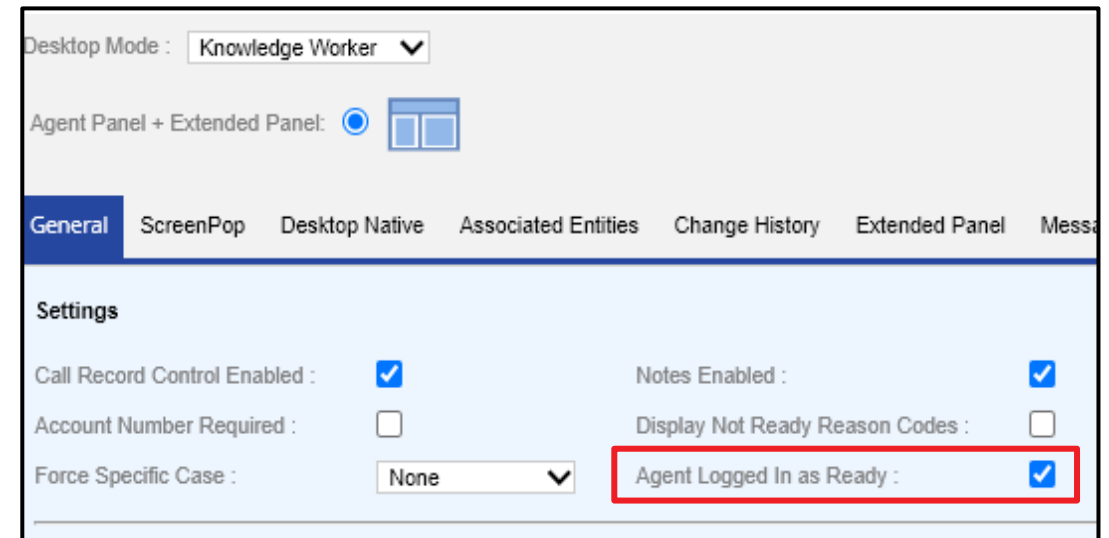
Knowledge Worker – Call History

- **Knowledge workers can now access their call history**

- Agents will be able **to see inbound, outbound and missed calls**

- Each entry will have the **phone number, duration and time, as well as a button to call the number back**

- Agents will be able to **search for interactions**

- The agents' **last 100 interactions will be available**

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Knowledge Worker – Agent Personal Phonebook

Knowledge workers can now curate a personal desktop phonebook

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VM 2.0 Enhancements and E911

- **Agents can now record their own personal voicemail greetings** from the agent desktop

- If no personal voicemail greeting is configured, then **the default message will be played instead**

- Alternatively, **agents can choose to upload a max 2MB .wav file**
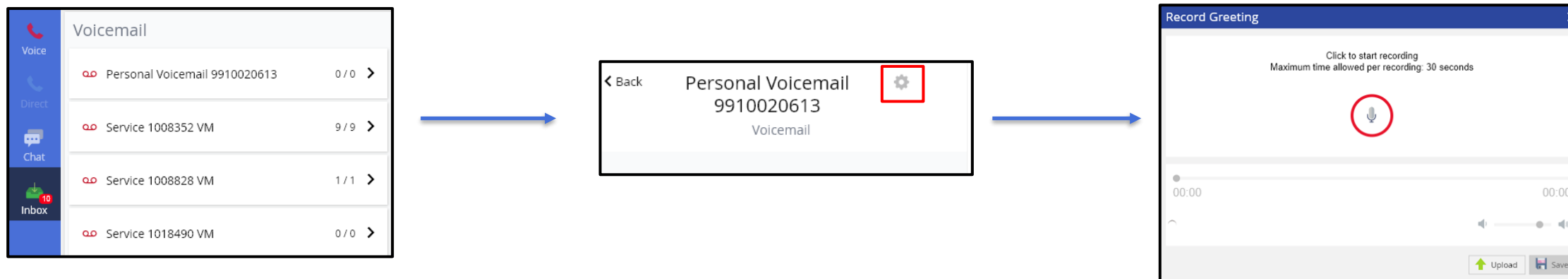
- **Plus, you can now dial 911 from the LiveVox platform**

- **Dialing will not apply any compliance checks,** require any extra input (i.e. zip code, account, etc.) and can only be dialed via a manual service

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Data Management and Analytics: Contact Management and Segmentation

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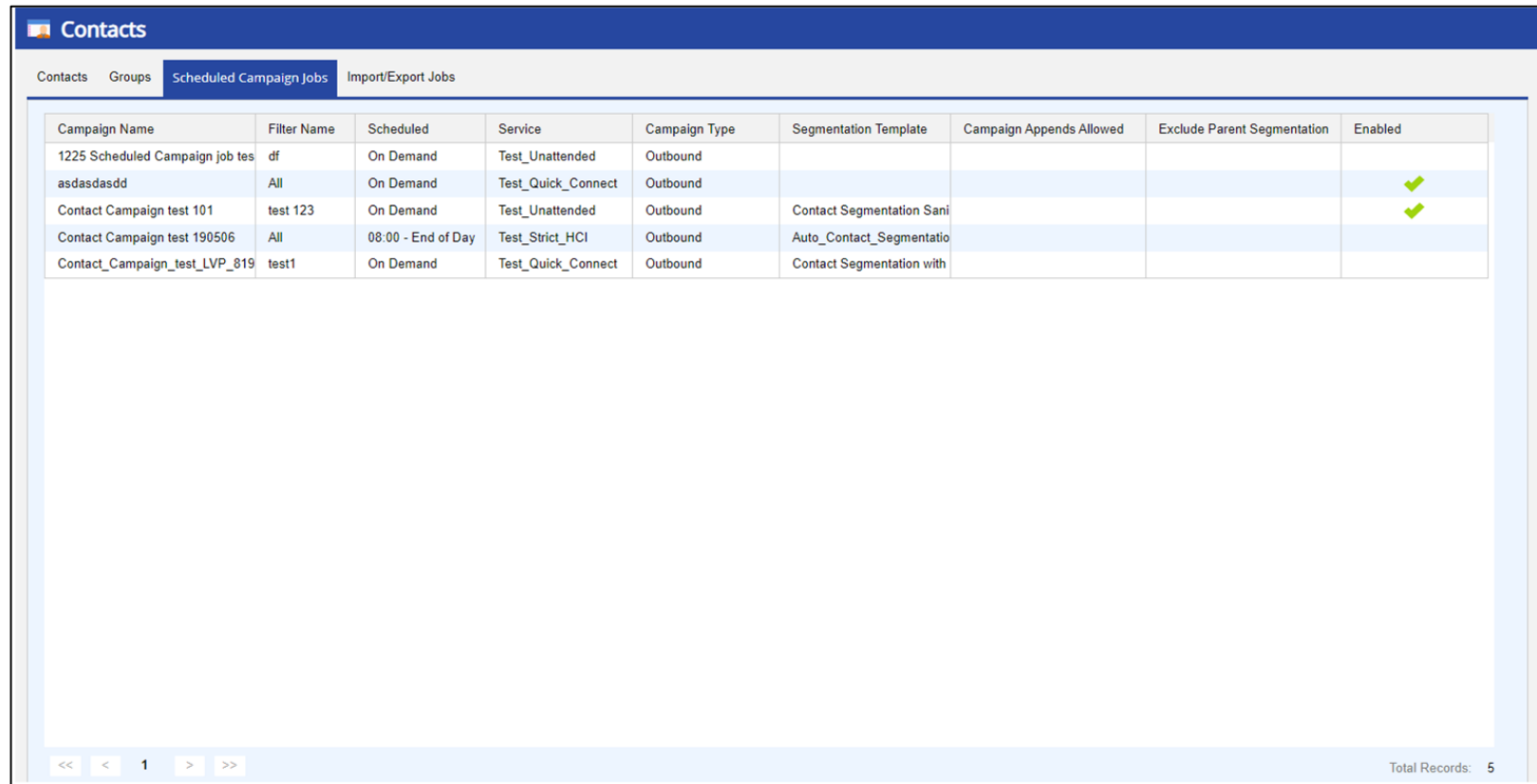
Contact Manager Segmentation Enhancements

- **Segmentation editor no longer requires defining criteria** for Transactional and Contact source types

- **Users can easily create or modify segmentation templates** without having to define the available criteria and values

- **The Segmentation Editor UI has been updated** for a better User experience

- Managers can now **create advanced search and segmentation filters** and use an 'Is Empty' or 'Is Not Empty' comparison for most fields.

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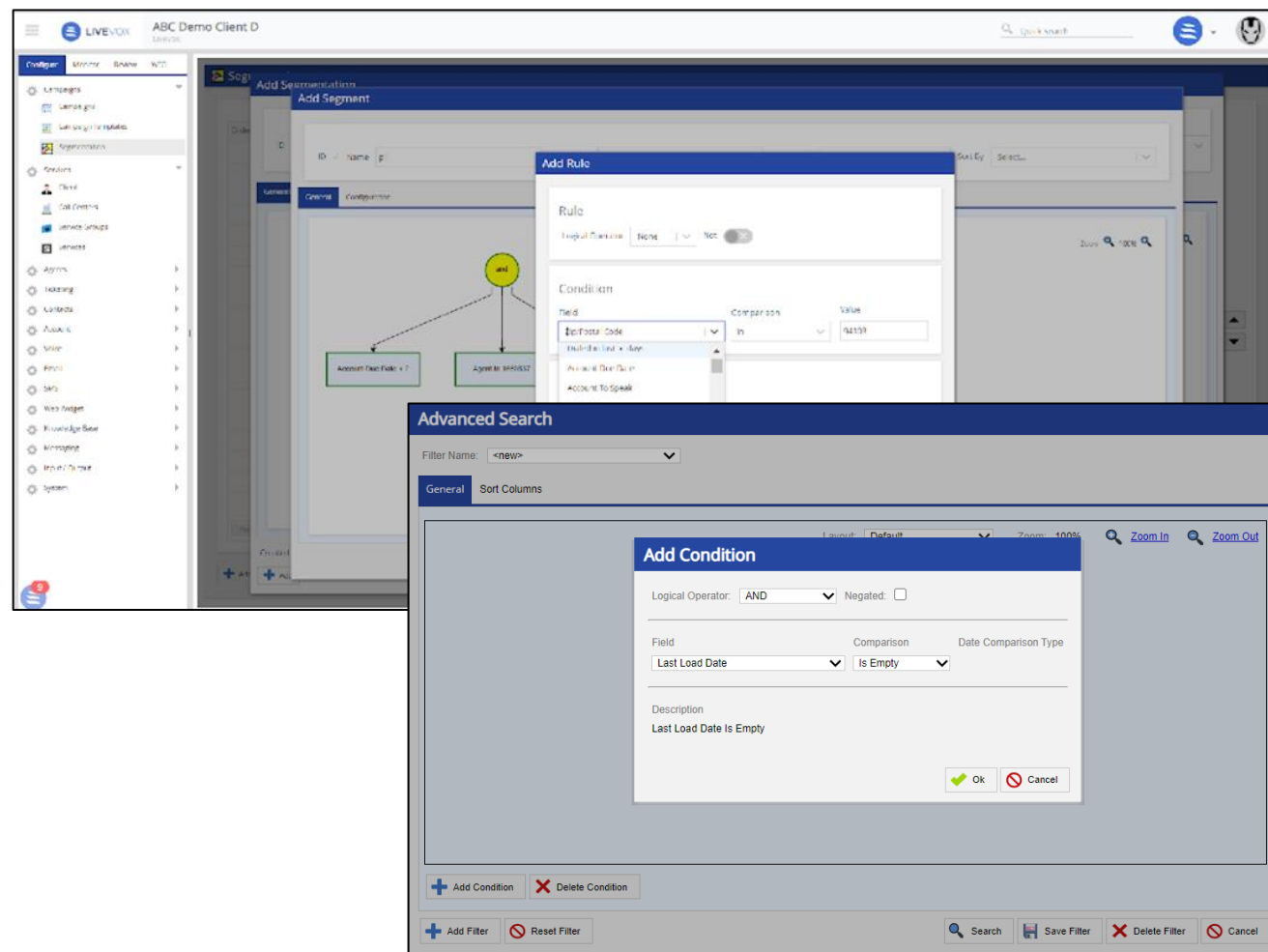
Contact Manager – Scheduled Campaign Job Enhancements

- Managers can now **schedule up to 20 campaign jobs in Contact Manager**

- Plus, **the Scheduled Campaign Job table grid now shows the following parameters** for easier reference

  - Schedule
  - Service Assignment
  - Campaign Type
  - Segmentation Template
  - Campaign Appends
  - Parent Campaign Exclusion

Contacts

Contacts   Groups   Scheduled Campaign Jobs   Import/Export Jobs

Campaign Name	Filter Name	Scheduled	Service	Campaign Type	Segmentation Template	Campaign Appends Allowed	Exclude Parent Segmentation	Enabled
1225 Scheduled Campaign job tes	df	On Demand	Test_Unattended	Outbound				
asdasdasdd	All	On Demand	Test_Quick_Connect	Outbound				✔
Contact Campaign test 101	test 123	On Demand	Test_Unattended	Outbound	Contact Segmentation Sani			✔
Contact Campaign test 190506	All	08:00 - End of Day	Test_Strict_HCI	Outbound	Auto_Contact_Segmentatio			
Contact_Campaign_test_LVP_819	test1	On Demand	Test_Quick_Connect	Outbound	Contact Segmentation with			

<<   <   1   >   >>   Total Records: 5

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Streamline Your Operation With Intelligently Triggered Workflows

Triggered workflows in U-Ticketing

- **Trigger vital workflows** based on specific ticketing fields being updated.

- **Start important processes promptly** saving time for your team and your customers

- **Mitigate human error** through automation.

- **Send reminders internally vis SMS & Email** whenever and even occurs for a ticket

- Create messages using the **new Email & SMS notification templates**

Example

```
┌──────────────────┐      ┌──────────────────────┐      ┌──────────────────────┐
│ Ticket set to    │ ───► │ Email or SMS to      │ ───► │ Manager assigns      │
│ 'critical'       │      │ relevant manager     │      │ ticket to specific   │
│ status           │      │ automatically        │      │ agent                │
│                  │      │ triggered            │      │                      │
└──────────────────┘      └──────────────────────┘      └──────────────────────┘
```

LIVEVOX
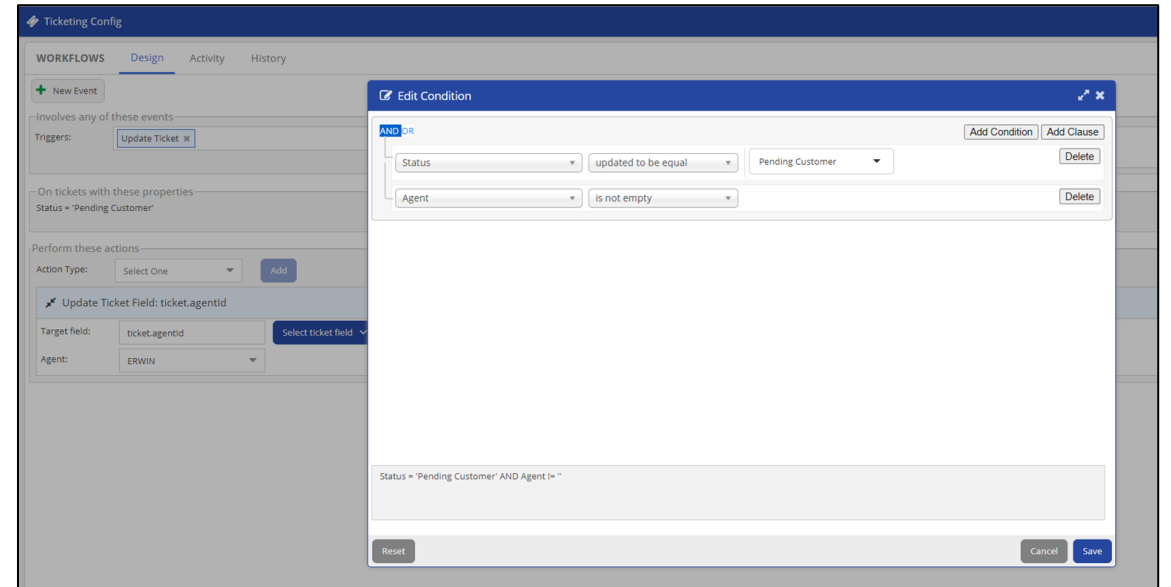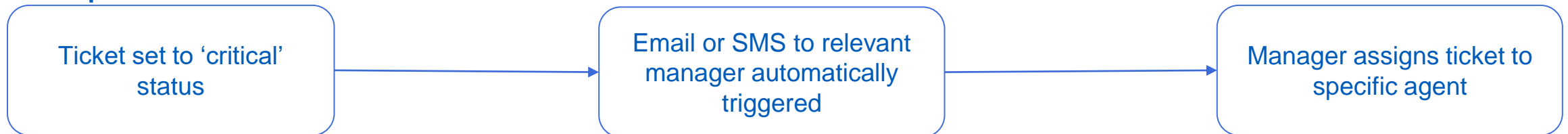
Input Filter – Support for DNC Layouts

- Users are now able to **create Input Filter layouts for the following DNC tables:**
  - Phone DNC
  - SMS DNC
  - Email DNC

- By utilizing Input Filter, users can **create different DNC import layouts and define what fields to import** with minimal to no changes to their files

- Once an Input Filter format has been defined, it becomes **available on the respective DNC table** type for uploads

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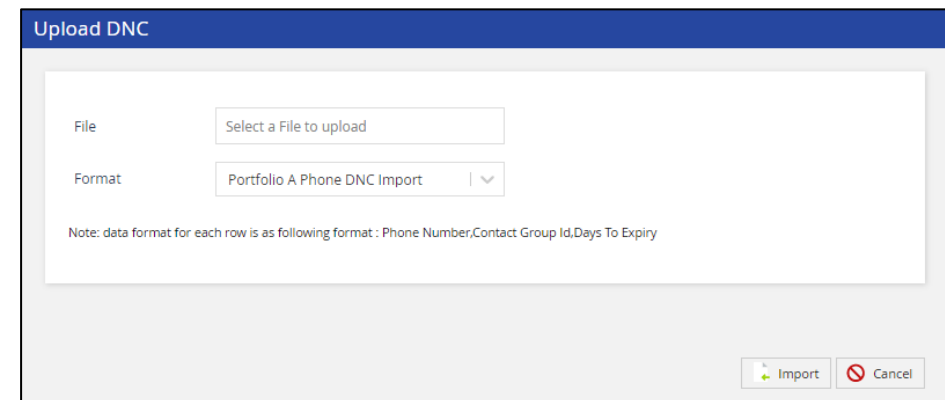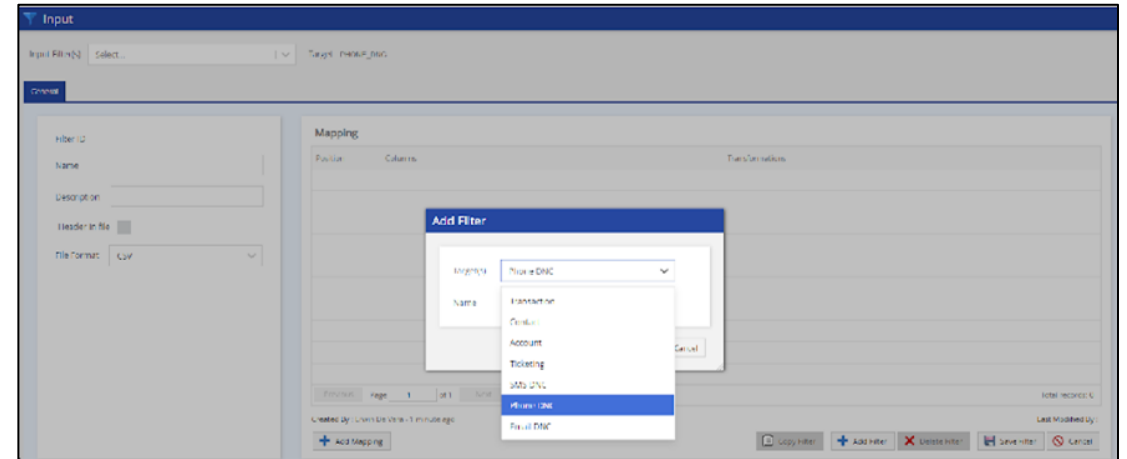
Data Management and Analytics: Business Intelligence

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Business Intelligence Enhancements

Key Customer Information Now Available

- **Contact Manager data is now available in U-BI (Business Intelligence)**

- All Contact Manager fields **including custom fields** are available for U-BI consumption

- Gain a holistic view on a **customer journey, campaign attribution and customer & volume trends**

Plus:

- **2 full years of interaction-level data** vs 6 months + 18 months aggregated

- **A dozen new attributes** including Thread ID, Campaign Type, Phone Position, Call Direction, Interaction Type, and more

- **Updated data model** for multi-channel support with new metrics and reports
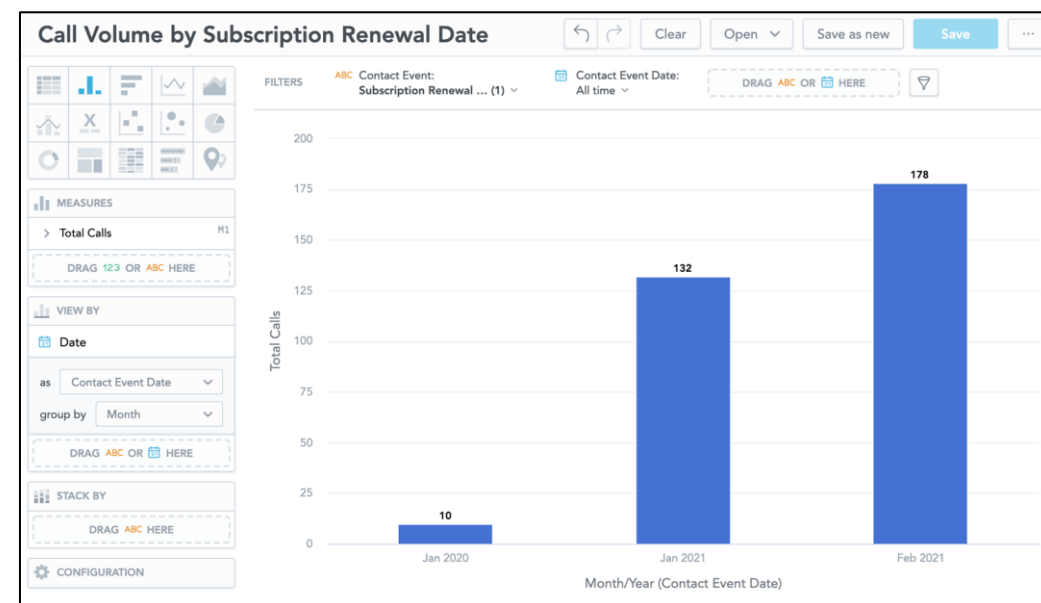
Example: Interaction data overlayed with Contact Manager custom field dimensions

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eLearning Changes

- **Our eLearning tool now supports external sites** as content.

- This is in addition to supporting **PDF, Office Documentation, videos and LiveVox voice/screen recordings**

- **External learning management systems like YouTube** can be added.

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LiveVox Mobile App

- The app now provides agents with **full access to their schedules with the ability to request time off and swap shifts.**

- **Great for agents working remotely**

- **Schedule information stays up to date and synchronized** ensuring everyone is working with the same schedule, whether an agent, manager or planner.

- **Supports iOS and Android**

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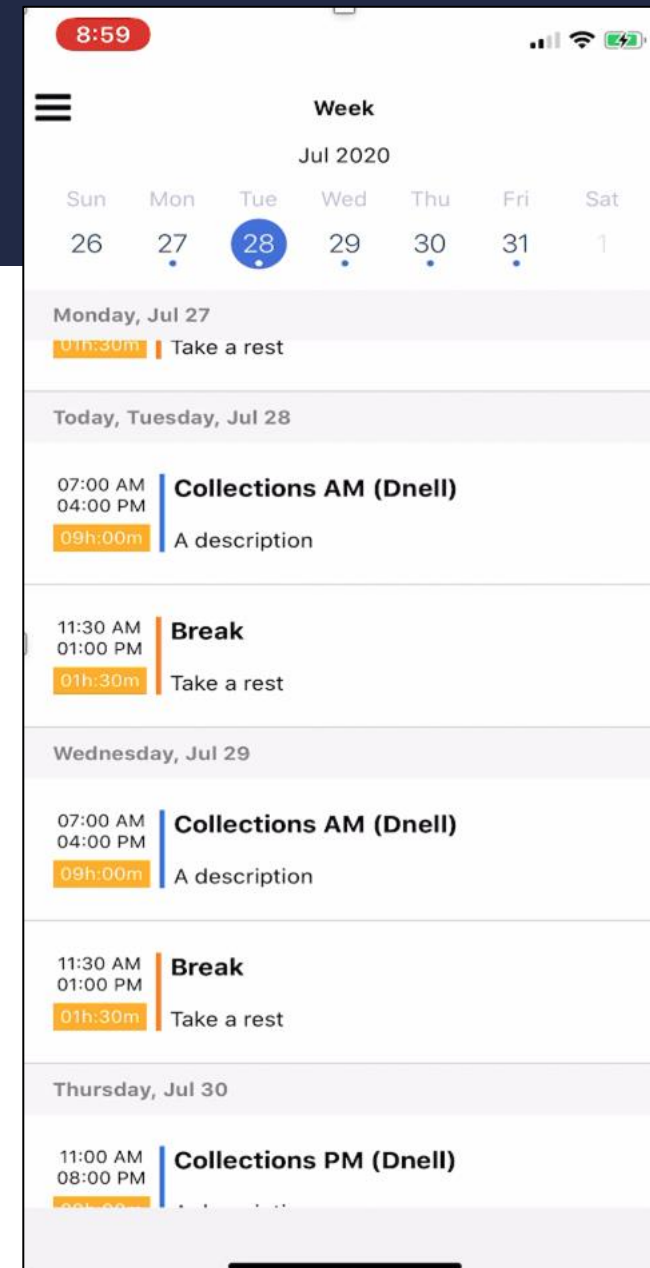
Messaging Enhancements: Webchat

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U-Chat Dashboard

- Managers are now able to **monitor their chat queues via a new dashboard**

- The chat dashboard **provides a real-time view of all unresolved and active chats**

- Users can **search for specific Agents, thread status or queues**

- Users are also able to **open the active chat thread and view the entire conversation** as well as the Contact profile it is associated with.

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Webchat: Seize Opportunities By Reaching Out To Customer Proactively

Proactive webchat

- **Reach out to customers** browsing your site with live chat

- **Customize the greeting message** based on the context

- **Automate greetings** based on URL and time spent on page.

Hi there! Are you finding everything you're looking for?

Chat Now   Maybe Later

Example

| A customer has been on the checkout page for 3+ minutes | → | Automatically reach out to them using webchat | → | An agent can then help them complete the process and answer any questions |

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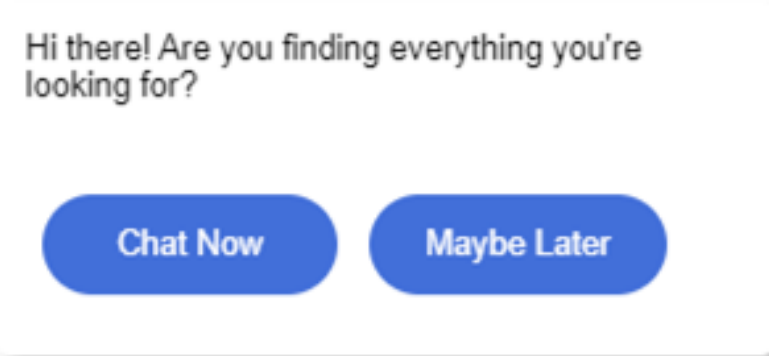
Webchat: Preview What Customers Are Typing And More

New chat features to empower agents and delight consumers

- **Agents can preview what customers are typing** priming them to provide smart, fast responses

- **Customer can review agents** with a simple thumbs up or thumbs down with records stored for review and analysis 👍 👎

- **Emojis** can be used by both the customer and the agent, allowing for more personable conversations 😊 🤓 😎

- **Agents can now share files** (up to 5MB) including jpg, jpeg, png, gif and pdf file formats.

Customer view

Agent view

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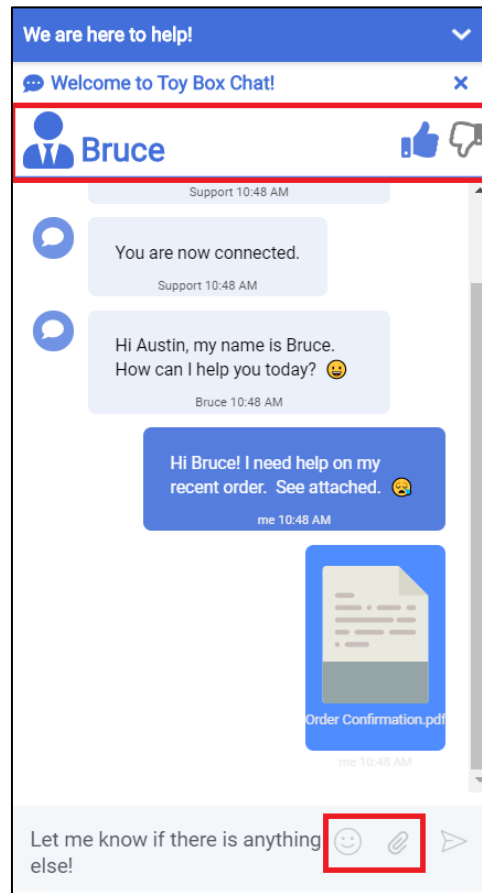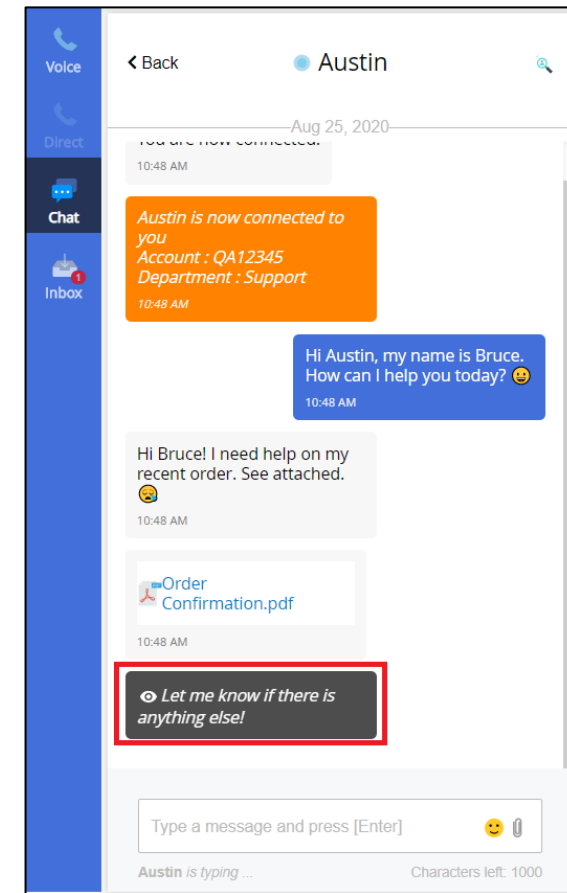
Messaging Enhancements: Email and SMS

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Agent Inbox – Configurable Max Messaging Threads

- Managers can now **define the number of active message threads** an Agent can work at any given time

- The option is **configured at an agent level**

- Managers can **select as many as 10 or as little as 1** messages per channel per agent

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SMS & Email Inbound Dashboard Enhancements

- Managers are now able to **transfer Email & SMS threads to an Agent or back to the Group Queue**

- Managers can **easily move conversations from one agent to another or back to the Group Queue** if agent is busy or no longer online to ensure responses are handled

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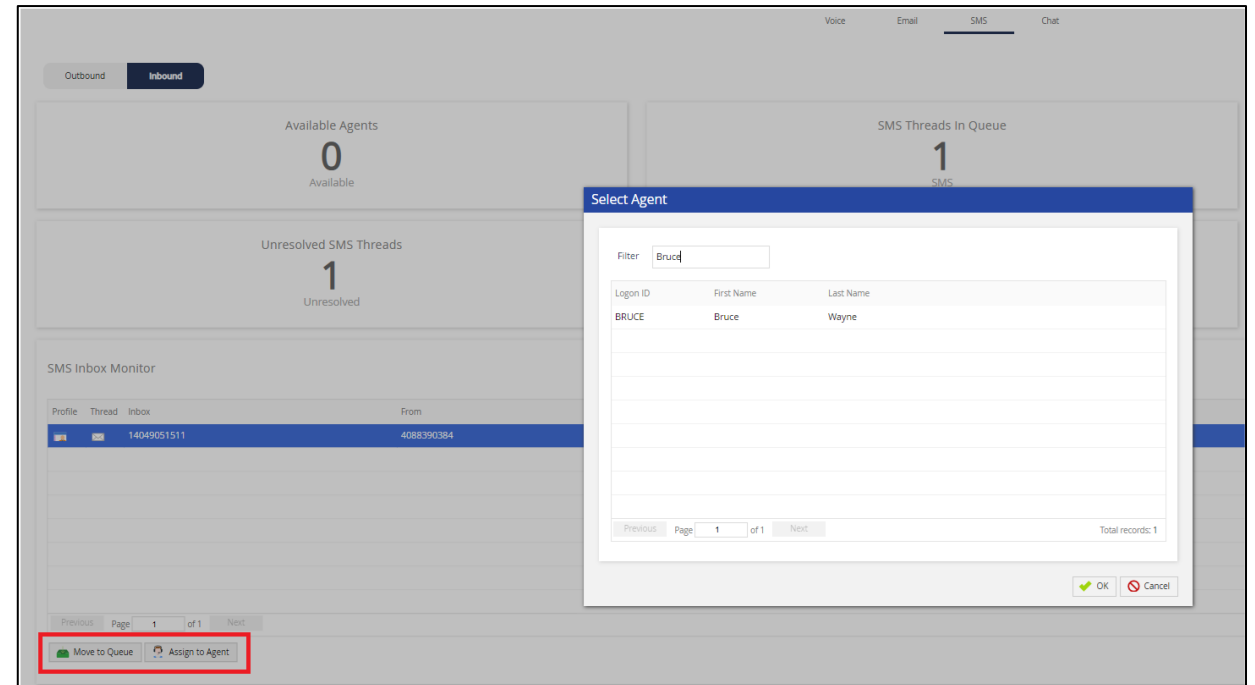
SMS Enhancements – MMS & Pacing Controls

- **MMS is now supported** on enabled long and short codes

- **Agents are now able to view and send multi-media** during an active SMS conversation

- MMS allows for a maximum of 5 files and 5Mb to be sent per interaction

- Supports **jpg, png, gif**

- SMS **pacing controls are now shown** on services that allow campaign- based SMS

Agent conversations with MMS

SMS Pacing Controls

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Emails & SMS: Create intelligent Agent Message Books

Streamline customer conversations by giving agents quick access to the most appropriate responses

- **LiveVox 2-Way Messaging** provides standard 'canned' responses that agents can use on any messaging channel

- **Now you can customize** which responses are available at an agent desktop level, making it easier for them to access the most appropriate responses to customers

- **Available across SMS & Email** – wherever your customers are.

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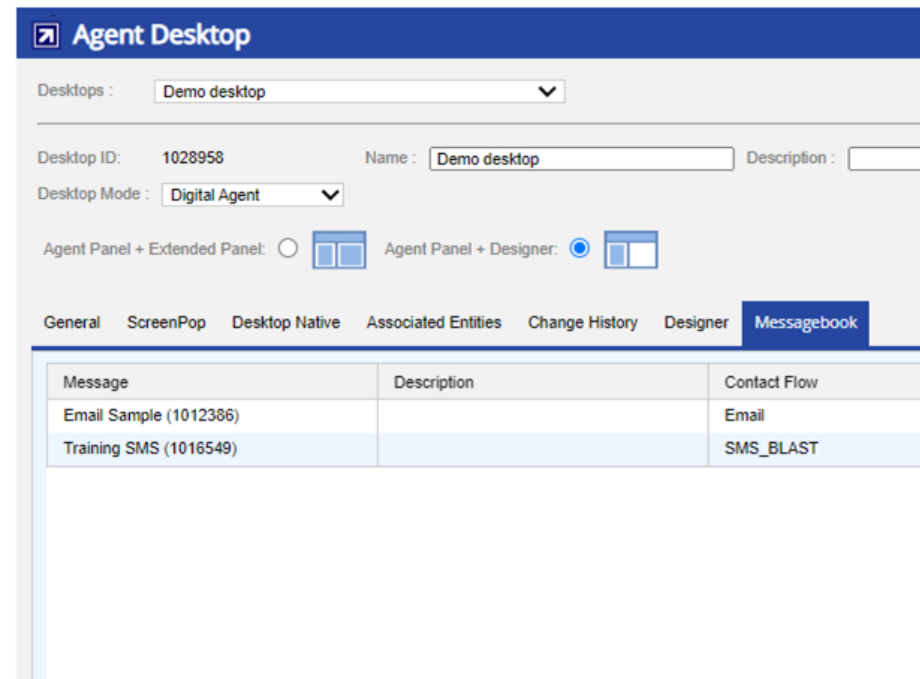
Use our platform to send out Emails and SMS with public APIs

- **Using a public API, send transactional Email and SMS** messages like:

  - Payment reminders

  - Payment notifications

  - Fraud Alerts

- **No need to log in** or have an active Agent session.

- **Trigger messages** based on CRM events or website activities without having to create a campaign

- **Send a custom message or use a template.**

```
Send SMS

#Request (JSON)
POST /sms/sms
Host: localhost.com
Content-Type: application/json
Accept: application/json

{
  "from": "16789318882",
  "to": "4156943849",
  "body": {
    "templateId": "74625"
  },
  "account": "13213"
}

#Response
200 OK
{
  "transactionId": 108660394211
}
```

Outbound Email and SMS: Avoid Agent Error When it Comes to Addresses and Short Codes

Make sure agents are sending messages to customers from the right numbers and the right email addresses.

- **Define which email addresses and short codes** agents can send emails and SMS from.

- **Control the codes and addresses** that are available at a service level

- **Simplify the agent experience**

- **Avoid mistakes that impact customer experience.**

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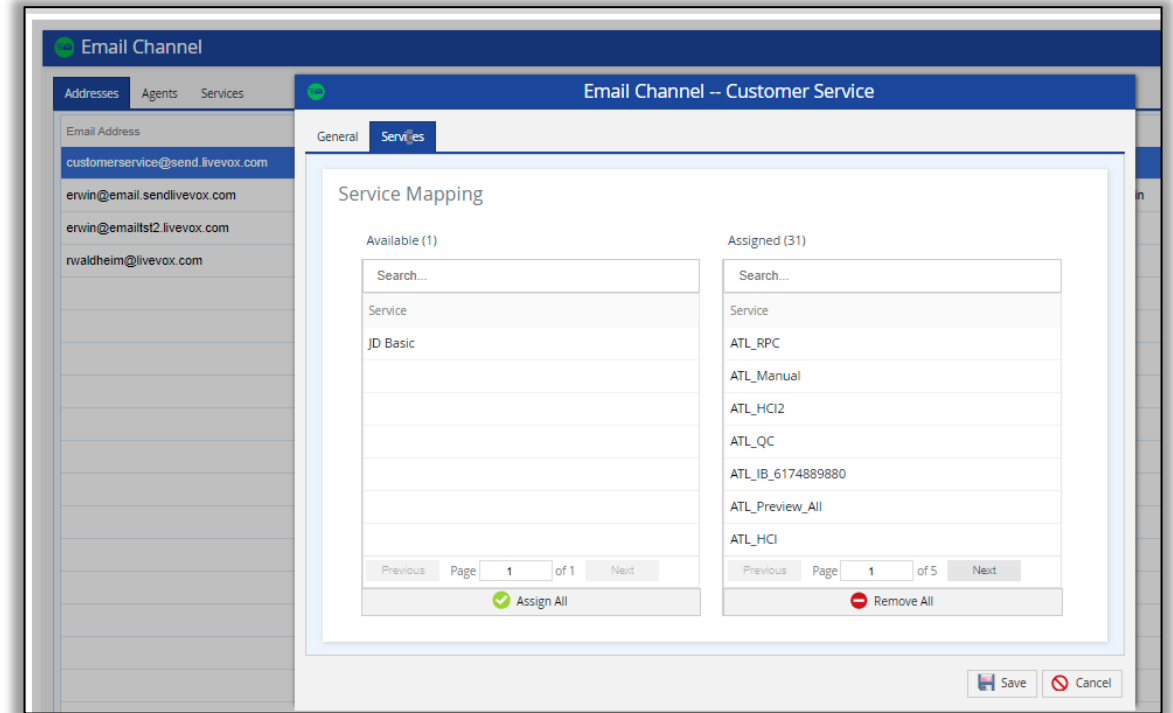
Email and SMS: Accurately Track Activity and Spending With New Usage Reports

Understand how many your sending, and how much you're spending

- **Gain accurate visibility on** how many emails and SMS you are sending and how much you are spending with two new usage reports

- The new report give a breakdown of **all SMS and email messages**

- For SMS, the report details the number of **160-character SMS segments sent.**

Configure	Monitor	Review	WFO
Inbound Reports			▸
Campaign Reports			▸
Call Reports			▸
Agent Reports			▸
Billing Reports			
Estimated Billing Duration Report			
SMS Billing report			
Email Billing report			
Analytics			▸
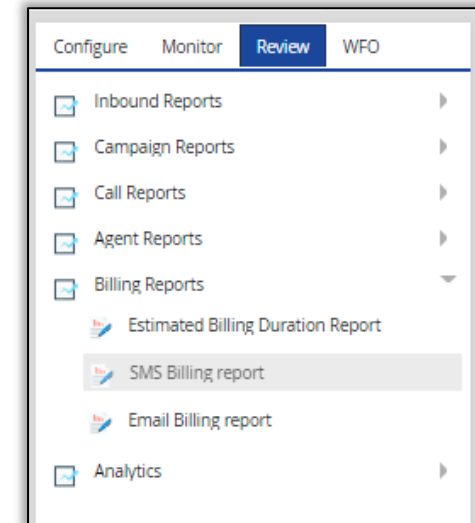
📄 SMS Billing report

Results
From 02/26/2021 To 02/26/2021

Date	Call Center	Service	SMS Segments	SMS Interactions	Outbound SMS	Inbound SMS	Agent SMS	Mass SMS	Transactional SMS
02/26/2021	Jared	JD Basic	0	1	1	0	0	1	0
		Total	0	1	1	0	0	1	0

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Enhancing the Manager Experience through Real-Time Monitoring & Reporting

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LVP UI Enhancements - Monitor UI Changes

We've enhanced our Monitor UI visually and functionally to make it more user friendly

- **Monitor dashboards have been updated to have a new look and feel** but still provide the same functionality

- **Widgets are now a defined size,** so that they display clearly. Plus, they can be **moved around easily by users.**

- **The inbound service monitor widget has been** resized to display all stats on a single page without the need for a scroll bar

- **The Service Monitor Widget has a new column called "Available Agents"**
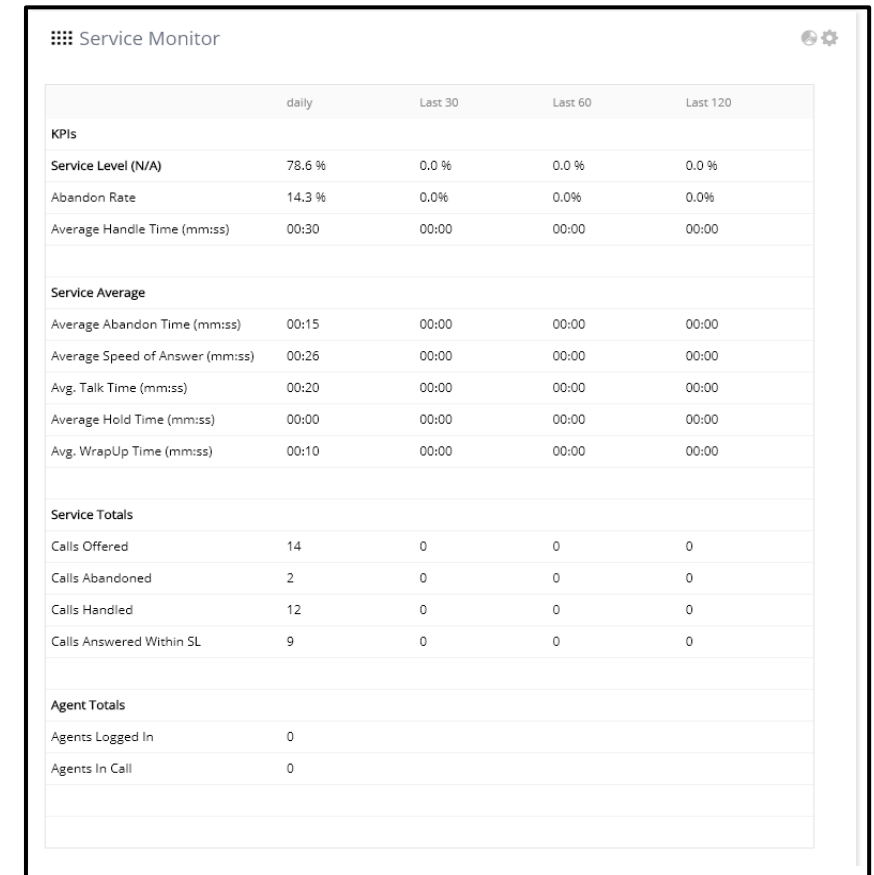
- **Grid vs Graph view selection will be remembered at the widget level**.

Service Monitor				
	daily	Last 30	Last 60	Last 120
KPIs				
Service Level (N/A)	78.6 %	0.0 %	0.0 %	0.0 %
Abandon Rate	14.3 %	0.0%	0.0%	0.0%
Average Handle Time (mm:ss)	00:30	00:00	00:00	00:00
Service Average				
Average Abandon Time (mm:ss)	00:15	00:00	00:00	00:00
Average Speed of Answer (mm:ss)	00:26	00:00	00:00	00:00
Avg. Talk Time (mm:ss)	00:20	00:00	00:00	00:00
Average Hold Time (mm:ss)	00:00	00:00	00:00	00:00
Avg. WrapUp Time (mm:ss)	00:10	00:00	00:00	00:00
Service Totals				
Calls Offered	14	0	0	0
Calls Abandoned	2	0	0	0
Calls Handled	12	0	0	0
Calls Answered Within SL	9	0	0	0
Agent Totals				
Agents Logged In	0			
Agents In Call	0			

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Enable/Disable Coach/Monitor/Barge

- It is now possible to **enable/disable the Coach, Monitor, and Barge functionalities** separately

- This is a client level feature and is **enabled on the 'Settings' tab** of the client editor

- If enabled **the controls will be displayed in the agent widget** like it currently is today, otherwise the button(s) will not be displayed at all

Agent Monitoring

Monitoring Enabled	☑
Barging In Enabled	☑

Coaching Enabled ☑

Agents   See: Logged Into Service ⌄   Name filter

	Logon ID	Name	State	Duration (in secs)	Monitor
	AT_AGENT	livevox livevox	🔴 Not Ready	00:02:55	

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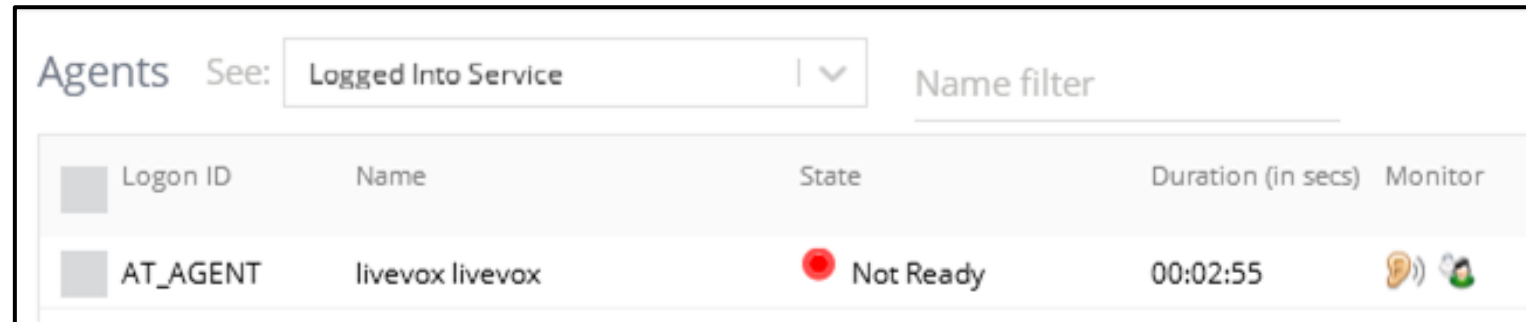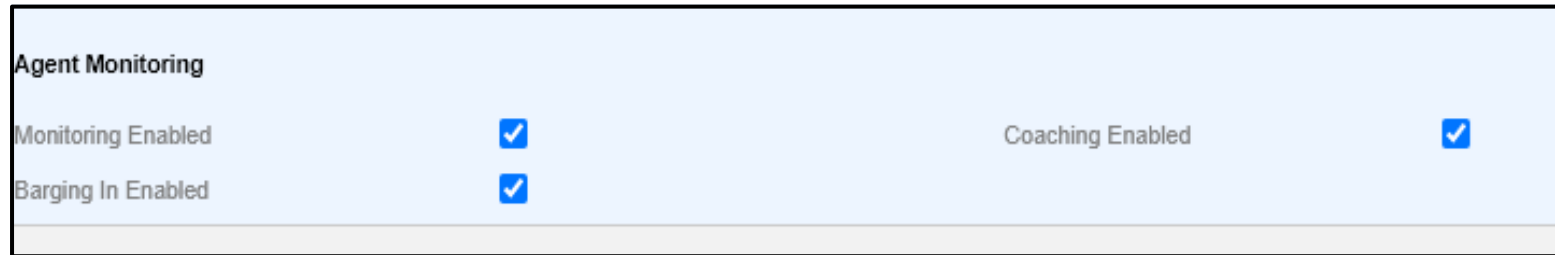
Other New and Improved Capabilities

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U-Chat Configuration Enhancement

You can enable/disabled these chat types independently of one another

- **Agent – Customer** chat (web chat)
- **Agent – Agent** chat
- **Agent – Supervisor** chat

Agent – Customer chat

Agent – Agent chat

Agent – Supervisor chat

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Agent to Agent Chat History & Persistency

Agent to Agent chat now persists across login sessions

- **Agents see their chat history** with other agents

- Agents **receive messages while offline**

- This feature is available for **Agent – Agent chat**

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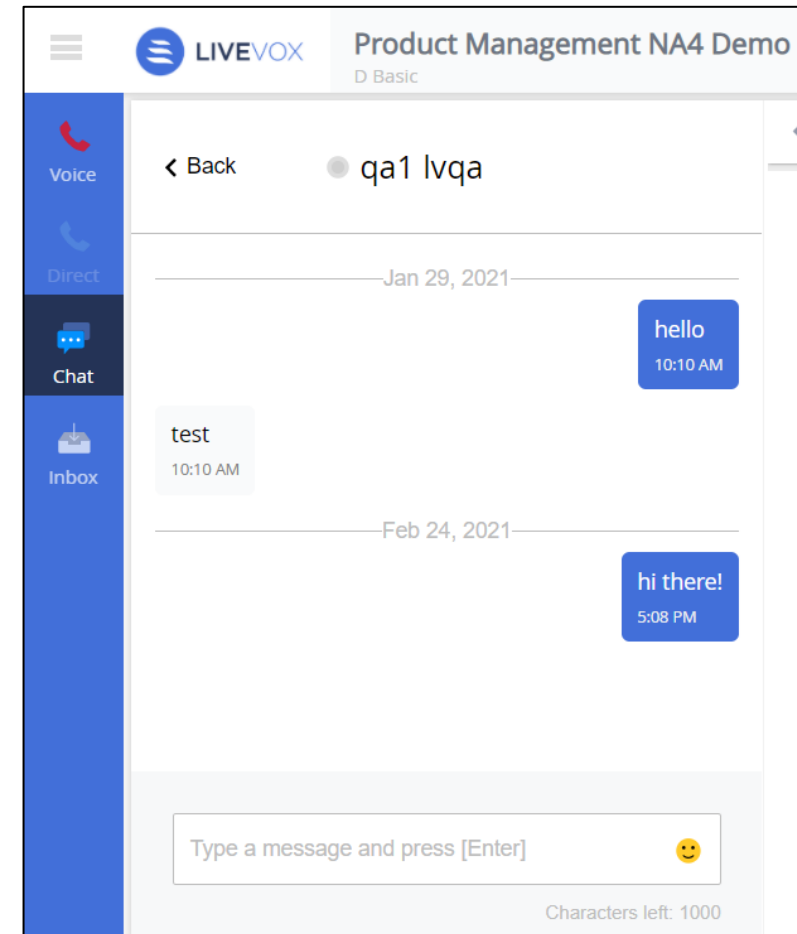
U-CRM – Custom Groups

- Users are now able to **create Custom Groups for Contact, Accounts and Ticketing** entities within the U-CRM desktop

- Custom Groups **can be added and edited on any U-CRM desktop**

- Gives you **flexibility on how to display and segment different portfolios to your Agents**

Selected

| Order	Name	Data Index	Group	Type	Column
⋮	Contact #	account	Custom Grouping	Display Only	1
⋮	Original Account #	originalAccountNumber	Description	Display Only	2
⋮	First Name	firstName	New Custom Group	Text	1
⋮	Last Name	lastName	New Custom Group	Text	2
⋮	Total Balance	balance	Banking Information	Number	1
⋮	Balance Due	amountToSpeak	Banking Information	Number	2

Preview

⊟ **Custom Grouping**

Contact #:

⊟ **Description**

Original Account #:

⊟ **New Custom Group**

First Name: Last Name:

⊟ **Banking Information**

Total Balance: Balance Due:

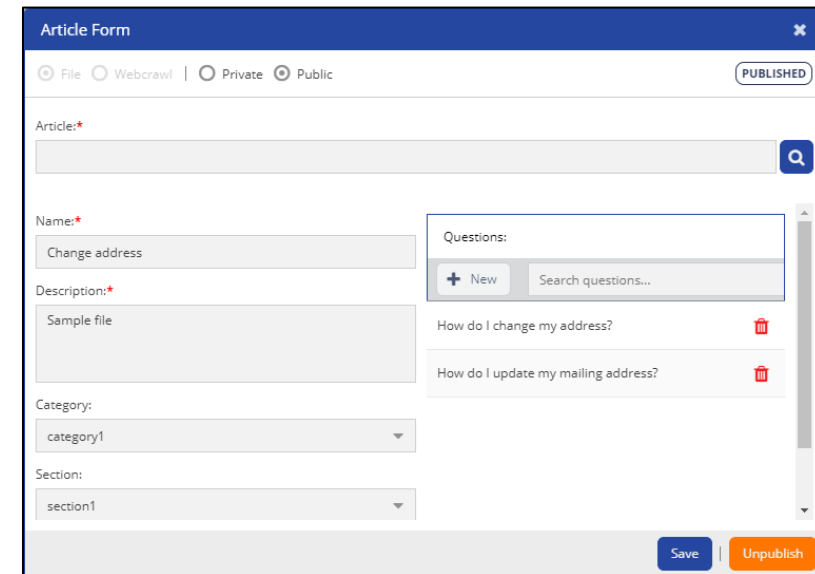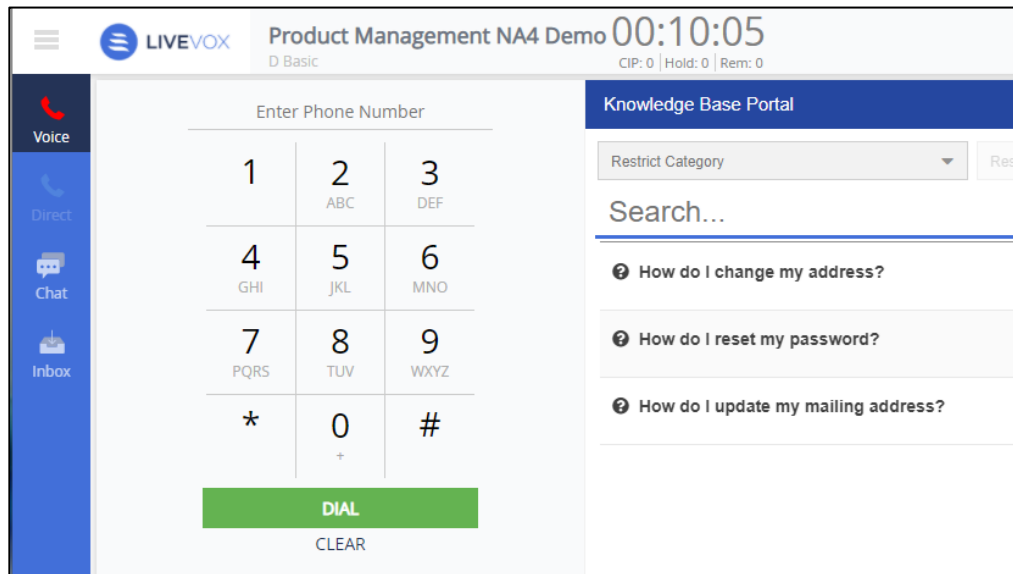**LIVEVOX**

Other Enhancements – Miscellaneous Cont'd

- **The Call Flow Editor has been renamed to Contact Flow**

- The new name **more accurately describes what the tool can do.**
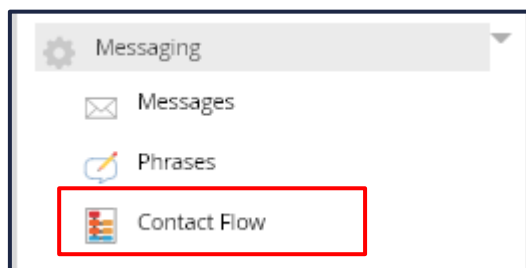
- **New API methods to manipulate account-contacts**

- With these new APIs you'll be able to **create/configure accounts and manipulate the links between them and contacts.**

- Contacts and accounts have a **many to many relationship.**

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U-Knowledge Base - Question Linking

- LVP users can now **associate "Questions" with Knowledge Base articles**

- Agents see the most popular questions, so they can **quickly access the associated articles**

How to upgrade to U-15

✅ **Reach out to your account executive or technical account manager today.**

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