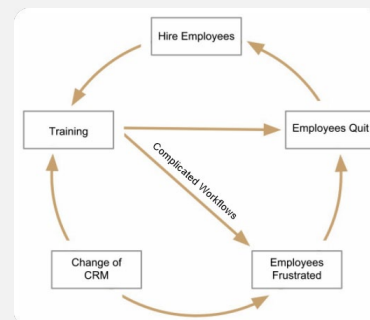


# TxVirtualGuide



Empowering Agents to deliver Faster and Better

The idea of “customer service” has evolved from a small team within an enterprise to dedicated support centers housing hundreds of agents interacting with customers over a variety of channels. And through the years, advancements in customer service technology have mainly focused on improving the customer experience. However, ever increasing agent training costs coupled with high attrition levels highlights the importance of agent support tools. Another impending challenge that contact centres are facing today is pertaining to Customer Data Security, exposing the CRM data to agents is something that should be regulated to make the customer support process more secure. TxVirtualGuide helps agents to learn faster, enabling them to go live within a short period of time by streamlining customer interactions and providing a clear organized support platform all along, safeguarding customer data.

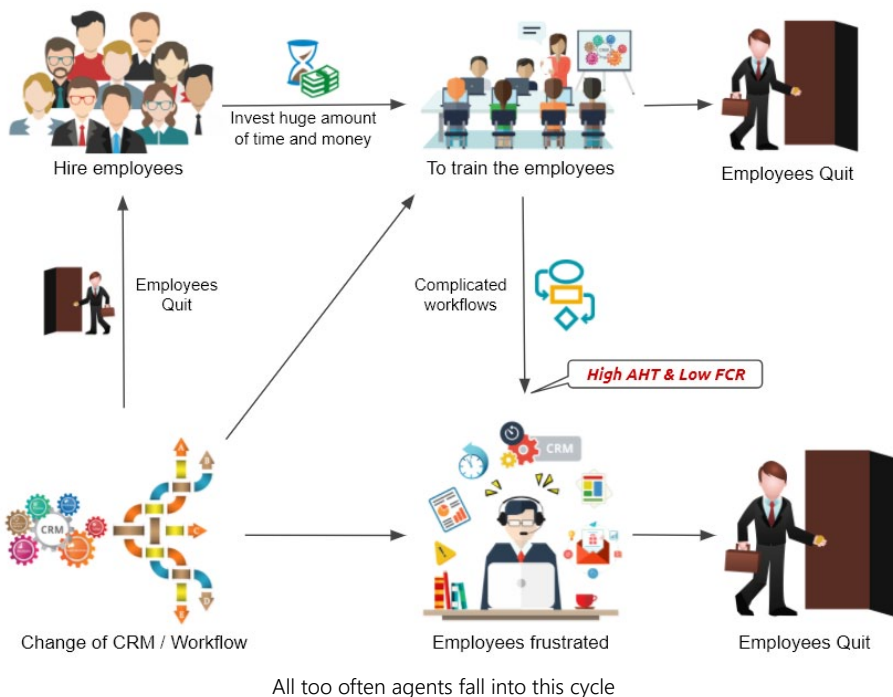


“Over the past two decades or so, the customer support team in an enterprise has evolved from being a “necessary liability” to an “absolute necessity” and in many cases a key differentiator to stay ahead of the competition”

To address the issue of new hires having to learn complex CRMs and platforms, TxVirtualGuide provides a simple, safe, and streamlined screen for agents to provide service, without worrying about messing up CRM entries.

## Highlights

- Enhanced Data Security
- Better Work Experience
- Streamline Customer interaction
- Reduce training time and cost
- Integration with simple to sophisticated CRMs
- Improved agent efficiency
- Improved Job Satisfaction
- Enhanced Data Security



## Unique features

### Data Security

TxVirtualGuide allows agents to access the backend CRM through its secure user interface denying the agents access to important customer data not relevant to the business process thereby improving data security.

### Better Work Experience

Agents use a single application for all their work. TxVirtualGuide will update all the integrated CRM / third-party applications in the backend without the agents having to interact with multiple CRMs.

### Streamline Customer interaction

Using TxVirtualGuide’s decision tree design tool, the entire customer engagement process can be streamlined and using its extensive integration capabilities, all CRM information including customer details are updated and maintained quickly and without errors. It works the same for commercial CRMs like Salesforce or any in-house applications.

### Reduce training time and cost

Agents use and get familiar with a single interface provided by TxVirtualGuide. This results in a drastic reduction of training time and the associated costs involved in training agents.

## Integration with simple to sophisticated CRMs

TxVirtualGuide comes with in-built support for most commonly used CRM. For any new or in-house CRM, TxVirtualGuide provides programmable integrations support to get you up and running quickly.

## Improve agent efficiency

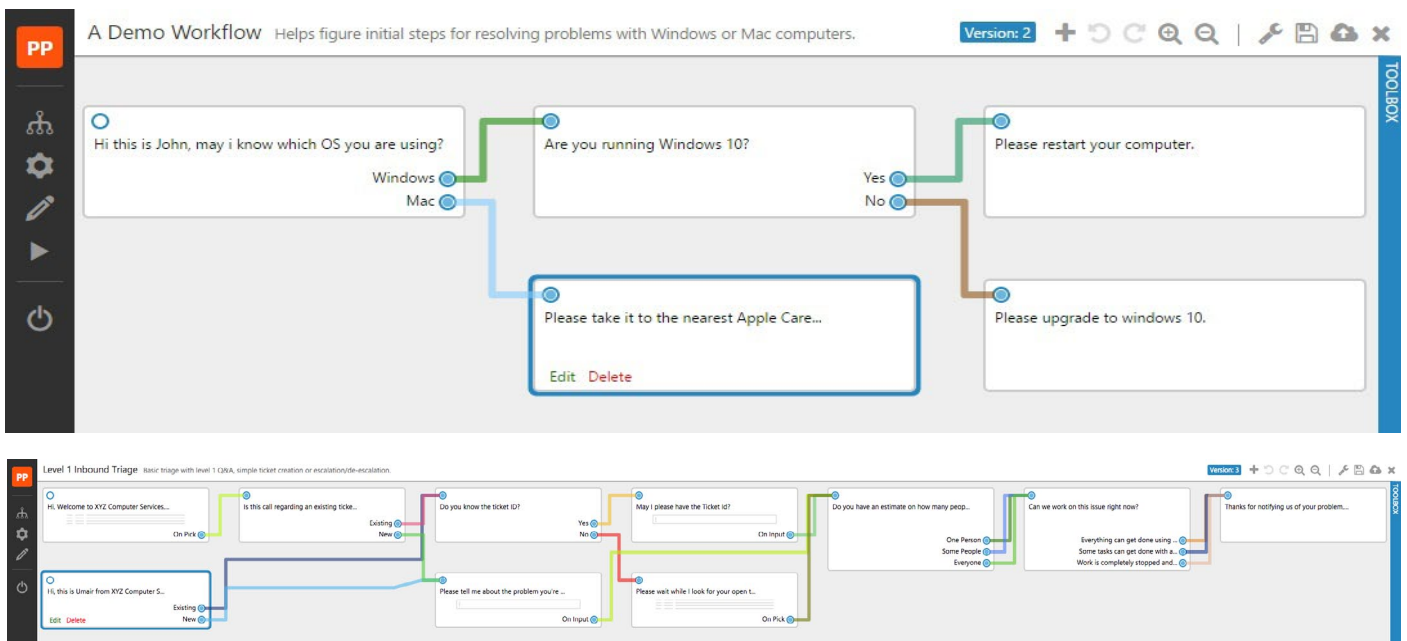
Easy to use and follow workflows provide agents with predetermined steps to follow while interacting with Customers. Integrating the company's knowledge base right into TxVirtualGuide improves agent confidence while solving problems. With fine-tuned workflows for agents to follow, you control the delivery quality.

## Enhance Job Satisfaction

The right tools help agents do their work in a better and more efficient way. Predetermined steps to follow during the call reduces work stress, which helps agents to solve problems more effectively and allows them to focus more on delivering a high-quality customer experience. This results in greater job satisfaction.

## The Workflow tool

It starts with the Workflow Tool where decision trees are created using an easy drag and drop interface. All the questions and answers can be pathed out to proper destinations, giving confidence to new agents in providing proper service.



## TxVirtualGuide Agent Interface

The screenshot shows the agent interface for a call with agent "JD". The header displays "Vendor Information has not been resolved yet." and a timer "00.00.14 CALL DURATION".

**AGENT PROMPT**  
Hi this is John, is this problem a Windows related or a Mac related?

**SELECT RESPONSE RECEIVED**  
Windows  
Mac

**Ticket Status**

Ticket ID	135478
Severity	Low
Impact	Not Many
Priority	Low

**Tickets History**  
No Items

Navigation buttons: Previous, Next

When an agent is live and greets a customer, TxVirtualGuide pops up the prompt and pertinent customer information. No more traversing through various CRMs trying to find customer information.

## Complex CRM

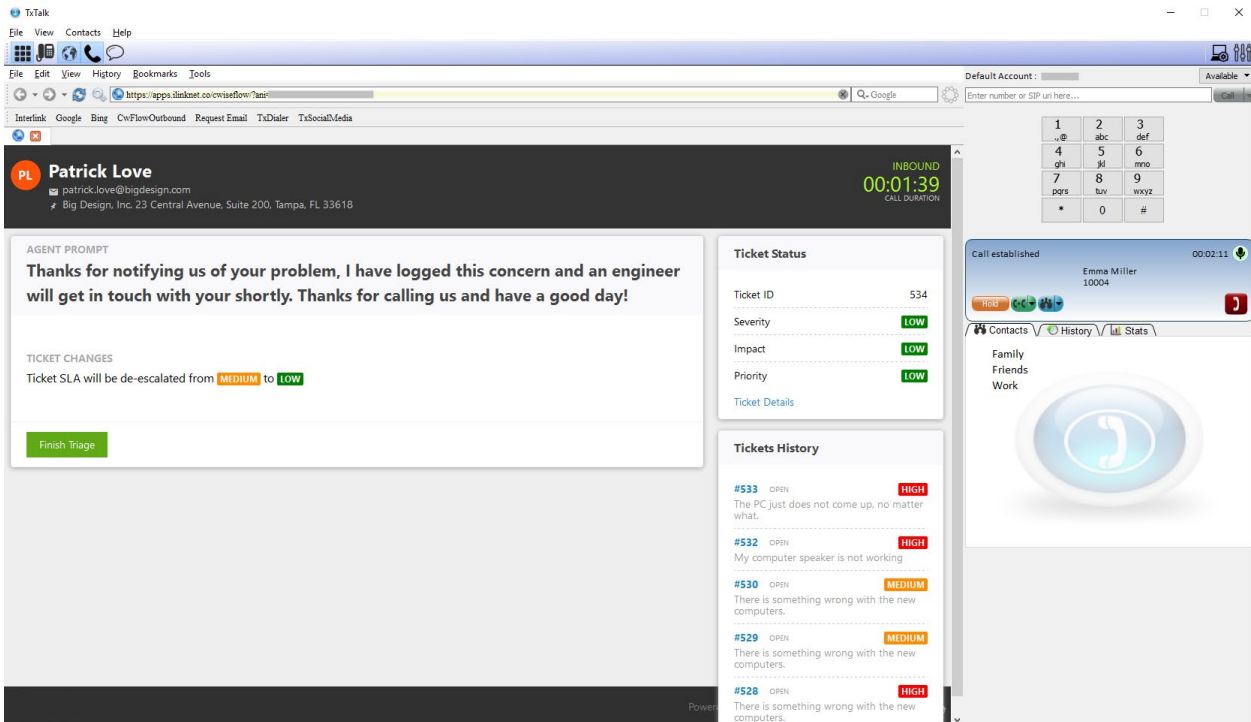
The screenshot shows a CRM interface for creating a new ticket. The left sidebar contains navigation icons for 'My Favorites (Testing)', 'Companies', 'Sales', 'Marketing', 'Procurement', 'Project', 'Service Desk', 'Time & Expense', and 'Finance'. The top navigation bar includes '+ New', 'Recent', 'Calendar', 'Chat with Support', 'Invoices', 'Search', and 'Training'. The main content area is divided into two columns. The left column, titled 'New Ticket', contains fields for 'Summary', 'Company' (with sub-fields for Company, Contact, Email, Site, Address 1, Address 2, City, State, Zip, Country), 'Ticket' (with sub-fields for Board, Status, Type, Subtype, Item, Ticket Owner, SLA, Agreement, Predecessor, Estimated Start Date, Due Date, Duration, Impact/Urgency, Priority, SLA Status), 'Initial Description' (with a 'Notes' field), 'Internal', 'Resolution', and 'Time Budget Analysis' (with a 'Budget Hours' field). The right column, titled 'Additional Details', contains fields for 'Opportunity', 'Source', 'Account Mgr', 'Account Tech', 'Entered By', 'Assigned By', and 'Closed By'. Below this is a 'Send Notes as Email' section with checkboxes for 'Contact', 'Resources', and 'Cc'. The 'Resources' section includes 'Resources' and 'Meetings' tabs, and a 'Members and Teams' section with a 'Start Date', 'Start Time', 'End Date', and 'End Time' range. The 'Where' section includes 'On-Site', 'Reminder', and 'Status' fields. The 'Show Advanced Options' section includes a 'SAVE AND NEW' button and a 'Team' dropdown. The 'Finance Information' section includes fields for 'Work Role', 'Work Type', 'Bill Time', 'Bill Expenses', 'Bill Products', 'Method', 'Hourly Rate', 'Customer PO', 'Reference', 'Est. Time Rev.', 'Est. Expense Rev.', 'Est. Product Rev.', 'Est. Time Cost', 'Est. Expense Cost', and 'Est. Product Cost'. There are also checkboxes for 'Bill this ticket separately', 'Bill this ticket only after it has been closed', and 'Bill unapproved time and expenses'.

TxVirtualGuide integrates with your CRM(s) behind the scenes and dips into the database when needed. The application eliminates all of the CRM complexity an agent may have to learn when first hired. And because agents are separated from the CRMs, data cannot be inadvertently lost or changed.

## CRM Screen POP

The screenshot shows a CRM screen pop for a contact named Mr. Josh Davis. The interface has a top menu bar with 'File', 'View', 'Contacts', and 'Help'. Below the menu bar is a search bar and a navigation bar with 'Home', 'Chatter', 'Files', 'Accounts', 'Contacts', 'Cases', 'Solutions', 'Reports', 'Dashboards', 'Tests', and 'CustomerCalls'. The main content area is divided into three sections: 'Contact Detail', 'Opportunities', and 'Cases'. The 'Contact Detail' section shows fields for 'Contact Owner' (Deepak Suir), 'Name' (Mr. Josh Davis), 'Account Name' (Express Logistics and Transport), 'Title' (Director, Warehouse Mgmt), 'Department' (Warehouse Mgmt), 'Reports To' (View Org Chart), 'Mailing Address' (621 SW 5th Avenue Suite 400, Portland, Oregon 97204, United States), and 'Created By' (Deepak Suir). The 'Opportunities' section shows 'No records to display'. The 'Cases' section shows a table with columns for 'Action', 'Case', 'Subject', 'Priority', 'Date/Time Opened', 'Status', and 'Owner'. The table contains one record: 'Electrical circuit malfunctioning' with priority 'Medium', date '2/3/2009 2:28 AM', status 'Closed', and owner 'Deepak Suir'. The right sidebar contains a numeric keypad, a 'Call established' indicator, and a 'Family Friends Work' section with a phone icon.

# TxVirtualGuide Screen POP



TxVirtualGuide simplifies complex workflows by effectively reducing them to a series of steps the agent must follow. An agent needs to be trained in following steps instead of learning complex business processes, which is a far simpler, error proof and cost effective investment in an industry with high attrition rates.

## System Requirements

- **Linux** (with Container Engine)  
Recommended : Debian derived 8.1+, Red Hat Enterprise Linux 7+
- **RAM** : 4GB
- **Hard Disk space** : 10GB

\*Requirements will further vary depending on number of integrations and number of agents being served.



Telenetix established in the year 2004 is a Customer experience and Universal Communications technology company. Our focus has been in having a unique corporate culture that starts with our mission statements Curiosity, Passion, Commitment and Openness. Creating innovative solutions that solve our customer problems and help them to grow their business is our primary goal and we work towards achieving it with our expertise.

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