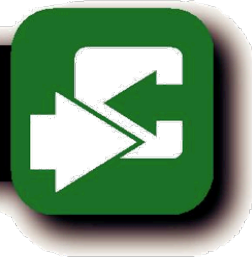
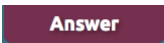









# LiveOps Advanced Demo Checklist



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|---|---|--|
| <input type="checkbox"/> <b>WebRTC Call</b>                             |   | Show & describe an inbound call to Engage using WebRTC. Show the Answer  & End Call  telephony            |
| <input type="checkbox"/> <b>Web Service Request</b>                     |   | Show & describe a Web Service Request. Accept & respond to the Web Service Request within Engage.  |
| <input type="checkbox"/> <b>Outbound Dialing Campaign</b>               |   | Describe the LiveOps Progressive & Push Preview Dialing Campaign capabilities & the differences between the two.   |
| <input type="checkbox"/> <b>General Tab</b>                             |   | Show & describe the General configuration parameters for a LiveOps Outbound Campaign.  |
| <input type="checkbox"/> <b>Telephony Tab</b>                           |   | Show the Telephony configuration options for a LiveOps Outbound Campaign.  |
| <input type="checkbox"/> <b>Dialer Start/Stop Tab</b>                   |   | Show the Dialer Start/Stop options for a LiveOps Outbound Campaign.  |
| <input type="checkbox"/> <b>Pools Tab</b>                               |   | Show the Pools options for a LiveOps Outbound Campaign.  |
| <input type="checkbox"/> <b>Leads Tab</b>                               |   | Show the Leads options for a LiveOps Outbound Campaign & successfully upload a leads dial list for your demo.  |
| <input type="checkbox"/> <b>Outbound Dial Demo</b>                      |   | Start the LiveOps Outbound Campaign & demonstrate outbound dialing with LiveOps Engage.  |
| <input type="checkbox"/> <b>Voice Recognition IVR</b>                   |   | Dial 800-840-6671 On prompt #1 say "one", on prompt #2 say "one", on prompt #3 say "one", on prompt #4 say "light" & on prompt #5 say "help me". Call will route to Voice Recognition IVR Agent Pool. Participate in the post call survey after the agent hangs up the call. |
| <input type="checkbox"/> <b>Multi-Channel Admin Settings</b>            |  | Show & explain Channel Priority, Grade Of Service Target, Grade Of Service Interval, Wait Time Warning Interval & Max Concurrent Per User.   |
| <input type="checkbox"/> <b>Multi-Channel AdminUser/<br/>Team Setup</b> |  | Show & explain User Details, Rights, Skills & Processing Limits.   |
| <input type="checkbox"/> <b>Multi-Channel Admin Keywords</b>            |  | Show & explain Keyword Setup, Priority, Match Type, Keywords, Auto Response, Output State, Message Priority, Category/Subcategory, Channels & Processing Rules.  |
| <input type="checkbox"/> <b>Multi-Channel Broadcasts</b>                |  | Show & explain Broadcast, Channel Selection, Customer Groups, Email Content, SMS Content, Sending Options, Preview & Confirmation & Campaign Dashboard.  |
| <input type="checkbox"/> <b>Multi-Channel Message Manager</b>           |  | Show & explain Queued items & how to manually close the interactions. Show & explain how to reset Messages that are assigned to agents.  |
| <input type="checkbox"/> <b>Multi-Channel Dashboard</b>                 |  | Show & explain the Multi-Channel expanded dashboard. Click on the Queued items to move to the Message Manager & click on the dashboard button to move back to the Multi-Channel Dashboard.   |
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

CRM Integration

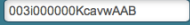
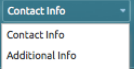
Show & explain the Settings, Contact Config, Lead Config, Interaction Config & Sync tabs.

Data Field Groups & Data Field Maintenance


Show & explain the Data Field Groups & Data Field Maintenance tabs & how they integrate into the Engage CRM interface.

Engage CRM

Show & explain the Record Type , Status Type , CRM Generated

CustomerRef1 Number  & Custom Engage CRM Fields 

CRM Record Pop Out

Show & explain the CRM Record Pop Out  button. Show the Engage Interactions object within the CRM Contact or Lead. Show direct access to CRM Opportunities & Cases. Select an Engage Interaction & show Channel, Handled By, Message Direction & Message Text

Agent Alert

Show & explain the Options  button and the Agent Alert settings

