



Agent	Target	T
—	408-839-0384	☎
ERWIN	408-839-0384	☎
ERWIN	408-839-0384	☎
ERWIN	408-839-0384	☎
ERWIN	408-839-0384	☎
ERWIN	edevera@livevox.com	✉
ERWIN	(+1) 408-839-0384	📞

Step 3. Select Fields to Display

Available Columns	Selected Columns
Filter by name	Filter by name
Number	Priority
	Subject
	Status
	Type
	Modified By
	Modified Date
	Agent
	Agent Team
	Account

**LiveVox U-15**

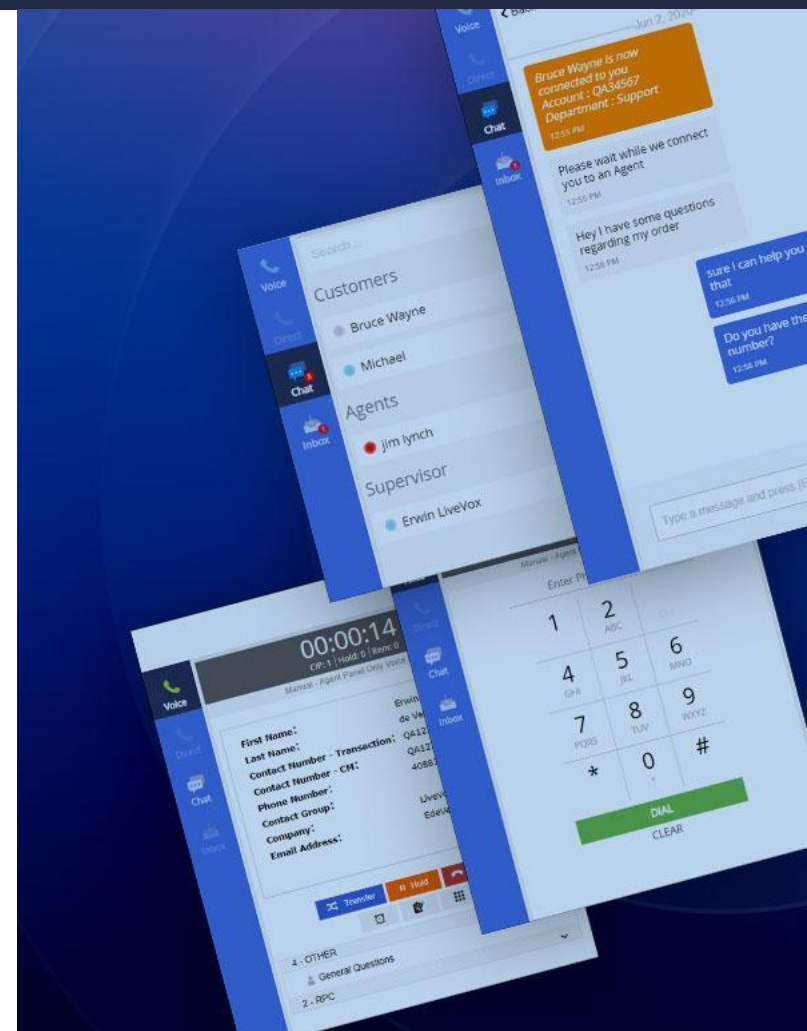
# Introducing the latest and greatest version of our platform

March 10, 2020



# 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



# Our Approach to U-15



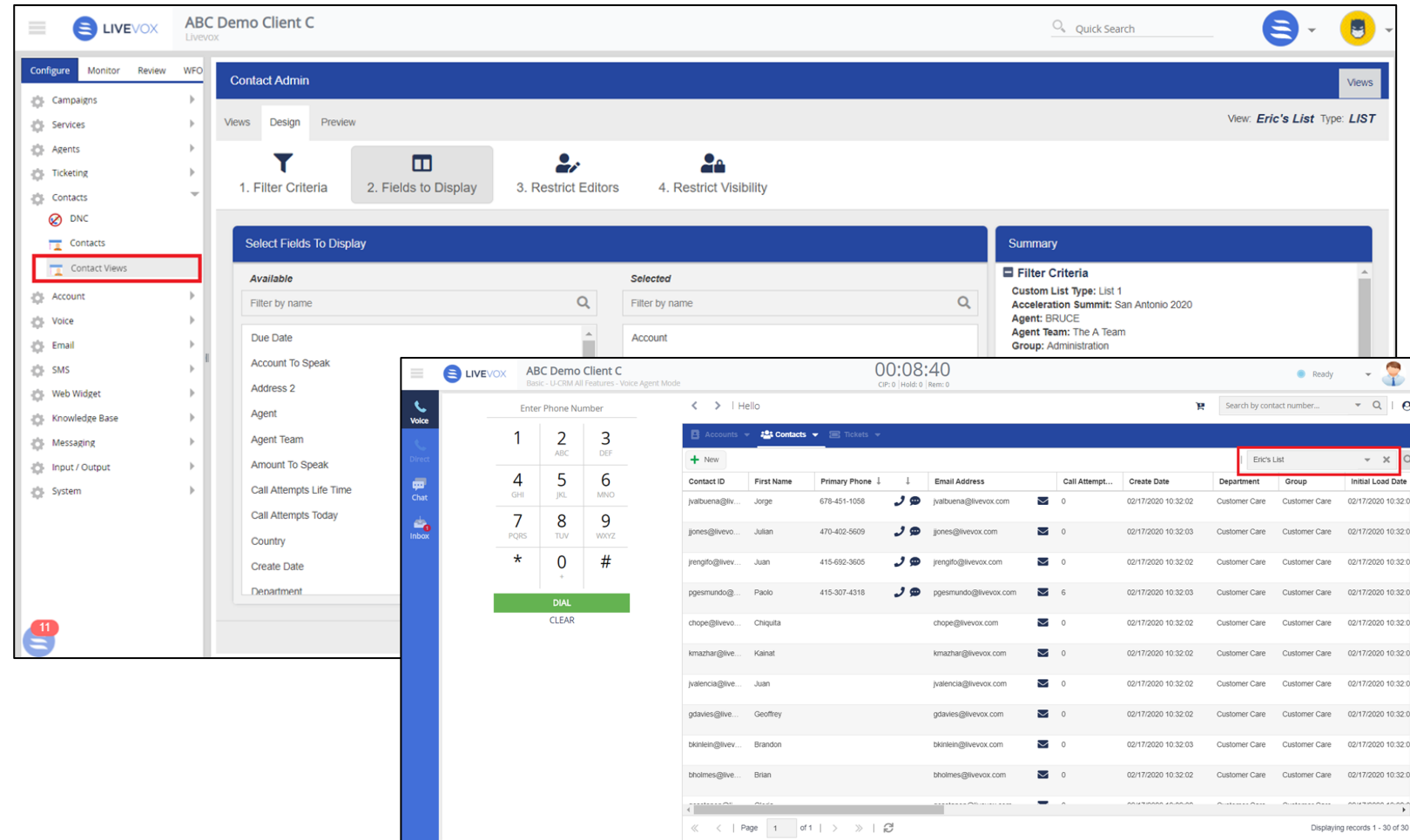
- **Improving agent experience** by supporting collaboration and ensuring back-office employees are connected to customer service agents
- **Making the platform easier to use** by simplifying data and contact management, campaign flexibility, and file exchanges
- **Unlocking vital insight** by providing 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.



# 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

Selected			
Order	Name	Data Index	Type
1	Member Information	COL2	Text
2	Sign Up Date	COL3	Date
3	Option	COL5	DropDown
4	Member ID	COL1	Number
5	Membership Active	COL4	CheckBox



Contacts List

Contact: Bruce Wayne (QA12345)

Member Information: This is a complete sentence. And some more information. Sign Up Date: 01/22/2021

Option: List 1 Member ID: 2222415871

Membership Active: true

Detail Directory Notes Interactions Tasks Schedule Callbacks Accounts Tickets

**Custom Grouping**

Contact #: QA12345

**Description**

**New Custom Group**

First Name: Bruce Last Name: Wayne

**Banking Information**

Total Balance: \$500.50 Balance Due: \$899.21

Ssn: 9999 Due Date: 07/23/2021

Address 1: 1 Main St. Address 2: Suite 10

City: San Francisco

# 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

Screen Configuration for: Contacts List component

Consent Management

Phone Consent  SMS Consent  Email Consent

Phones Management

Position ↑	Label	Enabled?
Phone 1	Cell Phone	<input checked="" type="checkbox"/>
Phone 2	Home Phone	<input checked="" type="checkbox"/>
Phone 3	Phone 3	<input type="checkbox"/>
Phone 4	Phone 4	<input type="checkbox"/>
Phone 5	Phone 5	<input type="checkbox"/>
Phone 6	Phone 6	<input type="checkbox"/>



Contacts List

Contact: Bruce Wayne (QA12345)

Phone #: 415-679-5111 | Contact #: QA12345

Email: example@email.com | Balance: \$500.50

Address: 1 Main St | San Francisco

Detail | **Directory** | Notes | Interactions | Tasks | Schedule Calls

Email Address

Example: example@email.com | Consent:

Phone Numbers

Label	Phone Number	Block	Permanent	Block	Attempts Today	Call Attempts Total
1 Cell Phone	415-679-5111	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
2 Home Phone	408-123-4567	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0

**Edit Phone Number**

Position: 2

Label: Home Phone

Phone Number: 4081234567

Do not dial:  Consent SMS:

Do not dial today:  Consent Call:

Delete Save

# 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




High Label: ORDER

Bruce Wayne (BRUCE) Agent Team: The A Team

Contact: Austin Wayne (QA12345)

**Confirm** ✕

 Are you sure you want to continue?

Interactions Attachments Comments

408-839-0384

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

tion

up broken. Issuing a rep

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

General Request Response **Parameter Editor**

Headers

Query Parameters

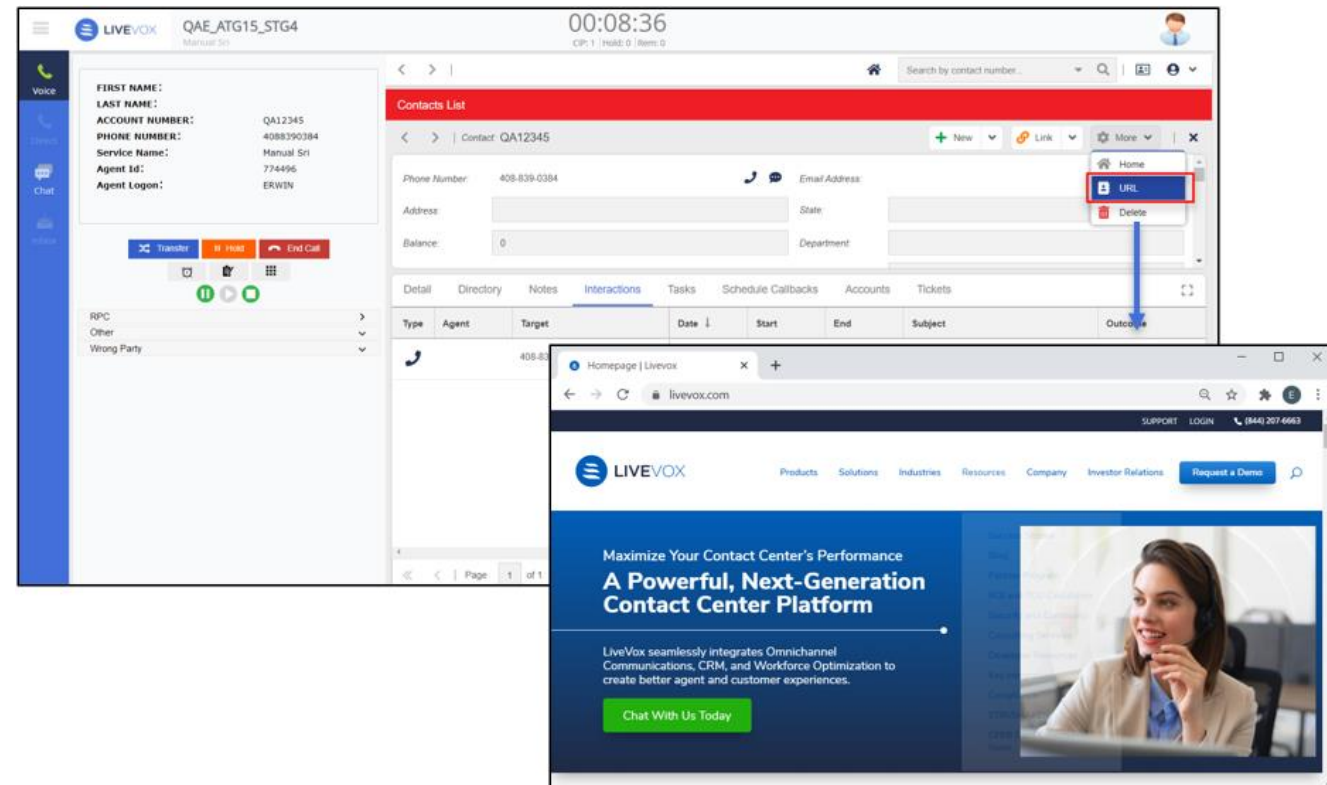
Name: ["fields"]["issuetype"]["name"]

Value: [\\${responseData.key}CATs Entry](#)

*Function Editor Dynamic Response Insert*

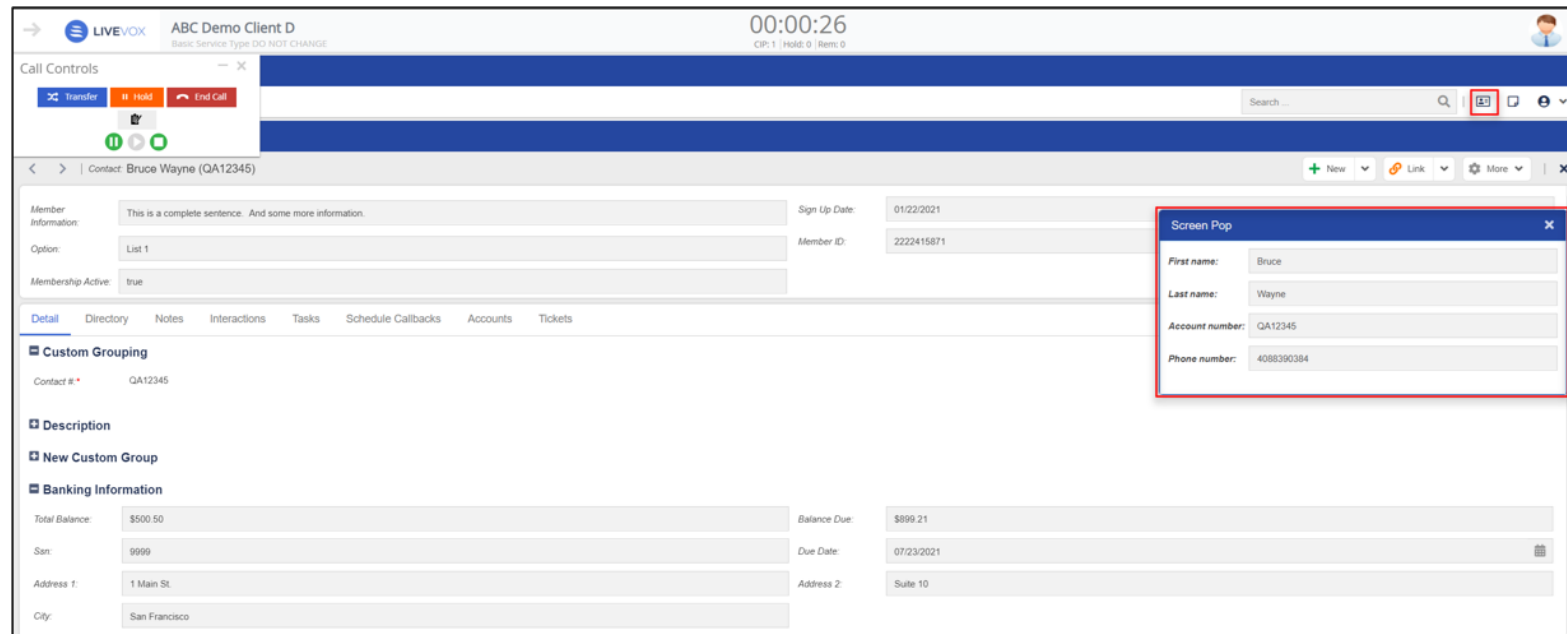
# U-CRM – URL Pop

- **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 3<sup>rd</sup> Party Platforms.



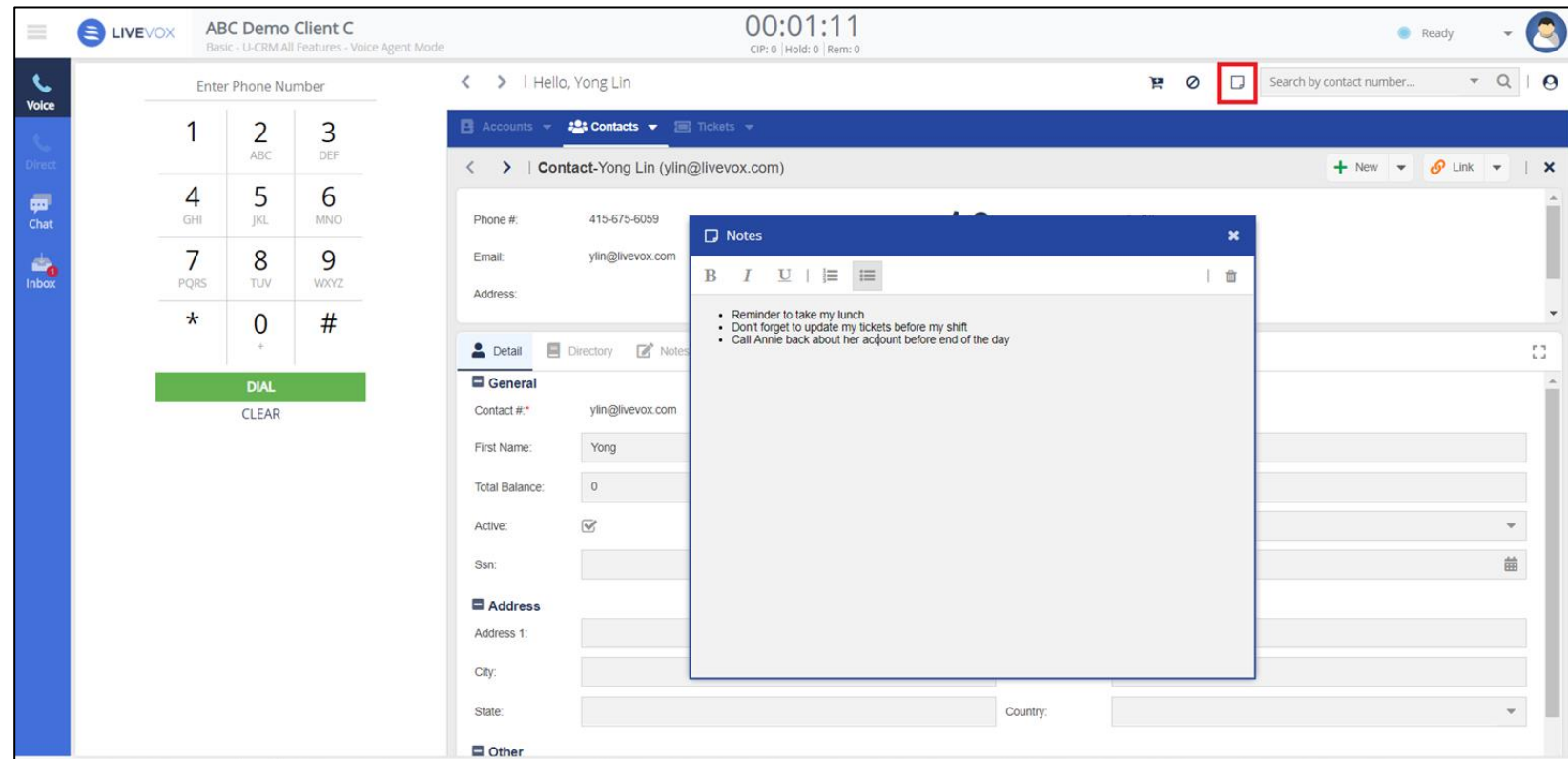
# U-CRM – New Screen Pop Component

- 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.



# U-CRM – Notepad

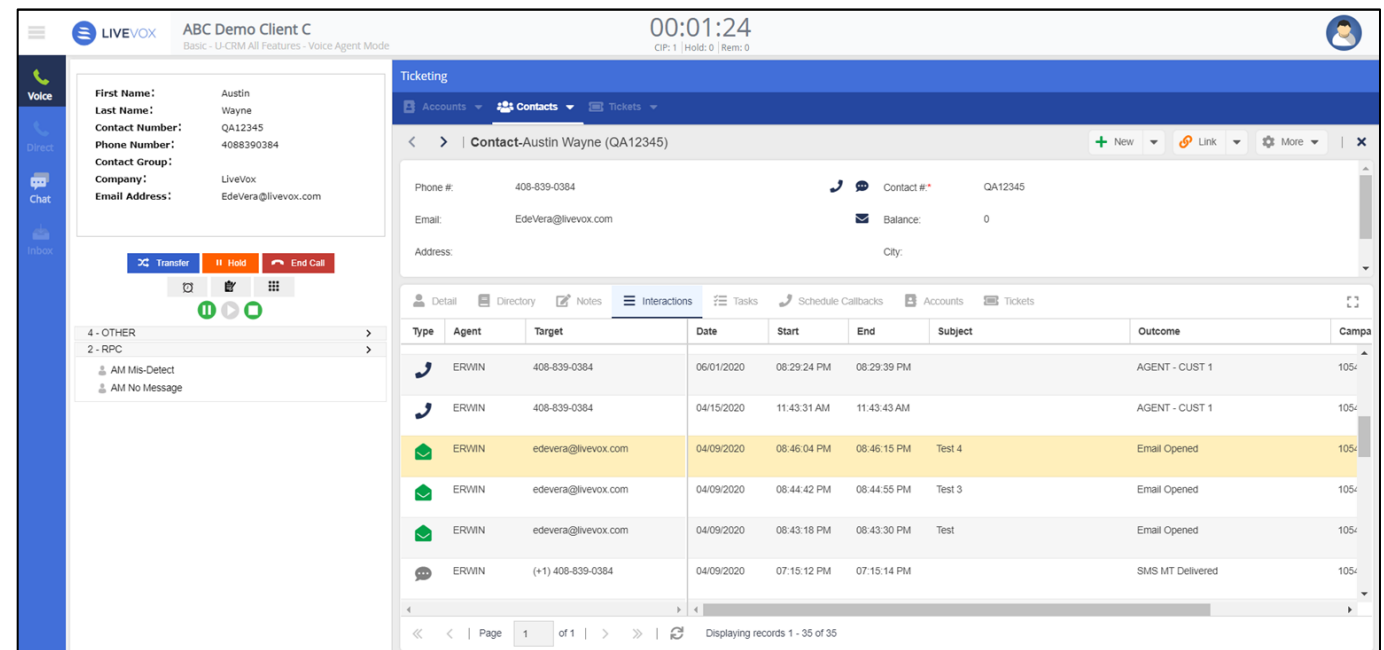
- Managers can now **configure U-CRM desktops with a notepad for Agents**
- Enabled on the Home bar, the notepad **allows agents to write notes anytime while logged in**
- The notes are **retained as long as the Agent is logged in**
- The notes are always at the forefront and **can be resized or closed 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**



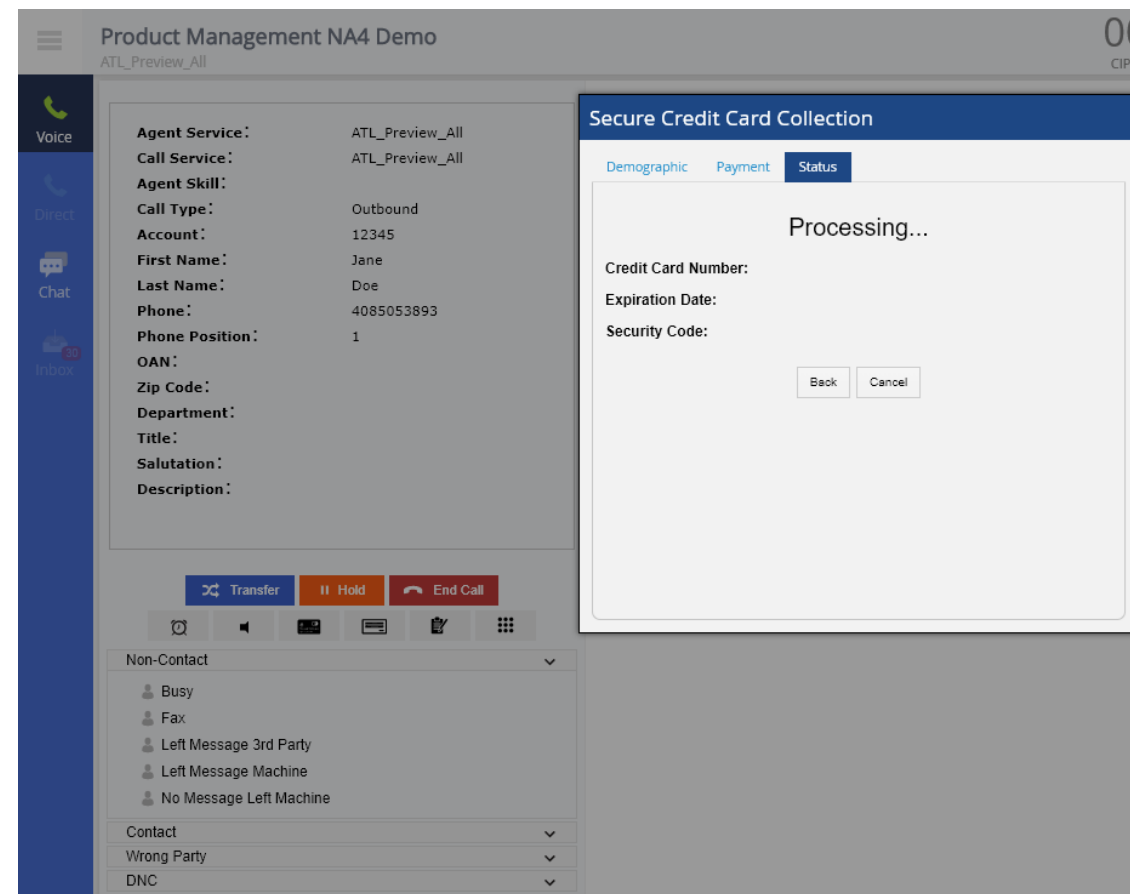
# Additional Agent Experience Enhancements

## 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.



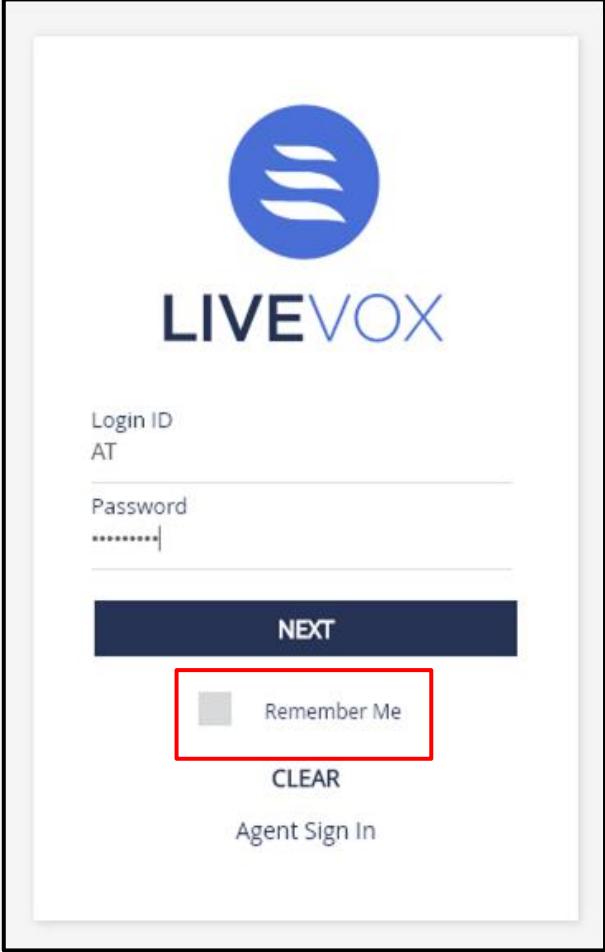
# Agent Experience: Back Office Agents & PBX

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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**

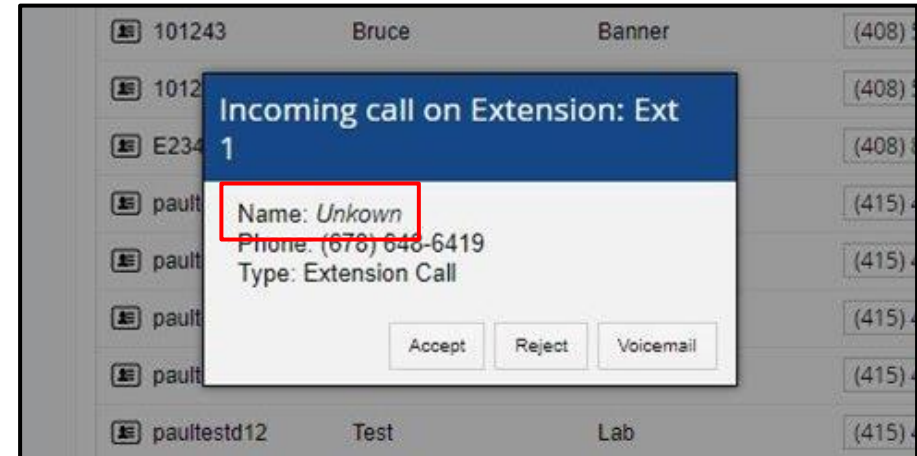


The screenshot displays the LiveVox login interface. At the top is the LiveVox logo, consisting of a blue circle with three white horizontal lines, followed by the text 'LIVEVOX'. Below the logo are two input fields: 'Login ID' with the text 'AT' and 'Password' with masked characters '.....'. A dark blue 'NEXT' button is positioned below the password field. A red rectangular box highlights a checkbox labeled 'Remember Me' located below the 'NEXT' button. Below the 'Remember Me' checkbox is a 'CLEAR' button and the text 'Agent Sign In'.



# Inbound CNAM

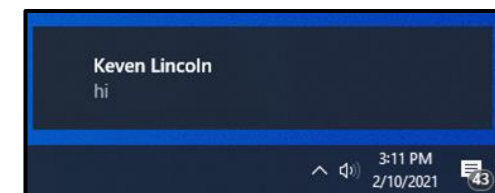
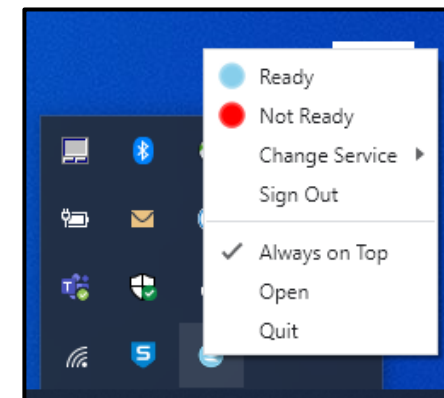
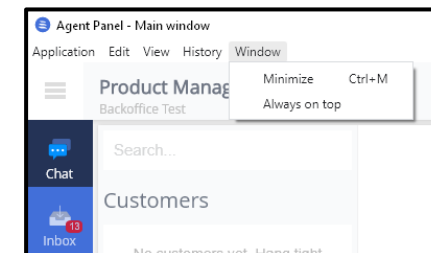
- Agents will now see CNAM information for incoming calls.
- This is in addition to the previously visible information: **the phone number and the option to accept, reject or send to voicemail**
- If CNAM is unavailable or blocked “Unknown” will display.



# Agent Desktop Native Enhancements

## We've improved the usability of our ADN

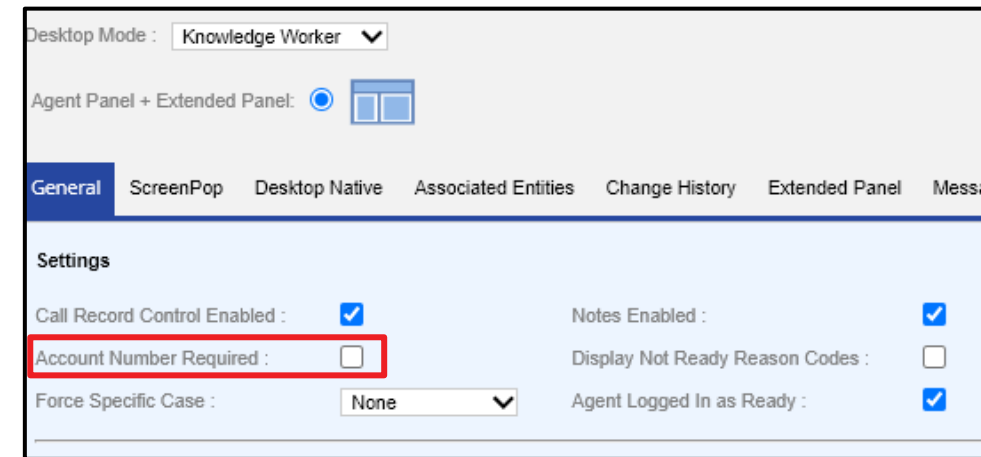
- The ADN can now be set to **always be on top of other applications on the agent's system**
- **Closing the ADN window no longer closes the application**, instead it is minimized into the system tray.
- Agents will **still receive chat notifications** while the window is minimized and **if they received 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



# 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



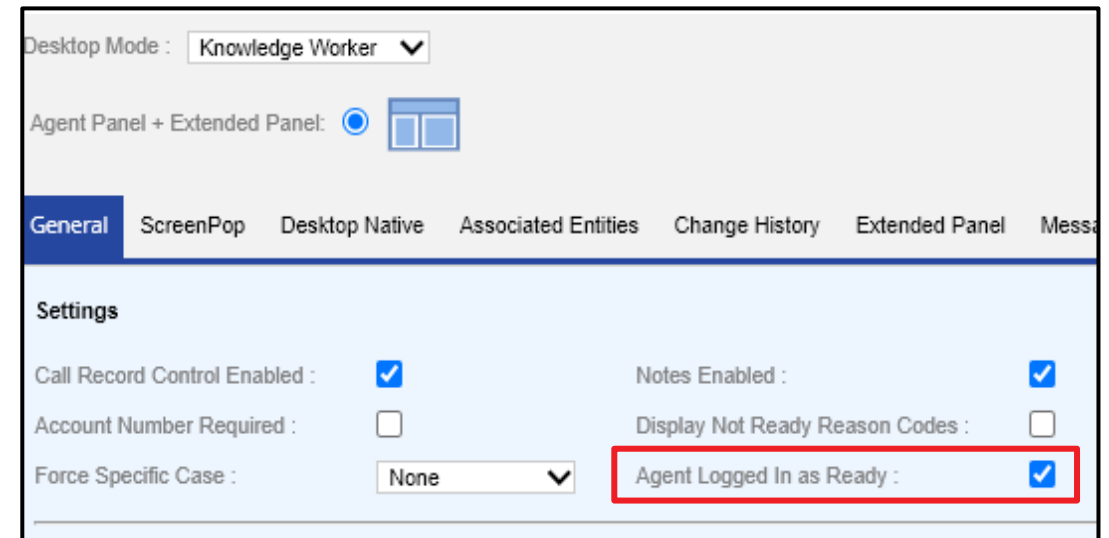
Knowledge Worker



# Knowledge Worker – Auto Ready & Service Login

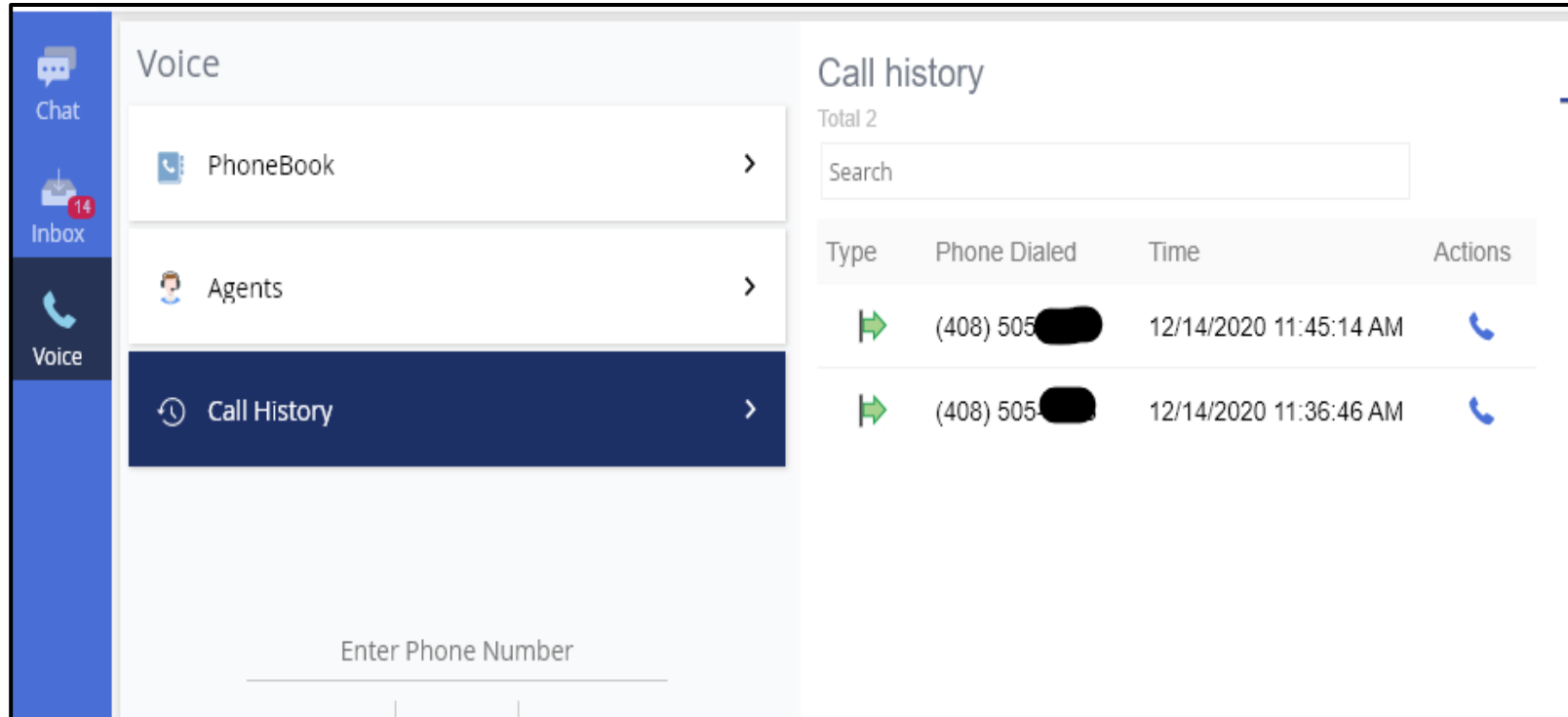
## A streamlined log-in experience for Knowledge Workers

- 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



The screenshot shows the LiveVox interface. On the left is a navigation sidebar with 'Chat', 'Inbox' (14), and 'Voice' (selected). The main area is titled 'Voice' and contains a menu with 'PhoneBook', 'Agents', and 'Call History' (highlighted). Below this menu is a search bar labeled 'Enter Phone Number'. To the right, the 'Call history' panel shows 'Total 2' and a search input. Below is a table with the following data:

Type	Phone Dialed	Time	Actions
➔	(408) 505-██████	12/14/2020 11:45:14 AM	📞
➔	(408) 505-██████	12/14/2020 11:36:46 AM	📞

# Knowledge Worker – Agent Personal Phonebook









## Knowledge workers can now curate a personal desktop phonebook

The screenshot displays the LiveVox backoffice interface for a user named 'QAE\_API15\_STG4' in the 'Backoffice' section. The interface is divided into three main areas: a left-hand navigation menu, a central 'Voice' section, and a right-hand 'Phonebook' section.

**Navigation Menu:** Includes 'Chat', 'Inbox', and 'Voice' (highlighted in blue).

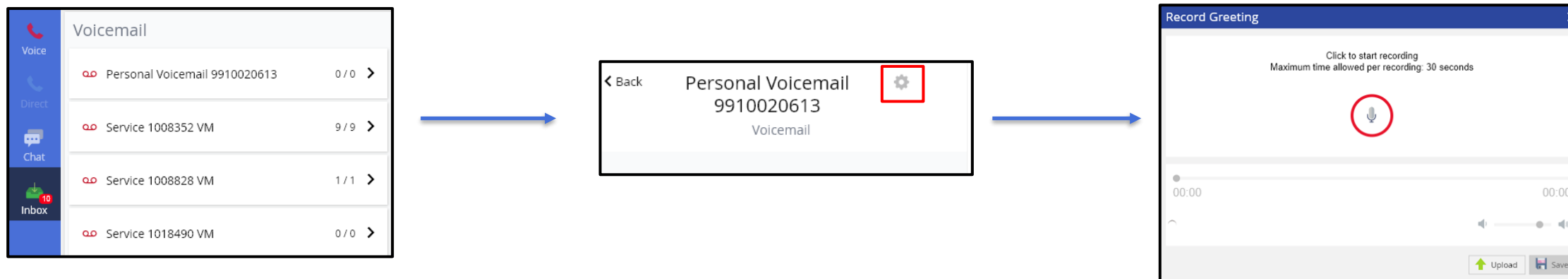
**Voice Section:** Contains three items: 'PhoneBook' (highlighted in dark blue), 'Agents', and 'Call History'.

**Phonebook Section:** Titled 'Phonebook' with a 'Total 4' count. It features a search input field and an '+ Add' button. Below is a table listing four contacts:

Name	Phone	Actions
Bruce Wayne	(415) 555-9875	 
James Bond	(408) 505-3893	 
Sam Simon	(415) 555-1483	 
Tony Stark	(415) 555-1483	 

# 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

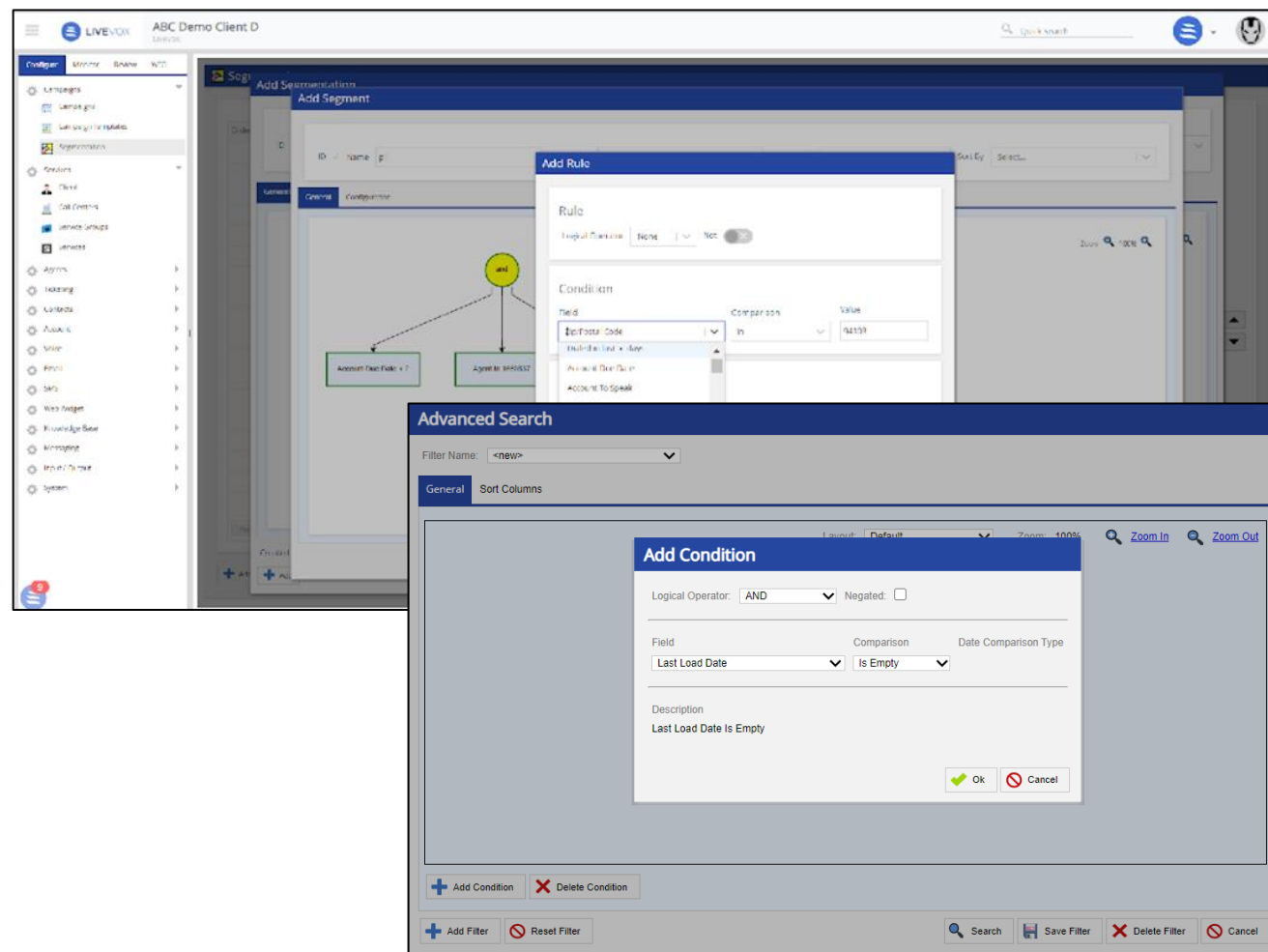
# Data Management and Analytics: Contact Management and Segmentation

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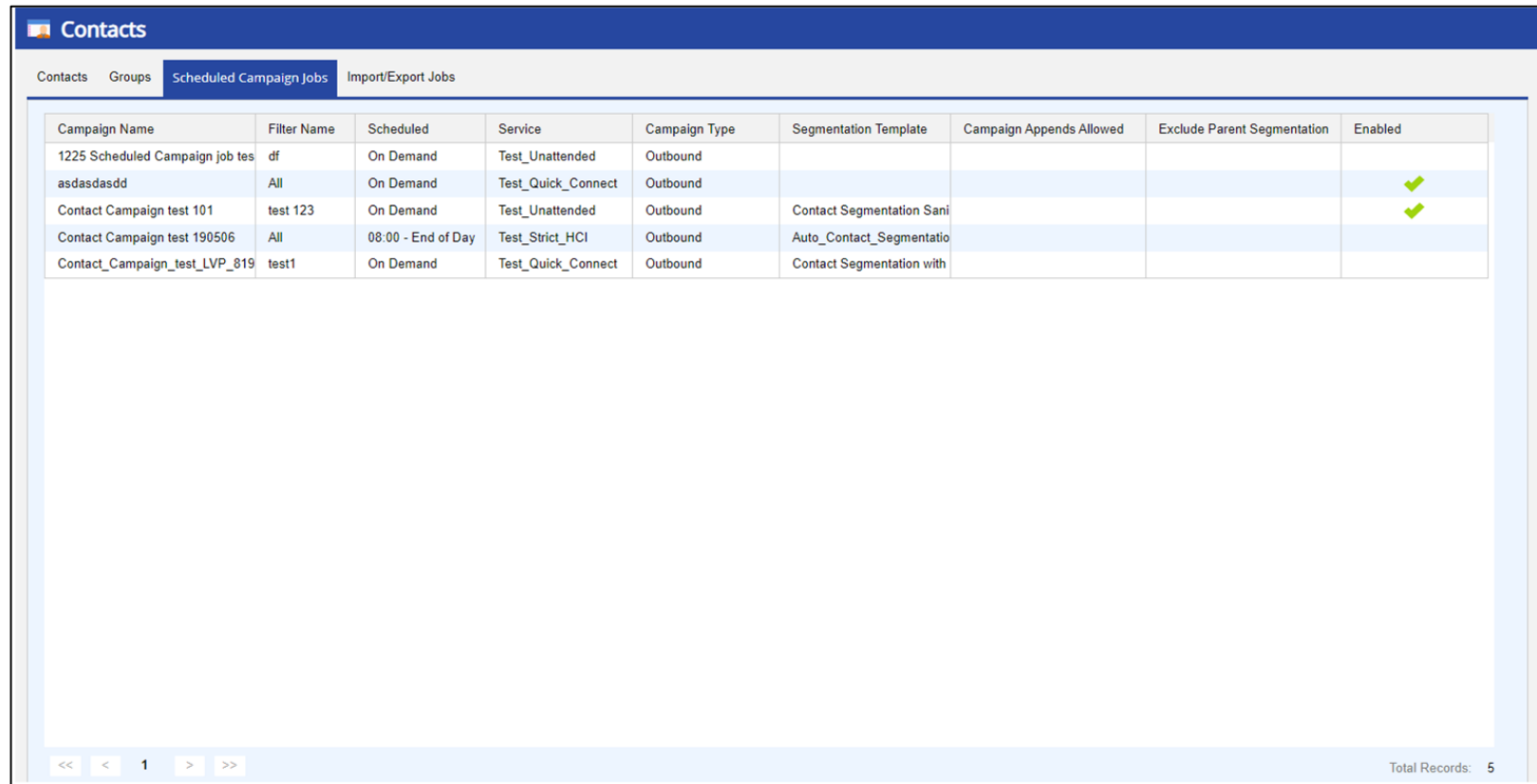
# Contact Manager Segmentation Enhancements

- **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.



# 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



The screenshot displays the 'Contacts' application interface, specifically the 'Scheduled Campaign Jobs' tab. The table below shows the details of five scheduled campaign jobs, including their names, filter names, schedules, services, types, segmentation templates, and whether they are enabled.

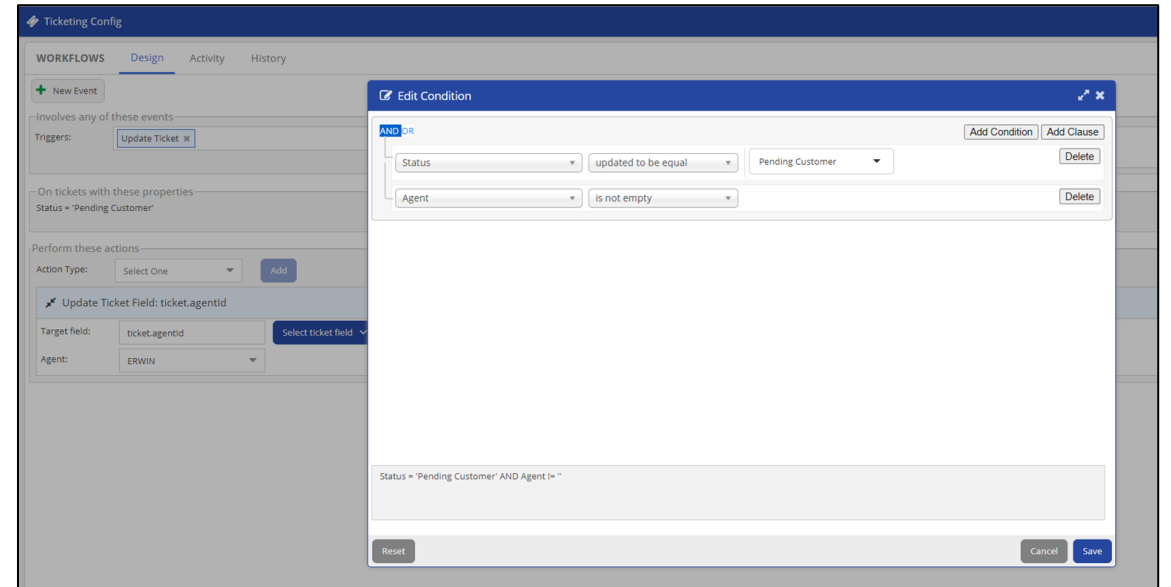
Campaign Name	Filter Name	Scheduled	Service	Campaign Type	Segmentation Template	Campaign Appends Allowed	Exclude Parent Segmentation	Enabled
1225 Scheduled Campaign job tes	df	On Demand	Test_Unattended	Outbound				
asdasdasdd	All	On Demand	Test_Quick_Connect	Outbound				✓
Contact Campaign test 101	test 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			

Navigation controls at the bottom of the table include '<<', '<', '1', '>', and '>>'. The total number of records is indicated as 'Total Records: 5' in the bottom right corner.

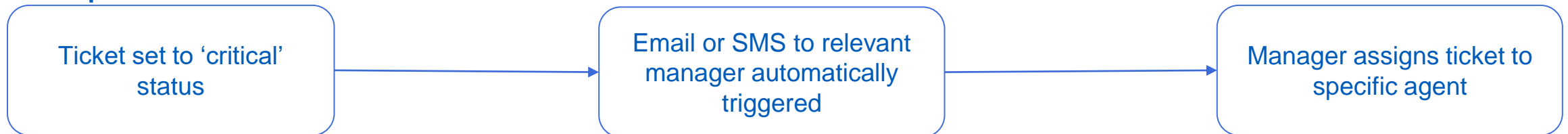
# Streamline Your Operation With Intelligently Triggered Workflows

## 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**

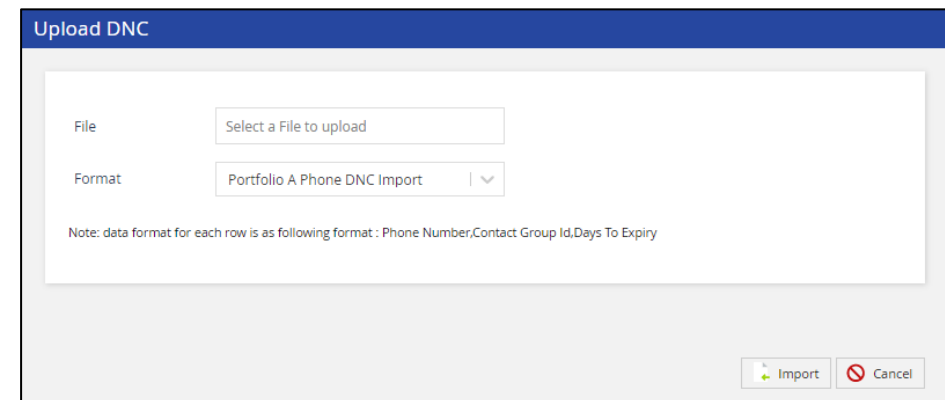
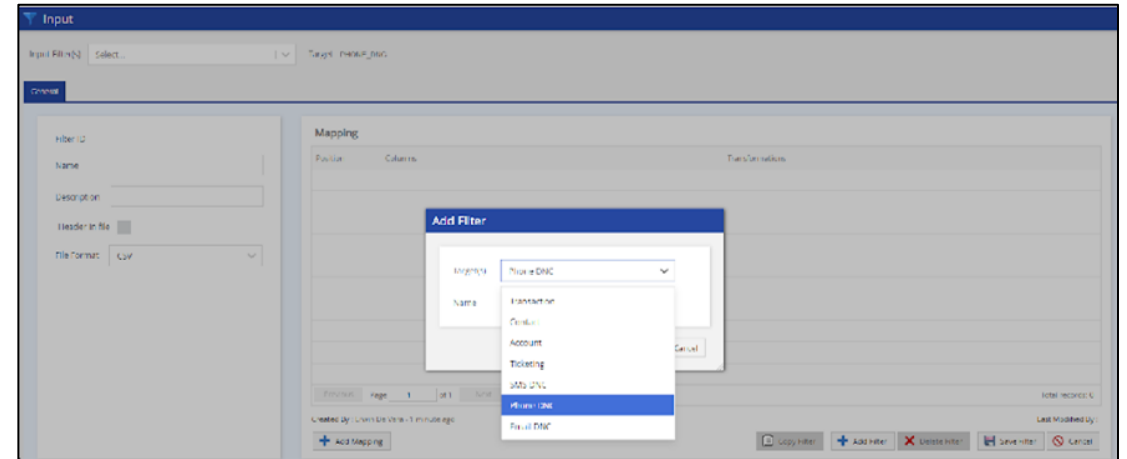


### Example



# 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



# Data Management and Analytics: Business Intelligence

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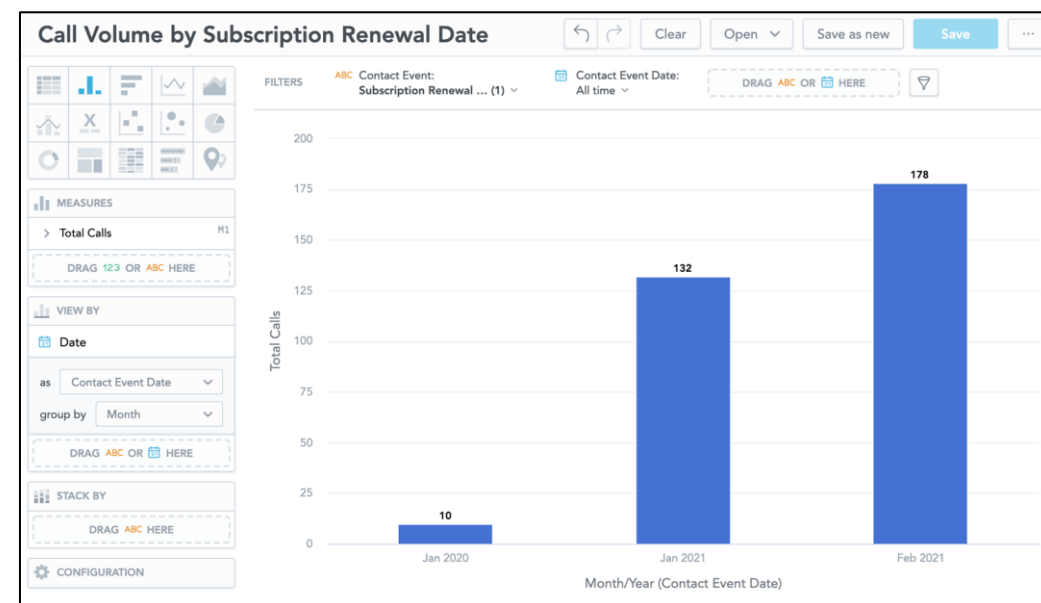
# Business Intelligence Enhancements

## 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 overlaid with Contact Manager custom field dimensions

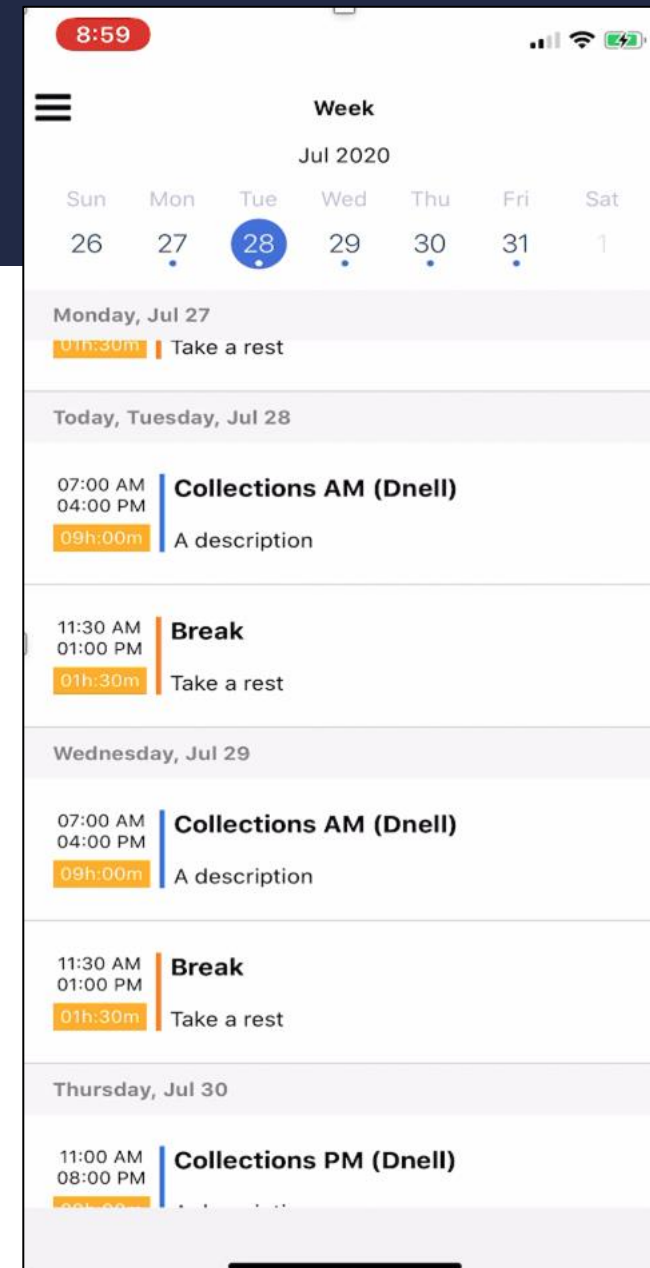
# eLearning Changes

- 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.

The screenshot shows a 'Content Form' dialog box with a blue header and a close button. Below the header, there are radio buttons for 'File' and 'External Url', with 'External Url' selected. A 'DRAFT' label is in the top right corner. The 'Url:\*' field contains 'Http://internal-learning-site.com' and has a red error icon. The 'Name:\*' field contains 'Onboard docs'. The 'Category:' dropdown is set to 'Compliance'. The 'Description:\*' field contains 'External link'. The 'Section:' dropdown is empty. At the bottom right, there are 'Cancel', 'Save', and 'Publish' buttons.

# 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**





# Messaging Enhancements: Webchat

---

# 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.

The dashboard features a top navigation bar with tabs for Voice, Email, SMS, and Chat. Below this are six summary cards:

- Available Agents: 2 Available
- Chats In Queue: 1 Chats
- Chats With Agent: 5 Chats
- Total Chats: 8 Chats
- Average Chat Wait Time: 00:00:03 (HH:MM:SS)
- Average Resolution Time: 00:07:27 (HH:MM:SS)

The main section is titled "Chat Monitor" and includes a search bar. Below the search bar is a table with columns for Profile, Thread, Queue, Thread Status, Agent, and Duration.

Profile	Thread	Queue	Thread Status	Agent	Duration
		Basic - U-CRM All Features - Voice Agent Mode	With Agent	ERWIN	3:48:42
		Basic - U-CRM All Features - Voice Agent Mode	With Agent	BRUCE	0:02:08
		Basic - U-CRM All Features - Voice Agent Mode	With Agent	BRUCE	0:01:01
		Basic - U-CRM All Features - Voice Agent Mode	With Agent	ERWIN	3:50:06
		Basic - U-CRM All Features - Voice Agent Mode	In Queue		
		Basic - U-CRM All Features - Voice Agent Mode	With Agent	ERWIN	

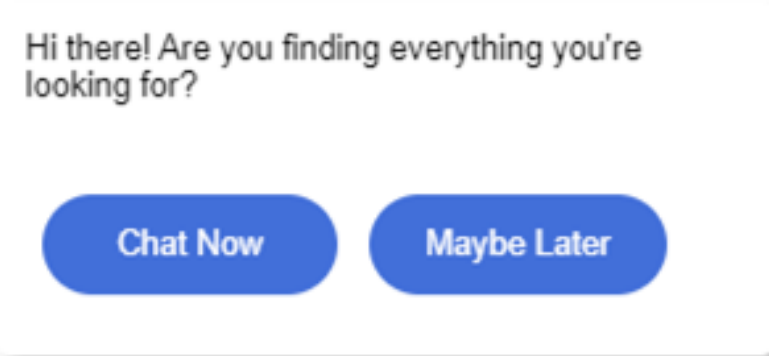
Two pop-up windows are shown:

- Contact Details:** A form showing general information (Account: Q412345, First Name: Austin, Last Name: Wayne), contact information (Address 1, City, State, Country), and other information (Payment Balance, Account Due Date).
- Chat Detail:** A conversation thread for Thread ID: 11504736959. It shows messages from Austin Wayne and Operator Transfer, including "Hi Erwin, I need help with my recent order." and "oh no, im sorry to hear that".

# 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.



## Example

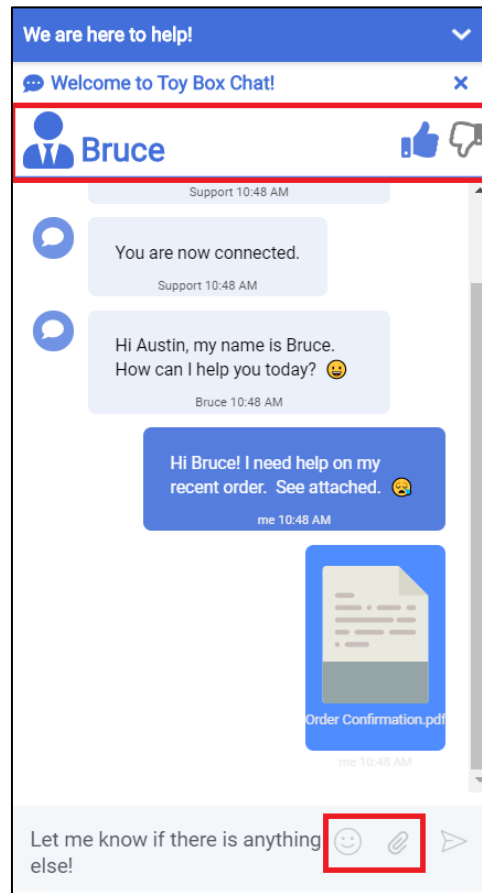


# Webchat: Preview What Customers Are Typing And More

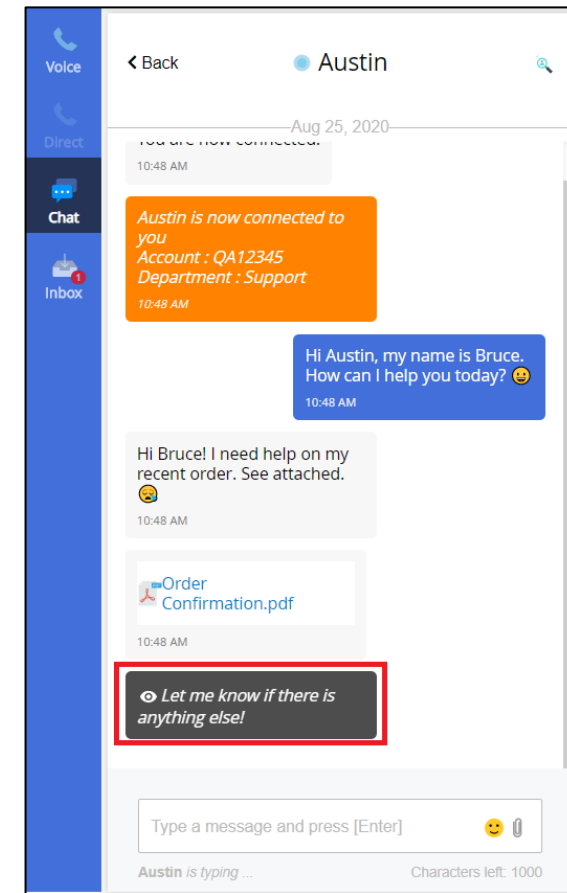
## New chat features to empower agents and delight consumers

- **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



# 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

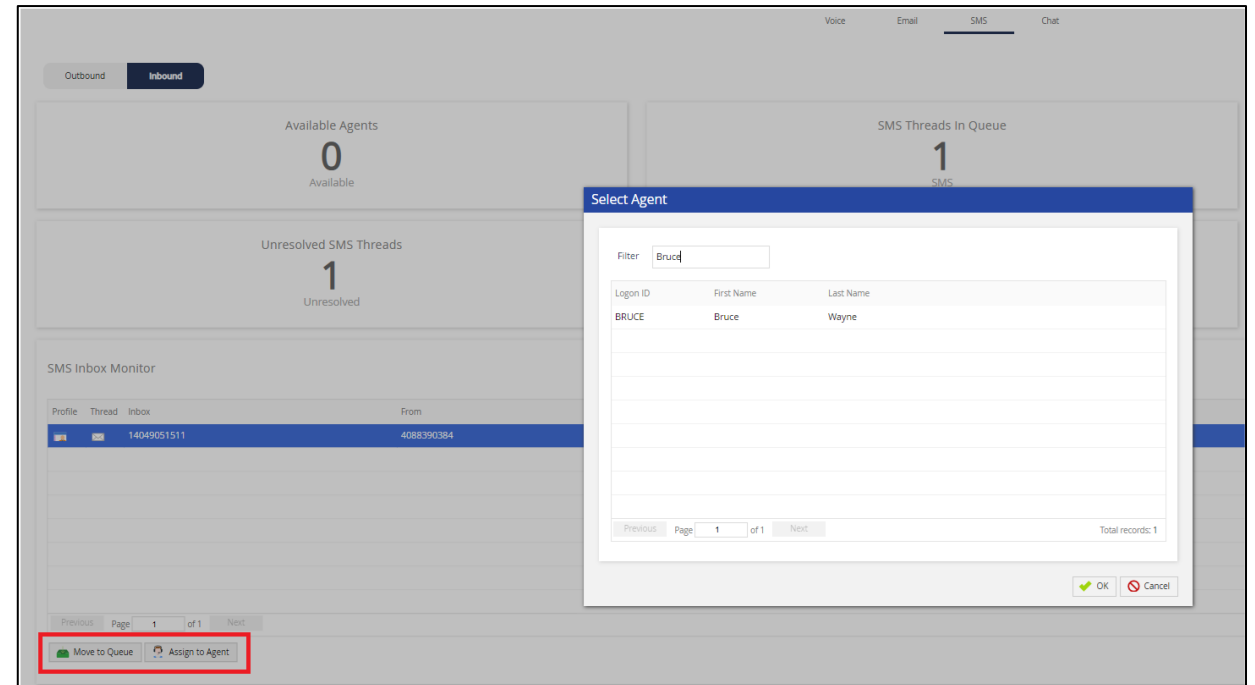
The screenshot displays the 'Agent Details' interface with the 'Channels' tab selected. On the left, there is a profile picture placeholder with a 'Change password' link below it. The main content area shows a 'Channels' section with icons for Phone, SMS, Email, and Chat. Below this, there are three configuration sections:

- SMS:** Max SMS Threads is set to 10.
- Email:** Max Email Threads is set to 10.
- Chat:** Max Active Chats is set to 3.

At the bottom right, there are 'OK' and 'Cancel' buttons.

# 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



# 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

The screenshot displays the LIVEVOX interface for an agent conversation with MMS. The main window shows a conversation with a contact named 'Personal SMS' (Sms) at the phone number (408) 839-0384. The conversation history includes a text message 'This is a cat' and a photo of a cat. A floating 'SMS' form is open, showing fields for 'To' (4088390384), 'From' (14049051511), and 'Template'. Below the form is an 'SMS History' section with a table of messages. The table has columns 'Date' and 'Start'. The messages are: 08/12/2020 06:52:22 PM, 08/12/2020 06:42:42 PM, 08/12/2020 06:13:59 PM, 08/12/2020 06:11:27 PM, 08/12/2020 05:58:31 PM, 08/12/2020 05:38:47 PM, and 08/12/2020 04:52:28 PM. The 'SMS' form also has a 'Reply' field and a 'Characters left: 160' indicator. The 'SMS History' table has a 'Date' column and a 'Start' column. The messages are: 08/12/2020 06:52:22 PM, 08/12/2020 06:42:42 PM, 08/12/2020 06:13:59 PM, 08/12/2020 06:11:27 PM, 08/12/2020 05:58:31 PM, 08/12/2020 05:38:47 PM, and 08/12/2020 04:52:28 PM.

## SMS Pacing Controls

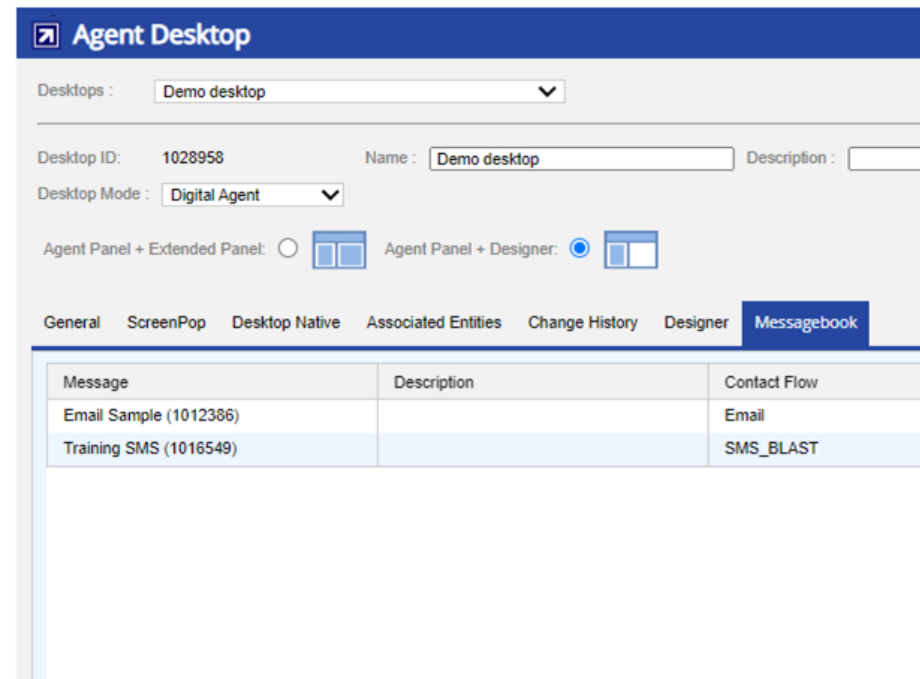
The 'Revise Limits' dialog box is shown with the 'SMS' tab selected. The 'Max SMS Per Second' field is set to 10. The dialog includes 'Revise' and 'Cancel' buttons.



# 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.



# 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

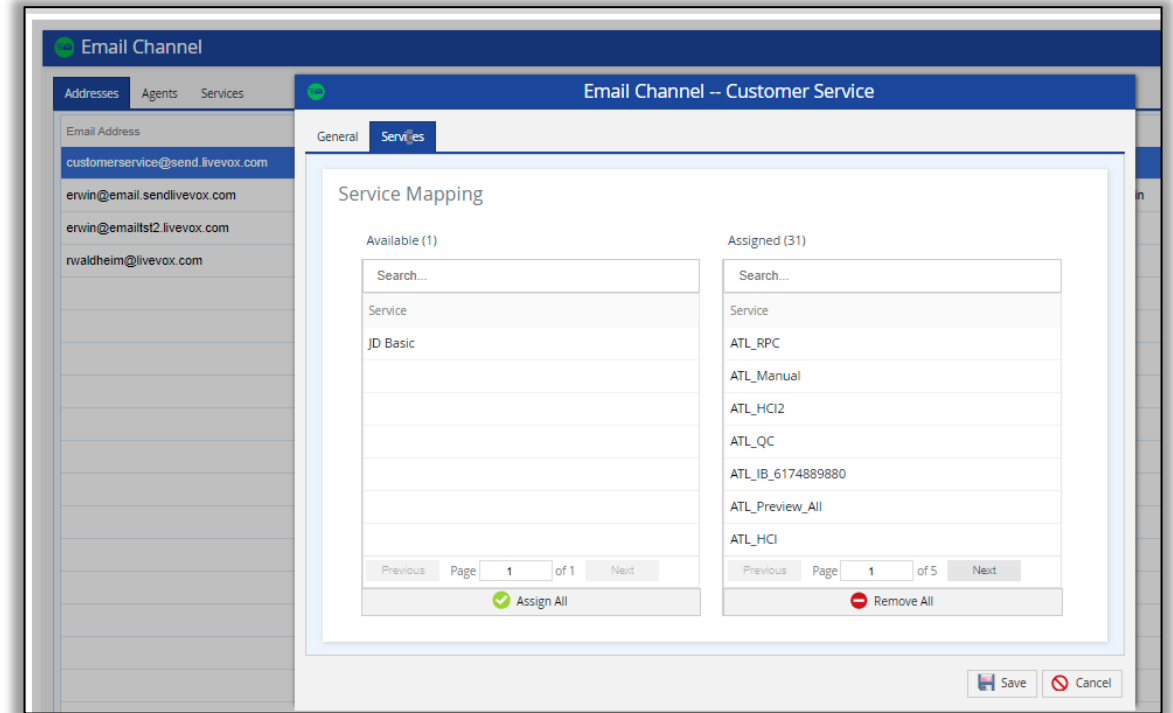
{
  "from": "16789318882",
  "to": "4156943849",
  "body": {
    "templateId": "74625"
  },
  "account": "13213"
}

#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.**

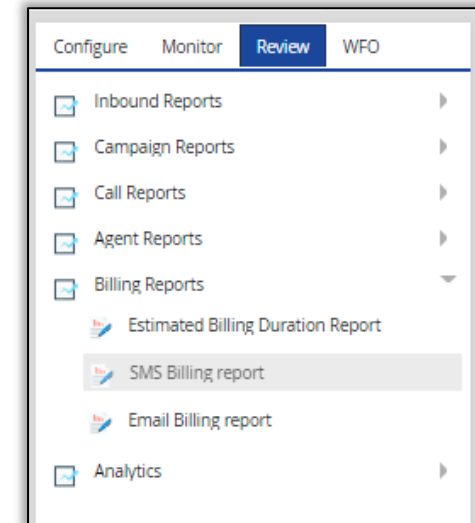
- **Define which email addresses and short codes** agents can send emails and SMS from.
- **Control the codes and addresses** that are available at a service level
- **Simplify the agent experience**
- **Avoid mistakes that impact customer experience.**



# 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.**



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

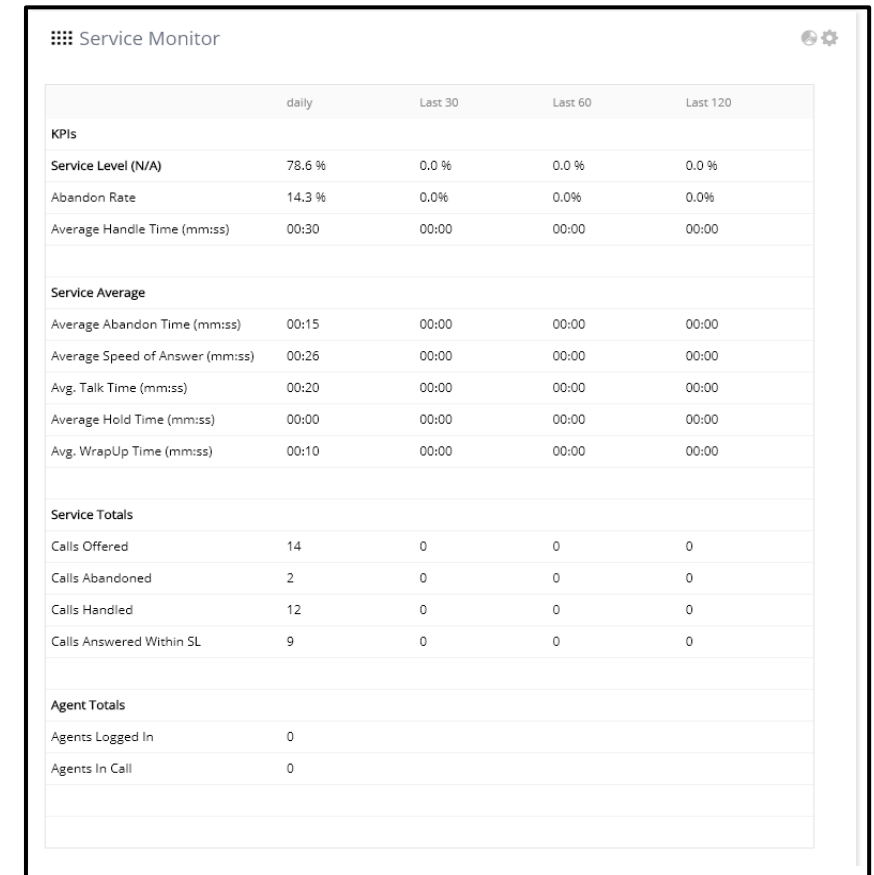
# Enhancing the Manager Experience through Real-Time Monitoring & Reporting

---

# 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.**

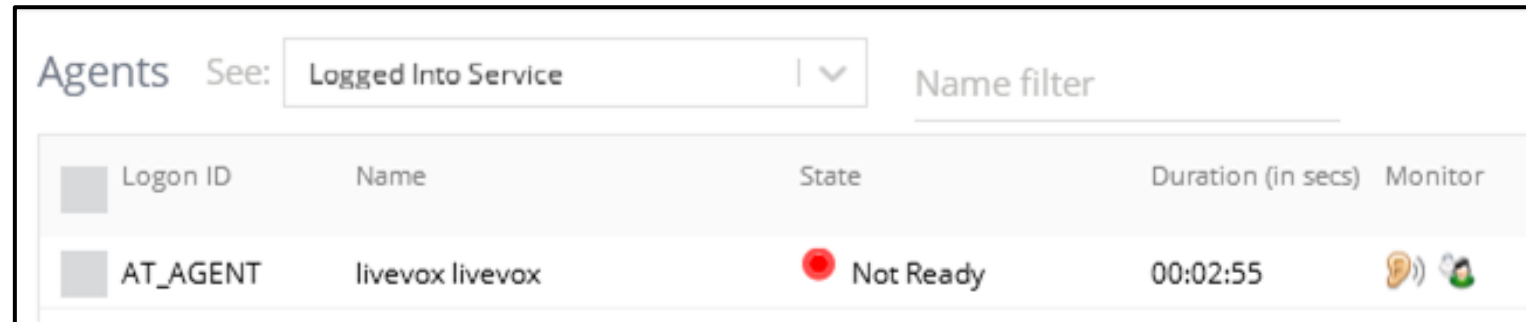
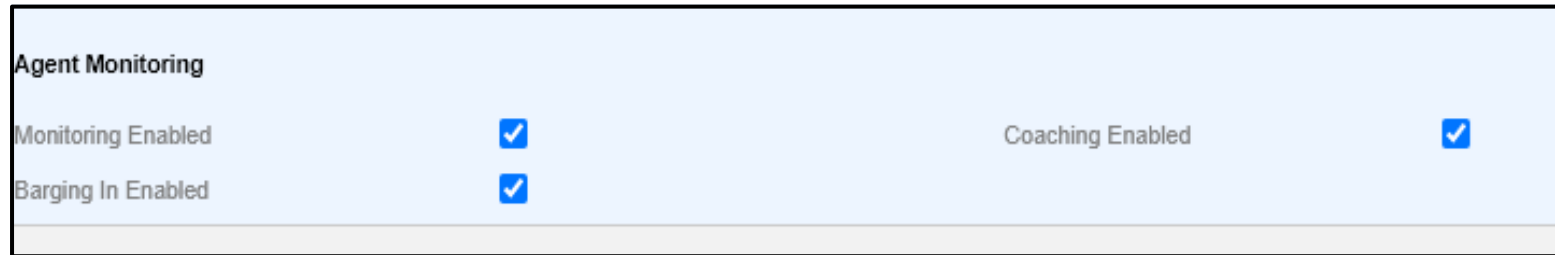


The screenshot shows a 'Service Monitor' widget with a table of performance metrics. The table has columns for 'daily', 'Last 30', 'Last 60', and 'Last 120'. The data is organized into sections: KPIs, Service Average, Service Totals, and Agent Totals.

	daily	Last 30	Last 60	Last 120
<b>KPIs</b>				
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
<b>Service Average</b>				
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
<b>Service Totals</b>				
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
<b>Agent Totals</b>				
Agents Logged In	0			
Agents In Call	0			

# 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



# Other New and Improved Capabilities

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# U-Chat Configuration Enhancement

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

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

### Channels

- Voice Channel ✓
- SMS Channel ✓
- Email Channel ✓
- Chat Channel ✓

**Agent – Customer chat**

### UCaaS

- Emergency Services ✓
- Meetings ✗
- Chat ✓

**Agent – Agent chat**

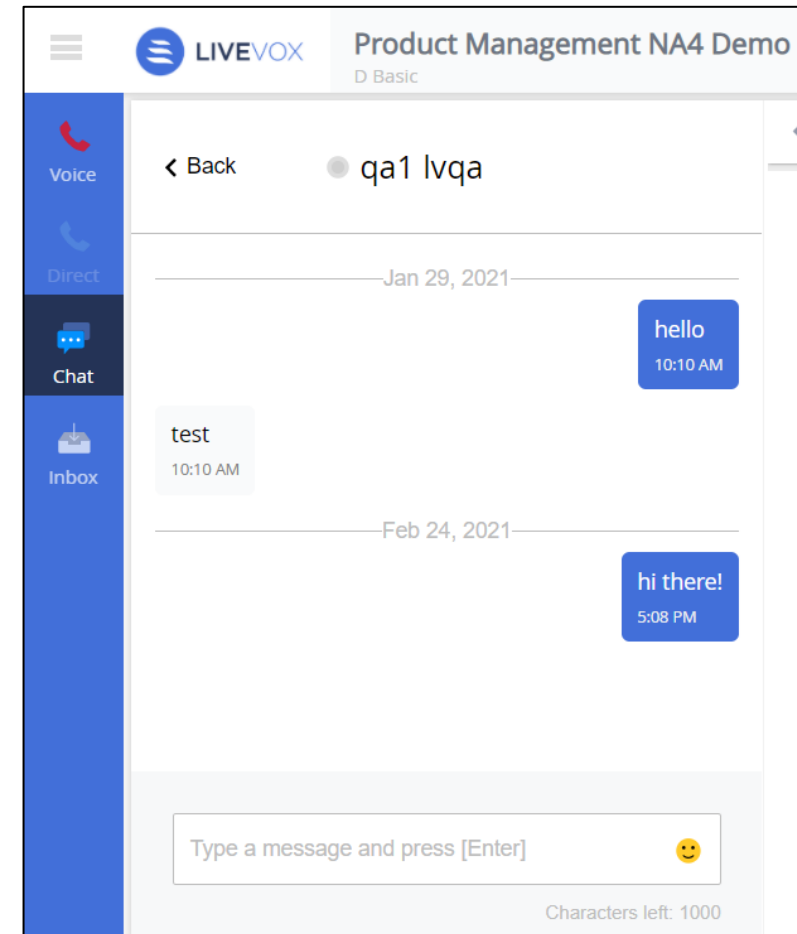
- Supervisor to Agent Chat
- Agent Call In Number Groups
- Use Websockets

**Agent – Supervisor chat**

# 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**



# 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
1	Contact #	account	Custom Grouping	Display Only	1
2	Original Account #	originalAccountNumber	Description	Display Only	2
3	First Name	firstName	New Custom Group	Text	1
4	Last Name	lastName	New Custom Group	Text	2
5	Total Balance	balance	Banking Information	Number	1
6	Balance Due	amountToSpeak	Banking Information	Number	2



Preview

**Custom Grouping**  
Contact #:

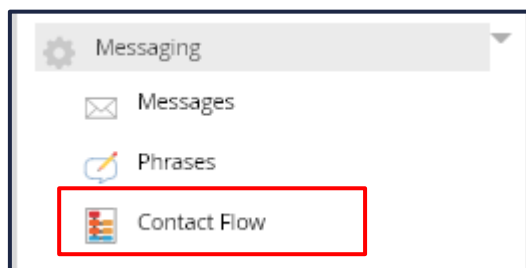
**Description**  
Original Account #:

**New Custom Group**  
First Name:  Last Name:

**Banking Information**  
Total Balance:  Balance Due:

# Other Enhancements – Miscellaneous Cont'd

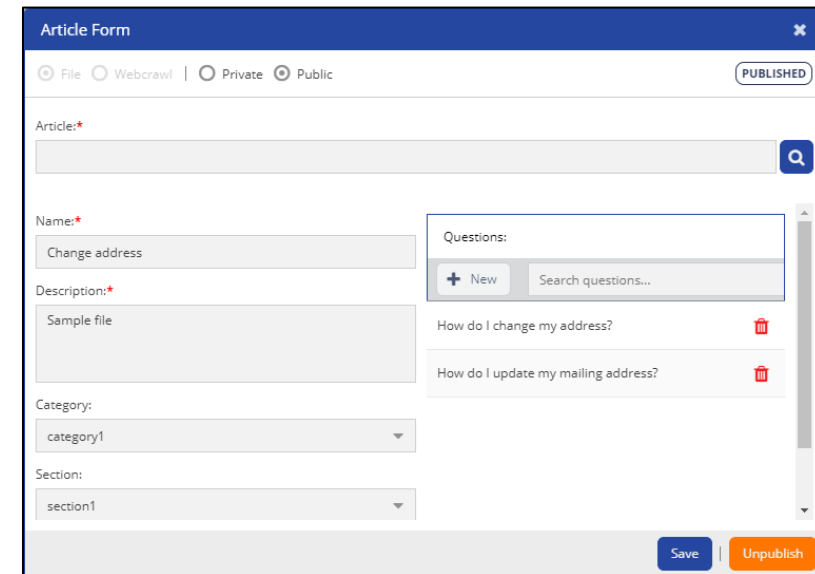
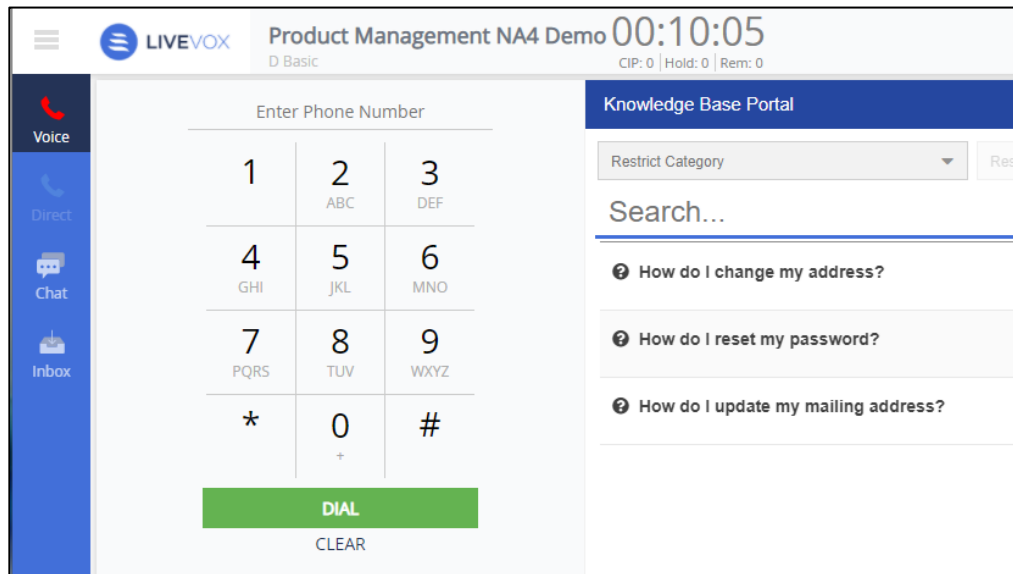
- **The Call Flow Editor has been renamed to Contact Flow**
- The new name **more accurately describes what the tool can do.**



- **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.**

# 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.**



To learn more, please reach out to your **LiveVox** Account Team or Customer Care

**Call:** 844.207.6663

**Email:** [customercare@livevox.com](mailto:customercare@livevox.com)

**Visit:** [livevox.com](https://livevox.com)

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