

Complete Records of Customer Interactions for Dispute Resolution, Fraud Investigation, Audit and Compliance

Record-keeping is an essential part of any business. Brokerages record every telephone transaction. Merchants save records of every in-store purchase. All kinds of businesses keep countless stacks of records about their customers. Online businesses, too, need reliable records of customer interactions for dispute resolution, fraud investigations, and audit and compliance purposes. Until now, there has been no practical way to provide a complete and accurate snapshot of an entire customer session on your web site.

Consider the following scenarios: your customer claims he was not informed that the purchase price was dependent on a special promotion. Or, a customer denies having agreed to terms and conditions for an online trade to avoid taking a loss. If corporate or government auditors demanded a comprehensive accounting of online customer interactions, could you provide one?

Tealeaf cxVerify™ solves this problem by preserving a complete and permanent record of all customer online interactions and transactions with your web site. It offers a flexible way to retrieve and replay complete customer sessions—exactly what customers viewed in their web browsers and the specific actions they took on each page—even if they took place months or years ago. With this essential documentation, your company can effectively resolve customer disputes, efficiently conduct fraud investigations, and streamline audit and compliance efforts.

## HOW IT WORKS

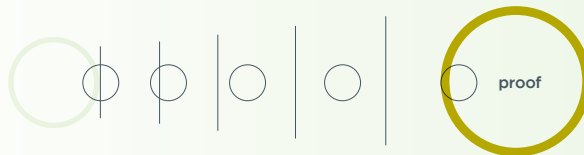
cxVerify gives you full control over your online customer interaction record-keeping process. For example, you can archive only the sessions in which a purchase, trade, or quote was made. After defining which sessions to archive, you can then choose exactly when or how frequently to archive these sessions. Finally, you can choose to archive these sessions within the Tealeaf system, via Selective Archiving, or export them into your own document management system.

## FEATURE HIGHLIGHTS

- > **Selective Archiving** to keep critical sessions within Tealeaf for longer periods of times without being cost prohibitive.
- > **Seamless integration with cxReveal** so customer service agents have the ability to handle customer disputes over a longer time horizon.
- > **Seamless integration with document management systems**, via a standards-based archive format, for long-term business and compliance purposes.

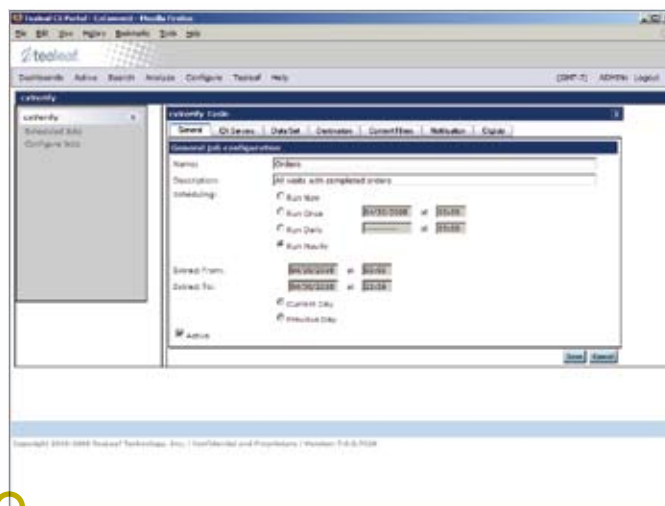
### Selective Archiving Within Tealeaf

Selective Archiving provides the ability to maintain critical sessions within the Tealeaf environment for longer periods of time without increasing your total cost of ownership. This capability is convenient for customer service, compliance and audit departments, who know in advance what type of sessions—purchases, trades, account applications—are important to save. For example, the longer sessions can be maintained within Tealeaf, the longer customer service agents have access to historical customer visits to aid dispute resolution efforts.



## KEY BENEFITS

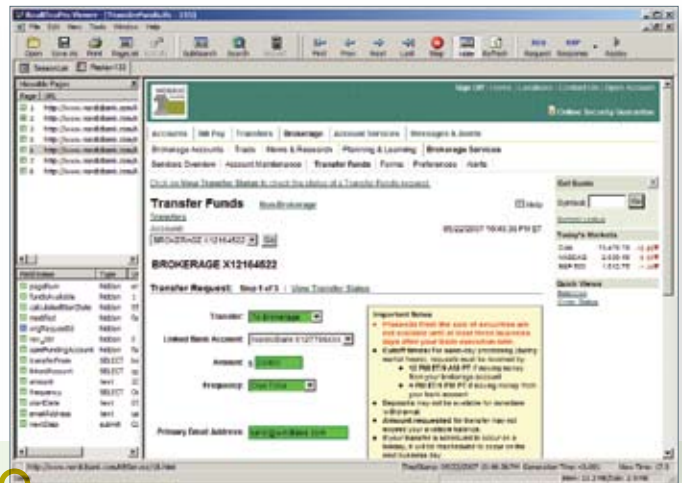
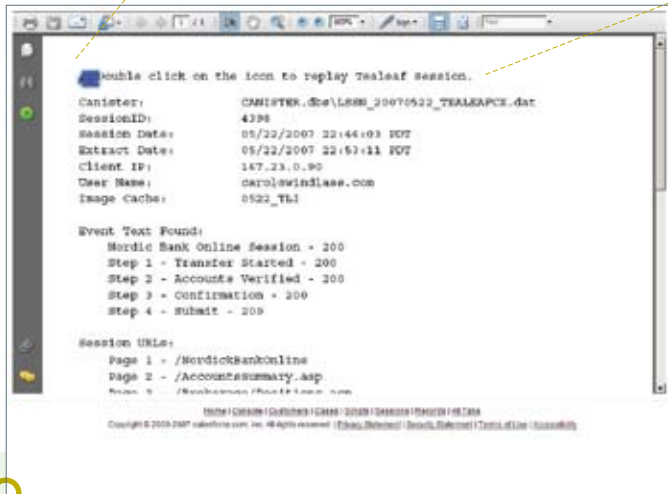
- > **Facilitate quick, effective resolution of customer disputes through documentation of online transactions and interactions.**
- > **Provide comprehensive, long-term records for ongoing audits and analysis of online security violations or potential fraud.**
- > **Extend records and compliance management to online applications by establishing a context-inclusive, document-of-record for online transactions and interactions.**
- > **Meet regulatory requirements with transaction reporting and archiving of all information involved in online securities transactions.**



- >> cxVerify allows you to take a defined group of customer sessions—for example, every customer that completed a stock trade—and extract those sessions from Tealeaf so they can be stored and managed in your document management system.



Double click on the icon to replay Tealeaf Session.



>> Whenever required, simply search your records management system and pull up specific PDF files to review. Open any PDF to access the embedded Tealeaf session for replay.

>> Tealeaf's session replay allows you to review exactly what the customer saw and did in their browser during this specific site visit—a "digital receipt" of the interaction.

### Archiving Within a Document Management System

For companies with long-term business and compliance retention needs, cxVerify includes a Windows-based utility that extracts selected sessions from the Tealeaf CX datastore. The browser-level session replay, along with critical metadata including the customer ID, date and time, and specific events related to that session, are then written to a tamperproof PDF file, which can be digitally signed for non-repudiation. PDF files are then archived within your document management system in order to preserve your retention and access-control policies. Once a customer record is pulled for discovery and review, a user simply clicks a link within the PDF to launch the embedded session for replay of the full customer experience.

### Powered by Tealeaf CX

Tealeaf CX is the industry's most comprehensive datastore of online customer information and the engine behind all Tealeaf products. By uniquely capturing and managing all visitor interactions on your web site, Tealeaf CX delivers unprecedented visibility into online customer experience.