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Welcome to Aviso AI

Aviso AI is an integrated revenue platform that helps modern sales organizations and revenue teams close more deals, drive revenue growth, and mitigate risk through patented AI guidance. As the industry leader in AI-based revenue operations solutions, Aviso AI is the only player with the most comprehensive set of intelligent tools and solutions for sales, marketing, and customer success teams that uncovers the hidden revenue opportunity from each customer.

The Aviso AI platform can be divided into six core pillars:

- Predictive Forecasting
- Deal Intelligence
- Activity & Relationship Intelligence
- Conversational Intelligence
- GTM and Customer Collaboration
- CRM Automation

Aviso AI is flexible and scalable to configure any complex customer hierarchies. Sales leaders, managers, and reps all benefit from using our pipeline management, forecasting, deal collaboration, and conversational intelligence tool. With Aviso, sales teams can set goals, unify forecasts, guide deals, and make course corrections for success. In the era of virtual selling, sales teams deserve a platform that can enable their success working remotely.

Powered by cutting-edge Auto-ML, Natural Language Processing (NLP), and a deep time-series database, the Aviso platform combines the best of human and artificial intelligence to guide selling. Companies like Honeywell, Dell, LaunchDarkly, Elastic, RingCentral, Microsoft GitHub, FireEye have all seen great results using Aviso, such as an average of 20% increase in deal win rates. Find your Revenue True North with Aviso AI.

Who uses Aviso AI?

Anyone involved in sales can be benefited by using Aviso AI. The following personas use Aviso AI:

Sales rep: Aviso AI works as a guide that helps the sales representatives with deal-level insights and identifies the best actions to generate new leads, create more pipelines, and close deals faster. Aviso AI also tracks all the interactions you make with the buyer, which reduces the time you spend in monitoring the interaction and gives you more time to spend in closing the deals.

Sales manager: Using Aviso AI, sales managers can review sales representatives' performance on a single platform and coach them on a one-on-one basis when required. As Aviso AI reduces the time a sales manager spends on administrative tasks, the sales manager can focus more on sales.

Customer Success Manager: Aviso AI helps customer success teams to collaborate with sales and marketing teams to get quick customer response time, insights into customer issues, and the ability to increase functionalities adoption and customer retention rate.

Technical admin: As a technical admin, you can perform integrations and configurations to set up Aviso AI for your sales teams.

What source systems does Aviso AI connect to help reps guide through the sales process?

Aviso AI lets you integrate with various sales tools and communication platforms to collect information, analyze it together, deliver the forecast values, guide you on what action to take and when to take, and prepare you to perform better in the upcoming deals.

Aviso can process information from the following sources, depending on what your organization uses:

CRM- Aviso connects to your CRM to import data related to deals, contacts, hierarchy, opportunities, and conversations.

Communication channel- (Video conference and telephone calls)- Aviso collects audio and video recordings of the conferences that you have and helps you understand your prospect's emotions.

Email and calendar- Aviso AI reads your email and calendar to create to-dos from actions mentioned in your email and upcoming meetings.

Marketing Automation System- Aviso AI collects the leads you generate through Marketing Automation System.

Customer support of ticketing platform- Aviso collects your conversational data from customer support applications such as Zendesk.

Learning Management System (LMS)- Aviso AI collects data from LMS to update on what all training sales reps have taken to educate themselves.

Sign in to Aviso AI

Aviso AI supports Single sign-on (SSO). You can use your official email ID to use SSO and log in to Aviso AI. Depending on the level of access (rep or admin), you have different privileges. You can also use Aviso mobile application to use some of the functionalities. As an admin, to know how you perform administrative activities with Aviso AI, see [Admin activities](#).

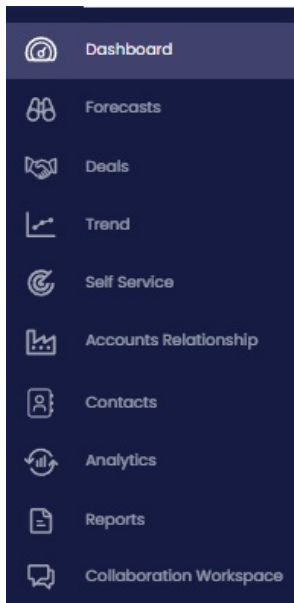
Aviso AI uses the hierarchy that is there in your CRM to create a similar hierarchy within Aviso AI. However, an admin can change the existing hierarchy.

Navigating through Aviso AI

Depending on what functionalities your organization has opted for, you can see the following screens in Aviso AI:

- [Dashboard](#)
- [Forecasts](#)
- [Deals](#)
- [Trend](#)
- [Self Service](#)
- [Account Relationship](#)
- [Contacts](#)
- [Analytics](#)
- [Reports](#)
- [Collaboration Workspace](#)
- [Admin screen \(visible only with admin access\)](#)

Click any icon from the left navigation bar to open the respective screen.



Narrow down your on-screen information

With a user-friendly and intuitive interface, the Aviso AI screens have the following breadcrumb to narrow down the search results and customization option to customize the page layout.

Sales cycle dropdown list

From the sales cycle dropdown list, which is beside the Aviso AI logo, you can select the sales cycle (year and quarter). Before you start using the Aviso platform, ensure that you have selected the current sale cycle.



The Forecast screen also has tabs for every quarter. Click any tab to see the sales forecast for the quarter. You can click any month of the quarter to see the sales forecast for the selected month.

Forecasts

 Total

 Export Data

 Customize Layout

Yearly Forecast 2023	Quarter 1	Quarter 2	Quarter 3	Quarter 4
	February	March	April	

Search and navigate through sales hierarchy

The hierarchy dropdown lists beside the sales cycle dropdown list let you select a region, sales project, or a user (sales rep or leader) for which you want to view various sales data and insights on the Aviso AI screens. Using these hierarchy dropdown lists, you can narrow down your sales data from a global view to an individual user view, based on what access you have.



You can also directly search for a hierarchy using the **Search Hierarchy** search box beside your profile icon. You can search for any hierarchy to which you have access.

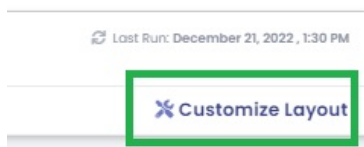


Customize various screens to suit it better for your use

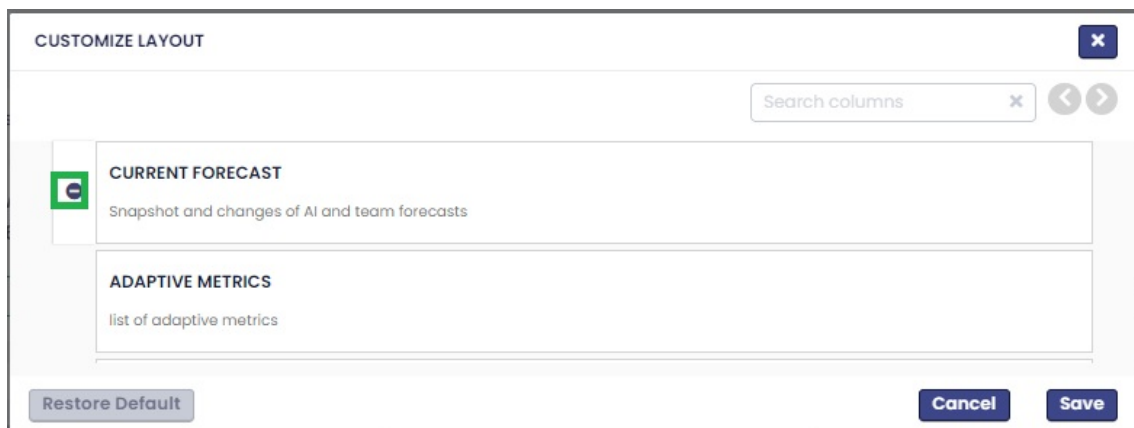
The **Customize Layout** option lets you customize the Dashboard screen, Forecast screen, and Deals screen. You can click the **Customize Layout** tab to open the CUSTOMIZE LAYOUT dialog box and keep or remove the columns or sections that appear on the screens. You can also drag the dashboard sections inside the CUSTOMIZE LAYOUT dialog box to change the sequence of the dashboard sections in which they appear on the Dashboard screen. There is a default sequence that you can use by clicking **Restore Default** in the CUSTOMIZE LAYOUT dialog box.

Customizing Dashboard screen

1. Click **Customize Layout** on the right-hand side top, below the profile section.



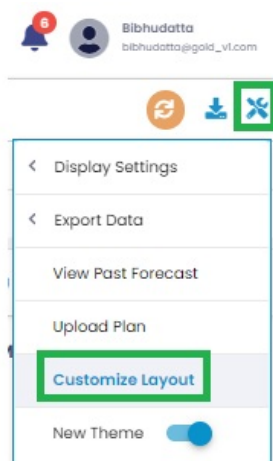
2. Select any grid, move up or down, and drop to change the sequence of the respective sections on the Dashboard.
3. Hover against any grid and click the subtract icon (-) to hide the respective sections from the Dashboard screen.



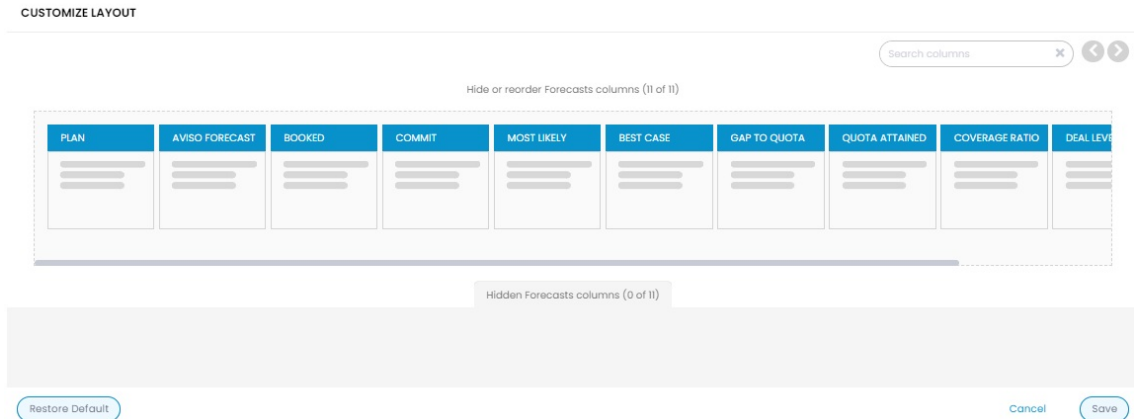
4. After any changes, if you want to restore the default view, click **Restore Default**.
5. Click **Save** to save the view.

Customizing Forecast screen

1. On the right-hand side top, below the Profile section, click Setting icon > **Customize Layout**.



2. Select any block, move toward left or right-hand side, and drop to change the sequence of the respective columns on the Forecast screen.



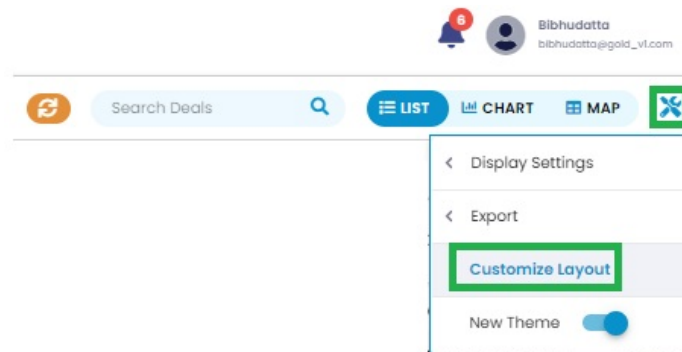
3. Hover against any block and click the subtract icon (-) to hide the respective columns from the Forecast screen.



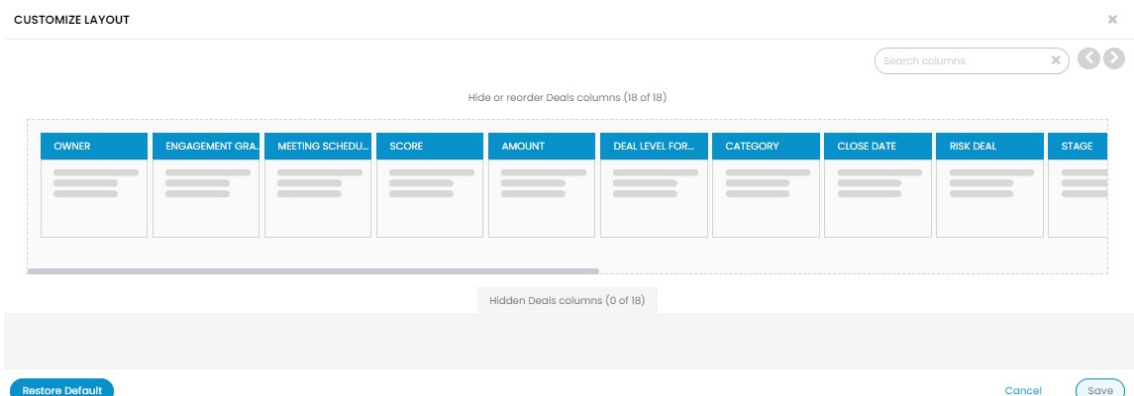
4. After any changes, if you want to restore the default view, click **Restore Default**.
5. Click **Save** to save the view.

Customizing Deals screen

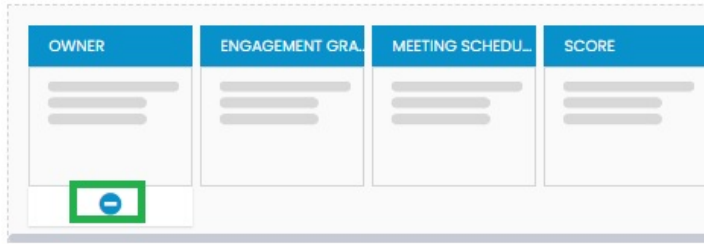
1. On the right-hand side top, below the Profile section, click Setting icon > **Customize Layout**.



2. Select any block, move toward left or right-hand side, and drop to change the sequence of the respective columns on the Deal screen.



3. Hover against any block and click the subtract icon (-) to hide the respective columns from the Deal screen.



4. After any changes, if you want to restore the default view, click **Restore Default**.
5. Click **Save** to save the view.

Refresh forecast data

Aviso AI runs at a fixed interval to show you the desired sales data. However, you can refresh the data any time by clicking the refresh () icon on all the screens.

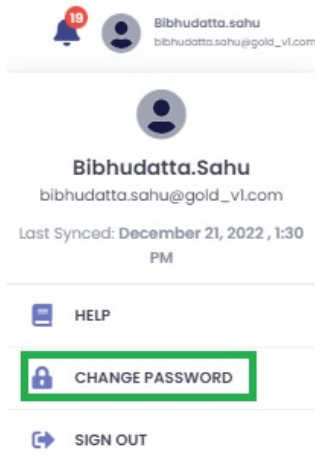
 Last Run: Today, 12:03 PM

 Customize Layout

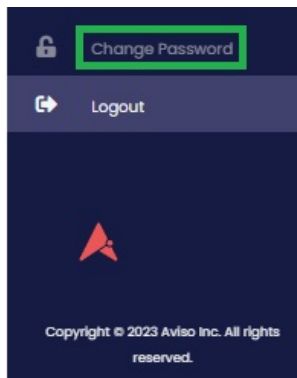
Change Password

Perform the following steps to change your password in Aviso AI:

1. Open Aviso AI and go to your profile section.
2. From your profile section, click **CHANGE PASSWORD** to change your current password.



You can also find the Logout option below the main Menu on the left-hand side.



The profile section redirects you to Reset Password page.

Reset Password

Old Password

New Password

Confirm New Password

CHANGE PASSWORD

[Not Now](#)

Password must contain at least 8 characters. Don't use common words that are easy to guess, or something too obvious like your pet's name. Use at least 3 of the following: lower case, upper case, numeric, and special characters.

3. Enter your old and new passwords.

While defining your new password, ensure that you follow all the password guidelines mentioned at the bottom of the Reset Password page.

4. Click **CHANGE PASSWORD**.

View Notification

Aviso AI notifies you of various events, for example, when you are invited to a collaboration room. You receive such notifications through email and also in the notification section. Click the notification (

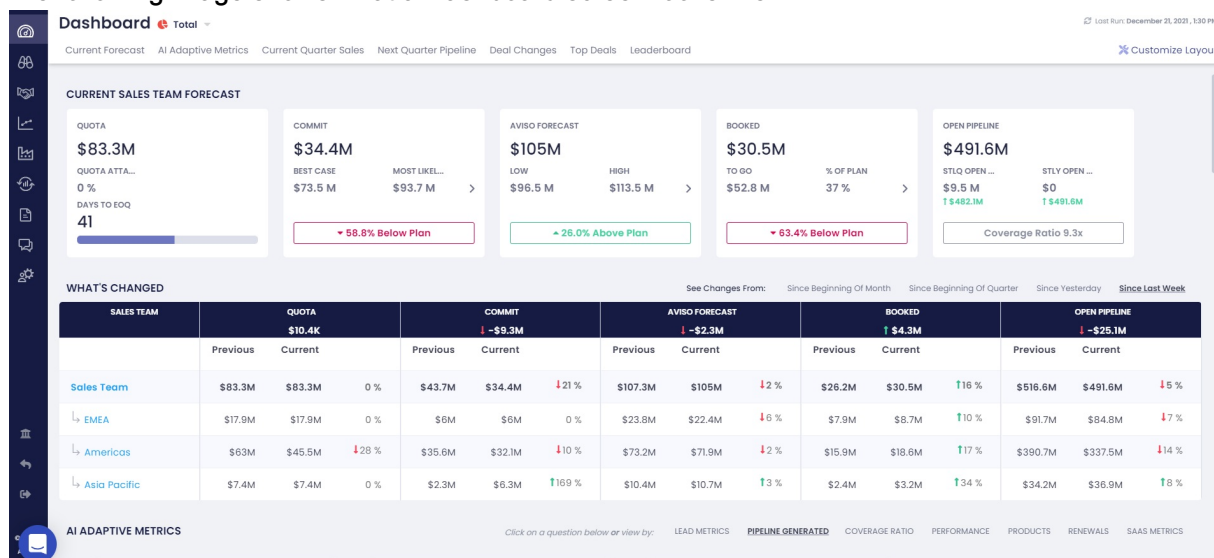


) icon to view notifications. The notification section only shows unread notifications. To view all the older notifications, click **View all notifications** in the notification section.

Stay on top of your business at any point in time during a quarter

To stay on top of your business, you must review all the corners of your business periodically, which at a top-level includes learning about current sales, comparing it against the sales plan, the pace it needs to achieve the current plan, deals, forecast, pipeline, and reps performances. But it's time-consuming to use multiple applications and gather all of these data. Aviso AI Dashboard gives you a consolidated view of such business-critical data that tells you where your business stands and actionable insights with respect to sales forecasts, deals, pipelines, reps' performance in a given quarter. You can customize and view this data for any selected contact across geography, for a regional team, and a global team as a whole. The Dashboard screen lets you view data segment-wise (total, new, upsell, and so on), customize the screen layout, and customize the formula for any section that best fits your requirements.

After you log in to Aviso AI, from the left side menu, click **Dashboard** to open the Dashboard screen. The following image shows what a Dashboard screen looks like.



Here are the sections you can view on the Dashboard screen:

CURRENT PRODUCT FORECAST

This section gives you a quick view of the following information separately:

- Sales quota and the remaining days to the end of the quarter.
- Most likely and related amount, and an indicator that shows whether you are on, below, or above the plan.
- Aviso forecast and related amount, and an indicator that shows whether you are on, below, or above the plan.
- Booked and related amount, and an indicator that shows whether you are on, below, or above the plan.
- Open pipeline and related amount, and indicator that shows the coverage ratio.

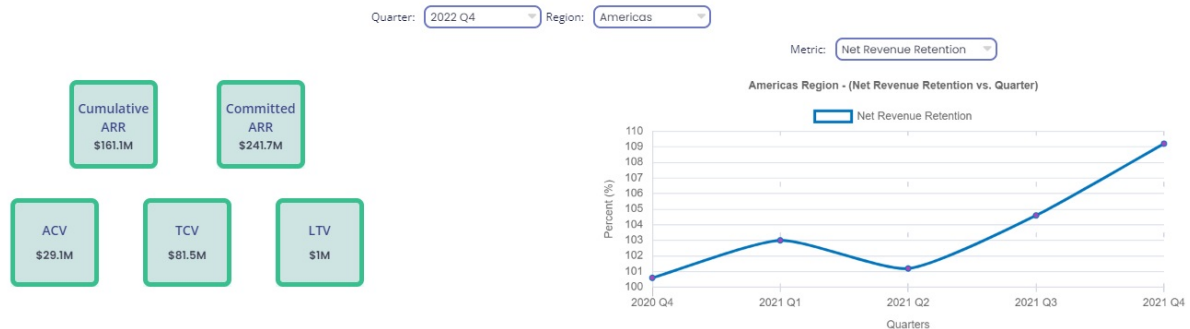
WHAT'S CHANGED

This section gives you visibility into what's changed in your deal, forecast, booked, and pipeline values. You can view the changed data and compare it with the old data from last month, last quarter, last week, and data from a day before the present day. Each compared pair of values also shows the change in percentage with a green upward arrow or red downward arrow.

AI ADAPTIVE METRICS

This section gives real-time data of vital revenue health indicators to help you quickly assess risk and take corrective plans. The AI ADAPTIVE METRICS help you address various important revenue-health related questions through tabular data or graphical representation. Click a question in the AI ADAPTIVE METRICS section and a metrics type such as **Pipeline Generated, Coverage Ratio, Performance, or Renewals** to get real-time data about it. You can also customize the AI Adaptive metrics to get desired data about your revenue.

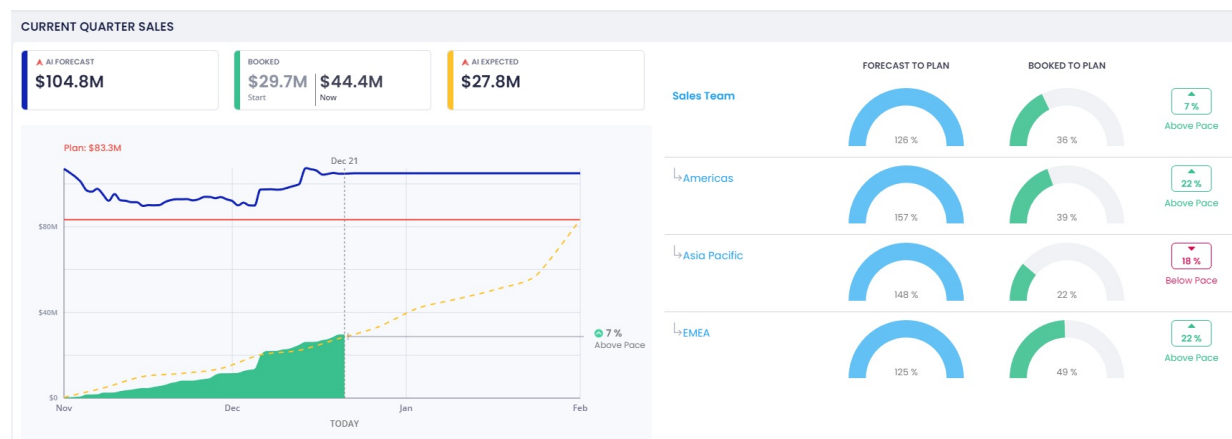
Here is an example- if you click the question “How is my overall business doing over time across regions,” the AI ADAPTIVE METRICS shows the following real-time data.



CURRENT QUARTER SALES

This section gives you visibility into sales performance in the current quarter. The graph on the right-hand side shows forecast to plan, and sales booked to plan values.

A box next to each graph shows if the booked value at any given point in time is sufficient to achieve the forecast. It shows in green and red color to indicate whether you have achieved the expected sale or not respectively.



NEXT QUARTER PIPELINE

This section gives you visibility into the pipeline in the next quarter to achieve the target. Enter a target booking amount for the next quarter in the Enter Your Target field.

The right-hand side in the NEXT QUARTER PIPELINE shows the currently achieved pipe value against the target value for each sales representative. A box next to each graph shows if the achieved pipe at any given point in time is sufficient to achieve the target. It shows in green and red color to indicate whether you have achieved the expected pipe or not respectively.

CHANGE IN PIPE VALUE

This section gives you visibility into changes in the pipe value. Pipe value is the Aviso forecasted booking in the next quarter. This value changes because of new opportunities and market activities. The CHANGE IN PIPE VALUE section shows what is changed in your pipe value and compares it with the old value from the beginning of the quarter and month, last week, and a day before the present day. Click **Since**

CHANGE IN PIPE VALUE ⓘ			See Changes From:			
			Since Beginning Of Quarter Since Beginning Of Month Since Yesterday Since Last Week			
FORECAST	AI FORECAST PREVIOUS	AI FORECAST CURRENT	TOTAL PIPE VALUE	NEW PIPE	PIPE DEV	
Sales Team	\$77.2M	\$77.2M	\$0	\$0	\$0	
↳ Americas	\$51.9M	\$51.9M	\$0	\$0	\$0	
↳ Asia Pacific	\$7.6M	\$7.6M	\$0	\$0	\$0	
↳ EMEA	\$17.7M	\$17.7M	\$0	\$0	\$0	

DEAL CHANGES

This section gives you visibility into what's changed in your current deals value and compares it with the old value from the beginning of the quarter and month, last week, and a day before the present day.

DEAL CHANGES			See Changes From:						
			Since Last Week Since Yesterday Since Beginning Of Month Since Beginning Of Quarter						
FORECAST	PREVIOUS PIPE	CURRENT PIPE	NEW	WON	LOST	DATE CHANGES	AMOUNT CHANGES	COMMIT CHANGES	AVISO BIGGEST MOVERS
Sales Team	\$106.9 M	\$104.8 M	\$16.6 M	\$4.3 M	\$30.8 M	↑ \$3.5 M ↓ \$39.5 M	↑ \$28.9 M ↓ \$9.5 M	↑ \$10.8 M ↓ \$1.1 M	↑ \$42.2 M ↓ \$205.3 M
↳ Americas	\$73.1 M	\$71.5 M	\$8.8 M	\$2.7 M	\$22.9 M	↑ \$2.1 M ↓ \$22.6 M	↑ \$15.9 M ↓ \$4.1 M	↑ \$8.1 M ↓ \$668.3 K	↑ \$27.2 M ↓ \$125.1 M
↳ Asia Pacific	\$10.2 M	\$10.9 M	\$1.9 M	\$816.9 K	\$4.8 M	↑ \$432.8 K ↓ \$4.3 M	↑ \$2.4 M ↓ \$2.3 M	↑ \$1.1 M ↓ \$26.4 K	↑ \$4 M ↓ \$17.2 M
↳ EMEA	\$23.5 M	\$22.4 M	\$5.9 M	\$785.4 K	\$3.1 M	↑ \$942.1 K ↓ \$12.6 M	↑ \$5.4 M ↓ \$3 M	↑ \$1.2 M ↓ \$445.4 K	↑ \$8.6 M ↓ \$52.8 M

DEAL CHANGE DETAILS

This section gives you visibility into details of the deal that was changed such as change in amount, forecast category, pipeline, and biggest movers. Click any deal name to open the deal section. To know more about the deal section, see [Deals](#) screen. Click the deal in the SCORE column to see WinScore Explanations and the key factors that contributed to this change in the deal. You can click all the deals that you won by clicking PULLED IN tab and all the deals that you lost by clicking PUSHED OUT tab.

TOP DEALS

This section shows you the best 30 deals with respect to best case, commit criteria, and forecasts. Click Best Case Deals, Commit Deals, or In Forecast Deals to view the respective best deals.

TOP DEALS						View:	
						Best Case Deals Commit Deals In Forecast Deals	
Best Case Deals \$159.9M • 848 Deals						Displaying 30 of 848 Deals	
OPPORTUNITY NAME	OWNER	AMOUNT	CLOSE DATE	CATEGORY	SCORE		
☆ Honotron License Deal	Mia Hamm	\$4M	Jan 30 2023	Best Case	11		
☆ Red eScent Implementation Project	Michael Jordan	\$2.5M	Jan 14 2023	Best Case	32		
☆ Affordable Beauty License Deal	Mathilde Butkovich	\$2M	Jan 28 2023	Best Case	19		
☆ Bizmatic License Deal	Merlene Lassen	\$2M	Jan 23 2023	Best Case	17		
☆ Immunics License Deal	Kym Rothermel	\$1.9M	Jan 30 2023	Best Case	26		
☆ ExoComm Implementation Project	Michael Jordan	\$1.8M	Jan 30 2023	Best Case	22		

LEADERBOARD

The performance of sales reps is a vital component in any sales organization, and sales leaders often face challenges in monitoring it. Aviso LEADERBOARD on the Dashboard screen gives the sales leaders a 360-degree view of the performance of all the sales reps. Along with quota attainment, the LEADERBOARD also helps the sales leaders evaluate the performance from other important aspects such as the amount committed against the amount forecasted, deal progression, maintaining CRM hygiene, conversational intelligence, and so on. Click any value from the Performance by list to review the performance of your sales reps in the respective areas.

LEADERBOARD				Performance By: Deal Risks Forecast Accuracy And Addons Deal Progression CRM Hygiene Email Activity Meetings				
	AMOUNT BOOKED		FORECAST ACCURACY			DEAL ADDONS		
NAME	ATTAINMENT	AMOUNT ⓘ	AMOUNT ACCURACY ⓘ	COMMIT PRECISION ⓘ	CLOSE DATE ⓘ	COMMIT	BEST CASE	
Mable Casias ⓘ	35%	\$425K	13%	6%	18days	\$548	\$2K	
Sadie Read ⓘ	35%	\$419K	14%	3%	31days	\$239K	\$13K	
Alegre Eakle ⓘ	49%	\$590K	16%	19%	27days	\$26K	\$11K	
Kandi Citizen ⓘ	50%	\$20M	16%	29%	17days	\$82K	\$35K	
Donte Kiser ⓘ	66%	\$796K	26%	31%	34days	\$44K	\$102K	

The Leaderboard also lets you view all the associated deals, recordings, and activate a coaching room if required. Click the menu icon against any sales rep in the Leaderboard and click the following options to view [deals](#), [recordings](#), and activate the [coaching room](#).

Mable Casias ⓘ

Sadie Read ⓘ

Alegre Eakle ⓘ

View Deals

View Recordings

View Coaching Room

Get a comprehensive understanding of your sales pipeline using Adaptive AI Metrics

Understand the business risks and take corrective plans with real-time data of vital revenue health indicators through AI Adaptive Metrics. The AI ADAPTIVE METRICS shown on the Dashboard screen provide you with insight into important sales and revenue data in the form of questions or important metrics. Click any of the following questions in the AI ADAPTIVE METRICS section and a metrics type such as Pipeline Generated, Coverage Ratio, Performance, or Renewals to get real-time data about it. You can also customize the AI Adaptive metrics to get desired data about your revenue.

- Do we have enough late-stage pipeline coverage to meet our current quarter forecast?
- With unexpected churn, are we still on target to hit our net retention goals?
- Are we addressing white space by generating a healthy mix of existing and net new business pipeline?
- Do we have the right product mix in our pipeline?
- Are all of our selling teams closing deals faster?
- Are we sourcing and closing bigger deals compared to previous quarters?
- How is my overall business doing over time across regions?
- Do we have enough top of the funnel leads to meet pipe targets?

Pipeline Generated

Pipeline Generated Indicator shows the number of deals generated regardless of the outcome of the deals. This indicator helps you to understand which deals are completed and which do not generate revenue. Additionally, the Pipeline Generated indicator helps you to compare the average selling price of the past two quarters and the current quarter. By doing so, you can more accurately identify the percentage increase/decrease in current and past quarter average selling price.

PIPELINE GENERATED	TOTAL CREATED ⓘ	AVG SELLING PRICE ⓘ ((PAST 2 QUARTERS) VS CURRENT)			CLOSING THIS QUARTER	CLOSING NEXT QUARTER	CLOSING IN FUTURE QUARTERS
Sales Team	\$698.9M	\$99K	\$83.9K	▼ 15 %	\$944.6M	\$39.4M	\$41.5M
↳ Americas	\$491M	\$102.6K	\$74.7K	▼ 27 %	\$667.8M	\$14.3M	\$22.8M
↳ Asia Pacific	\$81.6M	\$83.1K	\$90.1K	▲ 8 %	\$95.8M	\$10.9M	\$11.4M
↳ EMEA	\$114.3M	\$103.1K	\$114.9K	▲ 11 %	\$142M	\$14.2M	\$7.2M

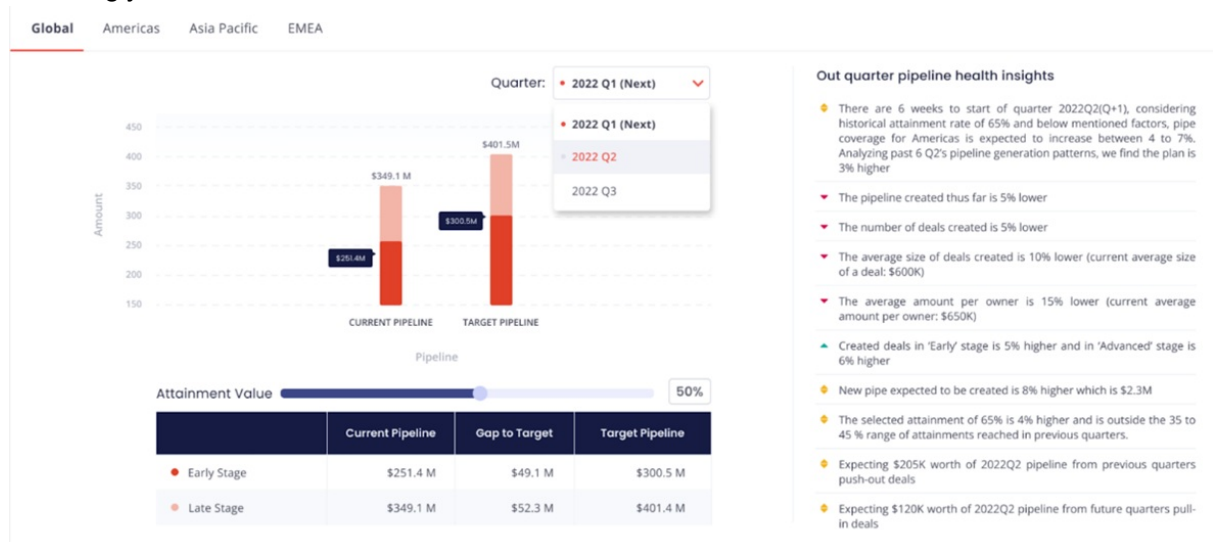
Coverage Ratio

A Coverage Ratio indicates how many open deals are in the sales pipeline relative to the sales quota the team has closed. Aviso provides detailed insights into the current quarter along with the past quarter's coverage ratio. Using the coverage ratio, you can chart out your pipeline and identify which customers you are most likely to win based on early-stage commitments or late-stage commitments with high performance.

ADAPTIVE METRICS		Click on a question below or view by:		Pipeline Generated	Coverage Ratio	Performance	Renewals
Do we have enough late-stage pipeline coverage to meet our current quarter forecast?		With unexpected churn, are we still on target to hit our net retention goals?		Are all of our selling teams closing d >			
COVERAGE RATIO	COMMIT	PIPELINE	COVERAGE RATIO ⓘ (PAST VS CURRENT)		COMMIT RATIO ⓘ (EARLY VS LATE STAGE)		
Global	\$922.7K	\$605.4K	-2.0x	-3.5x	75 %	-0.0x	-0.0x
↳ New	\$592.7K	\$605.4K	-5.7x	-3.5x	39 %	-0.0x	-0.0x
↳ Renewals	\$330K	\$0	-0.0x	-	-	-	-

Pipeline Projection

The Pipeline Projection is a valuable indicator for forecasting sales in the next quarter. It provides the pipeline value of forecasted sales, as well as the quota and attainment for the next quarter. This allows businesses to see the early stage and late stage pipeline for the next quarter, and plan accordingly.



Performance

A Performance metric measures how well your sales team is doing in relation to its goals. Aviso's performance metric compares the amount won, average time to close, win rate, and amount lost in the current quarter with that of the previous two quarters. In this way, you can determine any trends and see if your quota is on track or if any areas need to be improved.

PERFORMANCE	WON AMOUNT (PAST VS CURRENT)		AVG TIME TO CLOSE ⓘ ((PAST 2 QUARTERS) VS CURRENT)		WIN RATE ⓘ ((PAST 2 QUARTERS) VS CURRENT)		LOST AMOUNT (PAST VS CURRENT)	
Sales Team	\$90.8M	\$30.5M	69 days	62 days	21%	7%	\$173.2M	\$425M
↳ Americas	\$66.7M	\$18.5M	71 days	65 days	22%	6%	\$106.9M	\$314.4M
↳ Asia Pacific	\$9.3M	\$3.2M	80 days	70 days	19%	6%	\$19.3M	\$55.7M
↳ EMEA	\$14.8M	\$8.7M	55 days	49 days	20%	15%	\$46.9M	\$48.5M

Renewals

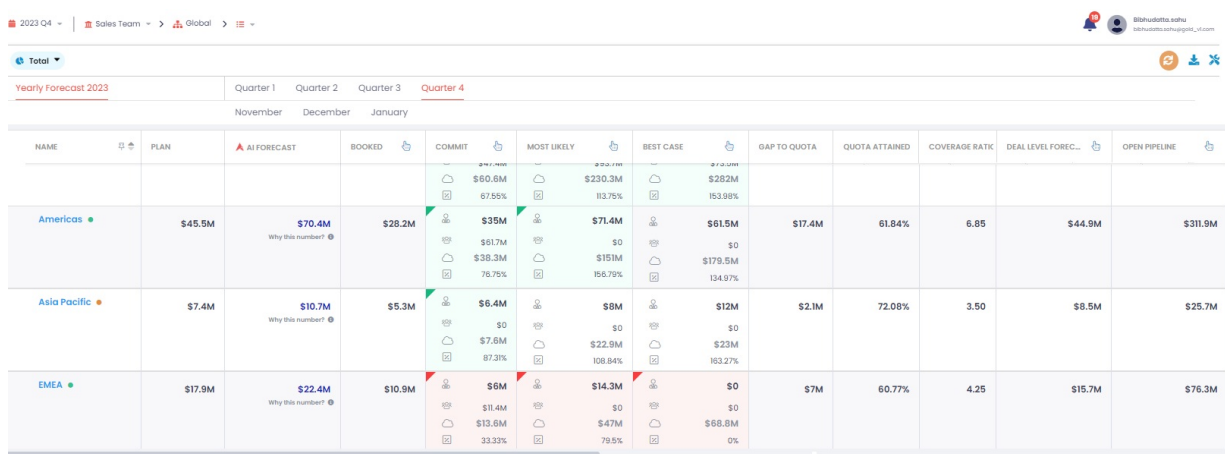
Renewals in Adaptive Metrics show the total amount of opportunities in your hierarchy that are already renewed as well as those that are to be renewed. Aviso provides the comparative opportunity amount from the past and current quarters within your hierarchy. In this chart, renewal rate is also provided through which revenue leaders get to know their product's ability to deliver long-term value to its customers.

RENEWALS	TOTAL OPP AMOUNT ⓘ (PAST VS CURRENT)		RENEWED SO FAR ⓘ (PAST VS CURRENT)		RENEWAL RATE ⓘ (PAST VS CURRENT)		
Sales Team	\$7.4M	\$34.1M	\$5.2M	\$1.8M	70%	5%	92 %
↳ Americas	\$5.2M	\$25.8M	\$4.2M	\$1.6M	80%	6%	92 %
↳ Asia Pacific	\$1.1M	\$4.6M	\$450.3K	\$106.8K	39%	2%	94 %
↳ EMEA	\$1.1M	\$3.8M	\$561.3K	\$121.7K	53%	3%	94 %

View sales forecast for a month, quarter, or year and get valuable forecast insights

Sales forecast is a must and pivotal component of any business as it drives sales deployment, financial planning, operations planning, and marketing planning. It must be as accurate as possible to help you make the right decisions. A human-generated sales forecast can have errors and might not be highly accurate. Aviso AI uses AI and ML to give you sales forecast with more than 98 percent accuracy. After you log in to Aviso AI, from the left-hand side navigation bar, click **Forecasts** to open the Forecasts screen.

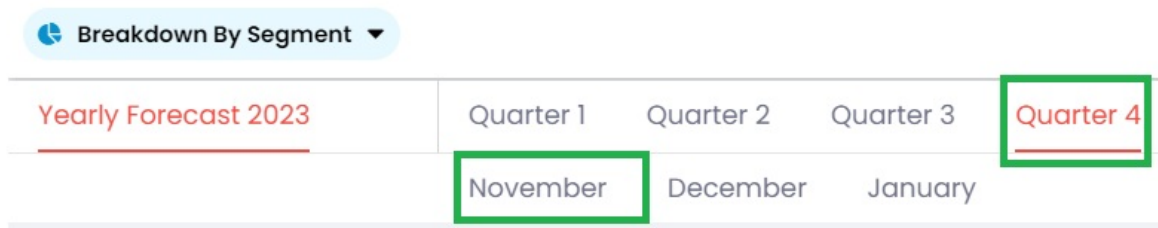
The Forecast screen is updated to make it more intuitive, user-friendly, and present more valuable insights. You can [switch to the new Forecast screen anytime](#). After switching to the new Forecast screen, because of any reason, if you want to use the old Forecast screen, you can switch back to the old screen. The new Forecast screen appears and looks like the following image.



NAME	PLAN	AI FORECAST	BOOKED	COMMIT	MOST LIKELY	BEST CASE	GAP TO QUOTA	QUOTA ATTAINED	COVERAGE RATE	DEAL LEVEL FOREC...	OPEN PIPELINE
Americas	\$45.5M	\$70.4M Why this number?	\$28.2M	\$35M \$60.6M \$67.55%	\$71.4M \$230.3M 113.75%	\$61.5M \$282M 153.98%	\$17.4M	61.84%	6.85	\$44.9M	\$311.9M
Asia Pacific	\$7.4M	\$10.7M Why this number?	\$5.3M	\$6.4M \$61.7M \$38.3M 76.75%	\$8M \$0 \$15M 155.75%	\$12M \$0 \$179.5M 154.97%	\$2.1M	72.08%	3.50	\$8.5M	\$25.7M
EMEA	\$17.9M	\$22.4M Why this number?	\$10.9M	\$6M \$11.4M \$13.6M 33.33%	\$14.3M \$0 \$47M 79.5%	\$0 \$0 \$68.8M 0%	\$7M	60.77%	4.25	\$15.7M	\$76.3M

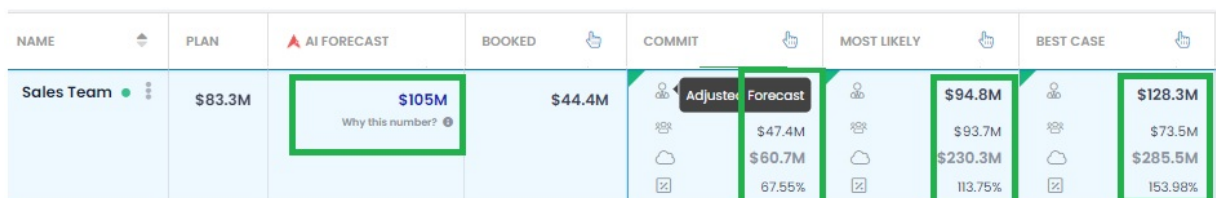
You can [customize](#) the Forecast screen to better suit your requirements.

Forecast screen shows sales forecast for a month or quarter from the available deals assigned to you. For example, if you are a sales rep and you have 20 deals assigned in a quarter, the Forecast screen will show forecast from those 20 deals. If you are a lead, the Forecast screen shows forecast from all the deals accessible at your level. You can select the quarter or month view from the quarter or month tabs below the **Breakdown By Segment** dropdown list to view forecast for quarter and month respectively.



Yearly Forecast 2023	Quarter 1	Quarter 2	Quarter 3	Quarter 4
	November	December	January	

The Forecasts screen shows sales forecasts for deal level with individual and rollup values. The COMMIT, MOST LIKELY, and BEST CASE cells show four values each - *Adjusted Forecast, Team Rollup, From CRM, and Percentage of plan*.



NAME	PLAN	AI FORECAST	BOOKED	COMMIT	MOST LIKELY	BEST CASE
Sales Team	\$83.3M	\$105M Why this number?	\$44.4M	Adjusted Forecast \$47.4M \$60.7M 67.55%	\$94.8M \$93.7M \$230.3M 113.75%	\$128.3M \$73.5M \$285.5M 153.98%

Click the green or red shade at the upper left-hand side corner to see the detail values that contribute to the forecast. If there is an increase in the forecast value from the previous quarter, the shade becomes green and if there is a decrease in the forecast value from the previous quarter, the shade becomes red. Clicking **View Deals** on the Insights pop-up redirects you to the Analytics screen and shows the deals with changes in the values over a particular time.

BOOKED	COMMIT	MOST LIKELY	BEST CASE
\$44.4M	Insights BOW Value : \$30.7M → New Value : \$35.0M WoW changes on Commit deals \$12.5M ▲ New \$14.1M (70) ▲ Change In Amount \$3.5M (239) ▲ Pulled In \$16M (65) ▼ Pushed Out \$254.9K (2) ▼ Lost \$19.6M (58) ▲ Won \$1.3M (22) View Deals		
\$28.2M			
\$5.3M			

Click menu () icon beside the Forecast name in the Name column to open forecast status, open the associated deals, view change in pipe, view or activate [forecast room](#), and start forecast call.

Americas	Status Deals Pipe Changes View Forecast Room Start Forecast Call
Canada	

Yearly Forecast 2023

Quarter 1

Quarter 2

Quarter 3

Quarter 4

November

December

January

NAME	PLAN	AI FORECAST	BOOKED	COMMIT	MOST LIKELY	BEST CASE	GAP TO QUOTA	QUOTA ATTAINED	COVERAGE RATIO	DEAL LEVEL FO...
Americas - total	\$45.5M	\$70.4M Why this number?	\$28.2M	\$35M	\$71.4M	\$61.5M	\$17.4M	61.84%	6.92	\$48.4M
				\$32.1M	\$55.7M	\$67.3M				
				\$38.3M	\$151M	\$183M				
				76.75%	186.79%	134.97%				

Forecast Status For Americas

PLAN

\$45.5M

Bunty Dey

Dec 16, 2022

BEST CASE

\$61.5M

Alan

Nov 03, 2022

RUN RATE

\$6.3M

Alan

Nov 02, 2022

MOST LIKELY

\$71.4M

Rohit Kumar

Dec 16, 2022

COMMIT

\$35M

Davidwatson

Dec 16, 2022

Deep dive into forecast with Forecast Insights

Along with highly accurate sales forecast derived using AI and ML, Aviso AI also provides forecast insights. Forecast insights appears on the right-hand side of the Forecast screen and can help you identify areas of growth and opportunities for improvement, optimize your sales performance and stay ahead of your competitors, and identify potential risks and challenges allowing you to proactively mitigate those risks.



As shown above, The Forecast Insights has three tabs - Deals, Insights, and Meetings.

- If you click **Why this number** in any cell of the AI FORECAST column, it opens the **Insights** tab as shown above and gives all the sales information that contribute to the AI Forecast number that includes -

NAME	PLAN	AI FORECAST
Americas	\$45.5M	\$70.4M
		Why this number?

- Aviso AI Forecast Analytics - gives a graphical representation of AI forecast, Most likely, Best case, Commit over the open and closed deals.
- Aviso AI Forecast Explanation - gives a graphical representation of quarter-wise Booked, Commit, Early stage, Newly created, and Pullins values.
- Current Quarter Sales
- Quota - shows the amount closed, the amount remaining to close to meet the quota, and the number of days left in the quarter.
- Aviso Forecast
- Booked - shows the amount booked in the current quarter and the percentage of amount booked that is above or below the pace required to meet the quota.
- Commit
- Most likely
- Open pipelines
- Bookings

The insights below the graph includes data that support the forecast such as comparison of the amount booked so far with amount booked in the same time last

quarter and last year. The At-Risk Deals lists deals that are not moving at a pace required to close in the current quarter. You may pay special attention to these deals to close in the current quarter or park for the next quarter.

- If you click any cells from the BOOKED, COMMIT, MOST LIKELY, BEST CASE, DEAL LEVEL FORECAST, and OPEN PIPELINE columns, the Deals tab in the Forecast insights shows the respective sections showing the details sales data to help you learn about the current health of the sales performance and the forecast. For example, clicking BOOKED, COMMIT, and MOST LIKELY opens the following sections and gives valuable forecast insights.

The image displays three screenshots of the 'Deals' tab in the Forecast insights, each showing a different forecast view: BOOKED, COMMIT, and MOST LIKELY.

Forecast - Sales Team (BOOKED)

- DEALS - BOOKED** (Booked)
- Sales Team's Booked: —
- Your Booked: \$44.4M
- Top Closed Deals in Booked (25) (View All)
- Filters: All (\$25, \$44.4M), Closed (\$25, \$44.4M), Open (0)
- Arrowhead Resh Corp Project 4218: 100% (3,908,777)
- Cyberonics Inc Project 3534: 100% (1,652,173)
- Newport Corp Project 3014: 100% (789,320)
- Nuvasive Inc Project 4230: 100% (785,866)
- Ruby Tuesday Inc Project 1202: 100%

Forecast - Sales Team (COMMIT)

- DEALS - COMMIT** (Commit)
- Sales Team's Commit: —
- Your Forecast: \$56.3M
- Start of week: \$52.4M
- Unadjusted: \$60.7M
- Direct reports: \$47.4M
- Commit for Quarter 4 (Monthly): —
- November 2022: \$11.7M
- December 2022: \$18.3M
- January 2023: \$20M
- Comment: No Data Found
- Top Open Deals in Commit (25) (View All)
- Filters: All (\$55, \$60.7M), Closed (426, \$38M), Open (128)
- Belden Inc Project 2865: 49% (\$5,370,338)
- Intelsat S A Project 2035: 42% (\$2,813,725)

Forecast - Sales Team (MOST LIKELY)

- DEALS - MOST LIKELY** (Most Likely)
- Sales Team's Most Likely: —
- Your Forecast: \$94.8M
- Start of week: \$50.7M
- Unadjusted: \$230.3M
- Direct reports: \$93.7M
- Most Likely for Quarter 4 (Monthly): —
- November 2022: \$11.7M
- December 2022: \$30.8M
- January 2023: \$26.8M
- Comment: No Data Found
- Top Open Deals in Most Likely (25) (View All)
- Filters: All (1452, \$230.3M), Closed (474, \$43.1M), Open (5)
- Belden Inc Project 2865: 49% (\$5,370,338)
- Honotron License Deal: 11% (\$4,036,990)

- The Meetings tab lets you create Forecast room and view all the meetings held with respect to the Forecast in the past.

The image displays the 'Meetings' tab in the Forecast insights, showing options to meet now or schedule a meeting, and sections for smart transcript, recorded calls, and upcoming meetings.

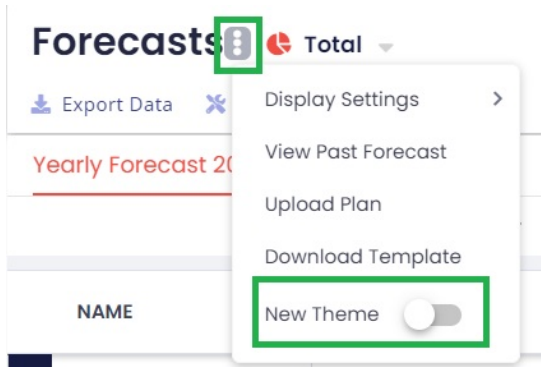
Forecast - Americas (Meetings)

- MEETINGS**
- Meet Now (button)
- Schedule Meet (button)
- SMART TRANSCRIPT**
- Upload your file for Smart Transcription (button)
- RECORDED CALLS**
- No Meetings Recorded (message)
- UPCOMING MEETINGS**
- No Upcoming Meetings (message)

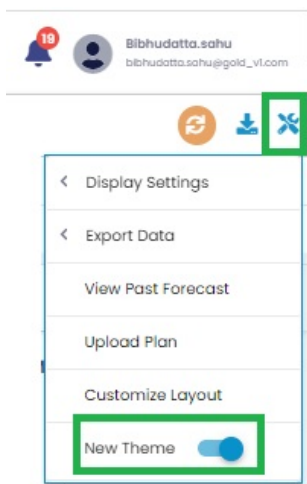
Switch to new Forecast screen

You can switch to the new Forecast screen anytime. After switching to the new Forecast screen, because of any reason, if you want to use the old Forecast screen, you can switch back to the old screen.

- **Switch to the new Forecast screen** - Click the menu icon beside Forecast and move the **New Theme** toggle button to switch to the new Forecast screen.



- **Switch back to the old Forecast screen** - To switch back to the old Forecast screen, on the new Forecast screen, click on the setting icon and move the **New Theme** toggle button.



Set up sales plan for a quarter

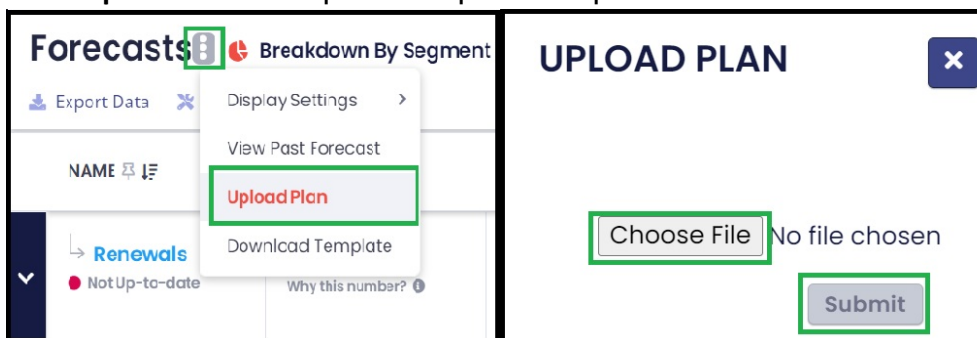
As a sales leader, you can set up sales plans for yourself and your team. As a rep, you can set up a sales plan for yourself. You can set up your sales plan in any of the following two ways:

- From the Forecasts screen-

1. Click edit () icon in the plan column on the Forecast screen.
2. Enter your sales plan.
3. Press enter key or click tick mark () icon to save your plan.

- Uploading a forecast plan-

1. Click menu () icon beside Forecasts.
2. Select **Download Template**.
Forecast template is downloaded. It has all the columns as your Forecast screen.
3. Update the Plan column and the other editable columns such as Commit, Mostlikely, and so on in the template.
4. Again click menu () icon beside Forecasts as in the step 1.
5. Select **Upload Plan** and upload the updated template.



View historical forecast trail

Forecast Audit Trail saves time and effort in tracking forecast numbers. Instead of manually entering previous forecast numbers, you can export the data based on different timelines. You can track the forecast numbers based on monthly, weekly, and quarterly forecasts. It helps to reduce the manual effort of forecasting and to improve the forecasting accuracy by comparing the forecasted numbers against actual numbers. You can do so by using forecast audit trail from Export section. After clicking Forecast audit trail, a csv file is downloaded to your local machine.

To view your forecast audit trail, perform the following steps

1. Click Export () icon below Forecasts.
2. Click Forecast Audit Trail.

An excel sheet containing the historical forecasts of previous weeks is downloaded to your local machine.

View your deals for a quarter

The Deal screen shows all the deals irrespective of the stage, amount, and category. After you log in to Aviso AI, from the left navigation bar, click **Deals** to open the Deals screen. While using the Deals screen, there are two themes to choose from- the old theme and new theme. The new theme brings minimalist and user-friendly design. By default, when you open the Deals screen, it opens with the old theme. You can switch to the new theme by performing the following steps:

1. Click the menu () icon beside Deals.
2. Move the **New Theme** toggle button to the right-hand side.

Note:

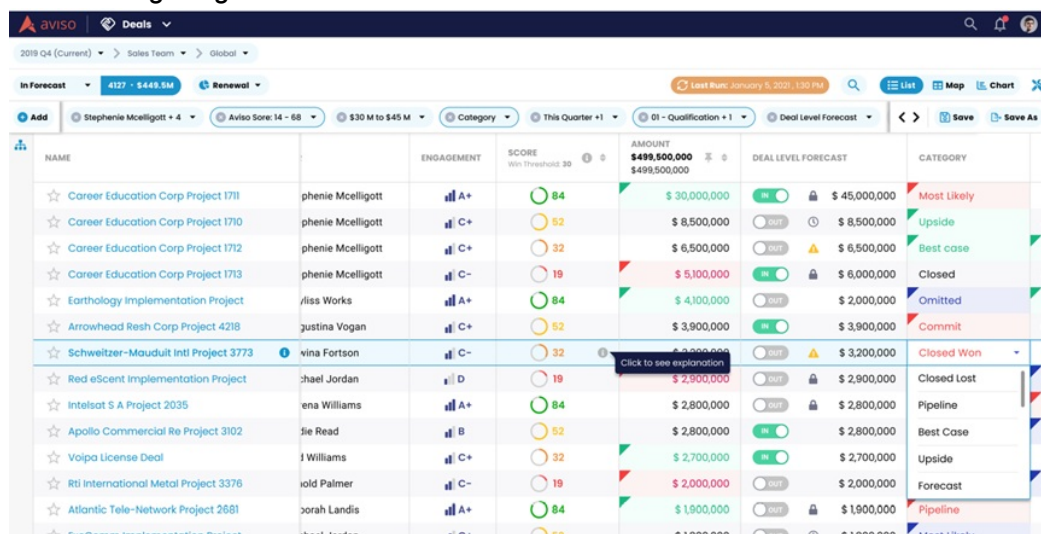
After switching to the New theme, if you want, you can always move back to the old theme.

Switch from the new theme to the old theme by performing the following steps:

1. Click the setting () icon.
2. Move the **New Theme** toggle to the left-hand side.

Every deal in the Deal screen shows **Win score** and **Engagement grade**. On the Deals screen, click **LIST** to see Deals in list view and click **MAP** to see deals in **Map** view. The map view shows deals by categorizing them with risk, priority, and forecast levels involved to help you prioritize the correct deals.

The following image shows the Deals screen with the new theme.



NAME	ENGAGEMENT	SCORE	AMOUNT	DEAL LEVEL FORECAST	CATEGORY
Career Education Corp Project 1711	phenie Mcelligott	A+	84	\$ 30,000,000	Most Likely
Career Education Corp Project 1710	phenie Mcelligott	C+	52	\$ 8,500,000	Upside
Career Education Corp Project 1712	phenie Mcelligott	C+	32	\$ 6,500,000	Best case
Career Education Corp Project 1713	phenie Mcelligott	C-	19	\$ 5,100,000	Closed
Earthology Implementation Project	Miss Works	A+	84	\$ 4,100,000	Omitted
Arrowhead Resh Corp Project 4218	justina Vogan	C+	52	\$ 3,900,000	Commit
Schweitzer-Mauduit Intl Project 3773	vina Fortson	C-	32	\$ 3,200,000	Closed Won
Red eScent Implementation Project	chael Jordan	D	19	\$ 2,900,000	Closed Lost
Intelsat S A Project 2035	ena Williams	A+	84	\$ 2,800,000	Pipeline
Apollo Commercial Re Project 3102	Sie Read	B	52	\$ 2,800,000	Best Case
Voipa License Deal	J Williams	C+	32	\$ 2,700,000	Upside
Rti International Metal Project 3376	old Palmer	C-	19	\$ 2,000,000	Forecast
Atlantic Tele-Network Project 2681	corah Landis	A+	84	\$ 1,900,000	Pipeline

Click a deal to to deep dive into it, get actionable insights, and join deal room.

Deal screen has the following options to filter, search options, and use deal inspector:

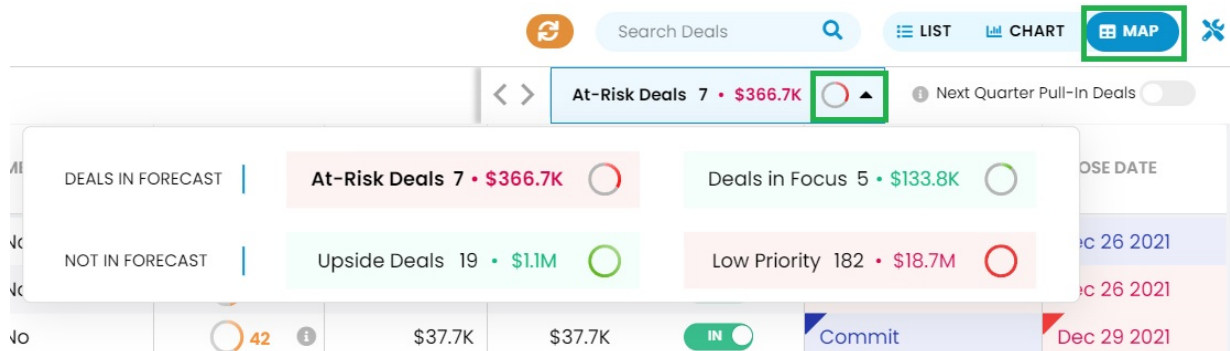
- **Export data** lets you download the deals in a spreadsheet.
- **Customize Layout** lets you reorder and hide the columns that are present in the Deal screen.
- **Query** ( search-1) lets you create a search query based on your requirements such as win score, amount, category, close date, stage, and so on. After you create and save a query, you can use it anytime to view deals that match your query.
- **Search Deals** ( Search Deals) lets you search deals using keywords such as deal name and deal ID.
- **Advanced search** () lets you search deals using criteria such as win score, amount, category, close date, stage, and so on.

- **Groups** lets you create group of deals to view some deals together.
 - **Deal inspector** lets you inspect or dig more into a deal. Select a deal and click Deal Inspector
- () icon to open deal inspector view. The deal inspector view has two tabs as follows:
- **Insights-**
 - Interaction over time graph- It helps you inspect your activity trending over the last 7, 15, 30, and 90 days.
 - See details of the activity by clicking View more. This opens the email activity view with the email body insights.
 - You can find the meetings scheduled in the next two weeks.
 - **Deals details-**
 - You can see the opportunity details and list of comments if there are any. To know more about Deal details, see How do I see details of a Deal?

View Opportunity Map to evaluate upside deals and deals associated with risk

When sales reps work with multiple deals, sometimes it's difficult to decide which deals require more attention and what can be parked for the next quarter. Wrong sales decisions can also affect your quota attainment in the current quarter. The Opportunity Map (Deals map) in Aviso AI drills down into all the deals and categorizes them with the risk, priority, and forecast levels involved to help you take the correct decision and achieve your quota in advance.

On the Deals screen, click **Map** and then the downward arrow to see the Opportunity Map.



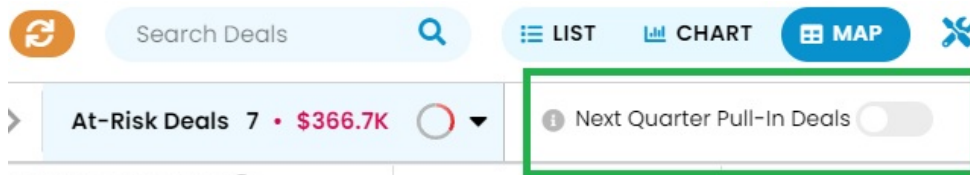
As shown in the image, the Opportunity Map has four quadrants separated by deals in forecast and not in forecast.

- **At-risk deals:** The first quadrant shows all the deals you or your team included in the forecast but are identified by the AI to be at risk. These are the deals you expected to close in the current quarter but as AI has learned from the deals movement, these deals have fewer chances of closing in the current quarter.
- **Deals in focus:** The second quadrant shows all the deals you or your team included in the forecast and are in Commit stage. Aviso AI also predicts that there are good chances of closing these deals in the current quarter and hence these deals deserve to be focused the most.
- **Upside deals:** The third quadrant shows all the deals you didn't include in the forecast but analyzing the deals movement, Aviso AI predicts that there are good chances of these deals closing in the current quarter. You may evaluate and include these deals in forecast, which might compensate for the vacant created by the deals that are at risk.
- **Low priority:** The fourth quadrant shows all the deals you didn't include in the forecast and Aviso AI also predicts that there is significantly less possibility of closing these deals in the current quarter. These deals should be the least focused to better utilize your time with the deals with better possibilities of closing in the current quarter.

Click any quadrant to see the associated deals. You can use the following filters to view deals more specific to deal categories, amount or count, and type of deals (new or renewal).

Category: Commit ▼ Recommending: Amount ▼ Types: ALL ▼

Next Quarter Pull-in Deals



Along with the Opportunity map, the **Next Quarter Pull-in Deal** option also appears. When you move the toggle button to the right-hand side, the screen shows all the deals that are targeted to close next quarter but analyzing the deals behavior, Aviso AI predicts significant chances of closing these deals in the current quarter. Leveraging these deals can further compensate for the deals which are at risk. As the Deals screen shows [WinScore](#) associated with every deal, the list of pull-in deals shows Pull-in score. Pull-in score is the statistical probability of a pull-in deal closing in the current quarter.

Deep dive into a deal

The deal details page helps deep dive into a deal to better prepare and take the right actions to close the deal. From Deals screen, click a deal to open the deal details page. The deal detail page has deal amount, close date, category, stage, Win score, Aviso ranking, and the following tabs and sections to give you in-depth visibility and insights into the detail of a deal.

☆ **Affordable Beauty License Deal**
Owner: Mathilde Butkovich

Details History Relationships Org Chart Action Plan Deal Room To Do's

19

AMOUNT
\$908.6K
No change.

CLOSE DATE
Jan 28 2022
Delayed from Dec 30 on Dec 06.

CATEGORY
Best Case
Up from 'Omitted' to 'Best Case' on Dec 04.

STAGE
2 - Needs ...
Advanced from '1 - Qualification' to '2 - Needs Analysis' on Dec 04.

CRM DETAILS View in CRM

ENGAGEMENT GRADE C	MEETING SCHEDULED No	COMMIT ACCURACY	RISK DEAL No Risk
TYPE Renewals	PRODUCT On-Prem	LEAD SOURCE	COMPANY SIZE
INDUSTRY Distributor	NEXT STEP	NEXT STEP LAST UPDATED Dec 04 2021	PARTNER INITIATED DEAL Yes
SUB-REGION USA North Central	EXPECTED REVENUE N/A	SALES ORDER GENERATED False	FIRST LEAD SOURCE N/A
REQUEST EXTENSION False	RESELLER REACH National	PROJECT FUNDED False	ACCOUNT Affordable Beauty

Deal details section

Note

These tabs are configured by your admin. Based on the configuration, you may see some or all the tabs with these names or different names.

- **Details-** It has CRM details section that shows all the data from CRM and lets you [write back to CRM](#). Click **View in CRM** to open your CRM directly from Aviso AI.
- **History-** It has Timeline of changes section that shows changes to the amount, close date, category, and stage.
- **Relationship-** The [Relationship](#) diagram helps you learn the state of engagement with every contact in a deal.
- **Org Chart-** The [Org Chart](#) lets you view all the contacts and hierarchy on a single pane and dig more about the contacts.
- **Deal Room-** [Deal room](#) lets you use a dedicated collaboration workspace to discuss about deals. This deal room serves as a collaboration workspace for the team that is involved in the deal. The team can consist of members from legal, pricing, procurement, presales, proposal team, and so on. You can activate and join a deal room from this space.
- **To-Dos-** Any action of item you get from email is tagged as a to-do and the To-Dos section reflects it. Once you act on a to-do, you can dismiss it to make the To-Dos section clear.
- **Meeting History-** shows all previous conversations with the clients associated with the deal.

Note:

You must be a part of Deal Room to view the Meeting History.

To join a deal room, perform the following steps:

1. Under Meeting History, click *Join Deal Room*.

A new page in Deals tab appears.

2. In the Deals screen, click *Join Deal Room*.

You are added to the Deal Room. You can now view the deal's Meeting History.

- **Deals insights-** It has useful deal insights such as [Win score](#), [Booking timeline](#), [Relationship](#), [Owner](#), and [Owner activity insights](#).
- **Comments-** This section lets you comment and make your comment visible to you only, your manager, or public.

View Engagement grade to know how effective your interactions with your prospects are

Engagement grade shows the health of your communication with your prospects. Based on the interaction (call or email) between you and your prospect from the date of creating a deal, Aviso AI assigns engagement grade to every interaction. Every deal is assigned with an engagement grade, which is an average of all the engagement grades of the interactions made by every contact. The engagement grade ranges from A+ to D-, A+ being the highest grade and D- being the lowest grade.

Note:

Engagement score decreases when a rep doesn't make any call or communication to a prospect for a certain period.

Aviso AI uses the following input to evaluate the Engagement grade of a deal:

- Last recorded interaction.
- Frequency of executive level engagement.
- Keywords used by the reps while interacting with the prospects.

Aviso AI shows engagement grade of a deal on various screens. Go to Deals screen to view win score of any deal.



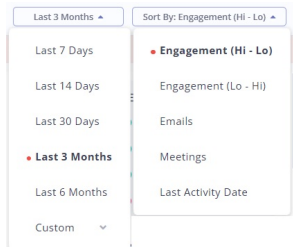
View Relationship map with a bird-eye view

Understanding account-level relationship plays a vital role while examining the status of a deal. As a sales rep, you must be aware of where you have relationship gaps to address and mitigate potential risks. As a sales leader, you must track all the interactions made by your sales reps over time, who are least engaged, and who are properly engaged with the accounts. Aviso captures all the interactions made through email and calendar and provides you with a relationships diagram to view all the interactions made over time with a bird-eye view. Every participating team member in the relationship diagram appears with the [engagement score](#) and is tagged under the appropriate seniority level such as Executive, Mid Senior, Manager, and so on. This helps you evaluate whether a rep is engaged with contacts with the appropriate seniority levels or not.

1. From the Deals screen, click a deal to go to the deal details section.
2. Click **Relationship** to open the Relationship diagram.

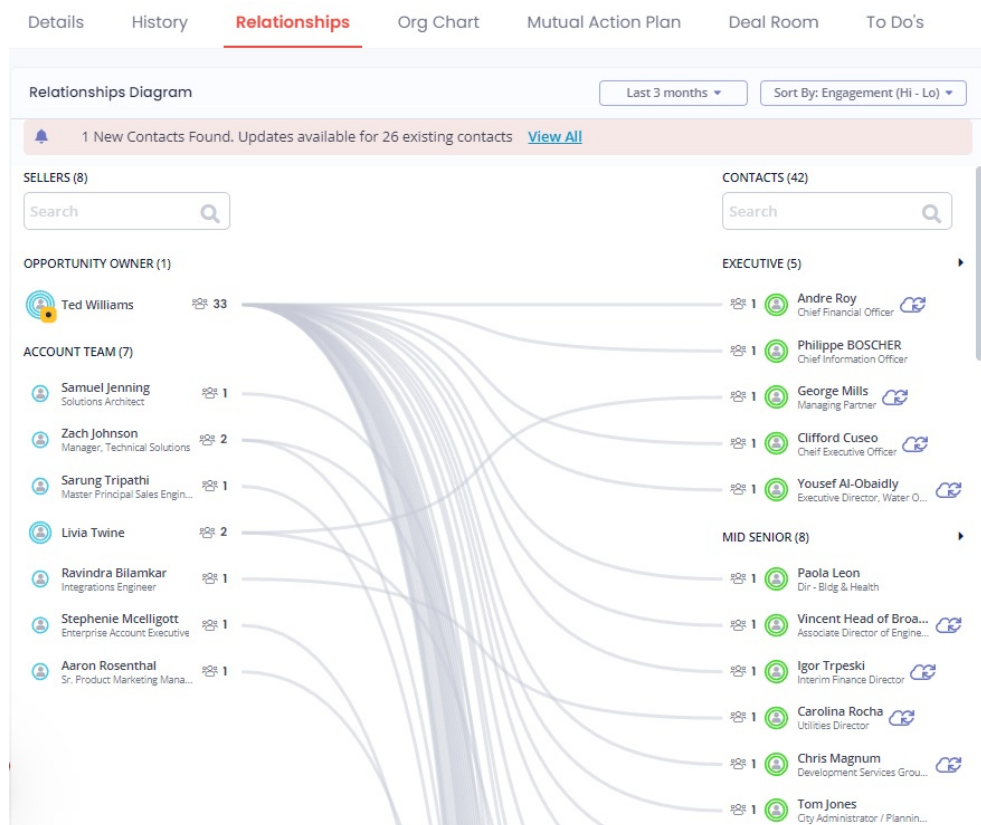
The Relationship diagram appears with default date and type of engagements.

3. Set your required range of days or months and types of engagements such as high to low, low to high, emails, meetings, and last activity date.



4. Select any account team member or contact to view the detail of the interactions in the Relationship diagram and the [Details pane](#).

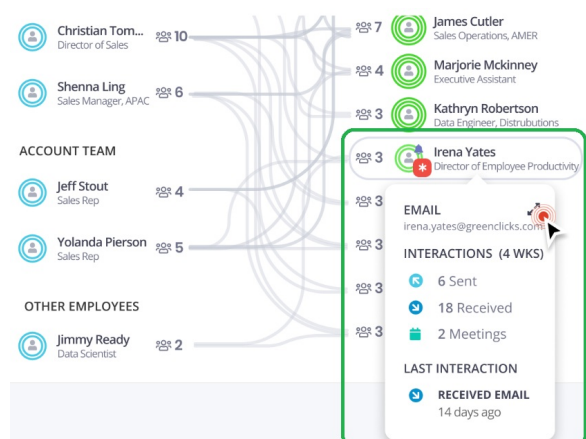
Relationship diagram appears as shown in the following image. Click an account team member or contact to learn details of their engagement. You can also hover over the participants to learn the details of their engagement. The opportunity owner, if marked in the CRM, is highlighted in yellow color.



Contact updates notification- From the list of contacts, if there are any updates available to the contact database in the CRM, it triggers a notification. Click **View all** to open the Contacts screen and sync the updates with the CRM contact database or reject.

View activity summary of any contact from the Relationship map

The relationship map lets you view the activity summary of every contact. Hover over any contact to see the activity summary pop-up. Click the expand symbol on the activity summary pop-up to open the details of the contact's engagement over time. Clicking the expand symbol opens the Engagement overtime (see [Get important insights into a deal](#) > Relationship Insights) screen but shows the engagement of the selected contact only.



Details pane

Click any team member or contact from the Relationship diagram and the Details pane beside the Relationship diagram shows the following insights about the team member or contact. If no team member or contact is selected, the Details pane shows the account relationships of all the accounts.

Details

See All Activity ↻

Viewing All Account Relationships

HIGHLIGHTS:

12

CONTACTS

C +

ENGAGEMENT

153

INTERACTIONS

SCHEDULED MEETINGS:

Apr 10, 1:00PM • 30 min
Greenclicks + Hastings, Demo
 Participants (3): James Cutler, Christian Tomlinson, Kandi Citizen

Key Role *

Irena Yates Dir. of Employee Productivity ...
 Last Interaction: 14 days ago, Email Sent

Most Engaged

Derrick Bryson SVP Customer Success ...
 Last Interaction: 1 hour ago, Email Received

Least Engaged

Dave Proost IT Manager ...
 Last Interaction: 31 days ago, Meeting

Highlights	• Number of contacts interacted with • Overall engagement score • Number of interactions made
Scheduled meetings	Any upcoming meetings scheduled
Key role	Interacted with any key roles such as CRO, CFO, and so on
Most engaged	The most engaged contact
Least engaged	The least engaged contact
Engagement Breakdown	All the interactions separated by the engagement scores (High, Medium, and Low)
Interactions	Number of outbound, inbound calls, and meetings in the current week and in total
Least interactions	The last email received, email sent, and meeting attended

WinScore and WinScore Projection: AI-predicted-probability of winning a deal and the best and worst possibilities of a deal from the current stage

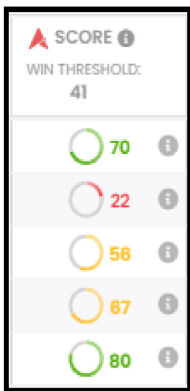
WinScore

WinScore is a statistical probability of winning a deal in the current quarter. Deals with higher WinScore have higher probability of winning in the same quarter. It's refreshed every day and changes over time. WinScore is generated by analyzing various data such as sales motion patterns of the deal and comparing them with the data and outcomes of the same types of deals from the past 12 quarters. A few examples of data used in Aviso to generate WinScore are-

- Time spent in various stages
- Sequence of stage movements
- Age of a deal
- Close Date push-outs - count and length
- Time left in the current quarter and the current close date
- Natural Language Processing (NLP) extracts of all the key CRM text fields
(Text from the key CRM fields such as **Next Step**, and **Manager's Comment** reveal a deal's health and progress. Aviso AI scans through these fields, processes the text using NLP, and contributes to generating a high-accuracy WinScore.)

WinScore Threshold

WinScore threshold is the minimum WinScore of any deal, as predicted by the AI, to be considered as a winning deal in the same quarter. Any deal with WinScore more than the threshold has a higher probability of getting closed in the same quarter. You can find the threshold value and Winscore of any deal in the WinScore column of the Deals table, the Deals detail section, and the WinScore explanation graph. The following image shows WinScore column on the Deals screen that shows WinScore and WinScore threshold of a deal.



WinScore Projection

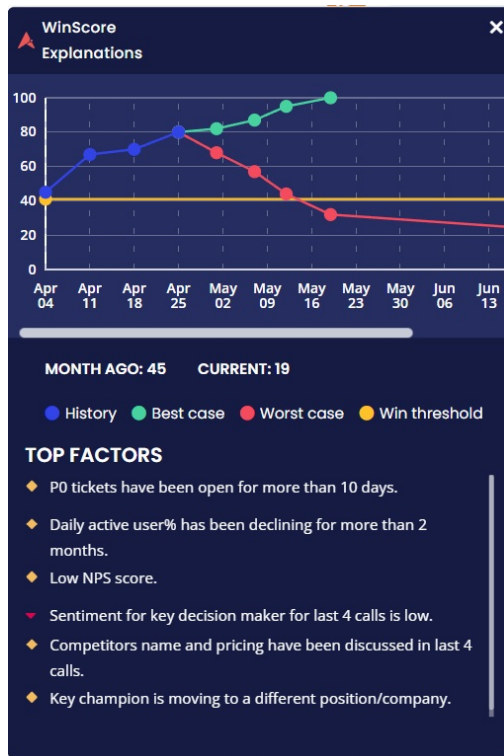
WinScore projection provides you with two important probable deal movements as learned from similar deals in the past-

- Best possibilities of the deal, progressing even faster than the pace at which the deal is

moving now, based on the data from the past.

- Worst possibilities of the deal, progressing slower than the pace at which the deal is moving now, based on the data from the past.

Click any deal in the Deals screen to open the deal details page to see the WinScore insights, where you can find the WinScore projection in the graph. You can also click the "i" icon in the WinScore column of any deal on the Deals screen to open the WinScore Explanations that gives you the WinScore projection.



The following table explains the graph and insights presented in the WinScore Explanations or WinScore insights.

WinScore Explanations	
Yellow line	WinScore Threshold value of the deal.
Blue line	Change in the WinScore history. Hover over any dot on the blue line to find the key factors that impacted the change in WinScore from its previous value.
Green line	Best possible path from the current stage of the deal as learned from similar closed won deals in the past. The top 20 percent of these deals have moved at this pace from this stage. Every green dot provides the time in which you can target moving to the next stage.
Red line	Worst possible path from the current stage of the deal as learned from similar won or lost deals in the past. The 20 percent from the bottom of these deals have moved at this pace from this stage.
Month ago	WinScore of the deal a month ago.
Current	The current WinScore of the deal.
Top factors	The top factors that contributed to the WinScore so far.

WinScore and WinScore projection can help you in the following ways:

- WinScore projection lets you estimate the projected scores over the next remaining weeks in the quarter.
- As you will be aware of the best and worst possibilities and prepare for both scenarios, any

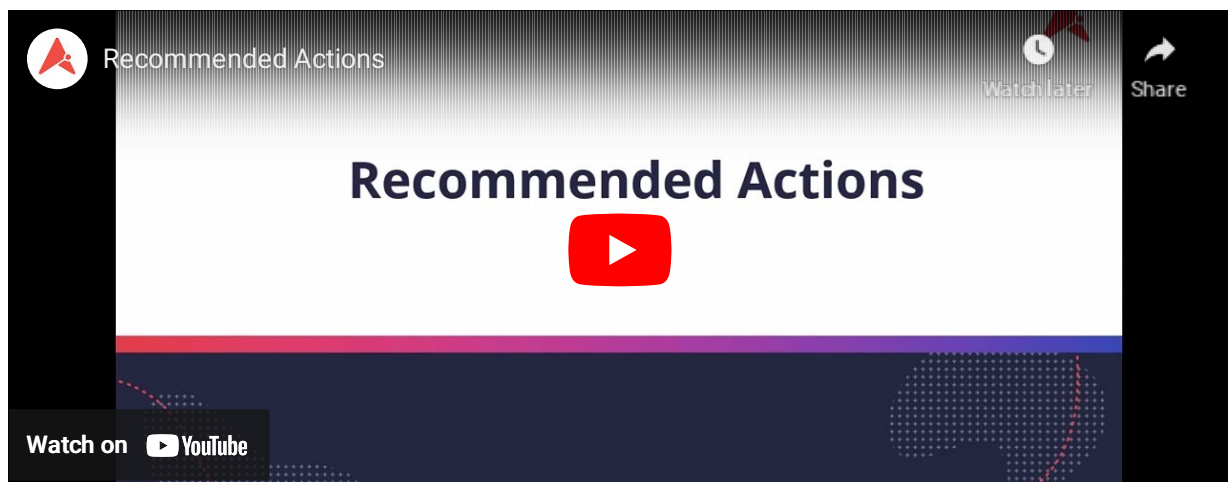
change in the WinScore will not surprise you. With a pre-preparation, you can better face any downfall of a deal and take corrective actions to move it toward closure.

- For an AE, it's crucial to know which deals require more focus than the others. WinScore projection helps you learn which deals require more focus. If a deal is not moving at an expected pace, as learned from the WinScore projection, the AE must focus more on the deal to understand the contributing factors. The TOP FACTORS section below the graph lists all the top contributing factors.

Eliminate guesswork and streamline your sales process with Recommended Actions (Next Best Actions)

Recommended Actions or Next Best Actions is an advanced AI-driven tool that works like a personal strategic advisor to sales reps, helping them make informed decisions and navigate the sales process more effectively. It assesses win score insights, past interactions, and value nudges of the specific deals, analyzes them using historical data, contextual information, and industry best practices to identify the optimal course of action for sales reps to advance opportunities through the sales process. These are some of the benefits you get from Recommended Actions

- **Informed decision Making:** Empower sales reps with data-backed recommendations, ensuring they consistently possess high-quality guidance.
- **Enhanced efficiency:** Streamline the sales process by eliminating guesswork. Sales reps can clearly understand which actions to prioritize, resulting in time and effort savings.
- **Consistency and quality:** Guarantee that your sales team consistently adheres to best practices, fostering superior interactions and outcomes.
- **Accelerated deals:** Expedite opportunities through the pipeline by executing well-timed actions that nurture key contacts and drive conversions.



How to find Recommended Actions for a deal on the Deals page

1. Go to your [Deals](#) page.
2. Find the Recommended Actions column on the Deals page.

The screenshot shows the 'Deals' page in a CRM system. The table lists various deals with columns for Name, Owner, Engagement Grade, Score, Amount, Deal Level Forecast, Category, Close Date, Commit, Next Step, Recommended Actions, and Stage. The 'Recommended Actions' column is highlighted with a green box, showing a numerical value for each deal. The deals are sorted by 'Total' value, with the highest value being \$2.5M.

	NAME	OWNER	ENGAGEMENT GRADE	SCORE	AMOUNT	DEAL LEVEL FORECAST	CATEGORY	CLOSE DATE	COMMIT	NEXT STEP	RECOMMENDED ACTIONS	STAGE
☆	Volpa License D...	Ted Williams	A	90	\$2.5M	\$2.5M	Best Case	Jan 17 2023	53%	1. Agreed Upon CL...	6	7 - Contract...
☆	Xerox	Mathilde Butkov...	B	80	\$2.5M	\$2.5M	Best Case	Dec 17 2022		Through RFP	5	7 - Contract...
☆	Coffee DreamL...	Kerri Walsh	C+	77	\$890K	\$890K	Upside	Jan 10 2023	95%	12/9 Maria Woul...	2	6 - Negotiati...
☆	Money Coach U...	Dante Kiser	C	66	\$806.9K	\$806.9K	Best Case	Jan 23 2023	86%		3	4 - POC Not R...
☆	Affordable Bed...	Mathilde Butkov...	B	58	\$800K	\$700K	Forecast	Jan 18 2023		Follow-Up	4	2 - Needs And...
☆	Career Educati...	Stephanie Moeil...	B-	56	\$800K	\$800K	Closed Won	Jan 05 2023	60%	12/17: Andrew Is ...	3	1 - Qualifica...
☆	GreatKooch	Ted Williams	C+	38	\$779.7K	\$779.7K	Best Case	Jan 30 2023	53%	12/14: Met W/ Ka...	2	5 - Negotiati...
☆	The Orb Imple...	Stephanie Moeil...	C-	32	\$760K	\$760K	Commit	Jan 11 2023	60%	11/28: Speaking ...	3	4 - POC
☆	Bd License - S...	Karthik Ramant...	C-	34	\$500K	\$500K	Pipeline	Jan 14 2023	66%	OTT_FEE2 - OT-L...	1	05 - Proposal...
☆	Stocktag Com L...	Dante Kiser	C	30	\$493.6K	\$493.6K	Upside	Jan 30 2023			1	8 - Negotiati...
☆	Retro Plum Impl...	Kym Rothermal	C	27	\$415.4K	\$415.4K	Best Case	Jan 26 2023	87%	12/10: Meeting W...	3	4 - POC
☆	XORTa License D...	Dante Kiser	C	18	\$302K	\$302K	Commit	Jan 23 2023	88%	12/2: Reached Ou...	2	2 - Needs And...
☆	Jth Hldg Inc Proj...	Stephanie Moeil...	B-	17	\$107.2K	\$107.2K	Best Case	Dec 30 2022	60%	12/16: Received R...	5	6 - Negotiati...
☆	Citi Bank New U...	Karthik Ramant...	B+	10	\$99K	\$99K	Pipeline	Nov 17 2022	59%	Test Next Step 1	2	1 - Qualifica...
☆	Itopolis.Com L...	Max Tarasovich	C+	23	\$72.5K	\$72.5K	Pipeline	Jan 30 2023	66%	11/29: Meeting W...	1	1 - Qualifica...
☆	DePort License ...	Mathilde Butkov...	B	27	\$70K	\$70K	Commit	Jan 20 2023	76%		2	4 - POC

For every deal, the Recommended Actions column shows a number which is the number of recommended actions a deal has.

RECOMMENDED ACTIONS	
6	
5	
2	
3	
4	

- Click on the number to find the recommended actions for the specific deal.

Recommended Actions

- ⬇ Negative sentiment identified on inbound email from an exec level contact that has pricing intent

Action: Review your pricing
- ⬆ Aviso recommends to add product 'Activity Management Module(AMM)' as 85% of similar accounts that bought 'Enterprise Level Security Module(ELSM)' product also eventually bought AMM.

Action: Add product

60% 11/29: Speaking ...

- Click on the Action to open your CRM and act on the recommend action.

Recommended Actions

- ⬇ Negative sentiment identified on inbound email from an exec level contact that has pricing intent

Action: Review your pricing
- ⬆ Aviso recommends to add product 'Activity Management Module(AMM)' as 85% of similar accounts that bought 'Enterprise Level Security Module(ELSM)' product also eventually bought AMM.

Action: Add product

Write back to CRM

Aviso AI lets you write back to your CRM from Aviso AI. Open a deal from the Deals screen. CRM DETAILS section in the Details tab lets you view data from your CRM, open your CRM, and write back to your CRM. Any field with edit () icon is editable. As an admin, you can create a custom field and map it to your CRM so that you can write back to the respective field in the CRM. Talk to Aviso customer success manager to know more about creating custom fields.

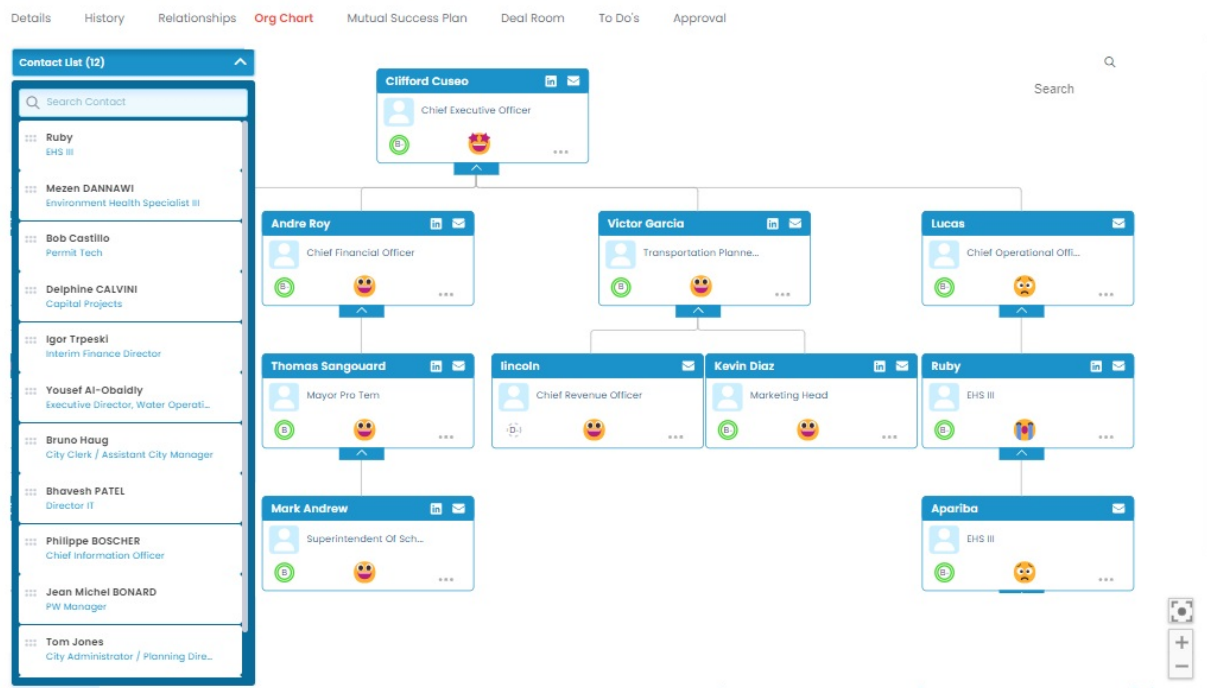
CRM DETAILS [View in CRM](#) 

ENGAGEMENT GRADE  	MEETING SCHEDULED No	COMMIT ACCURACY 55%	RISK DEAL No Risk 
TYPE New Business	PRODUCT Cloud 	LEAD SOURCE	COMPANY SIZE
INDUSTRY Hardware Vendor (IHV)	NEXT STEP 12/14: Met w/ Kamal and he would like me to put together some slides on the 3 use cases. He will present to his team on Monday. Asking for a meeting with his team the week of 12/27 but he said likely first week of Jan 	NEXT STEP LAST UPDATED Oct 31 2021	PARTNER INITIATED DEAL Yes
SUB-REGION USA Southwest	EXPECTED REVENUE \$623.8K	SALES ORDER GENERATED False	FIRST LEAD SOURCE Other
REQUEST EXTENSION False	RESELLER REACH National	PROJECT FUNDED False	ACCOUNT GreatKoach

See Org Chart to learn about the key contacts

An organizational chart, often referred to as an "org chart," is a visual representation of the hierarchical structure within a sales department or organization. It is a valuable tool for understanding the relationships and roles of individuals or teams within the sales team, providing a clear and concise overview of the chain of command and reporting lines. The org chart in sales is instrumental in defining the distribution of responsibilities, illustrating the flow of information, and delineating the various levels of authority within the sales organization.

Org Chart at Aviso lets you create a hierarchy (organizational chart) of your key contacts from an opportunity or account, have a visual representation of your prospect's organization.

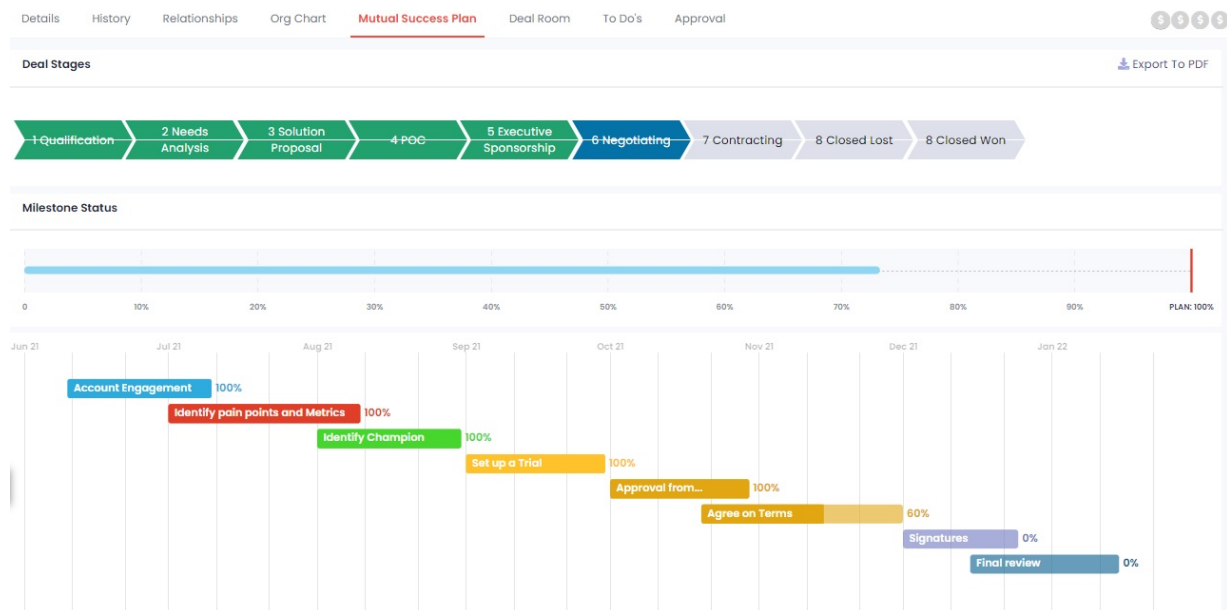


The Contact List in the Org Chart shows all the contacts saved in your CRM. Select the contacts, drag, and drop in the Org Chart to create a hierarchy. Drop a new contact over an existing contact to make it a branch of the existing contact in the hierarchy. Click **Save** to save the org chart of a tenant. Every contact shows an [engagement grade](#) to show their engagement level, LinkedIn profile so that you can easily open their profile in one click, and an email icon so that you can send them an email without opening another app.

Click the Menu (**...**) icon on any contact and click **Remove Relationship** or **Remove from Org chart** to remove the contact from CRM or remove it from the Org chart respectively. You can add an emoji to every contact for your reference. When the number of contacts is too big to search a particular contact from the hierarchy, use the search field to type the name of the contact and search. You can use the zoom option to keep the chart at the center, zoom out the chart, or zoom in the chart.

Use Mutual Action Plan to define sales process and increase reps productivity

As the sales reps deal with multiple opportunities at a time, a customized action plan defining the course of action in every stage of a deal helps them track the progress and increase productivity. The mutual action plan helps sales organizations manage a sales cycle effectively from deal creation to closure by defining a series of milestones and steps that sellers should accomplish to move forward in a deal cycle.

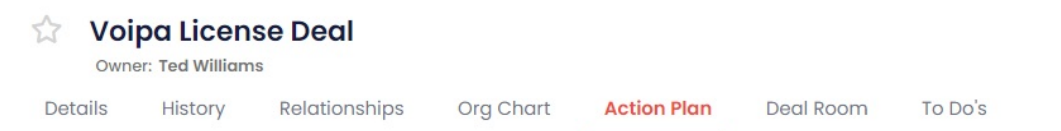


Mutual Action Plan comes with a predefined template, which is customized initially per your requirements. Later, you can modify it to suit a particular deal. An Action Plan has a set of milestones and every milestone has one or more tasks. A deal owner can [create or update a milestone](#), [create or update tasks inside the milestone](#), [assign a task to any team member](#), and [mark the tasks as complete](#). After all the tasks in a milestone are marked as complete, the milestone appears as complete.

Create, delete, and update a milestone

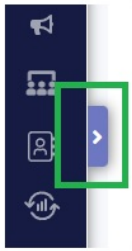
A deal owner can create a milestone, map it to a deal stage, add a start and end date, and apply a color to distinguish it from the other milestones.

1. Click a deal on the Deals screen to open the deals detail screen.
2. Click **Action Plan** to open the Action Plan screen.

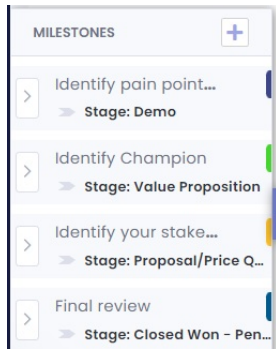


Action Plan screen appears and shows deals stages.

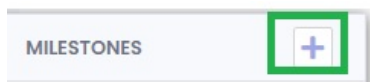
3. Click the arrow facing the right-hand side.



The MILESTONES dialog box appears with predefined milestones and it lets you create new Milestones.



4. Click the Add icon beside MILESTONES to add a new milestone.



The Create Milestone dialog box appears.

Create Milestone

×

Milestone Title

Enter the Milestone title

Start Date

Pick a Start Date

Target Date

Pick a Target Date

Color

Stage

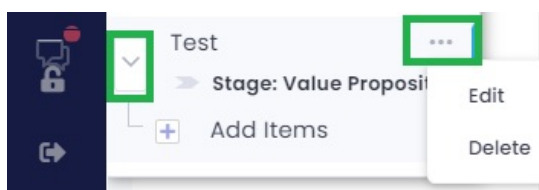
Select Stage

Create

5. Enter a name of the milestone of your choice in the **Milestone title** field.
6. Add start date and target to complete date in the **Start Date** and **Target Date** fields respectively.
7. Select a color to apply on the milestone.
8. Select a stage to map from the **Stage** drop-down list.
9. Click **Create**.

The newly created milestone appears in the Action Plan along the timeline.

10. Expand a milestone and click on the menu icon to edit or delete the milestone.



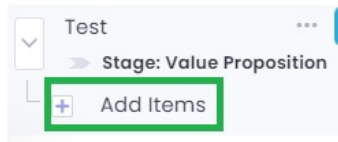
Clicking on **Edit** opens the Update Milestone dialog box and lets you modify all the fields such as **Milestone title**, **Start Date**, **Target Date**, **Stage**, and **Color**.

11. After you create a milestone, add the associated tasks that you or the reps should accomplish between the start and target dates.

Create, delete, and update a task in a milestone

A deal owner can add and update tasks in a milestone and delete the task.

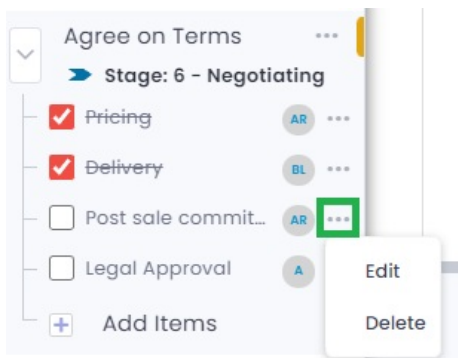
1. On the MILESTONES dialog box, click **Add items**.



The Create Checklist for <milestone name> dialog box appears and lets you create a new task.

A screenshot of a dialog box titled 'Create Checklist for Test' with a close button (X) in the top right corner. The dialog contains several input fields: 'Checklist Title' with a placeholder 'Enter the Checklist title'; 'Start Date' with a placeholder 'Pick a Start Date'; 'Target Date' with a placeholder 'Pick a Target Date'; and 'Assign To' with a dropdown menu showing 'Select assignee'. At the bottom right, there is a 'Create' button.

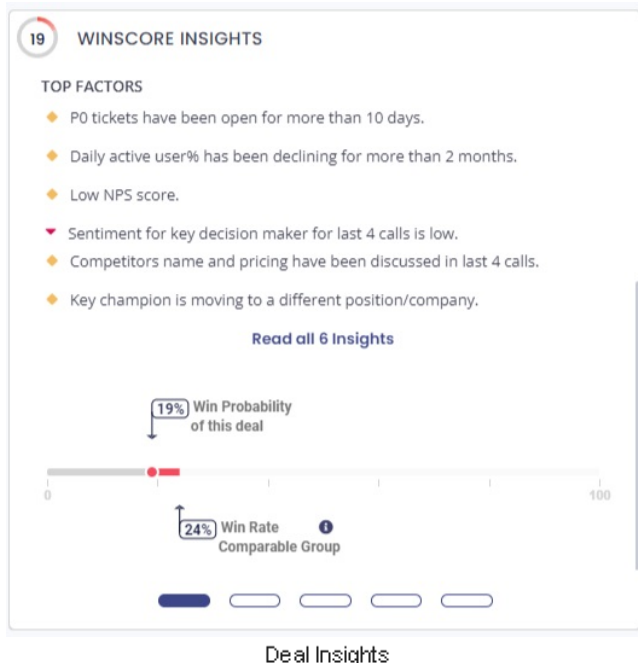
2. Enter a name of the task of your choice in the **Checklist Title** field.
3. Enter a start date and target to complete date in the **Start Date** and **Target Date** fields respectively.
4. Type the name of the team member who you want to assign the task in the **Assign To** field and press Enter.
5. Click **Create**.
6. After you accomplished a task, select the checkbox against the task to mark it as Complete.
7. Click the Menu icon against a task to edit or delete a task.



Clicking **Edit** opens Update Checklist for <milestone name> dialog box and lets you update all the fields such as **Checklist Title**, **Start Date**, **Target Date**, and **Assign To**.

Get important insights into a deal

The deals insights give you deal-specific insights to learn the current state of a deal and various actionable insights that would help you close the deal. After you open a deal from the Deal screen, the deal insights are on the right-hand side, just below the Meeting history pane.



Click the tabs at the bottom of the insights to open the insights.



Here are the insights that you can view from the insights pane:

Win score Insights

Win score insights gives the top factors that lead to a current score. For example, when a deal remains at the same stage for more than n days, the Win score may decline. Insights from Win score include multiple factors, including the stage of the deal, its duration, probability, other deals in the same stage, and more.

Booking Timeline Insights

Booking Timeline insights gives you insights into closing timelines of the deal and shows if the deal is ON time or not. Booking Timeline gives you insights into how far a deal is likely to close in EOQ and its probability.

Relationship Insights

Relationship insights gives you insights into all the communications made with your contacts, next steps updated, and executives involved while working on the deal. You can view the complete interaction, including inbound, outbound, and email conversations. It also notifies you if there are any contacts missing in the CRM and a lack of communication such as when there is no interaction with the most engaged contact in the last seven days or there is no key role in the contacts. You can add the missing contacts to the CRM using [Contact Auto-population](#).

Relationship Insights

No recorded interaction in 7 days with Most Engaged Contact, zakria.humayoon@pawsparlour.com. Aviso recommends following up.

There is no Key Role at this account.

3 contacts are missing from crm.

Interactions Over Ti... Last 4 Weeks View more



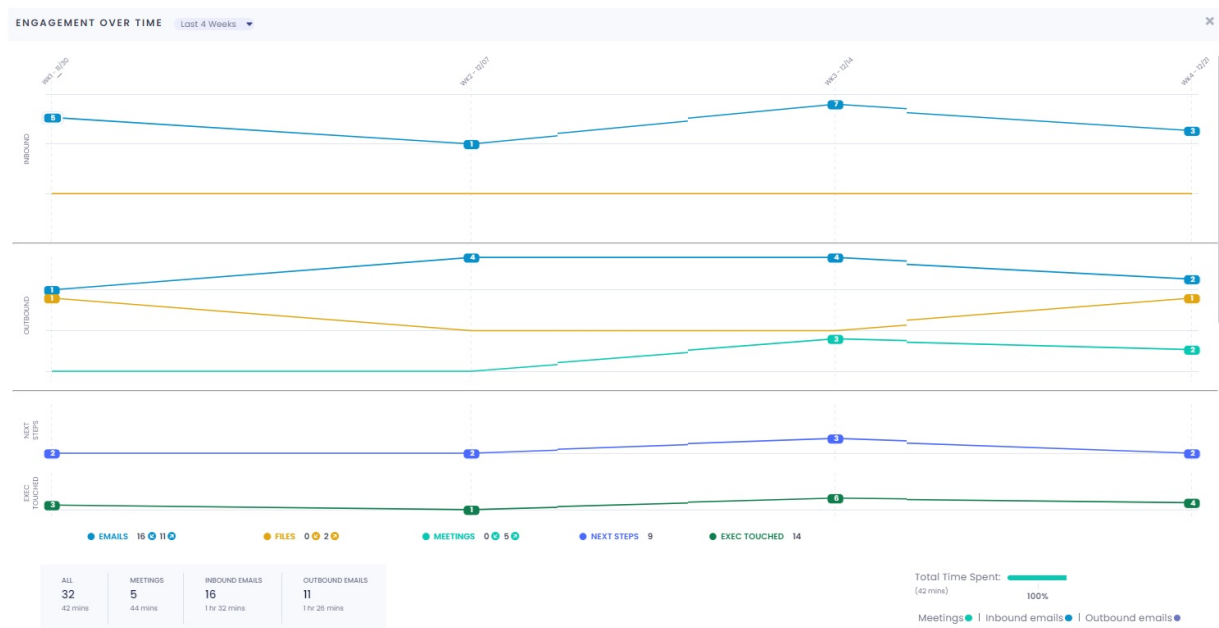
Perform the following steps to see the details of interactions over time.

1. Under Relationship Insights, click **View more** link beside Interactions over Time.

Engagement Over Time screen appears.

2. Click the drop-down from the upper left-hand side of the screen and select the time range for which you want to see the engagement. By default, it shows for four weeks.

Engagement over time screen shows the following graph with communications over time and the detailed information to help you stay on top of the communication. For every activity in the graph, it shows the number of occurrences. You can click any activity to open the respective activity summary.



Emails (27) Meetings (5) Next Steps (9) Competitor Mentions (3) Objection Moments (2) Positive Moments (6)

Filters: Email Type: All Emotions: All Email Length: All Intent: All Apply

Subject & Sender	Emotion & Length	Content	Date & Time	Intent	Number of Attachments
Re: 8x8 FY21 SKO	😊 Neutral length: ideal	Got it! Thank you.	02 Dec 2022, 07:07 PM	Proof Of Concept	0
New Success sync w/Aviso in 2020	😊 Neutral length: ideal	Dear Sabri, Good afternoon Hope all is well with you .As we briefly spoke weeks ago, you were quite busy How is it goin	04 Dec 2022, 07:07 PM	Onboarding	0
Tour Updates	😟 Apprehensive length: ideal	XTERNAL]Hello Fanny, I am afraid that the GEBO Tours opportunity can be cancelled. I have tried to reach Mr. Toinne de Roo, w ..Read More	05 Dec 2022, 07:07 PM	User Experience	0
scheduling weekly success sync	😡 Displeased length: ideal	Shurong .I dont want to be rude but I have been reaching out for weeks and this is starting to feel like a one-way conversati ..Read More	06 Dec 2022, 07:07 PM	Architecture	0

• Emails

Aviso AI tracks not only past email conversations but also the emotions, email length, and intent of each conversation. It categorizes them in such a way that the most relevant info is laid out for you in an easily digestible format. Here are some insights from the email conversations that you can view:

Subject and Sender	You can see the subject of the email address, the sender's name, email address, designation, and other details. Note The Subject and Sender column also shows the designation of the sender. This feature comes only if you have configured it.
Emotion & Length	You can see the length of words in the email body and the emotion the email tone conveys.
Content	You can see the content of all the email conversations.
Date & Time	You can see the date and time of the email exchange.
Intention	You can view the intent behind the email.
Number of Attachments	You can see the total number of attachments with the email.

• Meetings

Emails (27) Meetings (5) Next Steps (9) Competitor Mentions (3) Objection Moments (2) Positive Moments (6)				
Filters: Meeting Type: All Apply				
Name	Date & Time	Customer Attendees	Company Attendees	Follow Up Email
Aviso 8x8 Connect	11 Dec 2022, 12:00 AM - 12:00 AM	rubycon@voipa.com	todd.senter@gold.com	Ruby, lets connect at 2pm ET tomorrow! Thu, Dec 18, 2021 at 4:10 PM Ruby Eastman .wrote: > Dave, my apologies if I lost track ..Read Less
Call with Sam Wilson today	12 Dec 2022, 07:07 PM - 05:54 AM	lincoln@voipa.com	dyee@gold.com	-
Potential Aviso Upgrade Release this Weekend	13 Dec 2022, 12:00 AM - 11:56 AM	Lucas@voipa.com	kwong@gold.com	-
Aviso 8x8 Connect	20 Dec 2022, 12:00 AM - 01:00 AM	hari@voipa.com	stephenie.mcelligott@gold.com	Finalized proposal. Need to speak with Adam and Tom to determine their requirements and get the draft proposal in their hands for review..2/12/21 - Working internally on order documents for submission to customer for review. Desired goal of 1/16 to send draft to Adam and Tom for them to review with IRS legal..1/8/21 - Funding secured. Working with strategy and planning on deal structure and terms. Want to get wrapped up in ..Read Less

See all your meeting insights in one place. Meetings section provides you with deeper access to valuable data from all your meetings. You can see all the meetings that pertain to an opportunity and filter it out by meeting type (Inbound and Outbound). Here are some insights from the email conversations that you can view:

Name	You can see the name of the meeting.
Date & Time	You can see the date and time of the meeting.
Customer Attendees	You can see the names, email addresses, and designations of customers who participated in the meeting.
Company Attendees	You can see the names, email addresses, and designations of sellers who participated in the meeting.
Follow Up Email	You can see and track the follow-up email content.

• Next Steps

This section shows the Next Steps saved in the CRM along with timeline.

• Competitor Mentions

This section provides a breakdown of your competitor mentions in a conversation. Here are some insights from the competitor mentions in a conversation:

Competitor	You can see the name of the competitor.
Number of Mentions	You can see the number of times the competitor's name was mentioned in a conversation.
Last Mentioned	You can see the name of the contact who last mentioned the competitor's name.
Timeline	You can see the timeline of when competitor's name is mentioned.

- **Objection Moments**

Aviso AI tracks customer objections and provides meaningful insights on objection moments. Here you some insights that you get in this section:

Objection	You can view the objections raised by the contacts.
Number of Mentions	You can see the number of times the objections were made by the contacts.
Last Mentioned	You can see the name of contact who raised the last objection.
Timeline	You can see the complete timeline of when the objections were made.

You can view the content from the email where the objection moment is present by clicking on the arrow.

Emails (27) Meetings (5) Next Steps (9) Competitor Mentions (3) Objection Moments (2) Positive Moments (6)				
Objection	Number of Mentions	Last Mentioned	Timeline	
▼ concerned	1	jmbonard@voipa.com 83 days ago	1 wk1 11/30	
Hi Mark, I just checked the slides, and I m sorry I do nt remember the specifics of this new Ad Revenue Intelligence feature. ..Read More		jmbonard@voipa.com 83 days ago		
> Expensive	1	pccottvod@voipa.com 66 days ago	1 wk4 12/21	

- **Positive Moments**

Aviso AI extracts topics from sales conversations and identifies positive moments within those topics, and presents this data in an easy-to-understand way.

Topic	You can see the topics that represent positive moments in a conversation.
Number of Mentions	You can see the number of times the positive moments were discussed in a conversation.
Last Mentioned	You can view the name of the contact who most recently had a positive moment in the interaction.
Timeline	In this section, you can see the complete timeline of topics with positive moments.

You can view the content from the email where the positive moment is present by clicking on the arrow.

Emails (27) Meetings (5) Next Steps (9) Competitor Mentions (3) Objection Moments (2) Positive Moments (6)			
Topic	Number of Mentions	Last Mentioned	Timeline
▼ Value Proposition	6	yousefa@voipa.com 65 days ago	
Hi Justin, Checkin to find out if you knew that Suncor acquired Ris from Azure. We are going to set up a meeting with Mark ..Read More		scott.f.ansill@voipa.com 82 days ago	

Owner Insights

Owner insights gives you insights into the deal owner's achievement in closing deals in the past.

Owner - Activity Insights

Owner - Activity Insights gives you insights into the activities performed by the owner in closing the current deal. It includes any deviation from the usual course of closing a deal.

Owner - Activity Insights

This opportunity is in the '6. Negotiating' stage but the procurement team has not yet been engaged - a deviation from the opportunity owner's usual behavior of interacting with procurement in the current stage.

This opportunity owner has so far engaged with 1 executive only - a deviation from his/her record of engaging with more than 2 executives for 'New business' opportunities after the '6.Negotiating' stage.

70% of this opportunity owner's customer interactions during the course of these deals have positive emotions.

This opportunity owner logs 2 interactions per week for 'New Business' opportunities in the '6.Negotiating' stage. The current deal has 3 interactions per week

30% of this opportunity owner's interactions in stage '6. Negotiating' and above have executive level engagement.

80% of opportunities closed by this owner in the last 4 quarters have multithreaded conversations.

Sentiment Score Insights

The Sentiment score insights captures sentiment scores of all the meetings held for the particular deal over time. The **sentiment score** ranges from -1 to +1 and indicates how positive or negative the emotion is. The insights section below the graph provides key updates from the meetings and reminds you of any important milestone that is due. For example, in the following screenshot, the deal close date is in the next ten days but pricing has not been discussed yet. It helps you understand the sentiments from all the meetings, which can help you define further communication or actions to close the deal.

74 SENTIMENT SCORE INSIGHTS



CI INSIGHTS

- ▼ Objections related to 'concerned' has been raised. Relevant content should be shared
- ▼ Seller talk ratio is 100.0% which is 50% higher than the recommended ration of 50.0%.
- ▲ The buyer sentiment score in last call is 0.
- ▲ Sentiment of key decision maker is negative with pricing aspect(s).
- ◆ Deals closed date is in the next 10 days and pricing hasnt been discussed so far. Shedule meeting with Adam

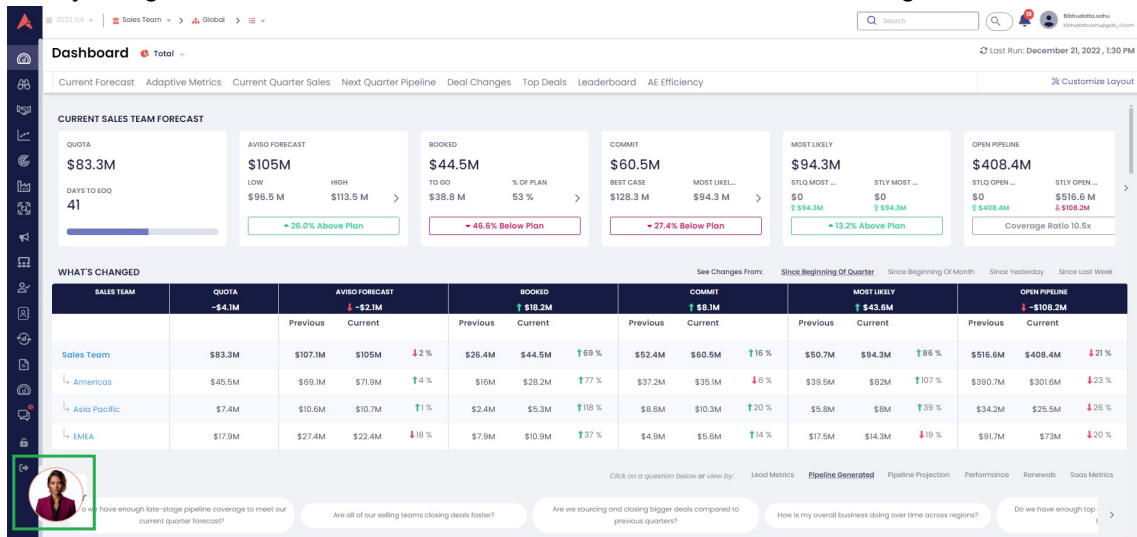
Ask MIKI everything

MIKI is an AI Assistant developed by Aviso, serving as the Chief of Staff to all personas in a Go-to-Market (GTM) function. It provides a seamless, no-UI way of accessing actionable insights generated by Aviso, catering to various needs within a GTM setup. Powered by Aviso's time-series database, actionable intelligence, product knowledge base, and tech integrations, MIKI offers unparalleled support and efficiency.

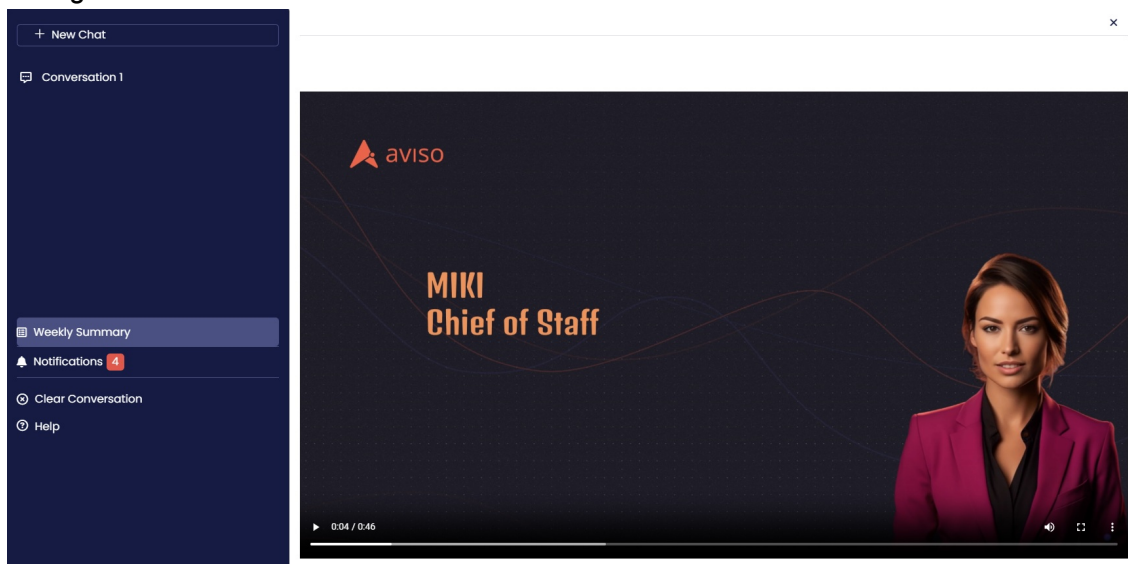
MIKI facilitates querying sales data in simple, natural language. It executes tasks such as updating CRM records or sending emails, all while sifting through vast amounts of data from different sources like product documentation, earnings call transcripts, meeting transcripts, and emails. It then generates concise and contextually relevant responses to user queries.

How to use MIKI

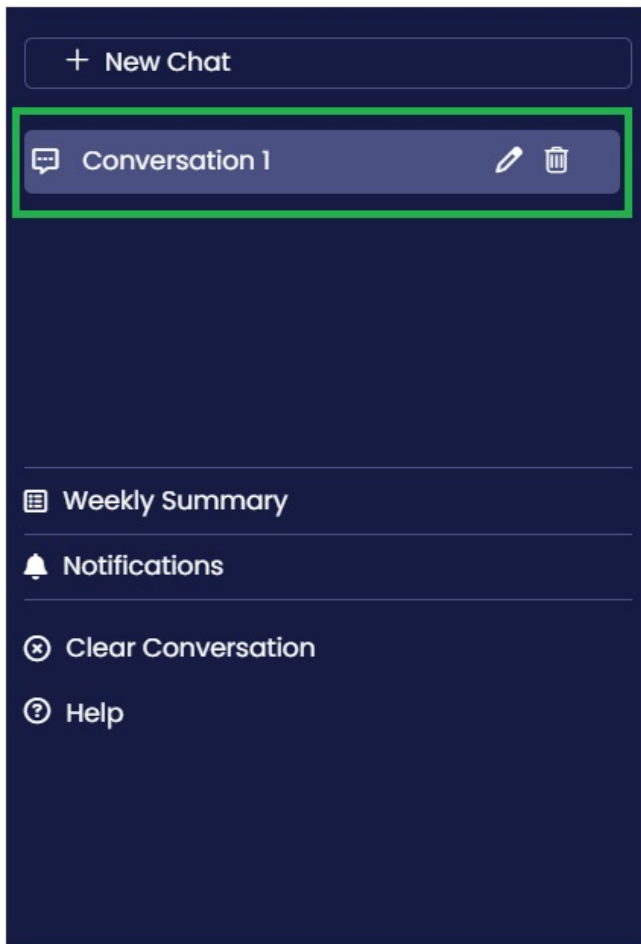
1. After you log in to Aviso, click on MIKI at the bottom-left corner to start using MIKI.



MIKI opens with a new window and by default briefs you about your weekly sales summary through a video.



2. Click **Conversation 1** to start a conversation with MIKI to ask for any **sales insights** and to **take various actions**.

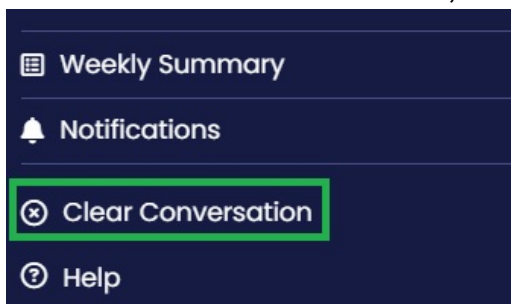


You can start with another new conversation by clicking **+New Chat**.

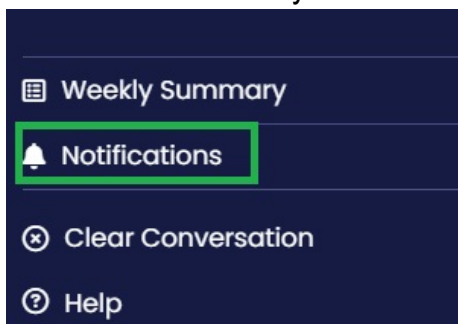
When you have multiple conversations, you can rename the conversations by clicking Edit icon in the particular chat.



3. To clear a conversation within a chat, click **Clear Conversation**.



4. MIKI reminds and notifies you about various important sales milestones and due actions. Click **Notifications** to check your notifications and take required actions from MIKI itself.



Exmaples of questions you can ask MIKI

Here are some examples of questions you can ask MIKI and actions you can ask MIKI to perform.

Aviso Winscore Insights

Aviso Winscore is a crucial feature assessing the likelihood of deal success. MIKI enables effortless interaction with Winscore Insights:

- Querying Winscore: Ask MIKI about the Winscore of a deal to find the probability of winning.
- Trend Analysis: Request MIKI to analyze the historical trend of Winscores to identify patterns and inform deal strategies.
- Contributing Factors: MIKI provides insights into factors influencing Winscore, suggesting actionable steps for improving deal success.

Pipeline Insights

Understanding the sales pipeline is essential, and MIKI offers valuable insights:

- Pipeline Changes: Inquire about changes in the pipeline over a specific period to visualize deal movements.
- Pipeline Distribution: Gain information on how open deals are distributed across stages, aiding in bottleneck identification.
- Pipeline Creation: Learn about newly created deals to assess pipeline health and performance.

Engagement Insights

MIKI provides insights into GTM team activities, crucial for sales success:

Note

You can ask for engagement insights only if you have Conversational Intelligence enabled.

- Engagement Grade and Insights: Understand engagement health and take necessary steps for improvement.
- Executive Engagement: Gain insights into high-level executive involvement in business accounts.

Conversation Insights

Effective communication is key, and MIKI offers insights into team conversations:

- Sentiment Analysis: Analyze the sentiment of customer interactions to address issues proactively.
- Keyword Analysis: Gain insights into frequently used keywords in customer conversations to adjust messaging.
- Topic Trends: Understand the frequency and nature of topics discussed during customer conversations to tailor communication strategies.
- Summary: Quickly surface meeting summaries to stay updated on customer interactions.

Aviso Deals

MIKI enables engagement with essential deal data:

- Deal Status: Inquire about updates on any deal to stay informed.

- Deal Changes: Learn about changes made to deal attributes through a timeline view.
- Stage/ Category Distribution: Obtain insights into deal distribution across stages.
- Deal Creation: Get quick insights into newly created deals for performance assessment.

Aviso Forecast

Access Aviso's forecasting data effortlessly to gain insights into sales performance:

- Aviso Forecast and Explanations: Retrieve your team's forecast and explanations for better understanding and planning.

Account Research

Utilize MIKI's 'Account Research' feature to analyze content from company earnings calls:

- Sample queries cover various aspects discussed during earnings calls, aiding in market understanding and strategic planning.

CRM Writeback

Streamline CRM updates through MIKI's direct commands, saving time and effort:

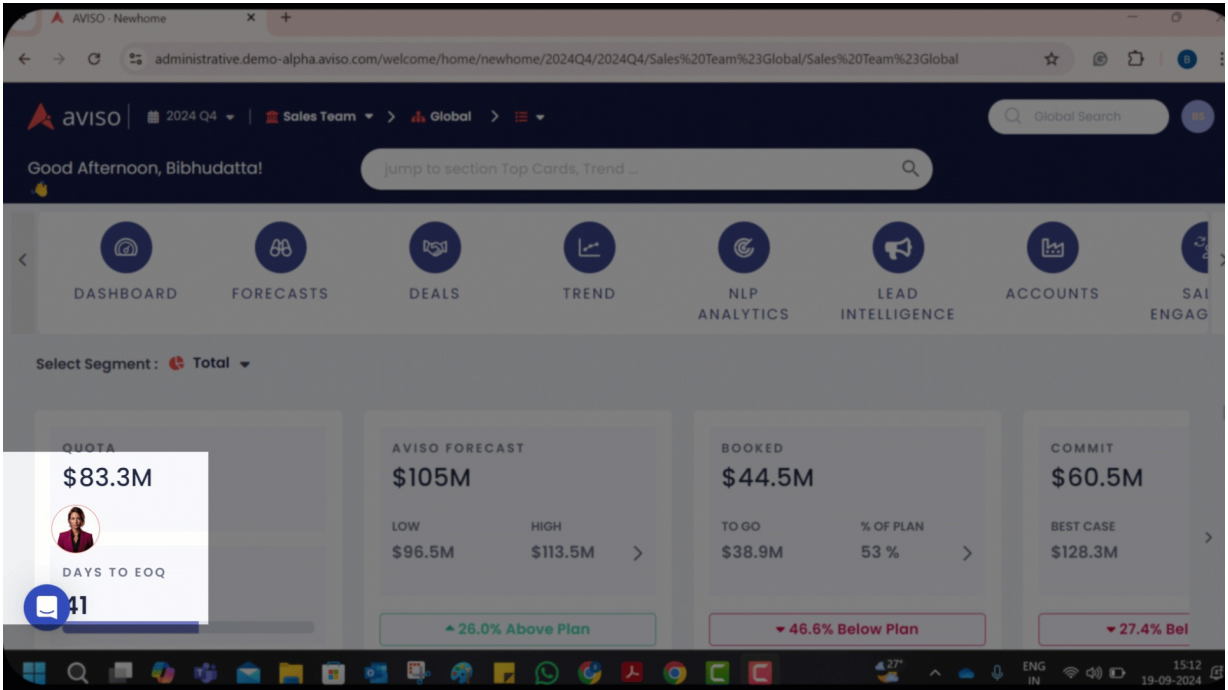
- MIKI ensures security and compliance while facilitating quick alterations to deal records.

Track and analyze your sales performance for the week with Aviso's Weekly Digest

Aviso's Weekly Digest provides key insights into last week's changes in your sales data, helping you stay ahead of your targets.

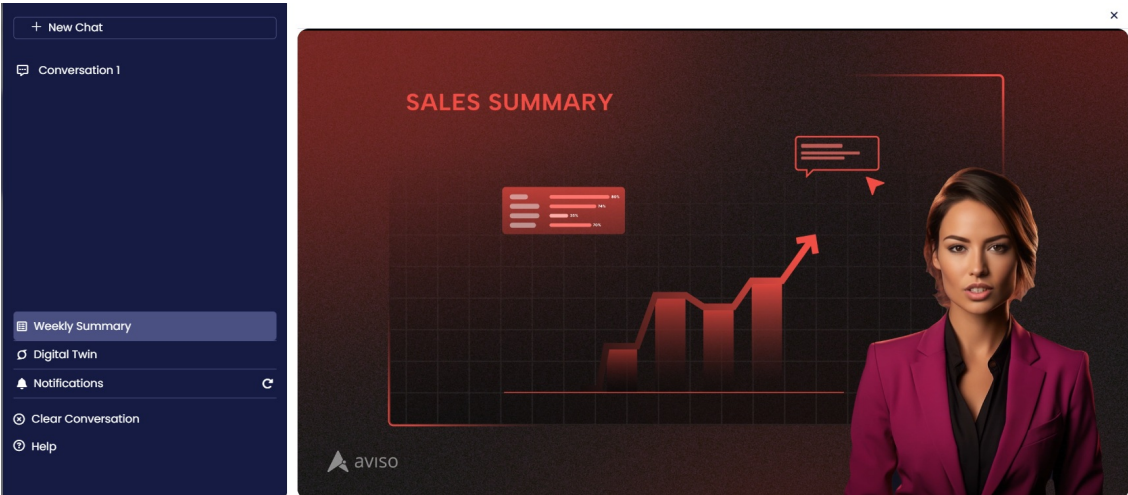
- As a sales leader, you can have updates on Bookings, changes in Commit and Pipeline, deals at risk, relationship summaries for the top accounts, your team's call insights, and scope for coaching.
- As a sales rep, you can have Commit changes, any meetings scheduled this week, deals at risk, relationship summaries for the top accounts, and your call insights.

Aviso lets you view this summary in different formats such as a video, a brief notification, and a detailed sales digest with various graphical representations. This digest enables you to quickly understand last week's sales updates and prepare for the current week.



View Weekly Summary and Weekly Digest

1. After you log in to Aviso, click on MIKI at the bottom-left corner to open MIKI. MIKI opens with a new window and by default **Weekly Summary** is selected to show you the weekly summary in a video.



2. Click Notifications to view the brief summary of your weekly digest.



Reminder to review weekly digest

Hi Bibhudatta Sahu,

Here are the key highlights from the last week's progress.

- Aviso forecast is \$105M, vs. Target \$83.3M
- Quota is set at \$83.3M, with \$44.5M already booked.
- Current pipeline value is \$150.3M, comprising 1883 deals.
- Number of deals lost is 144, amounting to a total value of \$16.5M

Would you like to see your weekly digest?

[Weekly Digest](#)

Review risky deals

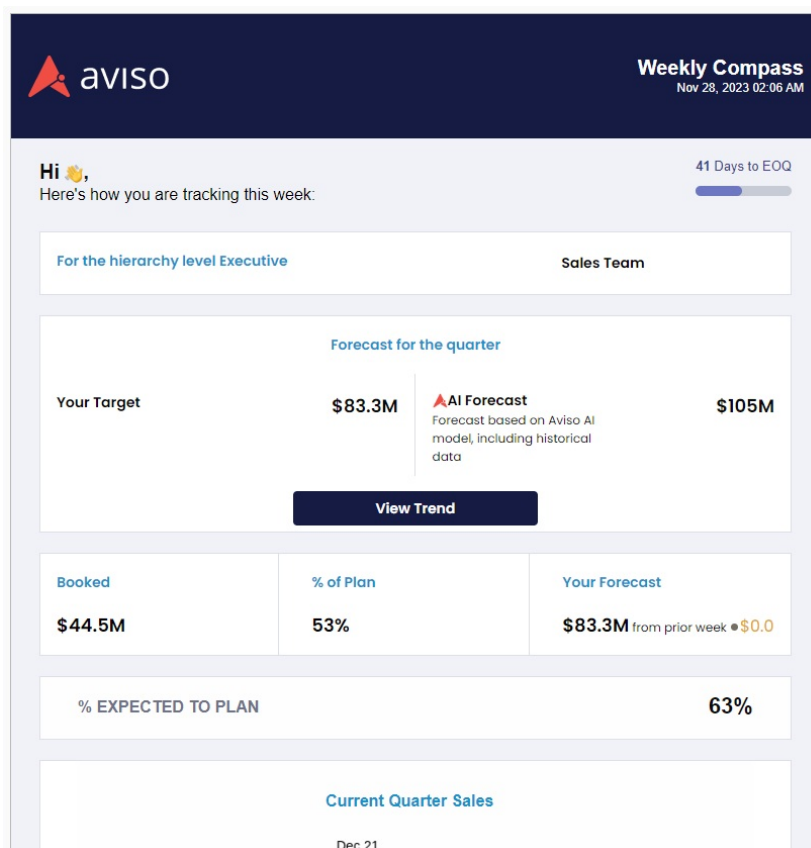
Review the current quarter progress

Review recommended actions for high-value deals

3. Click the **Weekly Digest** link on the summary to open the **Weekly Compass** that has detailed explanations of your weekly summary backed by various graphical representations.

The **Weekly Compass** has the following sections:

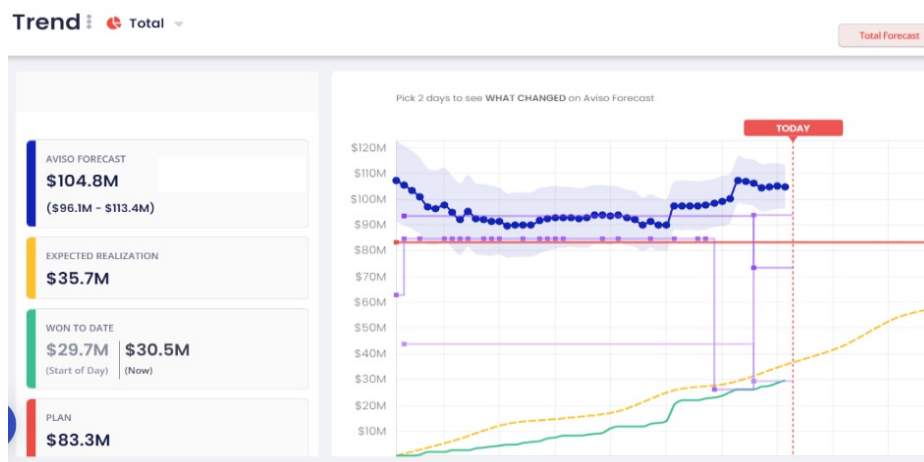
- **Forecast for the quarter**
- **Current Quarter Sales**
- **Current Open Pipeline** (you can open the)
- **Pipeline changes in last week**
- **Deal Commit Changes Week over Week**
- **Aviso AI Forecast Explanation**
- **Top Wins (Last Week)**
- **Deals to Focus on** (also shows the deals map)
- **Deal Activity**



Get visibility into how your forecast is trending for the quarter

The Trend screen in Aviso AI shows you a linear graph to give you visibility to realize if you are on track to achieve the sales plan. After you log in to Aviso AI, from the left side menu bar, click Trend to open the Trend screen. Y-axis in the graph shows amount and X-axis shows time period. On the Trend screen, click **Total Forecast**, **Existing Pipe Forecast**, and **New Pipe Forecast** to view the respective graph.

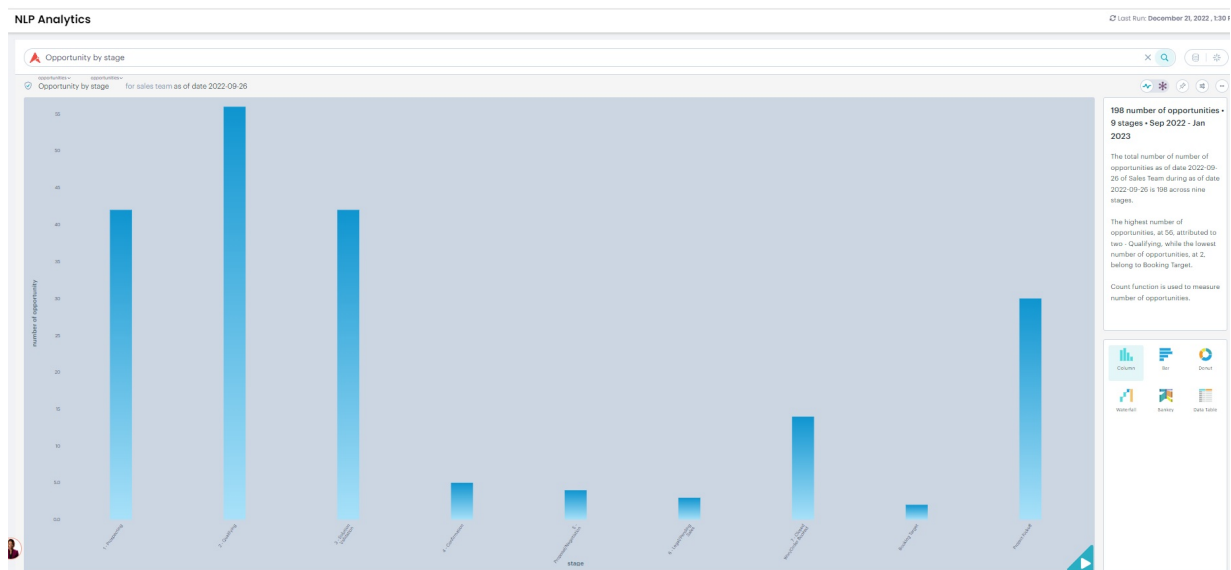
In the Total Forecast trend, the dark-blue dotted line indicates Aviso's AI forecast generated from the beginning of the quarter, the red line indicates company's plan, the yellow line indicates expected realization, and the green line indicates the amount booked as of now. The expected realization line shows where you should be present to achieve the target. You can click any two dots to know what's changed in Aviso forecasts. It opens a sankey chart in the [Analytic screen](#) to compare and show the changes in values and the flow contributing to the change.



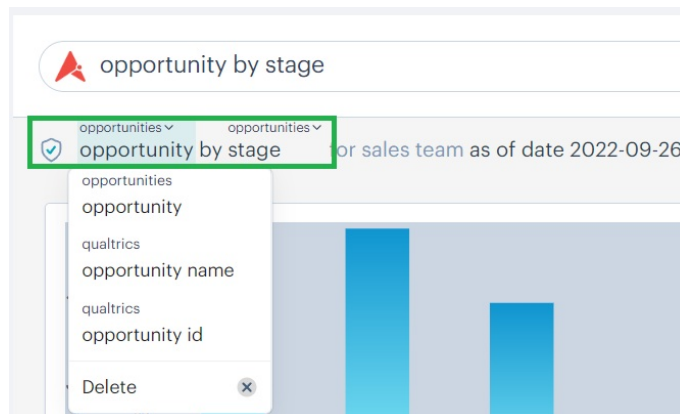
Use NLP Analytics to generate sales insights with any query

Aviso NLP Analytics lets you enter any sales queries in the natural English language and provides you with comprehensive sales analytics (report) to help you better understand your business for the selected hierarchy and quarter. It is preconfigured with keywords based on the sales terminology you use in your sales organization so you can use the same terminologies to get the desired reports. You can also pin the reports and create a dashboard.

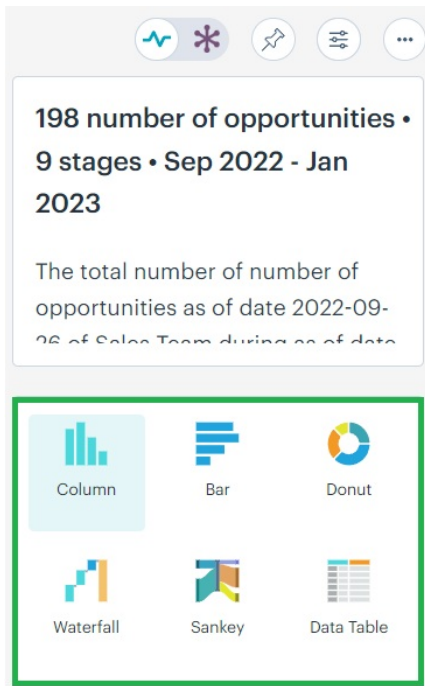
For example, you can enter “opportunities by stage” in the search bar, and it will show the amount (opportunity) by various stages such as prospecting, qualifying, confirmation, and so on. There are more examples [later on this page](#).



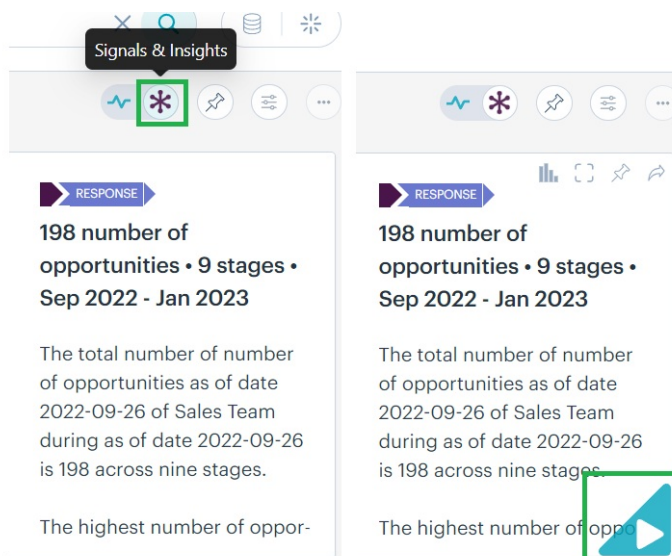
- These filters let you further drill down and view more actionable sales insights.



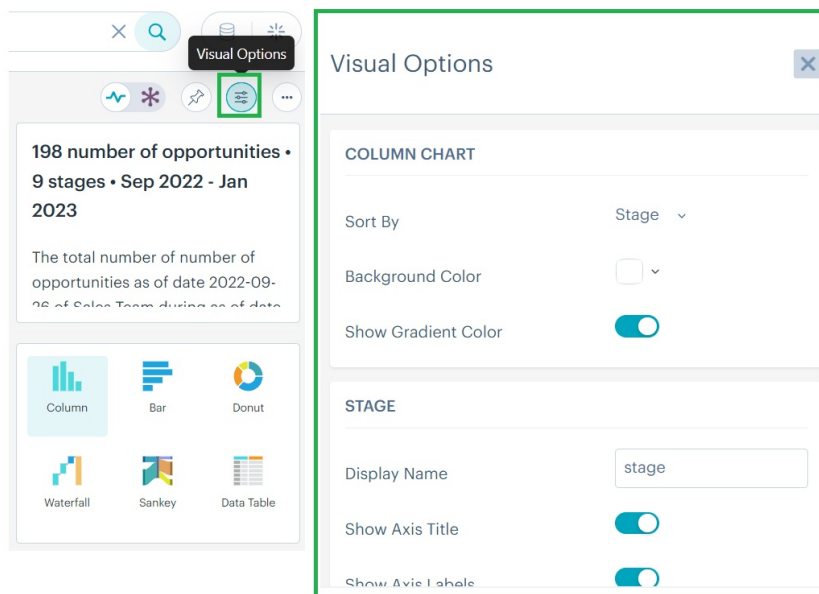
- You can select from multiple ways of visual representation to look at the data, such as Stacked bar graph, Stacked Column graph, and so on. Clicking on any bar in the graph allows you to drill down further to know the details of any information.



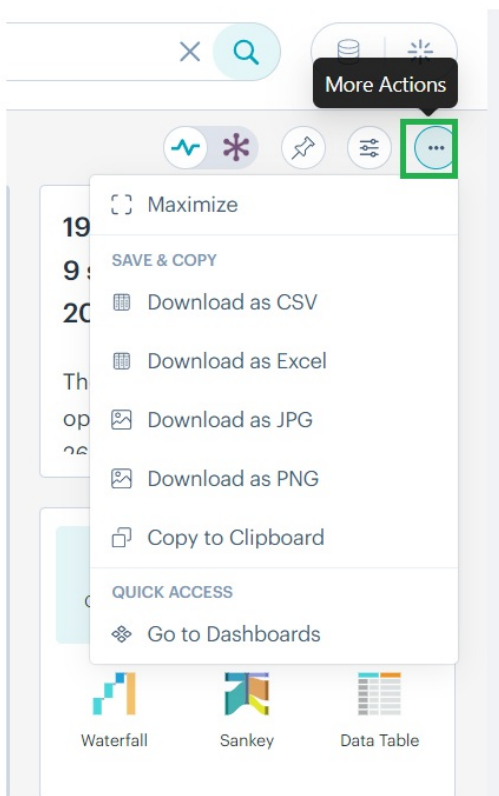
- Click on Signals & Insights icon to view the sales insights generated by NLP Analytics. When you hover over the insights, a Play icon appears at the bottom of the insights section that lets you play a video format of the insights.



- Click Visual Options to customize the graphs with different colors and customization options.



- You can maximize the insights view, download the insights into various formats, and go to the Dashboards by clicking on the menu icon.

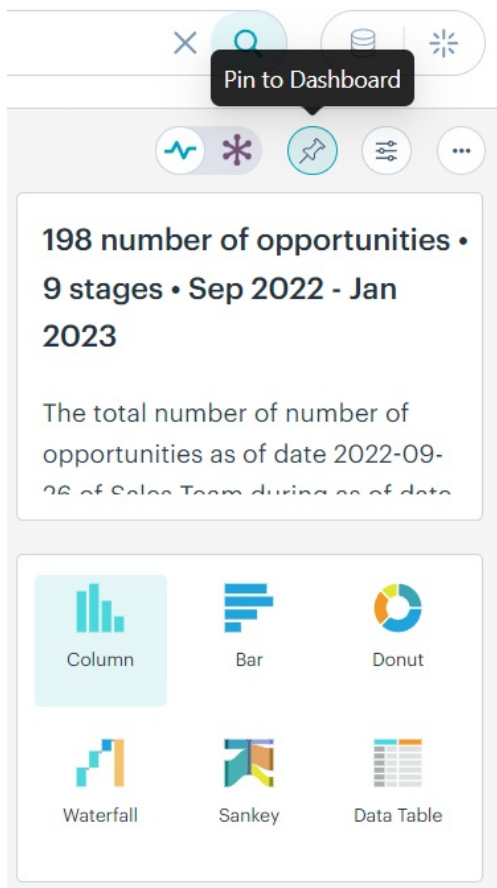


Create and manage dashboards with NLP Analytics

You may use some of the sales queries (NLP Analytics reports) very often and want to pin those so you can open those reports with one click. NLP Analytics lets you pin reports and create intuitive dashboards.

To create a dashboard from NLP Analytics, you can first generate a report, pin it, and create a dashboard. Alternatively, you can also visit the dashboard section first, directly create a dashboard, and add reports to it.

1. When viewing a report, click the Pin to Dashboard icon.



2. Under Pin to Dashboard, perform the following.

Pin to Dashboard



START FROM SCRATCH

FIND A DASHBOARD TO PIN

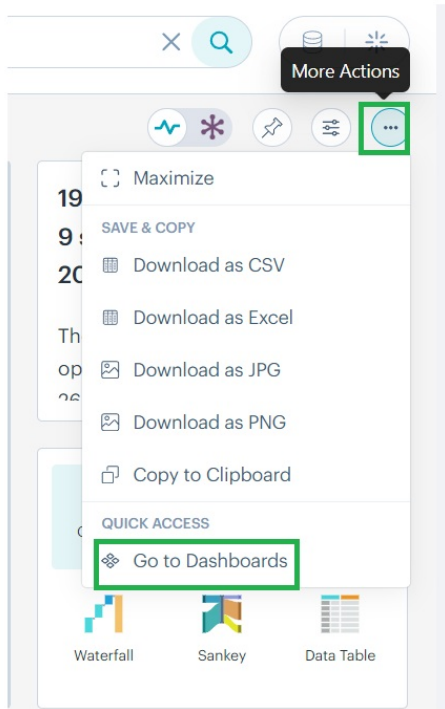
☐ NLP Reports

NOTES

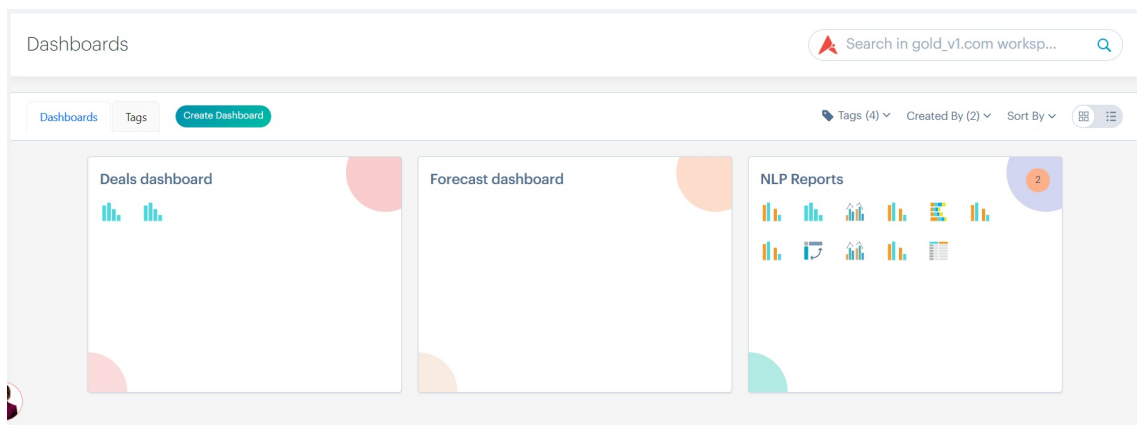
B *I* U ~~S~~

Submit

- a. If you want to create a new dashboard, enter a name of the dashboard in the **Create a dashboard to pin** field.
 - b. If you already have a dashboard and you want to add this report to the existing dashboard, find the dashboard by entering the name of the dashboard in the **Find a dashboard to pin** field and select the dashboard.
3. You can enter any note about the report in the **NOTES** field. It's an additional information you can add that would appear above the report on the dashboard.
4. Click **Submit**.
A confirmation message appears.
5. Click **More Action** (Menu icon) > **Go to Dashboard** to view your dashboards.

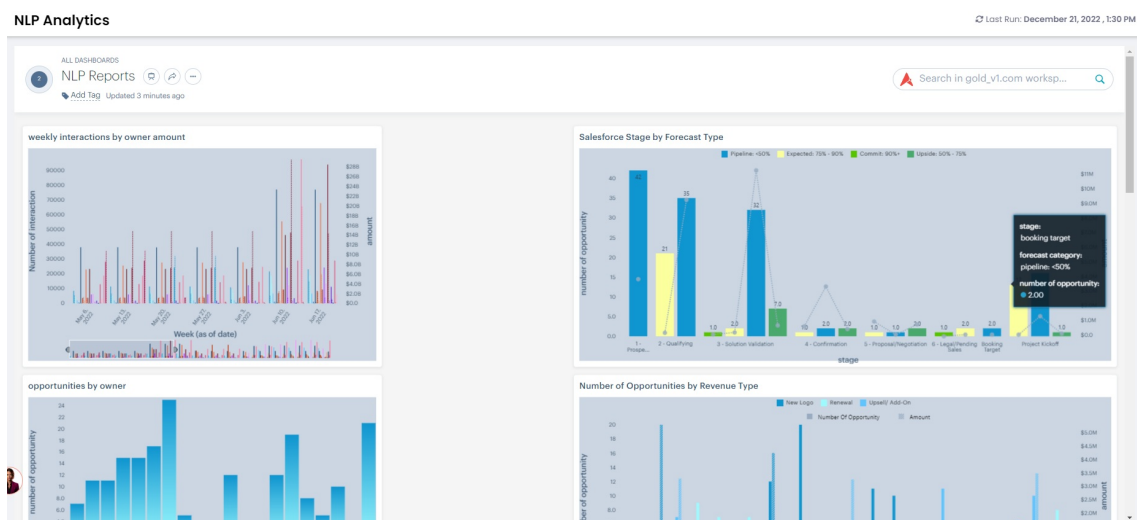


The Dashboard screen appears and shows all your existing dashboards.

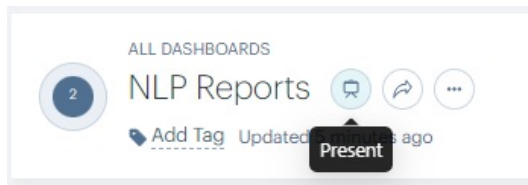


6. Click on the dashboard you want to open.

Your dashboard opens and gives you more useful actions to present, share, and manage the dashboard.

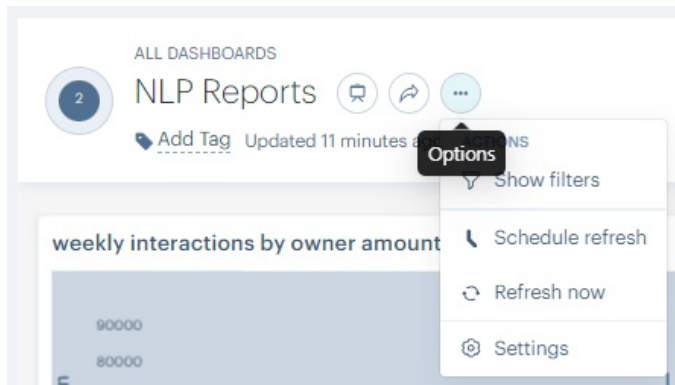


7. Click the Present icon to generate a presentable format of the report. You can use it to present in a meeting.

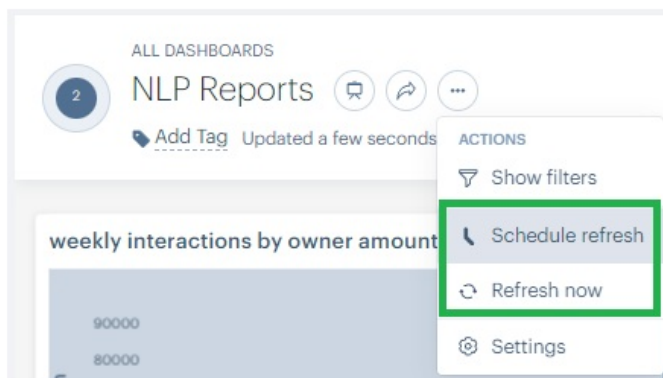


8. Click the [Share icon](#) to share the report (editable or read-only) with the other team members.
9. Click the Menu icon and then click **Show filter** to open the filters.

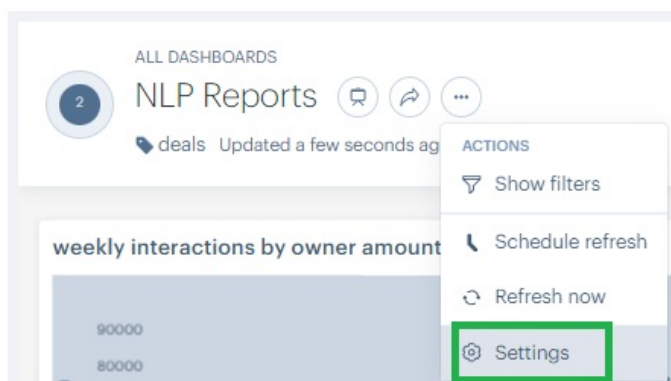
There are predefined attributes configured based on your sales data and specific terminologies you use in your sales organization. You can use those attributes to apply more filters on the dashboards and get your desired sales insights.



10. When you open a dashboard on the NLP Analytics screen, it is by default refreshed to fetch the latest data. It is also refreshed at every 10 minutes. However, if you want you can schedule refresh or refresh at the moment by clicking **Schedule refresh** or **Refresh** respectively.



11. Go to **Settings** to update your dashboard such as changing the name, adding tags, and note.



The Setting section also gives details of the dashboard such as any scheduled refresh, who created a dashboard, last modified, and so on.

Dashboard Settings

NAME

NLP Reports

CODE

1187ab65-e00a-42da-ae9e-06c594dfb48a

NOTES

TAGS

deals

+

CREATED BY

28c1081fc83756d6b3cc8dee81161222

CREATED AT

Mar 01, 2023

REFRESH SCHEDULE

Update

12. In the **Add tag** field, you can add a tag to the dashboard.

ALL DASHBOARDS

2

NLP Reports

Add Tag

REFRESH IN PROGRESS

Adding a tag is a way to categorize the dashboards. When you have multiple dashboards, along with the names, you can also use tags to categorize them.

NLP Analytics

Dashboards

Dashboards

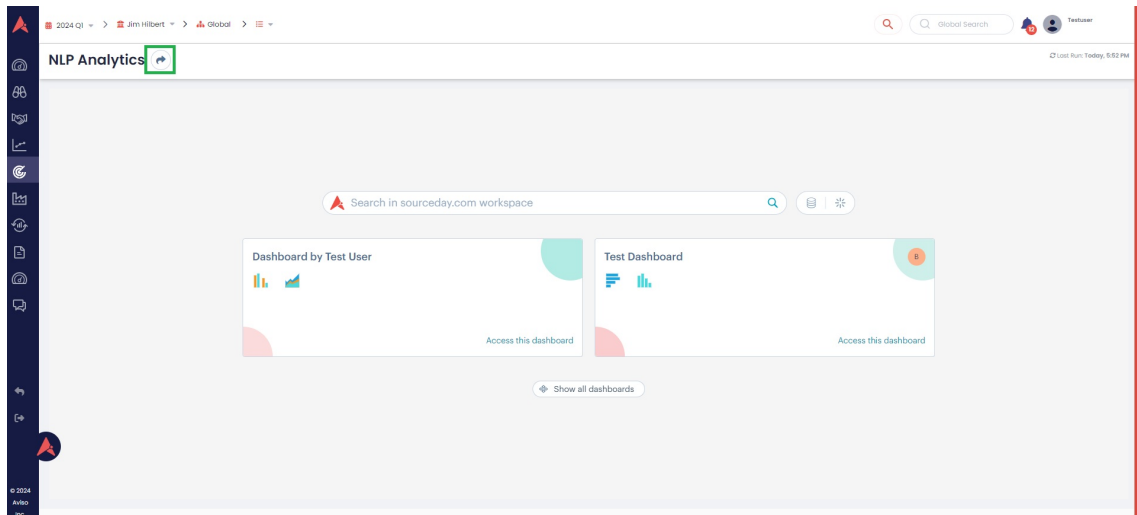
Tags

Create Dashboard

Share NLP Analytics Dashboards with other team members

Aviso NLP Analytics lets you share the dashboards with other team members (Aviso users). You can share a dashboard as a read-only or with edit options.

1. Go to NLP Analytics Dashboard page.
2. Click on the Share icon.



The "Share Dashboard" dialog box appears.

Share Dashboard
×

Select a Dashboard
▼

0 / 256

Share As:

Read Only
Editable

Share With

Find or invite a new user

VISHAL PANDEY
VISHAL PANDEY

TEST USER
TEST USER

Clear Selection

Share Now

- In the "Share Dashboard" dialog box, from **Select a Dashboard** dropdown list, select the dashboards you want to share.

If you shared this dashboard in the past with any team members, the dialog box shows the names of those members. The following screenshot shows that the user has shared the dashboard before with a team member with edit options.

Share Dashboard

Dashboard by Test User

I would like to share a dashboard Dashboard by Test User

56 / 256

SHARED AS READ-ONLY

SHARED AS EDITABLE

Share As: **Read Only** Editable

Share With

Find or invite a new user

VISHAL PANDEY
VISHAL PANDEY

TEST USER
TEST USER

Delete Dashboard Clear Selection Share Now

4. (Optional) Enter a note in the blank field below the **Select a Dashboard** dropdown list.
5. Select **Read Only** or **Editable** based on whether you want to share the dashboards as read-only or with edit options, respectively.
6. In the **Share With** field, enter the names of the team members with whom you want to share the dashboards.

If you previously shared a dashboard with any team members, their names appear below the **Share With** field. If you want to share the dashboard with these team members, select their names from the list.

As you can see from the following screen shot, there is a green color tick mark against the selected team member. This is to ensure that you are sharing the dashboard with the team members.

Share As: **Read Only** Editable

Share With

Find or invite a new user

VISHAL PANDEY ✓
VISHAL PANDEY

TEST USER
TEST USER

7. Click **Share Now**.

A confirmation message appears.

The shared dashboard appears on the recipient's NLP Analytics dashboard section.

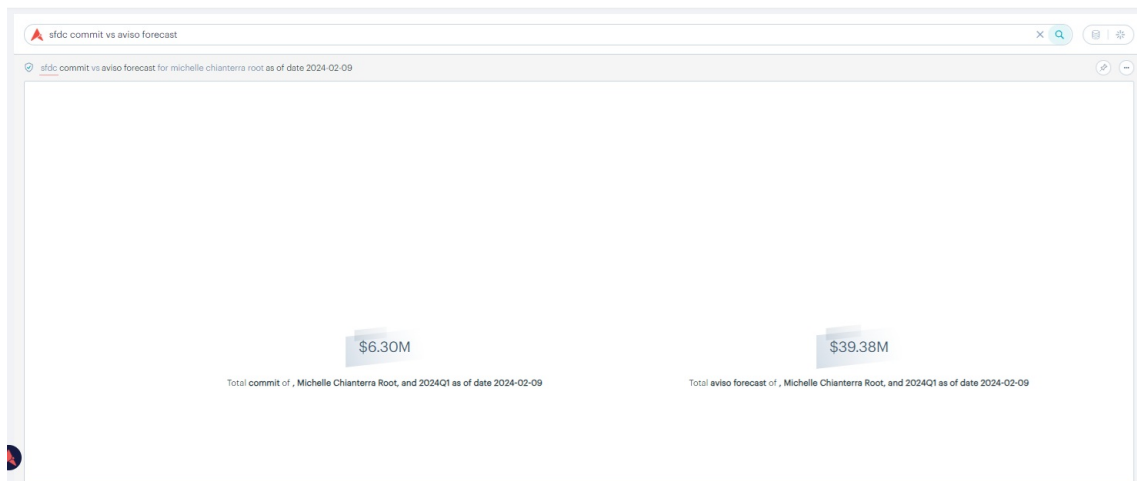
Examples: sample NLP Analytics queries

The examples of queries mentioned here are to help you better understand about the queries. It doesn't mean that you can only use these queries. You can run any query that is supported by your sales data.

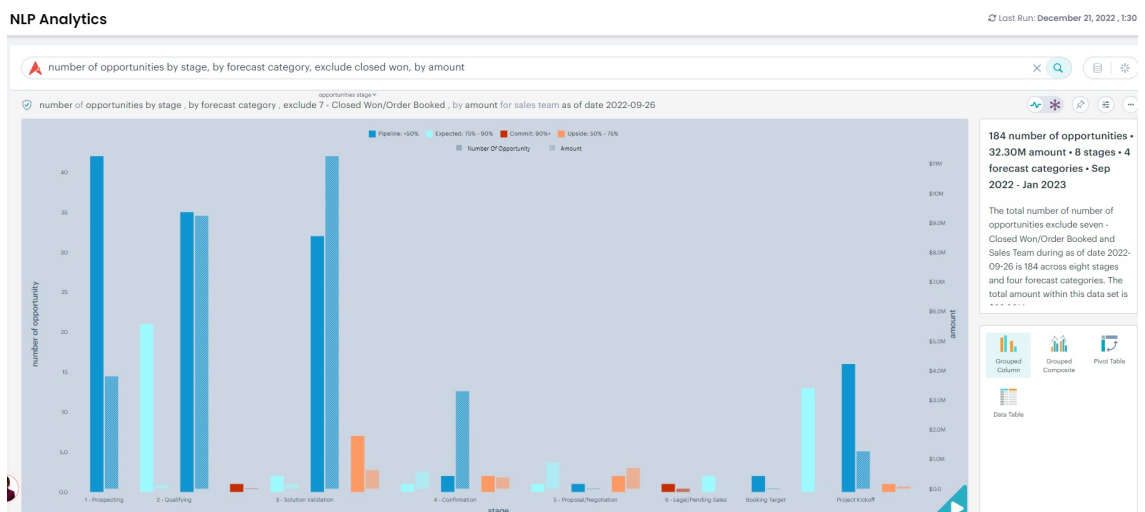
- Query: Deals by forecast category



- Query: SFDC commit versus Aviso forecast.
You can also add any specific date or quarter to it, for example, "SFDC commit vs Aviso forecast as of 10th February 2024."



- Query: Number of opportunities by stage, by forecast category, exclude closed won, by amount
In this query, we are excluding a particular category (closed won).



- Query: Number of opportunities by owner, by Upsell~~Add-on, New Logo, Renewal, by amount



View all the interactions of your contacts and insights into the interactions

The Accounts Relationship screen in Aviso AI gives you account-wise and contact-wise all the interactions and insights into the individual interactions. You can see how many times and by which means for an account and which owners have interacted. Clicking any interaction gives you details such as engagement ratio, number of inbound calls, outbound calls, and meeting in a particular time period, last interactions made, most engaged owner, and least engaged owner. From the Accounts Relationship screen, you can easily evaluate how effectively you and your team members are maintaining the relationship to close a deal.

Accounts Relationship

286 Accounts [Export Data](#) [Customize Layout](#)

Search Accounts Name/Account Owner

ACCOUNT NAME	ACCOUNT OWNER	EMAIL SENT	EMAIL RECEIVED	TOTALS MEETL	UPCOMING M.	FILES SENT	FILES RECEIVED
☆ Fast Proof 10 Deals		0	0	0	0	0	0
☆ Consultant 19 Deals		0	0	0	0	0	0
☆ Multi Color Corp 6 Deals		0	0	0	0	0	0
☆ Halloween Howl 9 Deals		0	0	0	0	0	0
☆ Bella Outdoors 9 Deals		0	0	0	0	0	0
☆ Dance Society 1 Deals		0	0	0	0	0	0
☆ Lingooage 14 Deals		0	0	0	0	0	0
☆ Acumentor 12 Deals		0	0	0	0	0	0
☆ Raising Music		0	0	0	0	0	0

Leverage ICP and increase conversion rates

Ideal Custom Profile (ICP) score helps to understand how well an account fits the ideal target account characteristics. Account Owners can leverage ICP insights to engage their accounts to move them closer to the ICP characteristics. The ICP characteristics are determined based on analysis of the historical wins so that the account characteristics are aligned with the success criteria of the organization. This will help to pursue their accounts for below benefits or scenarios:

- **Focused targeting:** ICP helps identify and focus on the most promising prospects, allowing sales and marketing efforts to direct towards those most likely to convert.
- **Improved messaging and communication:** Knowing the ideal customer's characteristics allows for tailored and more personalized marketing and sales messages, increasing the chances of resonating with the target audience.
- **Higher conversion rates:** Targeting customers who fit the ICP increases the likelihood of converting leads into customers, as they are more likely to find value in the product or service.
- **Reduced sales cycles:** By focusing on customers who are a good fit, the sales process becomes more efficient, leading to shorter sales cycles and quicker decision-making.
- **Increased ROI:** Targeting the right customers results in a higher return on investment, as resources are channeled into areas where they are most effective.
- **Better product development:** Insights gained from understanding the ICP can be used to refine and improve products or services to better meet the identified customer needs.

How to find your ICP score in Aviso

1. After you log in to Aviso, from the left menu, click **Account**.
2. On the Account page, find ICP score column to get the ICP score associated with every account.
3. Click on the info icon beside the ICP score to view the ICP insights associated with the ICP score.

The screenshot shows the Aviso Account page with a table of accounts. The table has columns for Account Name, Account Owner, Engagement, Time Spent, Contacts, Emails, Files, Exec Touched, and ICP Score. The ICP Score column has a threshold of 25. A tooltip titled 'ICP Parameter' is visible, providing insights for medium accounts in the United States.

ACCOUNT NAME	ACCOUNT OWNER	ENGAGEMENT	TIME SPENT			CONTACTS		EMAILS		FILES		EXEC TOUCHED	ICP SCORE P Threshold: 25
			Inbound Emails	Outbound Emails	Meetings	In CRM	Not in CRM	Outbound	Inbound	Outbound	Inbound		
		A+	31%	31%	37%	3	53	254	238	0	0	0	32
		A+	22%	15%	62%	13	132	503	736	0	0	3	36
		A+	34%	33%	31%	3	54	276	267	0	0	0	30
		A+	10%	6%	83%	2	40	229	384	0	0		
		A+	10%	13%	75%	5	10	151	160	0	0		
		A+	6%	6%	86%	2	28	45	42	0	0		
		A+	8%	11%	80%	4	19	105	115	0	0		
		A+	29%	13%	57%	4	19	200	266	0	0		
		A+	21%	19%	59%	3	19	122	147	0	0		
		A+	0%	1%	98%	2	35	62	103	0	0		
		A+	20%	13%	65%	5	38	238	328	0	0		
		A+	15%	11%	73%	4	15	141	188	0	0		
		A+	0%	0%	98%	3	130	820	722	0	0	2	0

ICP Parameter

- Medium accounts (in revenue) in United States may not convert to won opportunities.
- Deals from United States based accounts are not likely to convert into won opportunities.
- Deal size for United States based accounts are usually 6% smaller than average (\$45K).
- Sales cycle for United States based accounts are usually 1% larger than average (138 days).

Enrich your contact data and stay on top of your leads without manually updating the CRM contacts

Having a rich contact database is key to closing more deals, but it requires the sales reps to manually update their CRM contacts to enrich the same. The process of manually updating the contact database also wastes sales rep's precious time. There are contact details hidden in many internal and external sources, which a rep can easily miss to store.

Aviso AI scans through various internal and external data sources such as meetings, emails, and calendars, notifies you of any new contacts or updates to the existing contacts, and updates the CRM contact database upon your approval. This way, Aviso AI helps you stay on top of your leads and lets you use your valuable time to focus on closing more deals.

After you log in to Aviso AI, from the left navigation menu, click **Contacts** to open the Contacts screen. The Contact screen shows new contacts suggestions, updates to the existing contacts, and recently added and ignored contacts. You can sync all the updates at once or check them and sync them one by one. When you check every contact, you have the option to sync data from Email signatures or third-party sources. When you update any contacts without checking or update multiple contacts together, by default, updates from the email signature are synced. The following image shows Contacts screen.

The notification also appears under the **Relationship** tab in the Deals screen. Clicking **View** in the notification opens the Contacts screen.

Click the menu icon (☰) next to the Contacts to view the recently added, ignored, or available contact details to add to your CRM contacts. From **Show contacts details** for dropdown list, you can select a prospect to narrow down the results and see only the contacts of the selected prospect.

Select one of the following cards to view available updates and add the updates to your CRM contacts.

- **Updates available for contacts in CRM** - Click **View these Contacts** on this card to view

the list of existing contacts from your CRM with available contact details to update. Click **Sync contacts to CRM** to update your CRM contact database with this information in one click.

- **New contacts available to sync with CRM** - Click **View these Contacts** on this card to view the list of new contacts found in your email or third-party sources. These are the contacts with only email IDs and names. The other details are not available. Click **Add Contacts to CRM** to add these contacts to your CRM contact database in one click.
- **New contacts with updates available to sync with CRM** - Click **View these Contacts** on this card to view the list of new contacts found in your email. These contacts have the details such as name, email ID, title (current designation), seniority, telephone number, and engagement grade if interacted with them in the past. Click **Add & Sync contacts to CRM** to add these contacts and sync the details with your CRM contact database in one click.

While viewing the list of new contacts or contacts with available updates, you can review the contacts one by one. When you click a contact, the Enrich Contact dialog box appears and shows you all the available updates from email signature and the third-party vendor. You can select **Data from the Email Signature** or **Data from the Thirdparty vendor** and then click **Enrich & Sync Contact** to sync the data to CRM.

Enrich Contact

Email ID
irena@xyz.com

Contact First Name
Irena

Contact Last Name
Yates

Account Owner
Irena

Account Name
IrenaYates

Contact Owner
Irena Yates

☐ Data from the Email Signature

☒ Data from the Thirdparty vendor

Contact Title 
Senior Director

Contact Seniority
Mid Seniority

☐ Director

Phone Number

 +1

Director of Employee Productivity

Street Address
2972 Westheimer Rd.
Santa Ana, Illinois

City 
Manhattan

State 
New York

☐ Newport Beach

☐ California

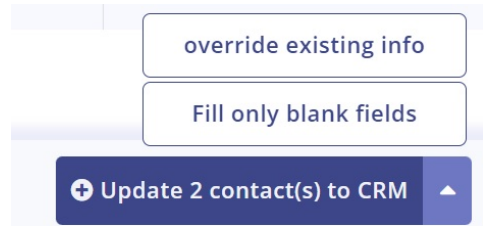
Country
United States of America

ZIP Code
154903

 Enriched Data

Enrich & Sync Contact

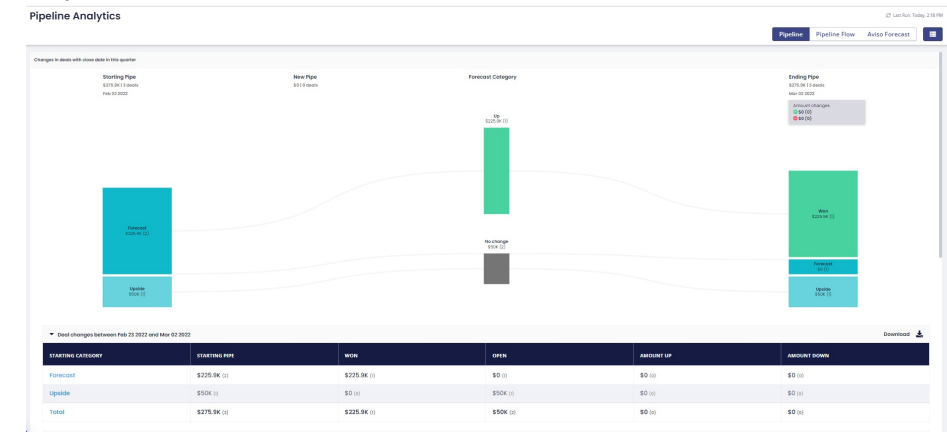
You can also select the contacts from the list and click **Update contact(s) to CRM** or **Add contact(s) to CRM** button at the bottom to sync the available contact details with the CRM or add the new contacts to the CRM respectively. You can also click the upward arrow () icon on the **Update contact(s) to CRM** button to override the existing information in the CRM or update only the blank fields.



View comprehensive sales analytics to understand your sales performance over a range of time

It's important to know how your deals in every category move and the flow to understand how your pipeline and forecast were changed. For example, why a commit deal was not closed, how a pipeline deal was delayed, and so on. But with huge quantity of data and attributes make it's hard to get the data from CRM and study using an excel sheet. The Analytics screen in Aviso AI, with its intuitive UI, displays a sankey chart to give you insights into pipeline flow between any two points. The Sankey chart helps you easily review deals that had positive, negative, or no moment, dive deeper into each flow, and review pipeline changes within the forecast.

After you log in to Aviso AI, from the left menu bar, click **Analytics** to open the Analytics screen. By default, the Analytics tab shows these changes in a week from the present day. However, if you want to see the changes with a different time frame, go to the Trend screen and select two points from the deep blue line that indicates the forecasts line.



Select **Pipeline**, **Pipeline Flow**, and **Aviso Forecast** to view the change in pipe, deals (closed or lost), and forecast respectively. Hover your mouse cursor over a change to see more about the change. Click a flow in the chart to open details of the associated deal such as Aviso Win score, name of the owner, difference in contribution, change in amount, and the reasons that contributed to the change. You can download the analytics data by clicking the download () icon.

Maximize your leads potential with Aviso Leads Intelligence

Aviso Lead Intelligence is a comprehensive tool designed to streamline lead management and maximize conversion potential for businesses. It features a centralized leads dashboard for a holistic view of leads, advanced leads analytics for deep insights into lead behavior and trends, and a lead scoring system that indicates the likelihood of leads converting into buyers. By leveraging data from your CRM, Lead Intelligence empowers businesses to prioritize their efforts efficiently, make informed decisions based on data-driven insights, and ultimately boost conversion rates, driving growth and success in their sales and marketing endeavors.

Key benefits

- Improved Efficiency:** By prioritizing high-quality leads, you can focus your time and resources where they matter most, maximizing your chances of success.
- Better Decision-Making:** With access to detailed analytics and accurate lead scoring, you can make data-driven decisions that drive your business forward.
- Increased Conversions:** By targeting the right leads at the right time, you can significantly increase your conversion rates and ultimately grow your revenue.

Get started with Lead Intelligence

After you log in to Aviso, from the menu, click **Lead Intelligence** to open the Lead Intelligence screen. The Lead Intelligence screen appears and gives a comprehensive view of the details of your leads.

Adhoc Query14

Search Leads

LISTMAPDashboard

Add

<>SaveSave As

Lead Intelligence

Last Run: December 21, 2023 , 1:30 PM

	LEAD NAME	TITLE	COMPANY	BUYING CENT...	REGION	COUNTRY	SDR A:
★	Ted Williams	CRO	DePort	Research and Devel...	North America	USA	Kevin
★	Sadie Read	Executive Assistant	Electrolux	Research and Devel...	North America	Canada	Alma
★	Michael Jordon	Sr. Director Marketing	Electrolux	Sales	Europe	Belgium	Shauri
★	Raleigh Isaac	Director Inside Sales	Logic Monitor	Research and Devel...	Europe	France	Kevin
★	Mark Richards	Sr. Director	Splunk	Investment Banking	APAC	India	Praty
★	Stephenie Mcelligo	CRO	MongoDB	Sales	South America	Brazil	Max T
★	Ben Macdonald	Sales Development ...	Task Force	Marketing	South America	Ecuador	Leela
★	Steve Litany	Sales Manager	Fluke	Logistics	APAC	China	Paty

Select a value from the filter to view some specific leads. Select **All Leads** to view all the available leads. You can also create a filter and add by clicking **+Create**.

NAME	TITLE	COMPANY
Stephenie Mcelligo	CRO	MongoDB
Ben Macdonald	Sales Development ...	Task Force

Aviso refreshes the leads details by fetching live data from your CRM at a specified interval. However, you can also manually refresh by clicking on the refresh icon at the top.

Find lead details and insights

On the Lead Intelligence page, you can click on any lead to open lead details such as lead name, country, email ID, buying center, SDR assigned, lead score, and so on, and insights about the leads, such as lead score over time and engagement over time.

Lead Name	Ted Williams
Title	CRO
Company	DePort
Buying Center	Research And Development
Region	North America
Country	USA
SDR Assigned	Kevin Pino
Aviso SDR recom...	Kevin Pino
Lead Score	45
Status	Converted
Priority	Normal
Email	

Leverage Aviso SDR recommendation to better assign SDR and convert a lead

Find the lead score assigned to a lead

Aviso lead score is a numeric score that indicates the likelihood of a lead converting. It is evaluated considering various positive events such as demo requested from the lead, involvement of senior titles, meetings scheduled, and so on, and various negative events such as meetings declined, email not opened or not for over 30 days, and so on. Click on the information icon against any lead score to find the factors contributing to the assigned score.

Kevin Pino	i	45	i
Almas Ahmad	i	70	i
Shaun Siler	i	79	i
Kevin Pino	i	60	i
Pratyay Patil	i	60	i
Max Tarasevich	i	70	i
Kevin Pino	i	49	i
Robyn Meyer	i	56	i

Lead Score Explanations

Positive Score Events99

Event	Date	Score
Non-Senior Title	Aug 17 2022	21
Non-Senior Title	Dec 25 2020	62
Positive response to SDR email	Sep 16 2020	37

Negative Score Events-20

Total79

Leverage leads map to prioritize your leads

Search Leads

LISTMAPDashboard

<>

High Lead Score and Converted3

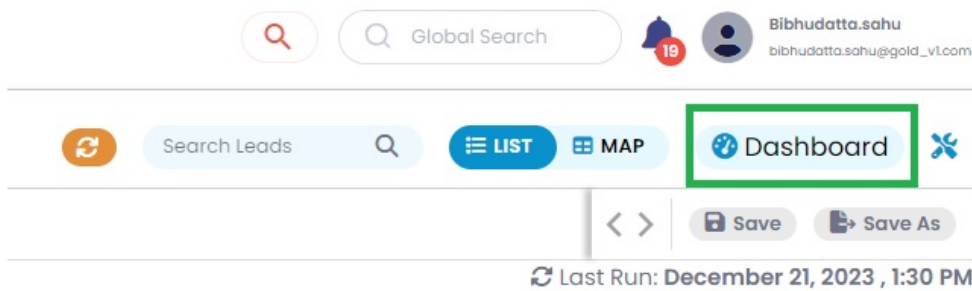
High Lead Score and Open4

Low Lead Score and Converted2

Low Lead Score and Open2

Stay on top of your leads using Leads Dashboard

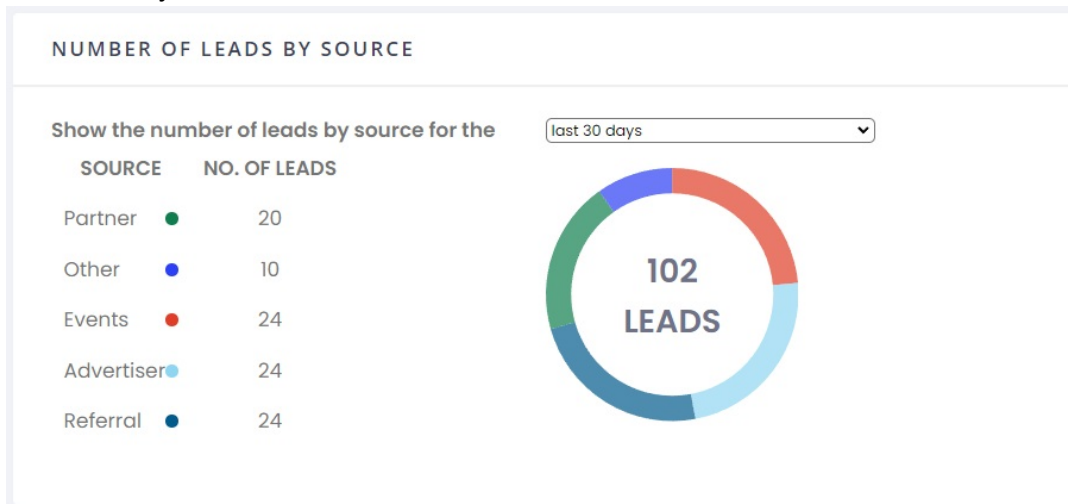
The Leads Intelligence dashboard provides you with a comprehensive overview of your leads and valuable insights to optimize your lead management strategy. On the Leads Intelligence page, click **Dashboard** to open the Leads Intelligence Dashboard.



The Leads Intelligence Dashboard features the following reports:

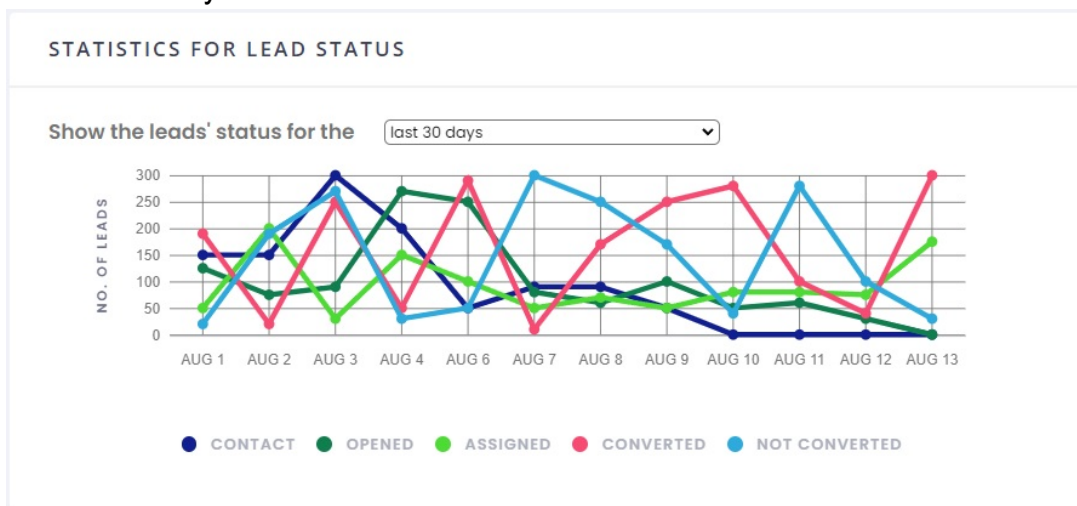
Number of Leads by Score

This report categorizes your leads based on their assigned scores, helping you identify high-potential leads that are more likely to convert into customers. From the dropdown list, you can select the number of days.



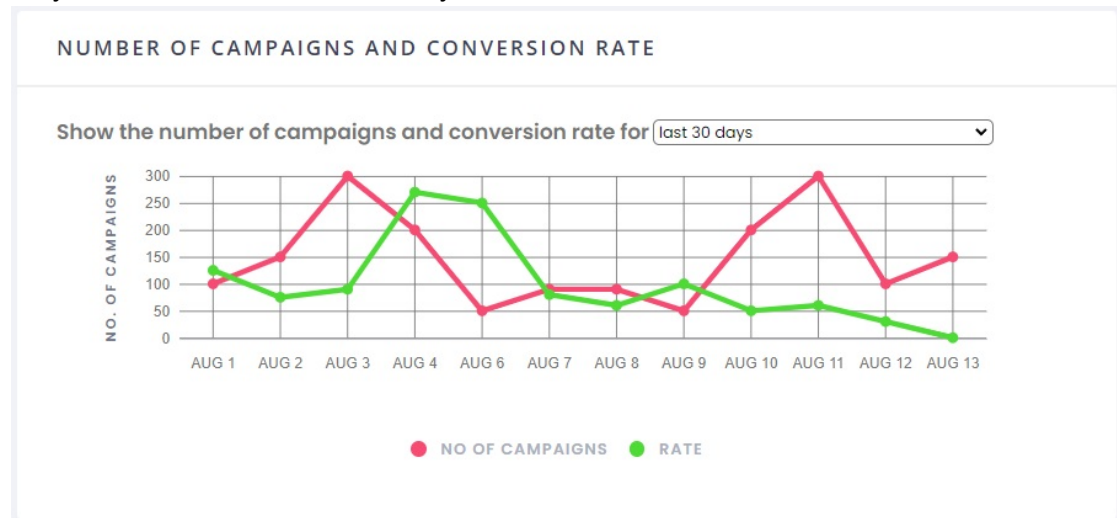
Statistics for Lead Status

Gain insights into the current status of your leads, including how many are in different stages of the sales process such as new, contacted, qualified, and closed. From the dropdown list, you can select the number of days.



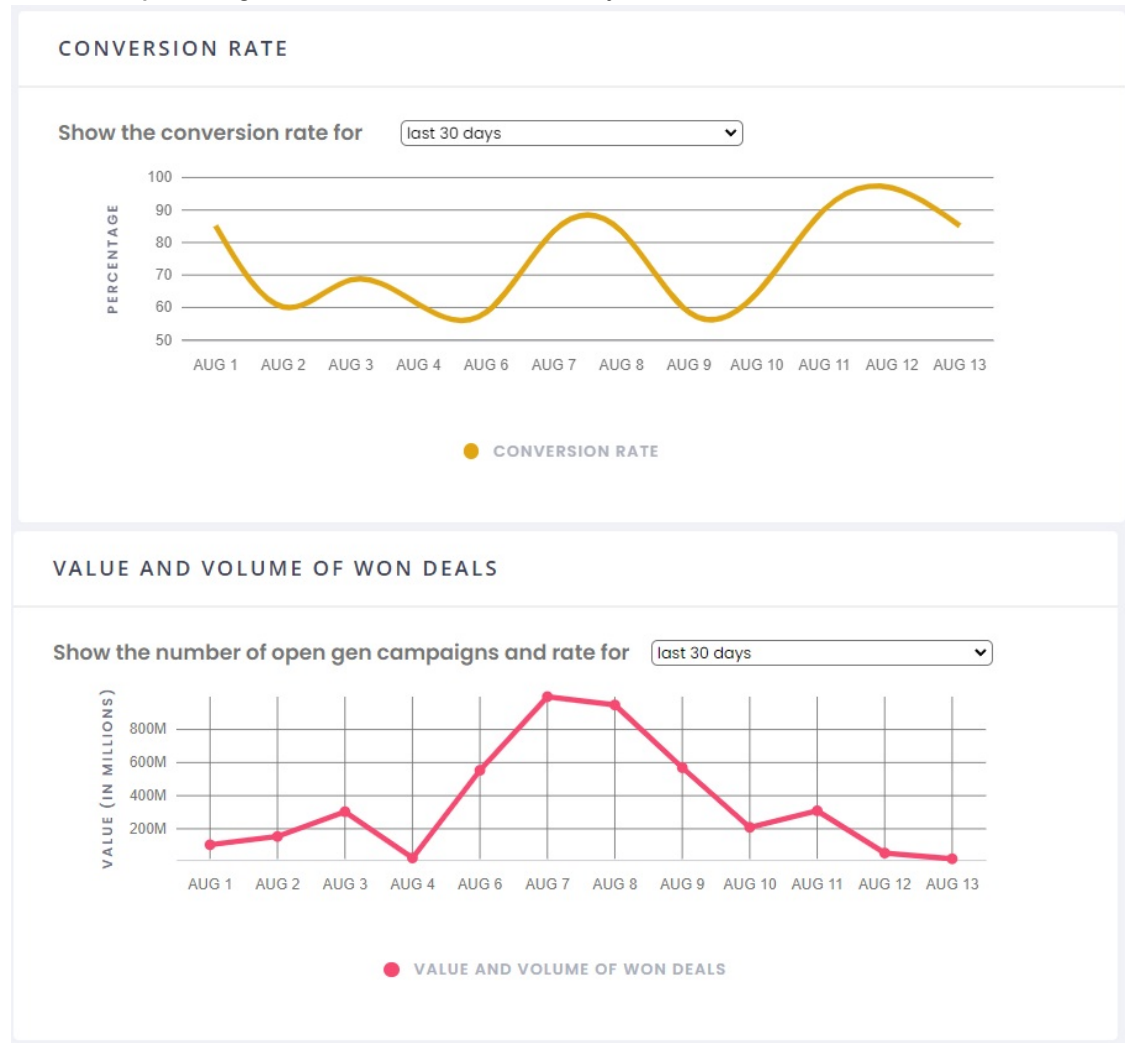
Number of Campaigns and Conversion Rate

Track the performance of your marketing campaigns by monitoring the number of campaigns launched and the conversion rate of leads generated through these campaigns. From the dropdown list, you can select the number of days.



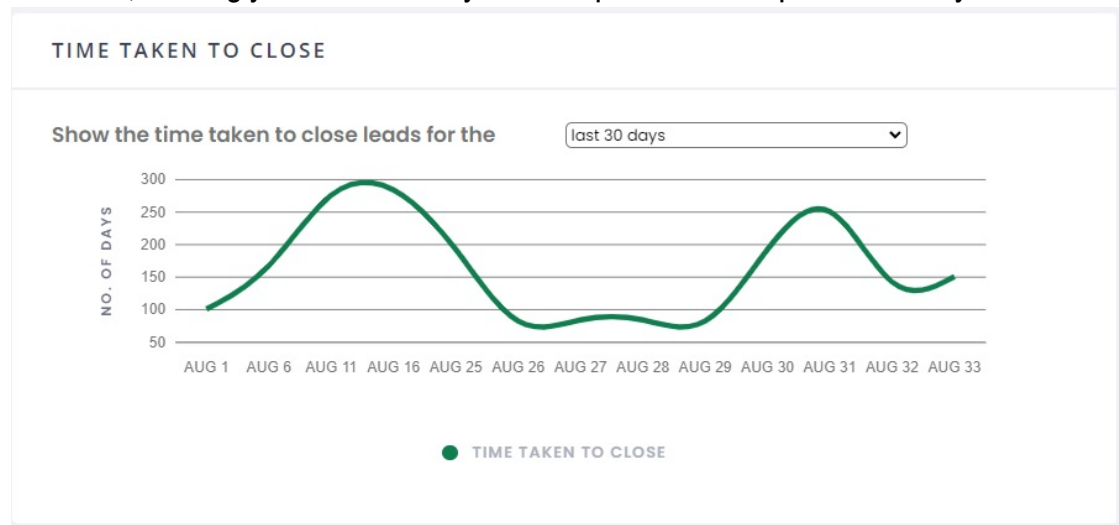
Conversion Rate, Value, and Volume of Own Deals

Get a detailed analysis of your conversion rates, the total value of deals closed, and the volume of deals won, providing valuable metrics to measure your sales team's effectiveness.



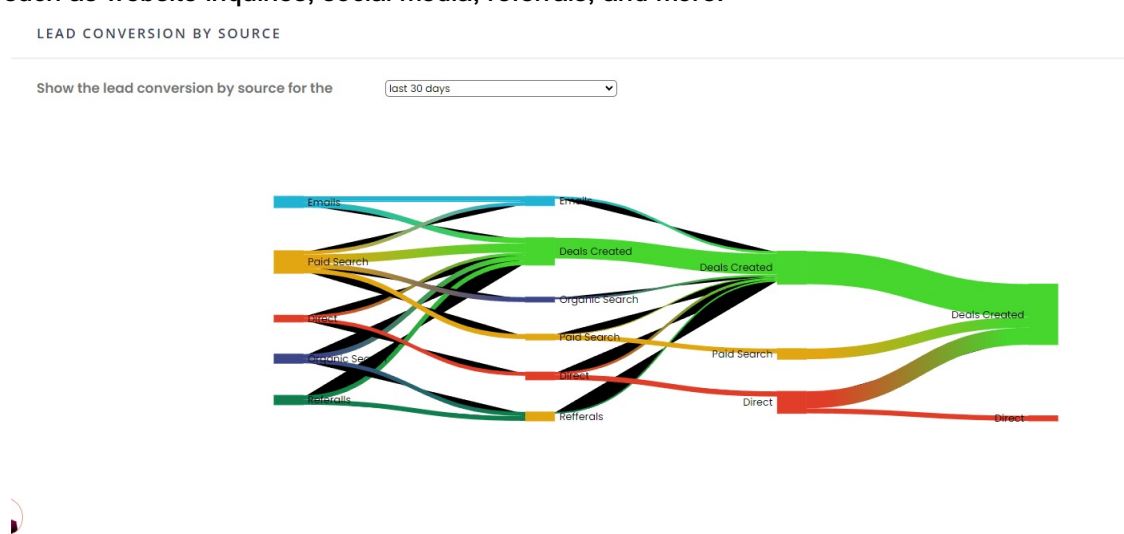
Time Taken to Close

Understand the average time it takes for leads to progress through the sales pipeline and convert into customers, allowing you to streamline your sales process and improve efficiency.



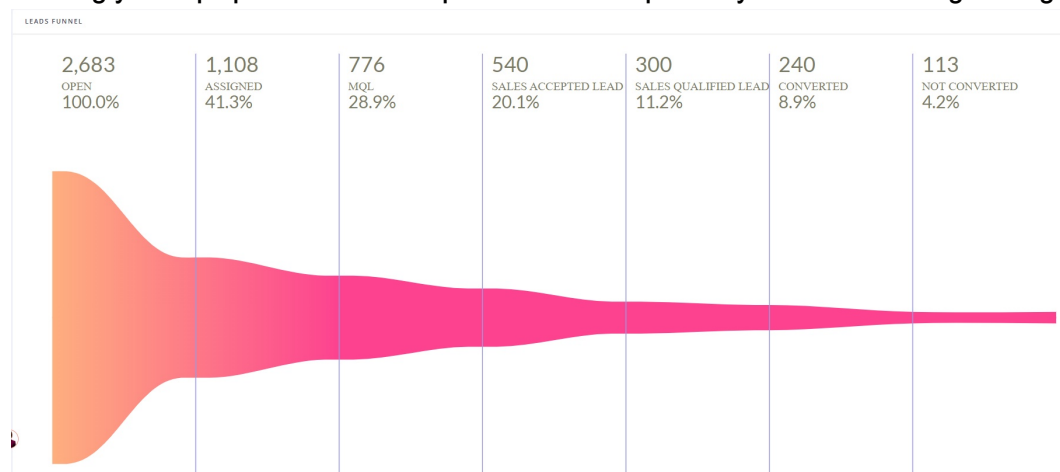
Lead Conversion by Source

Identify the most effective sources of leads by analyzing conversion rates from different channels such as website inquiries, social media, referrals, and more.



Leads Funnel

Visualize the journey of your leads through the sales funnel, from initial contact to conversion, enabling you to pinpoint areas for improvement and optimize your lead nurturing strategies.

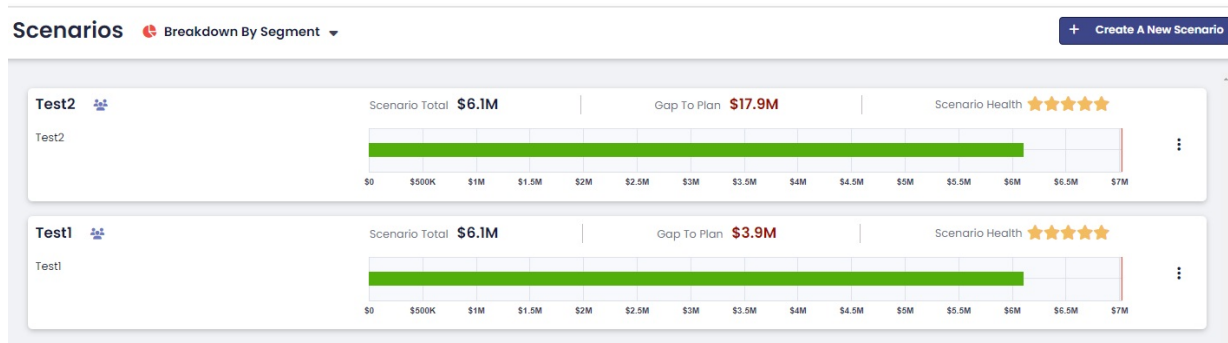


Optimize sales and gain strategic insights with Aviso's scenario-based forecasting

Scenario-based sales forecasting involves creating multiple scenarios or potential future situations based on different assumptions to predict sales outcomes. It offers a powerful approach by allowing businesses to anticipate different future scenarios and their potential impacts on sales. Scenario planning can help you identify opportunities and threats, assess risks and uncertainties, and develop contingency plans and strategies.

After you log in to Aviso AI, from the left navigator, click **Scenarios** to open the Scenarios screen.

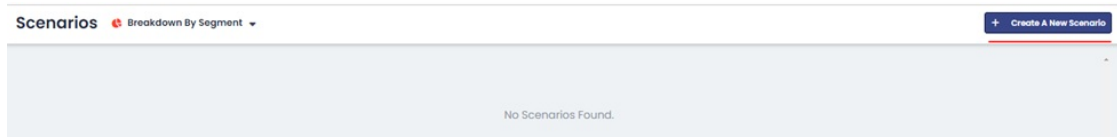
The Scenarios screen shows all the existing scenarios as follows. You can select a sales hierarchy or segment, if applicable, to view scenarios created with deals based on your selection.



Create a new scenario or edit an existing scenario

You can create as many scenarios as you want to create.

1. On the Scenarios screen, click **+ Create New Scenario** to create a new scenario.

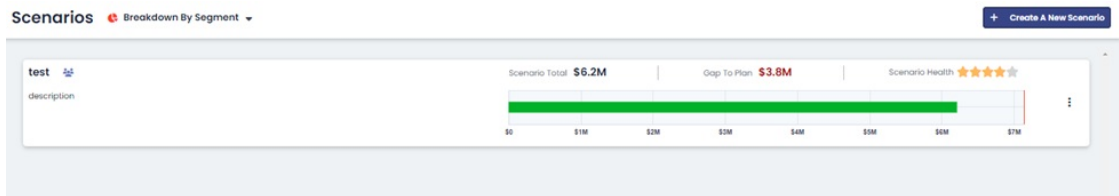


2. On the Create New Scenario screen, enter a name, description, and quota (plan value).

The screenshot shows the 'Create New Scenario' modal form. It has a title bar with a close button. The form contains three input fields: 'Scenario Name', 'Description (Optional)', and 'Plan Value'. The 'Plan Value' field has '0' entered. At the bottom right, there are 'Cancel' and 'Create' buttons.

3. Click **Create**

The newly created scenario appears on the Scenario screen.

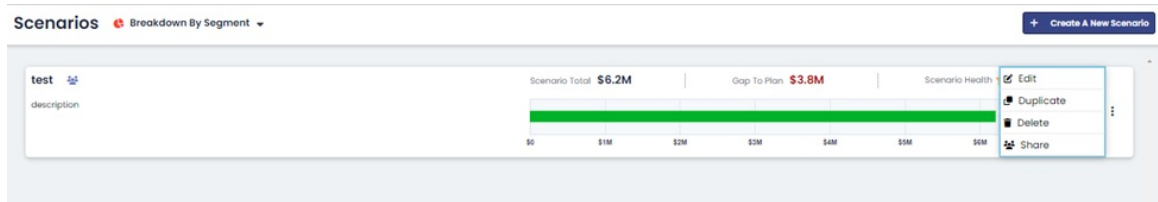


The newly created scenario, by default, creates a bucket with its own deals. Hence, on the Scenario screen, your newly created scenario shows a single color (Green) on the graph.

Note

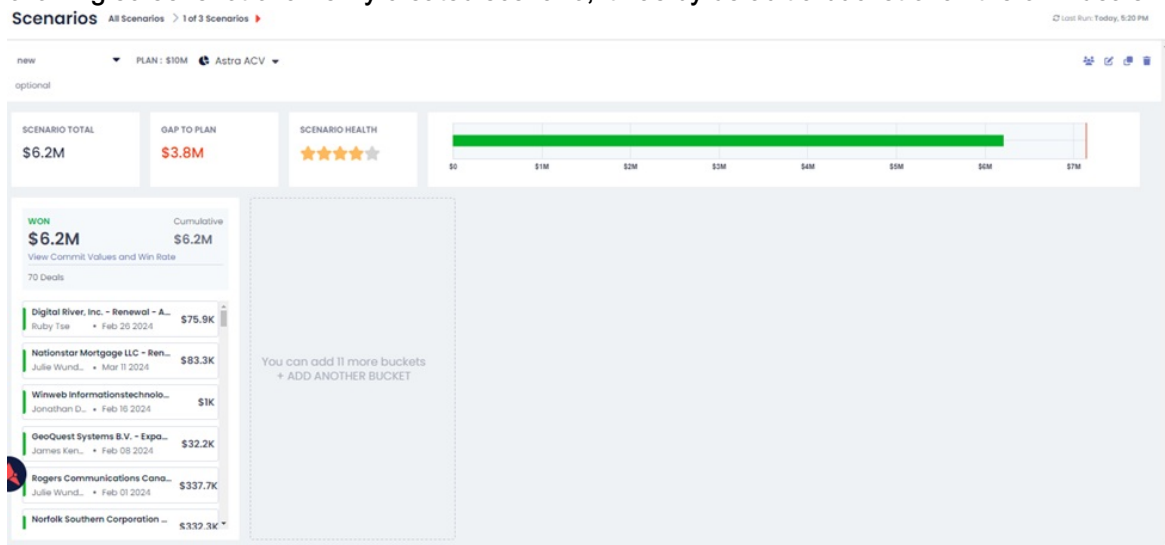
A bucket is a collection of deals that you can select and focus on.

To edit, duplicate, or delete a scenario or share a scenario with a team member, click the menu icon against the scenario and select the desired option.



View details of a scenario and create buckets

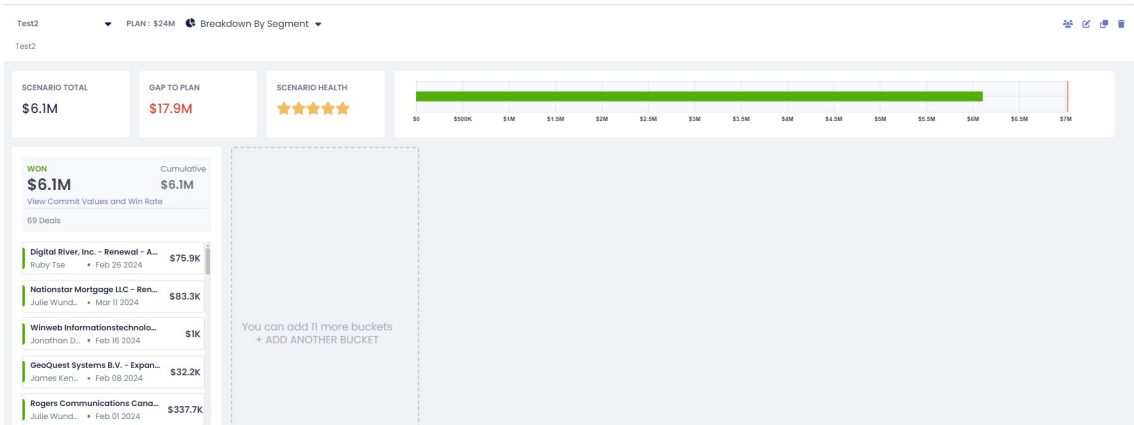
From the Scenarios screen, click on any scenario to open the scenario details. As you can see in the following screenshot of a newly created scenario, it has by default a bucket of all the own deals.



Note

In a particular scenario, you can add up to 12 buckets.

1. Click **Add another bucket** to add a new bucket to the scenario.



A dialog box appears and shows your available deals to select from.

Add Bucket

Bucket Name: Enter Bucket Name 2025 Q1 Breakdown By Segment

Selected 0 deal(s), and total amount \$0

All Deals 427 • \$40,277,690

NAME	OPP OWN...	DSE	REP FORECAST CAT...	CLOSE DATE	STAGE	SPRINT AM...	ACV	AGE	LAST STA...	NEW LOGO	NEXT STEP	AST...
Apple Inc. - Re...	Matt Graham	\$2,054,001	Commit	Mar 31 2024	3 Proposal	\$2,054,001	\$2,054,001	435	435	False	Mar-7-2024 MG...	
Yahoo! Inc. - Ex...	Todd Leisure	\$0	Upside	Apr 19 2024	3 Proposal	\$1,500,500	\$1,500,500	209	160	True	Mar-7-2024 TL Y...	
DTN, LLC - Rene...	Ruby Tse/Ch...	\$0	Commit	Mar 23 2024	3 Proposal	\$1,290,084	\$1,290,084	352	352	False	Mar-13-2024 RT...	
Priceline.Com, ...	Julie Wunde...	\$0	Commit	Mar 29 2024	4 Procurem...	\$1,140,000	\$1,140,000	957	2	False	Mar-13-2024 JW...	
Netapp, Inc. - R...	Mark Hupe/J...	\$1,108,603	Closed	Feb 05 2024	Booked	\$1,108,603	\$1,108,603	363	37	False	Feb-2-2024 JW: Roy...	
Fedex Corporat...	Mike Brumm...	\$1,050,000	Omitted	Apr 26 2024	1 Qualification	\$1,050,000	\$1,050,000	8	8	False	Mar-5-2024 MB...	
Qvantel Finlan...	James Kenn...	\$1,010,000	Upside	Apr 30 2024	3 Proposal	\$1,010,000	\$1,010,000	105	99	False	Mar-11-2024 JK J...	
FASHNEAR TEC...	Ruby Tse	\$0	Upside	Apr 07 2024	3 Proposal	\$700,350	\$700,350	267	267	False	Nov-29-2023 RT...	
Albertsons Co...	Julie Wunde...	\$616,823	Closed	Feb 02 2024	Booked	\$616,823	\$616,823	553	40	False	Feb-2-2024 JW: Purc...	
M&T Bank - Re...	Peter Weinb...	\$553,894	Commit	Apr 19 2024	4 Procurem...	\$553,894	\$553,894	328	28	False	Feb-15-2024 MG...	
The Home Dep...	Mark Hupe	\$0	Upside	Apr 26 2024	3 Proposal	\$500,000	\$500,000	844	0	False	Mar-13-2024 MH...	

Cancel Add Bucket

2. In the **Bucket Name** field, enter a name of the bucket you are creating.

Bucket Name: Test1 2025 Q1 Total

Selected 3 deal(s), and total amount \$4.3K

3. Select the deals you want to add to the bucket.

4. You can use filters such as hierarchy, segments, and deal types while choosing the deals.

2025 Q1 Global Global

All Deals 427 • \$40,277,690 Total

Views 1 selected + Create

Search Views

Standard

☒ All Deals 427 Deals • \$40,277,690

☐ Favorites 0 Deals • \$0

Cancel Confirm

OWN...	P	ENGAGE...	DSE
tt Graham	80	C-	\$2
ld Leisure	10	C-	\$1
oy Tse/Ch...	96	C	\$1
e Wunde...	94	D-	\$1
rk Hupe/J...	100	C	\$1
Fedex Corporat...	23	D-	\$1

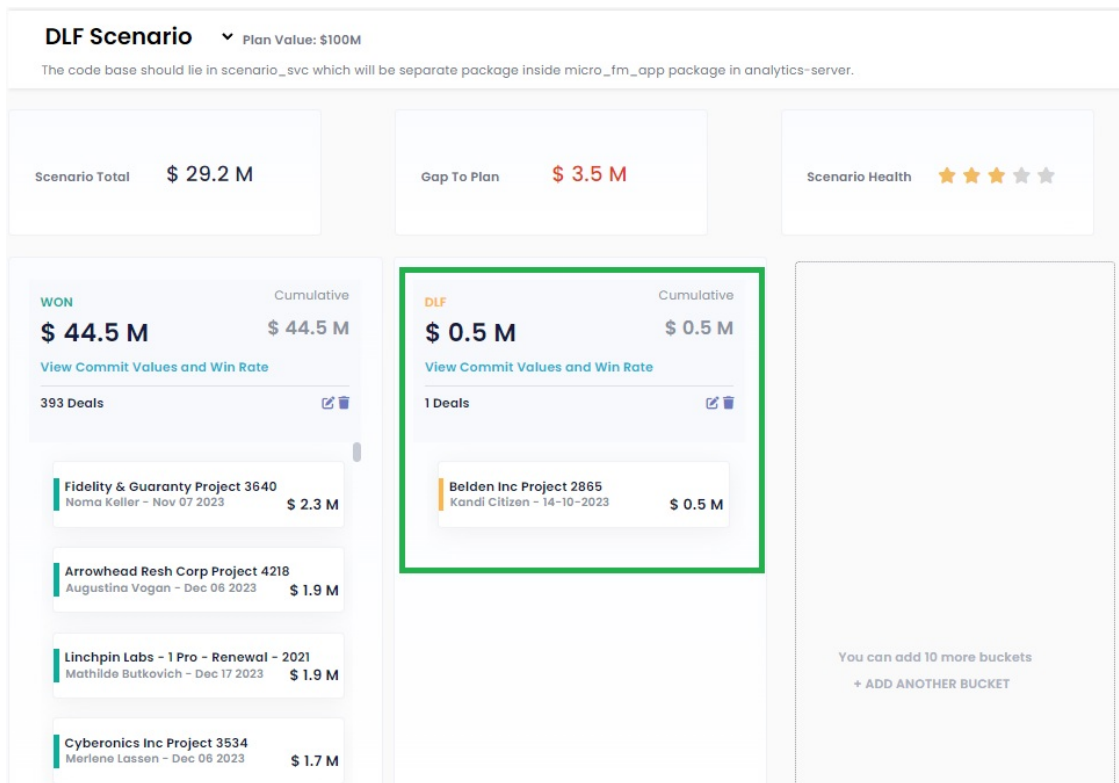
Note

You can add deals from future quarters also.

5. Select a color to use with the bucket.

6. Click **Add Bucket**.

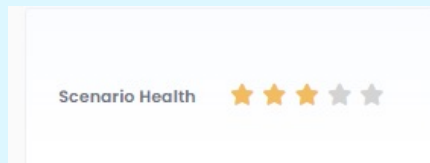
The new bucket is added to your scenario.



When you have multiple buckets in a scenario, you can drag and drop the buckets to change the sequence of the buckets.

Information

The scenario health indicates how close your scenario is to the plan. Every star shown here indicates 20% of 100 %. If your gap to plan is 20%, then you would get four stars; if it is 40%, then you get three stars.



Download various reports available with Aviso AI that can leverage to run your business better

The Reports screen in Aviso AI lets you view and download various reports on the ongoing sales and forecasts that can leverage to run your business better. After you log in to Aviso AI, from the left menu bar, click Reports to open the Reports screen. Click on any bar in the graph to view the details about it. You can also use various filters available with each report to shorten the data being shown in the report.

Here are the available reports that you can view from the Reports screen.

Forecast Reports	
Current Quarter Progression	This report provides summary of your sales performance, pipeline, and forecast for the current year.
Forecast Evolution	This report provides insights into evolution of your team's judgment over time compared to that of the last quarter taking forecast into consideration.
Pipeline Reports	
Pipeline Projection	This report provides current conversion rates compared to the same time in the last four quarters.
Pipeline Sales Funnel	This report provides conversion rates of opportunity in a particular time period.
Pipeline History	This report compares deal close dates against creation dates to track pipeline progression value.
Win and Loss	This report provides data on how many deals did you win and lose in a particular time period.
Pipeline Quality	This report provides a list of healthy deals with higher chances of getting closed in this quarter or the next quarter.
Sales Leaderboard	This report provides visibility into your team's deals closing in a particular time period such as month, two months, and quarter.
Pipeline Evolution	This report provides a summary of how your pipeline is evolved for the deals that are getting closed in a particular time period.
Pipeline By Risk	This report shows pipeline by risks across the stages.
Activity Reports	
Activity Type With Contacts	This report provides you with visibility into all the activities that your sales representatives are involved in a particular date range.
Account Engagement Activity	This report shows overall interaction with the buyers and highlights if there is any discrepancy.

Hunting Farming Reports	This report identifies whether the sales representative behaves like a hunter or farmer. This report highlights sales reps' outbound and inbound sales interactions and their key selling behaviors.
Early Signal Churn	This report shows if any potential deal is at risk due to less interaction in a particular time period such as a month, a quarter, and so on.
Active Inactive	This report shows the open deals in the current and next quarter categorized by different engagement grades.
Single-threaded versus Multi-threaded deals	This report shows if your sales representatives are properly engaged with all decision-makers from the buyers.
Rep Activity	This report shows how actively your sales representatives are engaged with the buyers.
Conversational Intelligence Reports	
Deals where pricing is mentioned	This report shows how frequently pricing was discussed by participants on a call. The report includes details on who mentioned the pricing and on which call. You can filter the accounts based on owner, categories, and stages. With stage filter, you can filter out early and late-stage deals where pricing is mentioned. It helps sales reps determine when it is appropriate to discuss pricing with prospects and adjust their strategy accordingly.
Competitive won deals	This report shows the percentage and value of deals won where competition is mentioned. During the initial configuration, your competitor names are updated.
Closing Deals without buyer's VP Participation	This report shows all the closing deals without the participation of VP from the buyer's side in the sales conversation. A deal that is closing without the participation of a buyer's VP indicates that the customer trusts the product and services of the seller.
Closing Deals with internal VP Participation	The report shows all the closing deals with the VP's participation from the seller's side in the sales conversation.

Examples of some reports

Pipeline Movement report

Here is an example of the Pipeline Movement report.



Click on any column on the report such as Starting Pipeline, New Opportunities, Pulled in - Pushed out, and so on to see the respective reports in tabular format. In this example, I clicked the **CLOSED-WON** column and the following report appeared showing all the closed-down deals in the quarter. Click any deal name on any report to open the deal details screen.

CLOSED-WON \$29M • 349 Deals

Name	Owner	Amount (in \$)	Category	Close Date
Broad and Cough Man Implementa...	Fredricka Liu	\$13.5M	Pipeline	2022-12-18
Mail Content Implementation Pr...	Mia Hamm	\$9.5M	Pipeline	2023-01-08
ExoTelephone.com License Deal	Phylliss Works	\$2.1M	Omitted	2022-11-04
VELOCITIZE.COM License Deal	Ulysses Veitch	\$639.6K	Pipeline	2022-11-19
Newport Corp Project 2288	Randa Stoneham	\$184.6K	Best Case	2023-01-21
Shutterfly Inc Project 1907	Tom Brady	\$2.2M	Omitted	2022-12-31
Sand Flower License Deal	Dollie Gracie	\$723.9K	Pipeline	2022-12-13

Deals where pricing is mentioned report

Here is an example of the Deals where pricing is mentioned report. In this example, in the "Number of meetings with pricing mentioned" column, if there are more than one meeting, click the value to have another report showing the meetings. Click any meeting on the report to open the meeting transcription.

Report

Deals Where Pricing Is Mentioned

About this report

Last Run: December 21, 2022, 1:30 PM

Current Quarter

Early Stage

No. Of Occurrence

ALL Stages Selected

ALL Owners Selected

ALL Categories Selected

Add to Dashboard

Cancel

Apply

2023Q4

DEAL NAME	ACCOUNT	NO. OF MEE...	STAGE	OWNER	AMOUNT
Ensono - advisor intro Paul Ch...	Ensono	2	01 Nurture (pre-pipeline)	Shaun Siler	\$130K

MEETING NAME	NO. OF TIMES PRIC...	SPEAKER NAME	SENTIMENT
Ensono Intro Call_Recording_4-28-22.mp4	1	spk_A, spk_B, spk...	neutral
Ensono Intro Call_Recording_4-28-22.mp4	2	spk_A, spk_B, spk...	positive

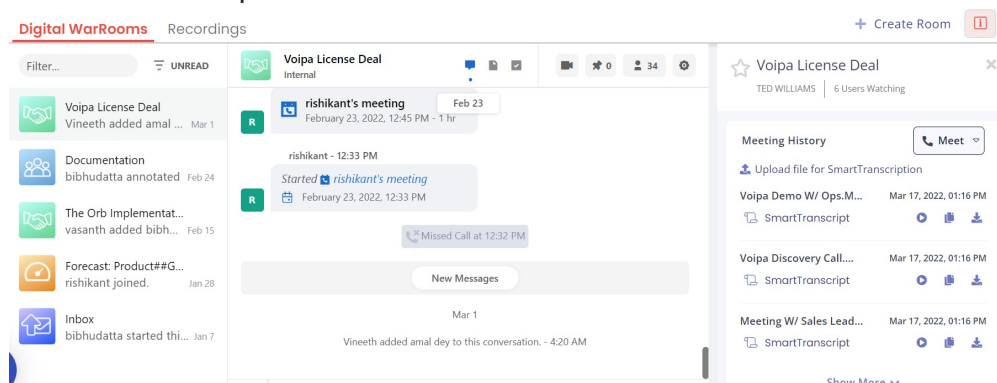
IBM - CI	IBM	1	03 Solution Presentation	Almas Ahmed	\$100K
Roku - outbound	Roku	1	03 Solution Presentation	Shaun Siler	\$175K
Uniphore	Uniphore	1	02 Discovery & Vision Devel...	Almas Ahmed	\$25K
BH - VMware Phase I	VMware	1	03 Solution Presentation	Max Tarasevich	\$241K

Collaborate digitally with team members and prospects

Effective communication is the key to success in any business activity, and while collaborating with others, communication plays a vital role to bring success. Likewise, in sales, starting from discussing a deal to closing the deal and coaching a rep, it's important to have an efficient platform that enables effective communication. Aviso AI has separate meeting platforms for different purposes and gives **actionable meeting insights** using conversational intelligence that help you evaluate your prospect's intent, emotions, willingness to buy, and so on. Aviso also saves your time by enabling you to call your contacts directly from Aviso AI.

The Collaboration Workspace screen lets you create common workspace called **Digital WarRoom** to use by the team members for effective collaborative communication, sharing files, using e-signature, creating to-dos, having one-on-one coaching, and creating whiteboards. After you log in to Aviso AI, from the left side menu, click **Collaboration Workspace** to open the Collaboration Workspace screen.

Collaboration Workspace



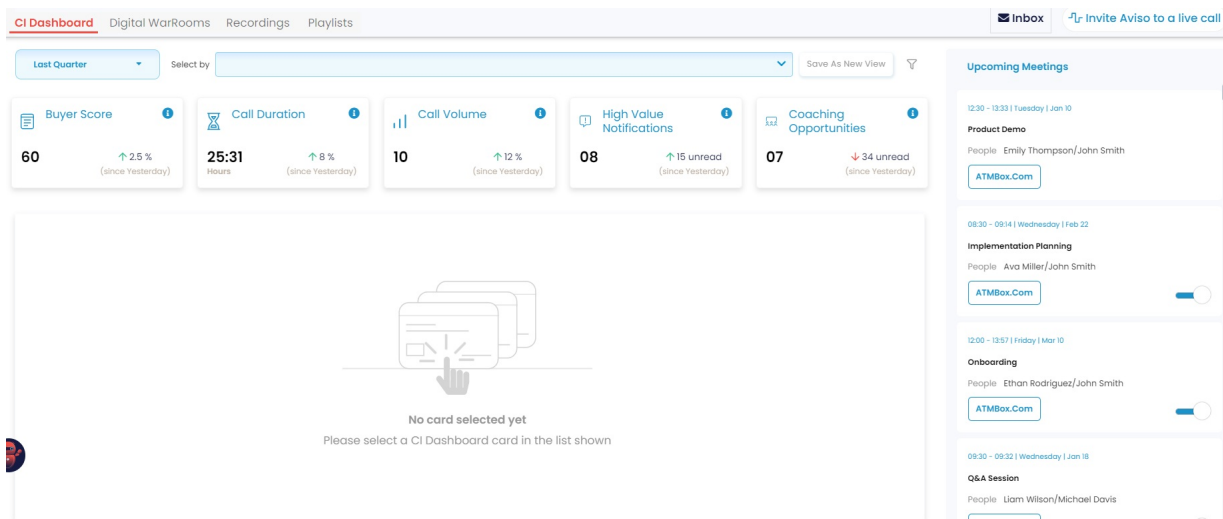
Aviso AI lets you have virtual meetings with your prospects and team members from the inbuilt meeting platform and third-party meeting platforms that you use in your organization.

CI Dashboard

The Conversational Intelligence Dashboard is a comprehensive and intuitive interface that provides real-time actionable insights and analytics into sales conversations. It enables the sales teams to track buyer interest, leverage AI-generated recommendations for the next best actions, identify coaching opportunities, and analyze call volume and duration. The dashboard also offers an integrated workflow feature, allowing the sales teams to deep dive into specific accounts, deals, or reps for a deeper understanding of the data. Additionally, high-value notifications and coaching opportunities are presented on a per-rep basis.

Coaching Opportunities

The Coaching Opportunities card offers a list of AI-generated suggestions tailored to enhance the performance of sales representatives. These suggestions help identify areas for improvement and offer coaching guidance to improve selling skills and achieve better outcomes.



Buyer Score

The Buyer Score card indicates the prospective buyer's level of interest and potential purchase intent. It combines engagement, competitor, next step, and sentiment scores using a predefined formula to generate a single score. The score is then categorized into three buckets: Good, Average, and Poor. This score provides insights into prospect's interest levels, which guides sales efforts toward more promising leads.

Call Duration

The Call Duration card offers a drill-down view of the number of meetings, filtered by deals, accounts, and sales representatives. It presents call duration data in terms of count, enabling users to understand the distribution of meeting durations across various parameters.

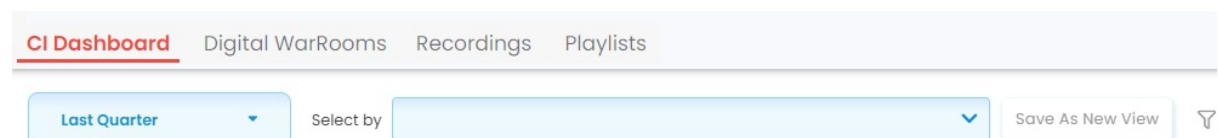
Call Volume

The Call Volume card provides a drill-down view of the time spent in meetings, filtered by deals, accounts, and sales representatives. It presents call volume data in terms of hours, allowing users to analyze the distribution of meeting times across different parameters.

Upcoming meetings

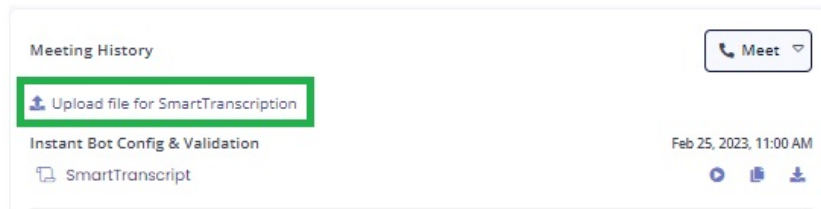
The Upcoming Meetings section on the right hand side lists all the scheduled upcoming meetings and lets you join the meeting from the dashboard.

The following filter criteria let you narrow down the search results and view sales conversational data for a particular user, team, or deal with respect to a month, last quarter, or previous quarter. You can use the **Save As New View** to create a view with certain filter criteria that you frequently use.



External meetings made outside of Aviso platform

For any reason, if you can't schedule a meeting from Aviso Collaboration workspace, you can use [Aviso Notetaker to import recordings of the external meetings](#) or upload a recording of the meeting to the Aviso Collaboration workspace to utilize the conversational intelligence features and get actionable meeting insights.



When using Aviso Notetaker to record an external meeting, or uploading a meeting recording, Aviso platform reads the following information to identify the account participated in the meeting and tags the meeting to the respective deal room or account room:

- **Meeting subject or description** - While scheduling a meeting, use the Deal ID in the subject or description. You can find the deal ID from your CRM.
- **Domain of the external participants** - Notetaker reads the domain of the external participants and tags the meeting to the respective deal rooms.

After identifying a prospect, if there is a deal associated with it in the current quarter, the meeting is tagged to the deal room created for the deal. If there is no deal in the current quarter but there were deals in the previous quarter, there is an existing account of the prospect in Aviso platform. In this case, the meeting is tagged to the account associated with the prospect. Later, if there is a deal for this account and if you want, you can move the meeting from the account room to the deal room.

Activate Digital WarRoom to have virtual meetings and use various conversational intelligence features

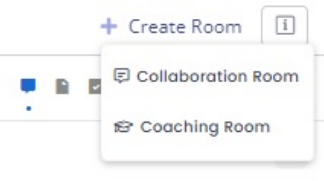
To have virtual meetings and use all the features available in the collaboration workspace such as deep dive into a meeting using Aviso CI (Conversational Intelligence) metrics, evaluate your prospect's emotions and intent through smart transcripts, share files, use e-signature, create to-dos, coach your reps, and create whiteboards, you must create a digital war room. Aviso AI lets you create the following digital war rooms:

Deals room	You can create a Deal room from Deals screen. You can access an existing Deal room from both the Deals and Collaboration Workspace screens.
Forecast room	You can create a Forecast room from Forecasts screen. You can access an existing Forecast room from both the Forecasts and Collaboration Workspace screens.
Collaboration room	You can create and access Collaboration room from Collaboration Workspace screen.
Coaching room	You can create and access Coaching room from Collaboration Workspace screen.

Perform the following steps to create a Digital WarRoom (Collaboration Room and Coaching Room):

1. Open Collaboration Workspace from the left menu bar.
2. On the right-hand side, click + Create Room.

A dialog box appears with options to choose Collaboration Room and Coaching Room.



3. Select the digital war room that you want to create.

Create Collaboration room or Create Coaching Room dialog box appears based on what you selected in the last step.

A screenshot of a 'Create collaboration room' dialog box. The dialog box has a title bar with the text 'Create collaboration room' and a close button (X). Inside the dialog box, there are two main sections. The first section is labeled 'Room Name:' with a red asterisk (*) indicating it is required. Below this label is a text input field. The second section is labeled 'Participants:' and contains a text input field with the placeholder text 'Search for user, or type email address'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Review'.

4. If you are creating a Collaboration Room, enter a room name in the **Room Name** field and add the participants in the **Participants** field. If you are creating a Coaching Room, add the participants in the **Participants** field.

Note:

You can add only your immediate representatives or reporting members to the Coaching Room.

5. Click **Review**.
6. Review and Activate Room dialog box appears.

7. Click **Activate**.

Digital WarRoom (Collaboration Room) is activated. You can make [audio or video](#) conferences, chat, share files, pin important information to the group, and record the calls. You can find all the recordings in the [Recordings](#) section beside the Digital WarRooms section. To know how to create a SmartTranscription, see [Evaluate your prospect's emotions through a call](#).

Note:

You can create a Deal Room from the Deals screen and Forecast room from the Forecasts screen only. However, you can access the existing Deal room and Forecast room from the Collaboration Workspace too.

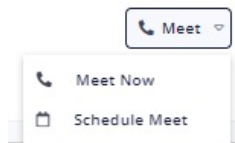
Have virtual meetings with your prospects and team members

Aviso AI lets you have virtual meetings with your prospects and team members from Aviso platform itself, using the inbuilt meeting platform or any supported third-party meeting platforms that you use in your organization. So you don't have to use multiple applications and waste time, which you can utilize in focusing on deals. To use a third-party meeting platform from Aviso, ensure that your admin has integrated the meeting platform with Aviso AI.

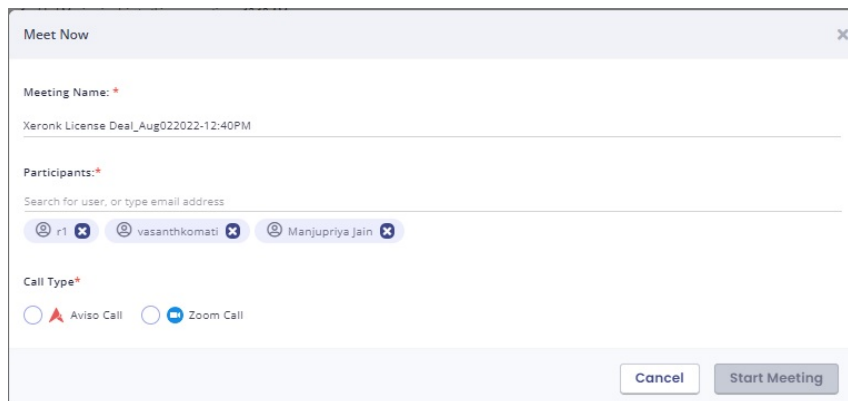
1. From the Collaboration Workspace, click the Meet () icon.

You can also call from a deal room or forecast room.

2. Click **Meet Now** or **Schedule Meeting** to make an instant call or schedule a meeting, respectively.



The Meet Now or Schedule Meeting dialog box appears.

A screenshot of the 'Meet Now' dialog box. It has a title bar 'Meet Now' with a close button. The form contains: 'Meeting Name:' with a red asterisk and a text field containing 'Xeronk License Deal_Aug022022-12:40PM'; 'Participants:' with a red asterisk and a search bar 'Search for user, or type email address' containing three user avatars: 'r1', 'vasanthkomati', and 'Manjupriya Jain'; 'Call Type:' with a red asterisk and two radio buttons: 'Aviso Call' (selected) and 'Zoom Call'. At the bottom right are 'Cancel' and 'Start Meeting' buttons.

3. Enter the meeting details and select a call type (meeting platform) to use for calling.

Currently, Aviso AI supports the following third-party meeting platforms:

- Zoom
- Microsoft Team
- Google Meet
- Webex
- RingCentral

Note

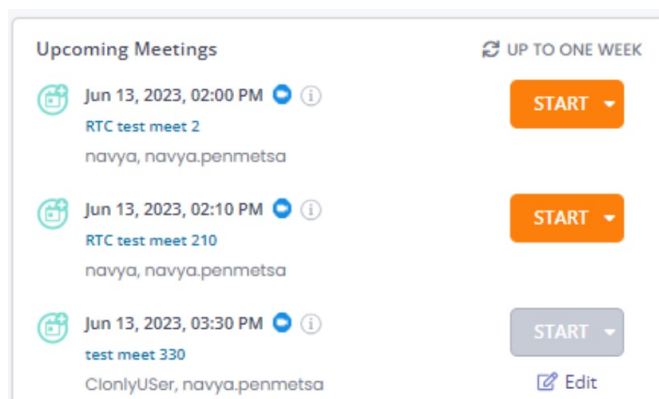
You must validate your [Zoom](#), [Microsoft Teams](#), [Webex](#), and [RingCentral](#) accounts in Aviso to be able to use their meeting platforms with Aviso AI.

Note

After you schedule a call, you cannot change the call type.

4. Click **Start Meeting** or **Schedule** to call or schedule a meeting.

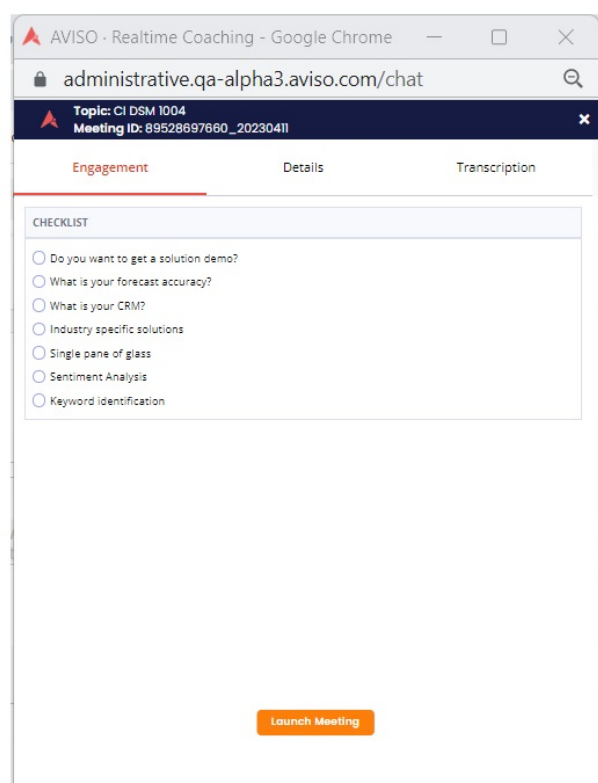
If you are scheduling a meeting and your meeting is after one hour, the meeting option is inactive and it turns active when the meeting is within one hour. If you schedule a meeting that is within an hour, the meeting option is active from the beginning.



5. If you want to use [real-time call guidance](#), select **Start With RTC**. If not, select **Start**.

If you want, you can also copy the meeting link by clicking on the (i) icon beside the meeting and use it for joining the call.

If you select **Start With RTC**, the real-time call guidance widget appears and lets you launch the meeting from the real-time call guidance widget .



6. Click **Launch Meeting**.

Aviso AI provides you with features to listen to call recordings and use various [conversational intelligence](#) features to help you learn more about a conversation, which then prepares you for the next call. Talk to your admin if you don't see a supported meeting platform from the list of available meeting platforms in Aviso AI.

Validate your Zoom account in Aviso

After Zoom is integrated with Aviso AI, before using Zoom from Aviso AI, every user must validate their Zoom account.

Perform the following steps to validate your Zoom account from Aviso AI.

Prerequisites-

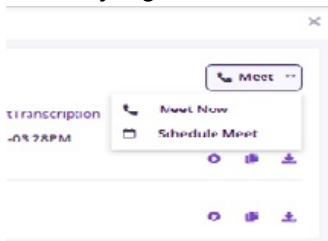
- Ensure that Zoom is integrated with your Aviso instance.
- Ensure that you have logged in to Zoom portal with the correct credentials.

Important

If you use incorrect credentials to log in to Zoom portal and validate your Zoom, you can't revert it later.

Perform the following steps to validate Zoom account from Aviso AI.

1. From any digital war room in the Aviso AI, click **Meet Now**.



Meet Now dialog box appears.

A screenshot of the 'Schedule Meeting' dialog box. It contains fields for 'Topic*' (with the text 'test zoom meet validation'), 'Description' (with the placeholder 'Meeting Description...'), and 'Participants*' (with a search bar and a tag for 'deepika'). There are radio buttons for 'Call Type*' with options: 'Aviso Call', 'Zoom Call' (selected), and 'Teams'. A 'Validate Zoom Account' button is on the right. At the bottom, there are 'When' and 'Duration' fields, and 'Cancel' and 'Schedule' buttons.

2. Click **Validate Zoom Account**.

You are redirected to the Zoom account page. If you have not logged in to Zoom, you are asked to log in to your Zoom account.

3. Log in to your Zoom account.

After you successfully log in to Zoom account, the following message appears:

```
{“msg”: “Your account is linked successfully to Aviso, please go back to Aviso to continue .”,  
“success”: true}
```

Validate your Microsoft Teams account in Aviso

After Microsoft Teams is integrated with Aviso AI, before using Microsoft Teams from Aviso AI, every user must validate their Microsoft Teams account.

Perform the following steps to validate your Microsoft Teams account from Aviso AI.

Prerequisites-

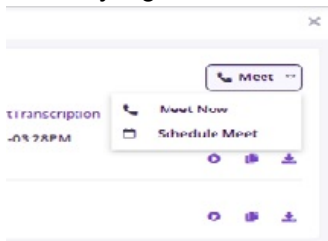
- Ensure that Microsoft Teams is integrated with your Aviso instance.
- Ensure that you have logged in to Microsoft portal with the correct credentials.

Important

If you use incorrect credentials to log in to Microsoft portal and validate your Microsoft Teams, you can't revert it later.

Perform the following steps to validate Microsoft Teams from Aviso AI.

1. From any digital war room in the Aviso AI, click **Meet Now**.



Meet Now dialog box appears.

A screenshot of the 'Meet Now' dialog box. It has a title bar 'Meet Now' with a close button. The form contains the following fields:

- Meeting Name:** A text field with a red asterisk. Below it, the text 'For Teams_Dec092021-02:54PM' is displayed.
- Participants:** A text field with a red asterisk. Below it, the placeholder text 'Search for user, or type email address' is shown. A tag with the name 'jhansi' and a close button is visible.
- Call Type:** A text field with a red asterisk. Below it, there are two radio buttons: 'Aviso Call' (selected) and 'Teams'.

At the bottom right, there is a purple button labeled 'Validate Mteams Account'. At the bottom, there are two buttons: 'Cancel' and 'Start Meeting'.

2. Click **Validate Mteams Account**.

You are redirected to the Microsoft account page. If you have not logged in to Microsoft, you are asked to log in to your Microsoft account.

3. Log in to your Microsoft account.

After you successfully log in to Microsoft account, the following message appears:

```
{“msg”: “Your account is linked successfully to Aviso, please go back to Aviso to continue .”,  
“success”: true}
```

Validate your webex account in Aviso

After webex is integrated with Aviso AI, every user must validate their webex account to use webex from Aviso AI. Perform the following steps to validate your webex account from Aviso AI.

Prerequisites

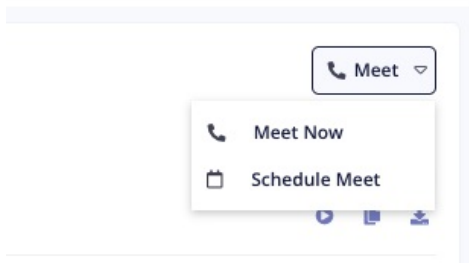
- Ensure that webex is integrated with your Aviso instance.
- Ensure that you have logged in to webex with the correct credentials.

Important

If you use incorrect credentials to log in to Webex and validate your Webex Account, you can't revert it later.

Perform the following steps to validate webex from Aviso AI.

1. From any digital war room in the Aviso AI, click **Meet Now**.



Meet Now dialog box appears.

2. From the available call types, select **webex**.

Meet Now

Meeting Name: *

New Webex_Jul152022-06:32PM

Participants:*

Search for user, or type email address

Call Type*

☐ Aviso Call

☐ Zoom Call

☒ WebEx

Validate WebEx Account

Cancel

Start Meeting

3. Click **Validate Webex Account**.

Webex account page appears. If you have not logged in to webex, you are asked to log in to your webex account.

4. Log in to your webex account.

After you successfully log in to Webex account, the following message appears:

```
{"success": true, "msg": "Your account is linked successfully to Aviso, Please go back to Aviso to continue."}
```


Validate your RingCentral account in Aviso

After RingCentral is integrated with Aviso AI, before using RingCentral from Aviso AI, every user must validate their RingCentral account.

Perform the following steps to validate your RingCentral account from Aviso AI.

Prerequisites-

- Ensure that RingCentral is integrated with your Aviso instance.
- Ensure that you have logged in to the RingCentral portal with the correct credentials.

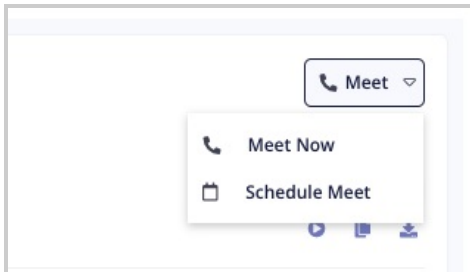


Your title goes here

If you use incorrect credentials to log in to RingCentral portal and validate your RingCentral, you can't revert it later.

Perform the following steps to validate Microsoft Teams from Aviso AI.

1. From any digital war room in the Aviso AI, click **Meet Now**.



Meet Now dialog box appears.

Meet Now

Meeting Name: *

Aspects 2_Sep272022-05:33PM

Participants:*

Search for user, or type email address

Call Type*

☐ Avisio Call

☐ Webex Call

☒ RingCentral Call

Validate Ring Central Account

Cancel

Start Meeting

2. Click **Validate RingCentral Account**.

You are redirected to the RingCentral account page. If you have not logged in to RingCentral, you are asked to log in to your RingCentral account.

3. Log in to your RingCentral account.

After you successfully log in to RingCentral account, the following message appears:

```
{“msg”: “Your account is linked successfully to Aviso, please go back to Aviso to continue .”,  
“success”: true}
```

Use a dedicated digital collaboration workspace to discuss about deals

Use Deal Room for any specific deal related discussion. Deal room has all the [Conversational Intelligence](#) features that let you effectively understand your prospect's emotions and track all the meetings. You can recognize a Deal Room by the deal () icon in the Collaboration Workspace screen.

If there is no Deal Room inside a particular deal under the Deal Room tab, you can activate a Deal Room manually. Perform the following steps to activate a Deal Room:

1. Click **Activate Deal Room**.
Activate Deal Room dialog box appears.
2. Enter the names or email IDs of participants you want to add to the Deal Room in the **Participants** field.
3. Click **Review**.
Review Deal Room details dialog box appears and shows the name of the Deal Room and the participants you have added.
4. (Optional) Add an invitation message in the **Add Invitation Message** field.
5. Click **Activate**.
Deal Room is activated.

Note:

You can create a Deal Room from the Deals screen only. However, you can view an existing Deal Room from Collaboration Workspace.

Note:

When you open a Deal Room from Deals screen, except SmartTranscription, the other Digital WarRoom features (Talk Ratio, Question Rate, and so on) don't appear. To use these features, open the Deal Room from Collaboration Workspace.

Use a dedicated digital collaboration workspace to have any sales related discussion

The Collaboration WarRoom screen lets you create Collaboration Room to have any business discussion and use all the [Conversational Intelligence](#) features that let you effectively understand your prospect's emotions and track all the meetings. You can recognize a collaboration room by the collaboration () icon in the Collaboration Workspace screen. To know how to create a Collaboration room, see [Collaborate digitally with team members and prospects](#).

Use a dedicated digital collaboration workspace to coach your sales rep

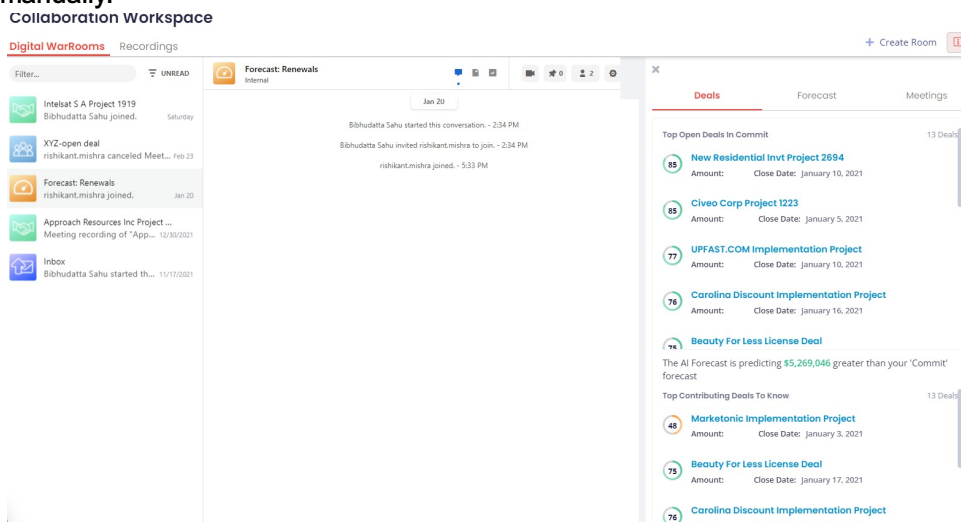
The Collaboration WarRoom screen lets you create Coaching Room to coach your reps when required. The Coaching room also has all the [Conversational Intelligence](#) features. To know how to create a Coaching room, see [Collaborate digitally with team members and prospects](#).

Use a dedicated digital collaboration workspace to discuss about forecast

Use Forecast Room for any specific deal forecast related discussion. Every Forecast room shows the following information so that you don't have to navigate to multiple screens and take informed decisions.

- **Deals-** Lists all the deals associated with the forecast and categorizes the deals into top open, top contributing, at-risk, low priority, upside, and deals in focus deals.
- **Forecast-** Lists all the points that contribute to Aviso AI Forecast and shows various important sales data such as Quota, Most likely, Aviso Forecast, Booked, and so on.
- **Meetings-** This section has all the [Conversational Intelligence](#) features that you can use to deep dive into a conversation and understand your prospect's emotions.

You can recognize a Forecast room by the forecast () icon in the Collaboration Workspace screen. If there is no Forecast room for a particular forecast, you can activate a Forecast room manually.



Perform the following steps to activate a Forecast room:

1. Go to Forecast screen.
2. Click menu () icon beside the forecast name in the NAME column.
If there is an existing Forecast room, the menu shows the option to view the forecast room. If there is no Forecast room, the menu shows the option to create a Forecast room.
3. Click **Activate Forecast Room**.
Activate forecast room dialog box appears.
4. In the **Forecast Room Name** field, enter a name.
By default, it shows the name of the forecast.
5. In the **Participants** field, enter the names or email IDs of participants you want to add to the Forecast room.
6. Click **Review**.
Review Forecast Room details dialog box appears and shows the name of the Forecast Room and the participants you have added.
7. (Optional) Add an invitation message in the **Add Invitation Message** field.
8. Click **Activate**.

Deal Room is activated.

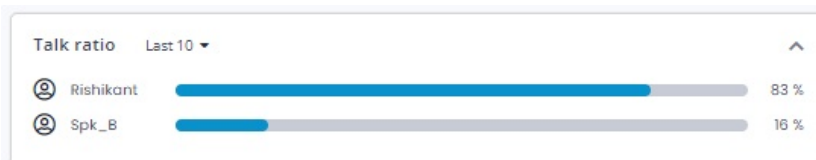
Note:

You can create a Forecast room from the Deals screen only. However, you can view an existing Forecast room from Collaboration Workspace.

Deep dive into a conversation using Aviso AI's conversational intelligence

The Collaboration Workspace lets you use the following AI powered functionalities.

- **Upcoming Meetings:** The Upcoming Meetings section displays the meetings scheduled for up to one week. The Collaboration Room helps the sales team plan meetings based on the Upcoming Meetings list.
- **SmartTranscription:** SmartTranscription transcribes audio and video with one click to quickly review and summarize deal-level conversations. This conversational intelligence (CI) feature analyzes text, speech, and sentiments to identify deal risks and give you the opportunity to act proactively to mitigate them. To know more on how to SmartTranscription, see [Process a conversation through SmartTranscription](#).
- **Talk Ratio:** Talk ratio is the percentage of time taken by a buyer to speak to a sales representative. Collaboration Room provides this data in real-time to measure the performance of the sales representative.



- **Question Rate:** The question rate is the ratio of questions asked by buyer to a sales representative.

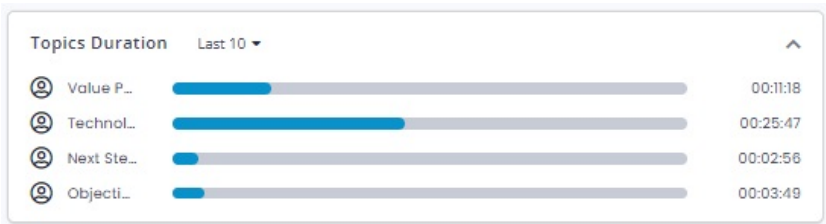


- **Engaging Questions:** Any question you ask while pitching is an engaging question if it meets the following criteria:
 - buyer's response lasts for more than 30 seconds.
 - buyer responds with phrases such as "that is a great question" and "I am glad you asked that".
 - buyer requests confirmation of the response. They commonly end the conversation with "I hope that helps" and "Let me know if that answers your question".
 - Engaging questions can help you get valuable information about the buyer, for example, you you can better understand their requirements and pain points. Conversations with engaging questions have a higher chance of advancing to the next stage.



- **Topics Duration:** Topic duration is the average number of minutes spent on each topic discussed in a sales forecasting meeting. It is an essential metric for measuring how long

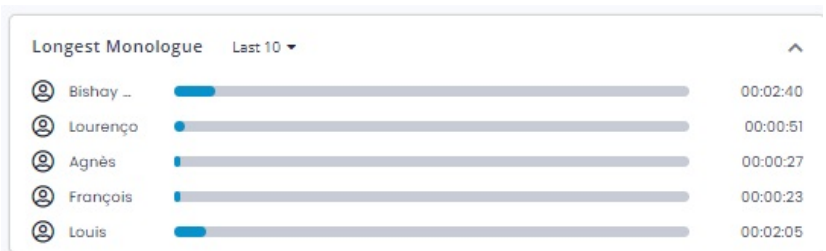
each topic takes to discuss and what topics should be prioritized according to your importance.



- **Topics Timings:** The total minutes spent on a call by the representative to buyer. Topic Timings is the time it takes for the participant to discuss a topic.



- **Longest Monologue:** Longest Monologue is the time spent by a team member on a single topic without interruption by other team members. It also includes their total number of minutes in the Collaboration Room during that topic.



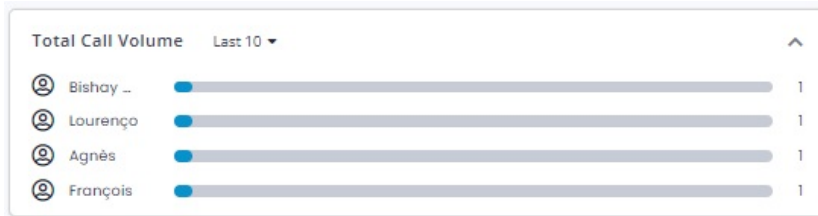
- **Weekly Call Volume:** Weekly call volume is the number of inbound and outbound calls handled by a sales representative in a week. This statistic is calculated based on the total number of calls received by or made to reps during the weekly time interval.



- **Weekly Call Duration:** Weekly Call Duration is the average amount of time spent on calls by a sales representative in a week. It can highlight which days are more productive and helps with understanding where your team spends their time.



- **Total Call Volume:** The total call volume is the number of inbound and outbound calls handled by a sales representative. With Total Call Duration, you can get a full, accurate picture of how much time is being spent on the phone at any given time.



- **Total Call Duration:** Total call duration is the total time spent by each member on a call. The Total Call Duration refers to the number of calls that were placed within a certain timeframe.



Note:

When you open a Deal Room from Deals screen, except SmartTranscription, the other features (Talk ratio, Question Rate, and so on) mentioned here don't appear. To use these features, open the Deal Room from Collaboration Workspace.

Listen to call recordings and view SmartTranscripts

The Recordings tab in Collaboration Workspace shows all the recordings for which SmartTranscriptions are available.

Collaboration Workspace

Digital WarRooms	<u>Recordings</u>	All Recording	Search
☐ Room Name	Room Type	File Name	Host
☐ Coffee Dreamtime Implementation Project	Deal	Coffee_Dreamtime_Imp_Project_Record...	Mike
☐ The Orb Implementation Project	Deal	The_Orb_Imp_Project.Mp4	Mike
☐ Ficity	Collaboration	Fictiv.Mp4	adrian.messih
☐ The Orb Implementation Project	Deal	GMT20220309_152404_Recording_1760x...	Mike
☐ The Orb Implementation Project	Deal	Ivanti_CI.Mp4	Mike

There is a filter in the Recordings tab. Choose any of the following options as required-

All recordings- As a Leader, by selecting All recordings, you can view recordings and transcriptions of all the meetings. This view is configuration driven and can be enabled or disabled.

My team recordings- As a sales team leader, if you select My team recordings, you can view recordings and transcriptions of all the meetings hosted by you and your team members.

My recordings- If you select My recordings, you can view all the recordings and transcriptions for the meetings hosted by you.

Click a SmartTranscript to view details of the [SmartTranscript](#). SmartTranscription is available in any language to understand your prospect's emotions.

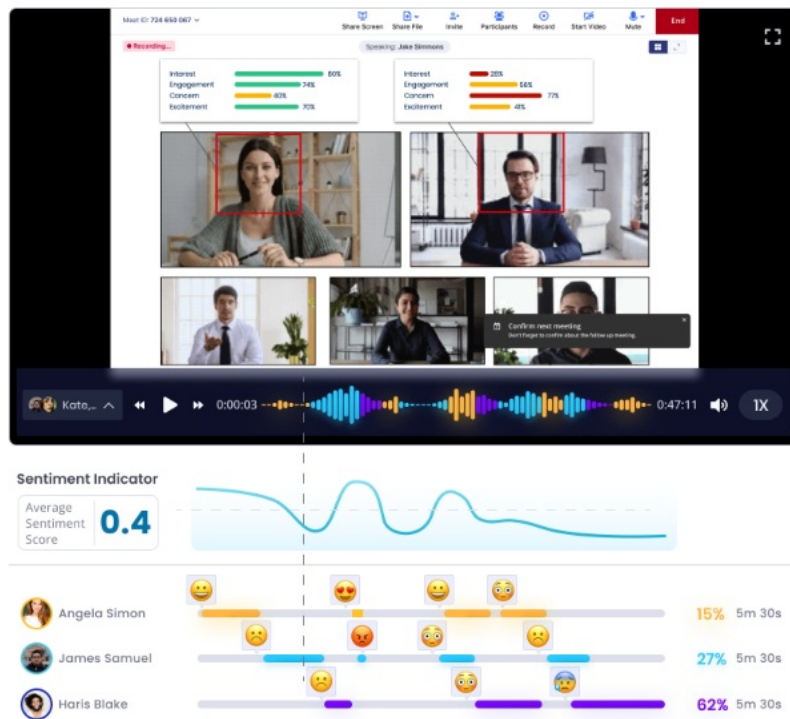
This feature is enabled or disabled during the organization setup process.

Evaluate your prospect's emotions from a meeting

When speaking to any prospect, it's crucial to know their emotions as it mostly decides whether they are going to close the deal or not. Aviso AI's SmartTranscription feature helps you understand your prospect's emotions so you can realize where your deal stands and better prepare to close the deal or save your time to utilize it with other priority deals. You can view the SmartTranscripts from a digital warroom from which the call was made and also directly from the [Recording tab](#).

Watermelon Systems+Hastings, Discovery

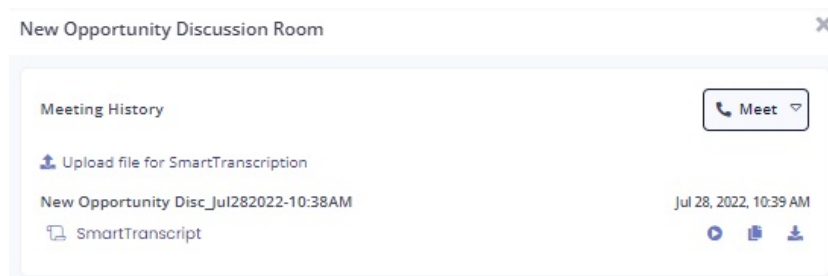
May 02, 2021 | 09:00 am 15 mins Host: Jesse Zackery



Generate SmartTranscript

While having a call, ensure that the participant's video and the call recording are ON. SmartTranscript for any call is generated in any language after the call is complete. You can also upload a recording of a call and generate the SmartTranscript. Click a meeting from the inbox (any digital war room) to open the meeting history on the right-hand side as shown in the following image.

1. Open the recording for which you want to see the SmartTranscript from the digital war room or Recordings tab in the Collaboration Workspace.



2. Click **SmartTranscript** to generate the SmartTranscript.
 3. If you want to generate SmartTranscript of a meeting that you made from some other apps, click **Upload file for SmartTranscription** to upload the recording.
- After the SmartTranscript opens, it shows the following outputs:

Save to CRM

Search Transcript

Uploaded Meet Recording

Keywords

stage (6)

forecast (4)

account (3)

plan (2)

opportunity (2)

offering (2)

demo (2)

timeline (1)

crm (1)

pricing (1)

expectation (1)

fab (1)

dashboard (29)

report (15)

query (35)

access (6)

deal (14)

app (5)

gold (7)

Themes

auto provisioning (1)

implementation timeline (1)

service analytics (1)

reporting capabilities (1)

use nlp (1)

Value Proposition

value proposition (1)

Technology

user experience (7)

architecture (3)

Summary

Transcription

Highlights

Comments

Translated Language

Japanese

German

RS Ravi Suryanarayan 0:00:42

You have the success adoption team first. We are always first, Robbie or call more client emails.

Tags

RC Rajesh Chaganti 0:00:52

Yes.

Tags

RS Ravi Suryanarayan 0:00:53

Argument is coming on. Usually the sales team should be there first.

Tags

RC Rajesh Chaganti 0:01:00

Technically, engineering was here first.

Tags

RS Ravi Suryanarayan 0:01:04

So again, Rajesh, without engineering won't even be here.

Tags

- **Summary:** Aviso generated Auto-Summary of the meeting
- **Transcription-** This section gives you speaker-wise transcription of the meeting. Click any transcript to view the video conversation or listen to the audio conversation.
Aviso AI also categorizes the transcription based on its meaning and assigns a topic tag to it. Every topic tag is one of the spoken words from the conversation. The following table lists some of the categories such as Keywords, Themes, Intent, Objection, and so on. You may notice that the Intent category has topic tags such as "purchasing", "awareness", and "discovery", which means the intent of this particular conversation was to purchase, make awareness, and discover the product.

Topics	Description and examples
Keywords	The Keywords section shows all the keywords and the number of times used in the conference. It helps you understand what was highlighted in the discussion. Keywords buying signal (5) performance plan (4) discover (4) awareness (3) cross selling (3) purchase evaluation (2) relationship management (1)
Themes	Determine different themes that were discussed during the meeting. Themes digit atm (1) change category (1) api word (1) collaboration workspace (2)
Intent	Intent of the speakers with regards to the deal. Intent purchasing (5) awareness (4) discovery (3)
Objection	Objection made by the speakers during the discussion.
Next Steps (Save to CRM)	See Aviso generated Next steps based on the transcription with the capability to write them back to CRM. Next Steps Sync Next Steps meeting with csm team next weeks visit call account executive check with IT work on the draft
Top Positive Aspects	Based on the emotion and keywords used in the conversation, Aviso AI identifies the top positive aspects of the meeting to help you understand what your prospect positively acknowledged. Top Positive Aspects platform (1) dashboards (1) report (1)
Top Negative Aspects	Based on the emotion and keywords used in the conversation, Aviso AI identifies the top negative aspects of the meeting to help you understand what your prospect negatively acknowledged. You can address the negative aspects in the upcoming activities, which will help you in closing the deal. Top Negative Aspects iframe (1) user id mapping (1)

If you think an existing topic tag is less relevant and would be better to have another topic tag, you can easily add a new topic tag and remove the existing tags. Click **Tag** on the right-hand side of a transcription.


Rajesh Chaganti 003:27




Okay, cool. We wanted to build self service capabilities, analytics and reporting capabilities into a Visa product in addition to the rich reports we already have. This really helps our customers to just do on the fly queries using natural language without having to worry about complex equal queries and stuff and kind of build their own dashboards and customize their charts and create multiple dashboards and stuff like that. So if you log into Gold, we already deployed this on Gold with a few caveats. We don't have all the drill downs and it's dummy data, but I'm going to talk about that a little bit more. But if you go into self service analytics, we're leveraging third party company called Makai, which specializes in natural language queries and having what they call us like a play button on report.

On the following dialog box, drag and drop the tags from the Untagged to Tagged box to add a new one or from the Tagged to Untagged box to remove an existing one. Click **Apply**.

Okay, cool. We wanted to build self service capabilities, analytics and reporting capabilities into a Visa product in addition to the rich reports we already have. This really helps our customers to just do on the fly queries using natural language without having to worry about complex equal queries and stuff and kind of build their own dashboards and customize their charts and create multiple dashboards and stuff like that. So if you log into Gold, we already deployed this on Gold with a few caveats. We don't have all the drill downs and it's dummy data, but I'm going to talk about that a little bit more. But if you go into self service analytics, we're leveraging third party company called Makai, which specializes in natural language queries and having what they call us like a play button on report.

Tagged

value proposition

architecture

Untagged

next steps

churn rate

concerned

expensive

poor product

pain points

budget

pricing

negotiation

PoC

demo

discount

validation

license

procurement

legal

payment

purchasing

customer references

maintenance

roadmap

API

user experience

onboarding

Cancel

Apply

- **Highlights-** This section highlights the transcripts that you and other participants bookmarked from the Transcription section. You can bookmark the important points that you may refer to later.
- **Comments-** You can add comments for yourself, specific team members, or all the team members. You can also have a chat conversation using the Comment section.

Summary

Transcription

Highlights

Comments

Jake Ryan • December 12, 2022

Important point to be noted

Public • 00:05:09 • 

 Reply

 Edit

 Delete

Rhea Jhon • December 12, 2022

Important point to be noted

Public • 00:05:09 • 

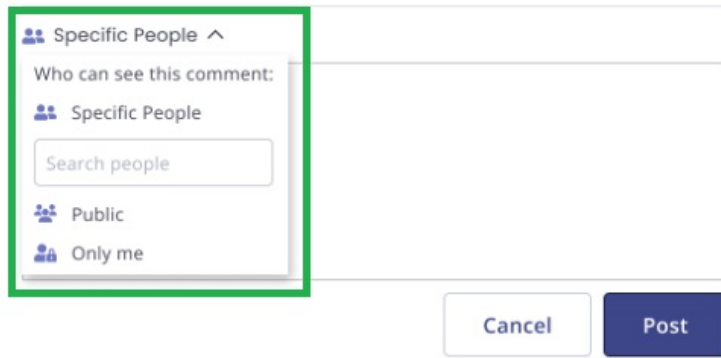
 Public ▾

Cancel

Post

While adding or replying to a comment, you can select the following options-

- **Specific People** - Your comments will be visible to the team members you have added here. You can add a single team member to have one-on-one chat.
- **Public** - Your comments will be visible to all the team members.
- **Only me** - Your comments will be visible to **you only**.



The image shows a dropdown menu for selecting the visibility of a comment. The menu is titled "Specific People ^" and lists three options: "Specific People", "Public", and "Only me". The "Specific People" option is currently selected and highlighted with a green border. Below the "Specific People" option is a search bar labeled "Search people". To the right of the dropdown menu is a large empty text box for the comment. At the bottom right of the form are two buttons: "Cancel" and "Post".

Specific People ^

Who can see this comment:

Specific People

Search people

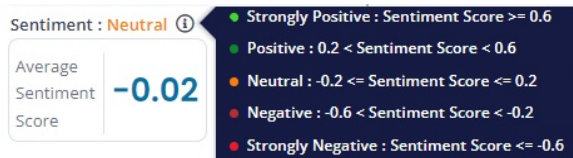
Public

Only me

Cancel Post

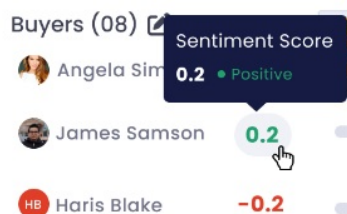
View Sentiment Indicator to know your prospect's sentiment

The Sentiment Indicator assigns sentiment scores for every meeting, which indicates whether the sentiment of the speakers (buyer) was strongly positive, positive, neutral, negative, or strongly negative. If there is no buyer in the meeting, it shows the seller's sentiment score. Hover over the Info icon to see which score indicates which type of sentiment.

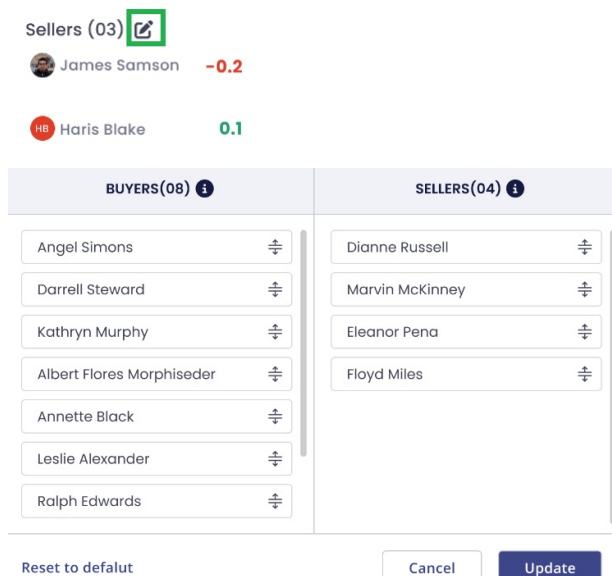


In a meeting, if both buyers and sellers are involved, Aviso AI identifies the participants from the meeting invite and distinguishes them as buyers and sellers.

You can see the participants under Sellers and Buyers.



If a participant is wrongly identified, for example, if a seller is wrongly identified as a buyer, you can manually change it to seller. Click the edit icon to open the dialog box, drag, and drop the participants to place them in the correct group (buyer or seller). After you make some changes to buyers or sellers, if you want to restore the default identification, you can click **Restore to default** on the same dialog box.

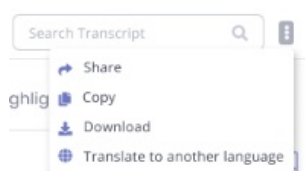


For every statement, the statement indicator also assigns emojis to express the sentiment of the speakers behind the statement.

Translate SmartTranscript into any language

By default, the SmartTranscript is in English but you can translate it to any language.

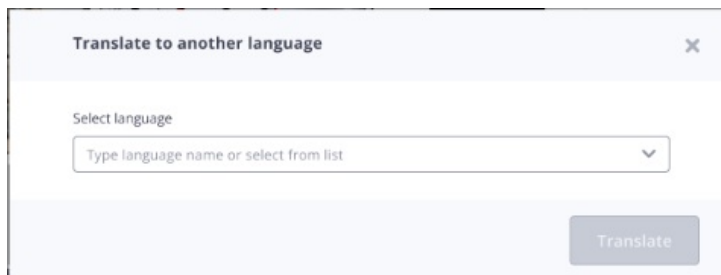
1. Click the menu icon beside Transcription.



2. Click **Translate to another language**.

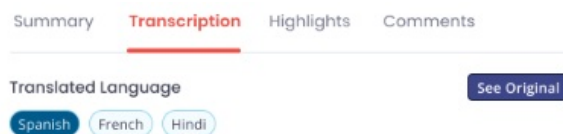
Translate to another language dialog box pears.

3. From the **Select language** list, select the language into which you want to translate the SmartTranscript.

A dialog box titled "Translate to another language" with a close button (X) in the top right corner. Inside, there is a "Select language" section with a text input field containing the placeholder "Type language name or select from list" and a dropdown arrow. At the bottom right, there is a "Translate" button.

4. Click **Translate**.

When the translation is complete, the selected language appears as tabs as shown in the following image.

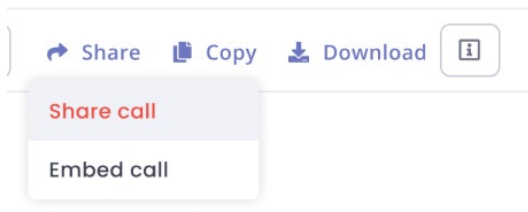
A horizontal tab bar with four tabs: "Summary", "Transcription" (highlighted with a red underline), "Highlights", and "Comments". Below the tabs, there is a section titled "Translated Language" with three buttons: "Spanish" (highlighted with a blue border), "French", and "Hindi". To the right of these buttons is a "See Original" button.

5. Click the language in which you want to see the SmartTranscript.
6. Click **See Original** to see the original SmartTranscript.

Share a recording and call transcription with others

You can share a recording and call transcription with your colleagues or anyone outside your organization.

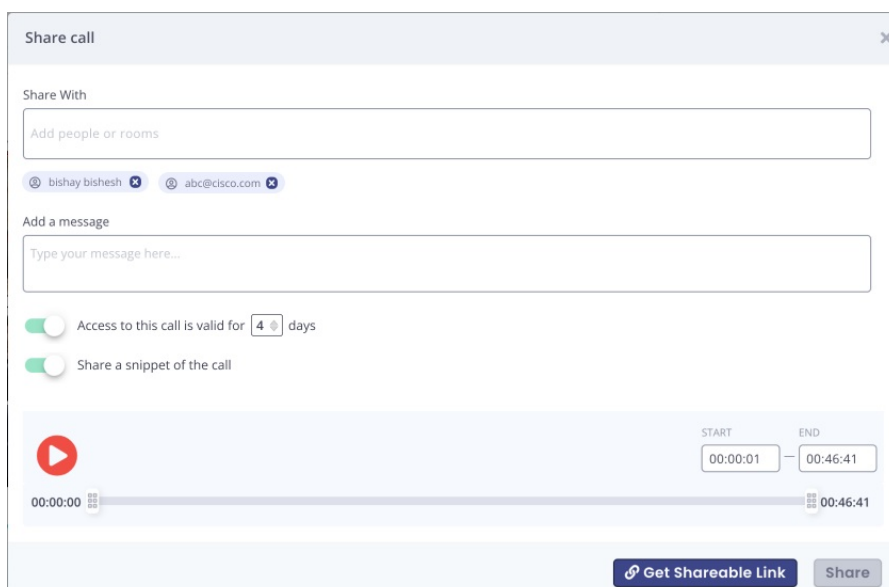
1. On the SmartTranscript section, click **Share**.

A horizontal bar with four icons: a share icon, a copy icon, a download icon, and an information icon. Below the icons, there is a dropdown menu with two options: "Share call" (highlighted with a red border) and "Embed call".

If you want to embed the recording on any browser, click **Embed call** to generate the video embed link.

2. Click **Share call**.

The Share call dialog box appears.

A dialog box titled "Share call" with a close button (X) in the top right corner. Inside, there is a "Share With" section with a text input field containing the placeholder "Add people or rooms". Below this, there are two user avatars: "bishay bishesh" and "abc@cisico.com". There is also a section titled "Add a message" with a text input field containing the placeholder "Type your message here...". Below this, there are two toggle switches: "Access to this call is valid for 4 days" (checked) and "Share a snippet of the call" (checked). At the bottom, there is a video player interface with a play button, a progress bar, and a timeline showing "START" at "00:00:01" and "END" at "00:46:41". At the bottom right, there are two buttons: "Get Shareable Link" and "Share".

3. In the **Share With** field, enter the email IDs of the external and internal participants with whom you want to share the transcription.
4. In the **Add a message** field, enter any message you want to convey while sharing the recording.
5. Set the number of days you want to keep the sharing link active. Move the button beside **Access to this call is valid for** to the right. Select the number of days from the list.
6. You can share the call transcription along with the recording. Move the button beside **Share a snippet of the call** to the right.
7. You can share the entire video or a selected portion of the video. To crop the video, enter the start time and end time in the **START** and **END** fields, respectively.
8. Click **Share**.

You can also get a link to share this recording and the transcription. Click **Get Sharable Link** to get the link.

If the shared link expires and a recipient with whom you shared the link tries to open the recording, an error message appears- The link share is expired. Please request to regenerate the link to access the recording.

MEDDPICC adherence with Aviso's Conversational Intelligence

Sales methodologies are essential frameworks that guide sales professionals through the complex process of selling. Among these methodologies, MEDDPICC has gained popularity for its effectiveness in B2B sales. However, ensuring consistent adherence to MEDDPICC poses challenges for sales teams. Aviso's Conversational Intelligence helps sales teams overcome challenges by accurately tracking key elements of MEDDPICC during sales conversations.

MEDDPICC at a glance

MEDDPICC offers strategic prospecting, improved forecast accuracy, and increased win rates by addressing the entire sales cycle comprehensively. MEDDPICC breaks down the sales process into key components:

Metrics: Understanding the economic impact of your solution.

Economic Buyer: Identifying the main decision-maker.

Decision Criteria: Highlighting the factors influencing the buyer's decision.

Decision Process: Understanding how the buyer makes decisions.

Paper Process: Identifying the steps to finalize the deal.

Identify Pain: Recognizing the buyer's challenges.

Champion: Finding an advocate within the buyer's organization.

Competition: Understanding competitors in the deal.

Aviso's Conversational Intelligence improves MEDDPICC adherence by accurately tracking these elements through call transcripts and non-verbal cues, ensuring sales teams maintain alignment and maximize effectiveness in sales conversations. Aviso seamlessly integrates MEDDPICC data collection into sales conversations. Engineered to detect keywords, phrases, and non-verbal cues, it ensures accurate tracking of key elements, promoting consistent adherence to MEDDPICC across sales teams.

The screenshot displays the 'Sales Methodology' tab in the Aviso interface. The interface is divided into two columns, each with a header and a list of tracked elements. The left column includes 'METRICS', 'DECISION CRITERIA', 'PAPER PROCESS', and 'CHAMPION'. The right column includes 'ECONOMIC BUYER', 'DECISION PROCESS', 'IDENTIFY PAIN', and 'COMPETITOR'. Each section contains a list of specific data points extracted from sales conversations. For example, under 'METRICS', it says 'No discussion on metrics'. Under 'ECONOMIC BUYER', it identifies 'David Watson' as the key decision maker. The interface also features a sidebar on the right with 'Discussion' and 'Score Card' tabs.

Section	Tracked Elements
METRICS	- No discussion on metrics
DECISION CRITERIA	- Increasing net new revenue per rep - Easy to use solution with actions to improve net revenue per rep - Better prioritization of deals - Compatibility with existing systems - Technical integration with 5-7 systems - Implementation process and timeline
PAPER PROCESS	- There is a discussion on procurement, order forms, and signatures. The buyer mentions that they need to 'circle up internally' and 'get final contracts' before making a decision. They also ask for the final statement of work and order form.
CHAMPION	- Aarathi Chelatl is the champion. She has got strong positive sentiment about Aviso's capabilities and is also part of decision
ECONOMIC BUYER	- David Watson is the key decision maker
DECISION PROCESS	- Meet with the decision maker - Hurdle internally to ensure everyone is on board - Review final contracts, statement of work, and order form - Make a decision whether to go or no-go
IDENTIFY PAIN	- No discussion on metrics
COMPETITOR	- Clari, Gong

Open any meeting recording and click **Sales Methodology** to view your adherence to MEDDPICC. Every field in MEDDPICC lets you write in case you want to make a manual correction. Click **Save to CRM** to save this data to your CRM.

Here's how Aviso's Conversational Intelligence efficiently tracks each element of MEDDPICC:

- **Metrics:** Identifies vital metrics and KPIs crucial to buyer success.
- **Economic Buyer:** Pinpoints decision-makers based on economic impact.
- **Decision Criteria:** Decodes factors pivotal to the buyer's choice.

- **Decision Process:** Grasps the buyer's decision-making stages.
- **Paper Process:** Comprehends the buyer's internal purchase protocol.
- **Implications:** Assesses broader impacts of the buyer's challenges.
- **Champion:** Identifies staunch advocates within the buyer's organization.
- **Competition:** Recognizes competitors in the buyer's consideration set.

Through call transcripts and non-verbal cues, Aviso's Conversational Intelligence ensures accurate and consistent MEDDPICC data collection, enhancing sales effectiveness.

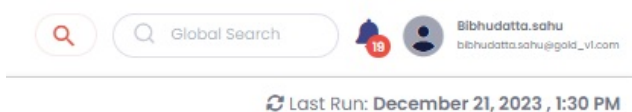
Effectively retrieve call details with Aviso Global Search

SDRs interact with numerous prospects through calls as part of their daily tasks. At times, it becomes essential to locate specific call details from a vast archive of past interactions. Aviso Global Search simplifies this process by enabling users to pinpoint a desired call using various parameters such as Call Participants, Account Name, Deal Name, specific Words or Phrases, Trackers, Call Title, Opportunity Stage, Date, Call Duration, and additional criteria. You can use filters to add or reorder and customize search criteria based on your preference.

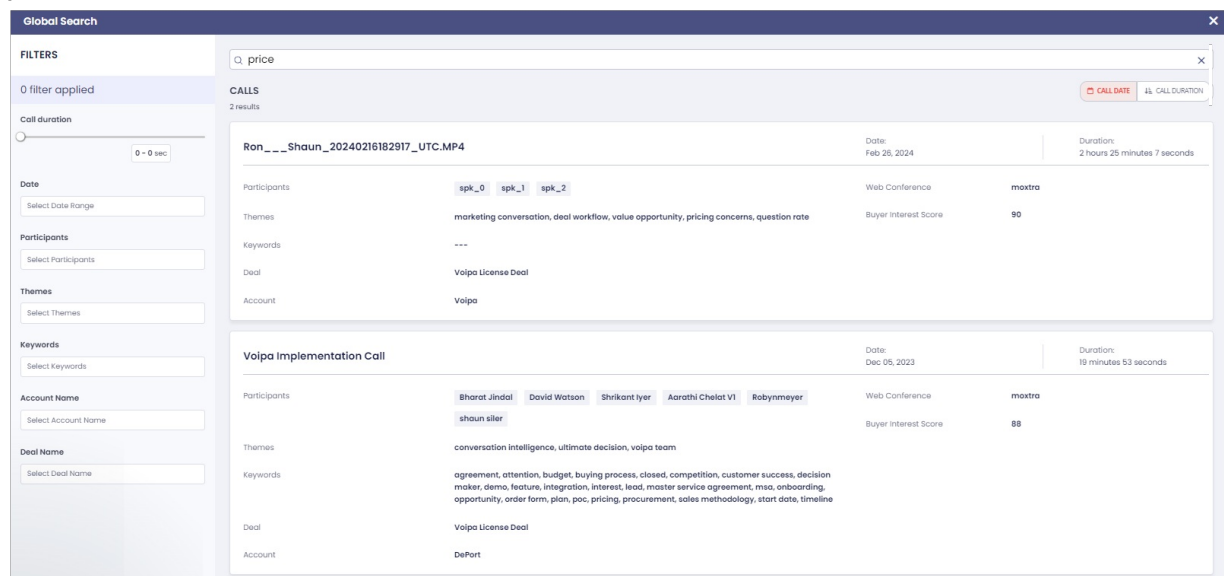
Note

While configuring this functionality, your admin can configure the search parameters and filters.

After logging in to Aviso, you can see the Global Search Option at the top right



To search for a call, enter an associated search parameter such as call participants, account name, specific words or phrases, trackers, call title, opportunity stage, date, call duration, and press Enter. The Global Search page appears and lets you use filter to customize your search based on your preference.



Click your desired call to find the details such as recording, call summary, actionable insights, highlights, metrics, buyer score, and so on. You can also use the bot to get AI-generated answers to questions about the call.

Collaboration Workspace

Ron_...Shaun_20240216182917_UTC.MP4

Buyer Interest Score 90

Ask Anything

E-Mail Assistant

Save To CRM

More

Uploaded by: golduser

Date: Feb 26, 2024

Duration: 2 hours 25 minutes 7 seconds

Viewed By: 0 People

Watch Now

Listen Now

Transcript

Sentiment Analysis

Summary

Buyer insights

Highlights

Metrics

and the speaker mentioned that there might be areas where Clari could be complemented with something that they don't do, specifically mentioning blind spots.

In the conversation, spk_0 mentioned Gong and how it provides optimal talk ratio, which is 70%. They also mentioned that every conversation is different and the sentiment of the conversation is what really matters to determine if it was good, bad, or ugly. Additionally, spk_0 discussed how Aviso can help identify if a deal is at risk based on procurement conversations and how reps may try to close deals within the last couple of minutes of the quarter.

The conversation discussed Gong and Chorus, two platforms that provide metrics such as talk rate, question rate, and longest monologue. The speaker mentioned that these platforms are task states and that the sentiment of the conversation is what really matters to determine if it was good, bad, or ugly. The speaker also discussed the importance of listening to the sentiment of the conversation to figure out what is real and what is not.

Save To CRM

CLOSING REMARKS

spk_1

Follow up with the smaller prospects sent last week.
Recommend a candidate for AE position and connect them with spk_0.

spk_0

Send an email to Sharon with the updated demo workflow document for certification preparation.
Block more time on Monday for further training and study.
Continue studying the platform and try to simplify the workflow for concise articulation.
Follow up with prospects and reach out to more peers for meetings.

spk_2

No action item identified.

spk_1

above.

- spk_1 mentions that they have a single pane of glass for forecasting, which helps them save costs from a licensing standpoint.
- spk_0 also mentions that they have recommended actions based on their AI, which includes suggested content for overcoming pricing objections.
- However, there is no detailed discussion on specific pricing models or subscription plans.

spk_0

spk_0 asked spk_1 to continue working on the remaining tasks that were left uncovered.

spk_1 confirmed that they will follow up on the smaller prospects that spk_0 had sent last week.

spk_0 wished spk_1 a great day and mentioned that Monday is a holiday, and they will see each other on 2 Tuesday.

ASK ANYTHING

Get AI-generated answers to questions about this call.

Ask anything about this call

No Questions about this call yet.
Please ask anything about this call and get AI-generated answers.

Use Aviso Notetaker to import recordings of the external meetings and generate meeting insights

When you host a meeting through the [Collaboration Workspace](#) in Aviso AI, you can generate AI based meeting summary, transcription and insights to deep dive into the call to understand the buyer's intent, define course of actions to improve customer interactions and close more deals. If you have a recording of a meeting that took place on any other meeting platform, you can upload the recording to Collaboration Workspace and generate meeting transcription and insights. But you cannot record a meeting in the following scenarios-

- you receive a meeting invite from your prospects
- your meeting platform subscription doesn't allow you to record or is disabled globally

In this scenario, use Aviso Notetaker to record the meeting and import the recording to Aviso Collaboration Workspace without any manual intervention. After the recordings are stored in the Collaboration Workspace, you can generate meeting transcription and insights similar to any other meeting. Currently, Aviso AI supports using Notetaker with the following service providers:

- Zoom
- Google Meet
- Microsoft Teams

What is Aviso Notetaker and how does it work?

Aviso Notetaker is basically a bot that joins your meeting as a participant and imports the meeting recording to Aviso Collaborations Workspace. You have to either [integrate Aviso Notetaker with your calendar](#), or [send or forward the meeting invite to the Aviso Notetaker](#) at least 15 minutes before the meeting starts. If you integrate with calendar, the Notetaker reads the meeting schedules and joins automatically.

Note

If your call service provider requires you to admit any external participants to the meeting, you have to admit the Notetaker. If you didn't admit the Notetaker for ten minutes from the start of the meeting, the Notetaker leaves the meeting.

Note

If you have integrated the Notetaker with your calendar, and want to remove the Notetaker from a meeting, you can remove the Notetaker from the list of participants. You can also remove it from the list of participants to stop the recording while the call is in progress. The Notetaker works like any other participants in the meeting. However, once you remove the Notetaker from a meeting, it cannot join the same meeting again.

When using Aviso Notetaker to record an external meeting, The Notetaker reads the following information to identify the account participated in the meeting and tags the meeting to the respective deal room or account room:

- Meeting subject or description - While scheduling a meeting, use the Deal ID in the subject or description. You can find the deal ID from your CRM.
- Domain of the external participants - Notetaker reads the domain of the external participants and tags the meeting to the respective deal rooms.

After identifying an account, the meeting recording is tagged to the deal for which the meeting host is the deal owner. If Aviso identifies multiple deals for a particular meeting recording and if the meeting host is the deal owner of all the deals, the meeting recording is tagged to all the deals.

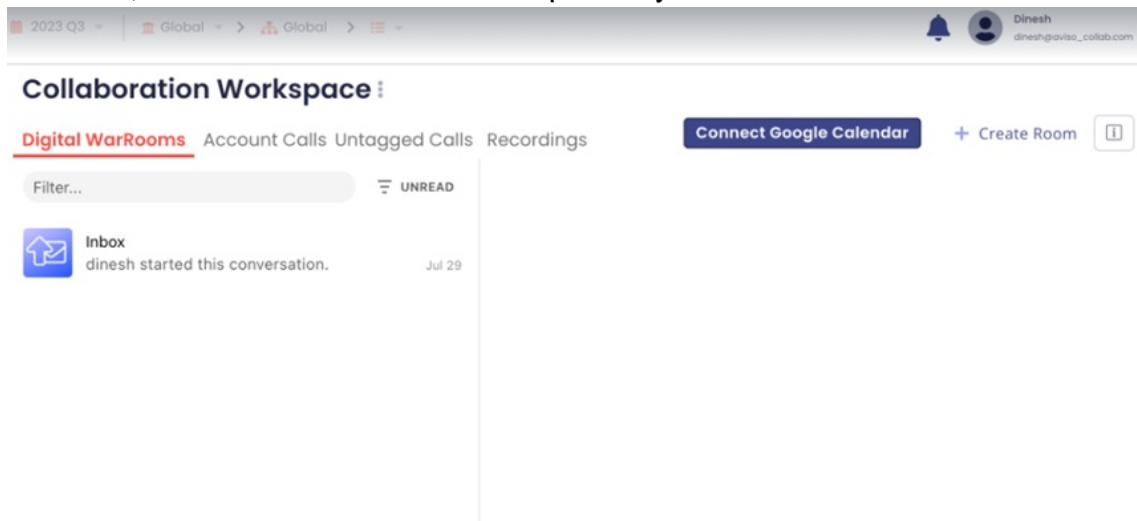
If it could not identify any deal, or if there is no external participant in the meeting, the meeting recording is tagged to your inbox. Later, you can move the meeting recording from your inbox to any deal room as required.

Integrate Aviso Notetaker with your calendar

Your IT administrator can register the Aviso application and enable the application access to the calendar APIs. Then perform the following one-time settings.

(If you use Google Meet or Microsoft Teams, and if Aviso Conversational Intelligence platform is already configured to access recordings from these meeting service providers, the IT administrator does not need to configure anything. In that case, you can perform the following one-time settings and enable the Aviso Notetaker.)

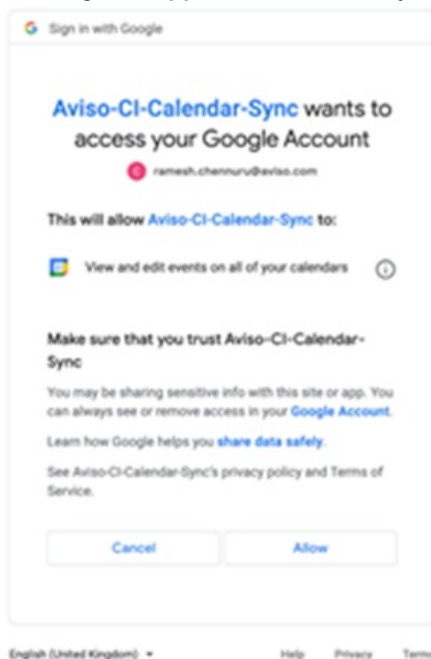
1. Log in to Aviso AI and open Collaboration Workspace.
2. On the top, right-hand side, click **Connect Google Calendar** or **Connect Outlook Calendar**, based on which calendar service provider you use.



You will be redirected to a Sign in page.

3. Sign in with your calendar account.

A dialog box appears and asks if you want to give Aviso with access to your calendar.



4. Click **Allow**.

A confirmation message appears on your browser- Your calendar account is successfully linked with Aviso.

Invite Aviso Notetaker to a meeting

Calendar integration is the preferred approach to enable the Aviso Notetaker, but if you want to enable the Notetaker explicitly for some specific meetings, you can use this way.

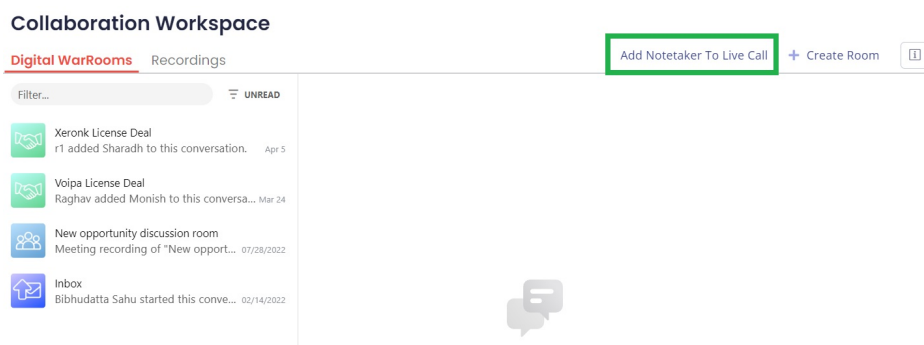
To invite Aviso Notetaker to a meeting, send or forward the meeting invite to .notetaker@aviso.com.

For example, if you work for XYZ company, the email ID should be xyz.notetaker@aviso.com.

Add Aviso Notetaker to a live call

Aviso lets you add the Notetaker to a live call. If you haven't added Aviso Notetaker using any of the ways mentioned above, you can still add it when the call is going on by using the meeting link.

1. Go to Aviso Collaboration Workspace.



2. Click **Add Notetaker To Live Call**.

The Add Notetaker to Live call dialog box appears.

Add Notetaker to Live call

Enter meeting link:*

Enter the meeting link URL

Add Notetaker To Live Call

3. Enter the meeting link in the **Enter meeting link** field.

4. Click **Enter meeting link**.

The Notetaker joins the live call.

Make effective customer interactions with real-time call guidance

While you are on a sales call, your sales pitch and responses to your prospect's queries decide whether you will close a deal or not. To make your interaction effective, you must memorize all the detailed information (price details, features, competitors details, and so on) or keep shuffling through many resources to find the required information. You also need to make a checklist of breakthrough points and keep track of them while on the call. These processes are inefficient and also distract you from focusing on selling and handling objections. Equip yourself with Aviso real-time call guidance to let Aviso show you preconfigured checklist, recommended responses, key information related to the deal that are specific to each stage so you can focus more on selling your products or services. Currently, Real-time call guidance is supported on Zoom calls only.

Important

You can use Real-time call guidance only when you join a meeting through Deal room.

Configure Checklist and Recommended response

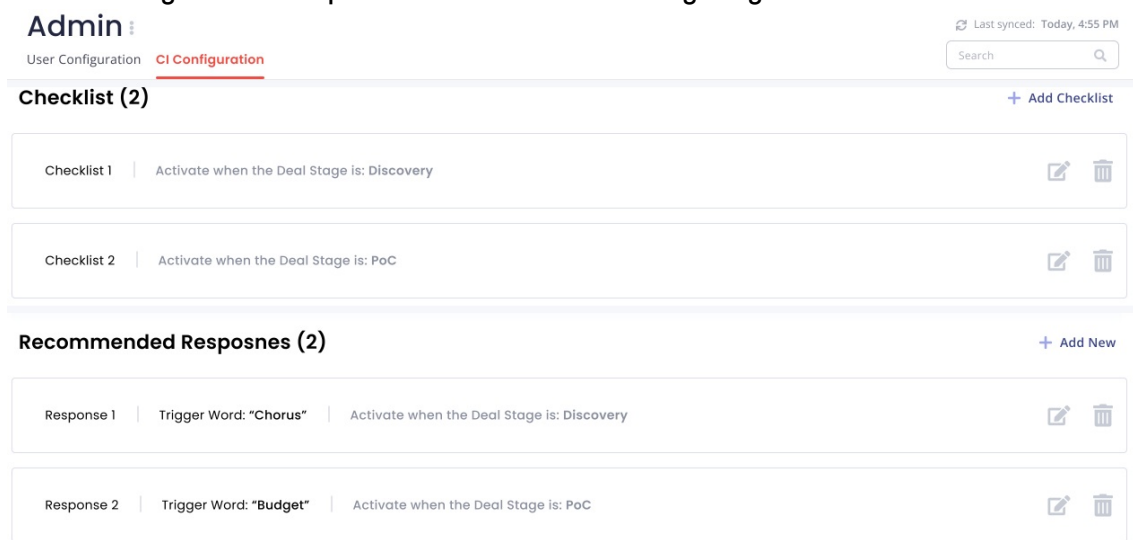
Note

A sales leader can configure the required checklist and recommended responses, or sales reps can do it for themselves based on the initial configuration made while activating the functionality.

Configure the checklist and recommended responses to the Real-time call guidance for any stage of a deal by performing the following steps.

1. Go to the Admin screen in Aviso AI and open CI Configuration tab.

The CI Configuration tab opens as shown in the following image.



2. In the Checklist section, click Add Checklist to add a new checklist.
Create Checklist dialog box appears.

3. In the **Checklist Name** field, enter a name of your choice. For example, you may enter a name that is a combination of the deal name and stage.
4. Under **Checklist Items**, write down the first item you want to keep in the checklist. Press the Enter key on your keyboard to create more items.
5. From the **Activate when the Deal Stage is** list, select the stage in which you want to activate the checklist.
For example, if you select *Negotiating*, the checklist appears when you make a call and the deal is in Negotiating stage.
6. Click **Create**.
The newly created checklist appears under **Checklist** on the CI Configuration screen.
7. In the **Recommended Responses** section, click **Add New** to add a new recommended response.

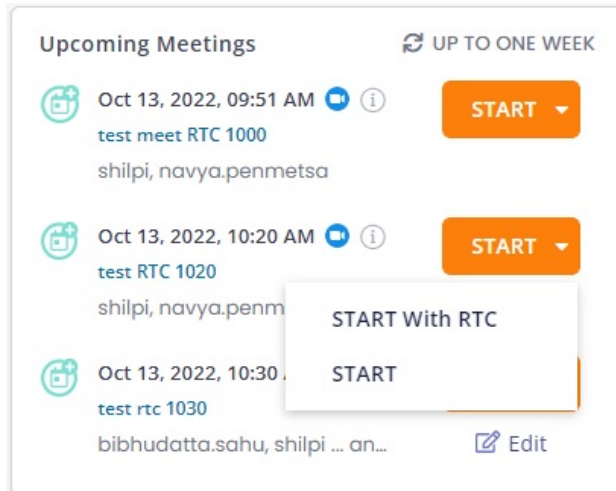
Create Recommended Responses dialog box appears.

8. In the **When someone says** field, enter the keyword for which you want to create the recommended response.
9. Under **We suggest the response**, enter the responses you recommend for the keyword you mentioned in the last step.
Press the Enter key on your keyboard to create multiple responses.
10. From the **Activate when the Deal Stage is** list, select the stage in which you want to activate the Recommended Response.
11. Click **Create**.
The newly created Recommended responses section appears under **Recommended Responses** on the CI Configuration screen.

Add Real-time call guidance to your meeting with your prospect

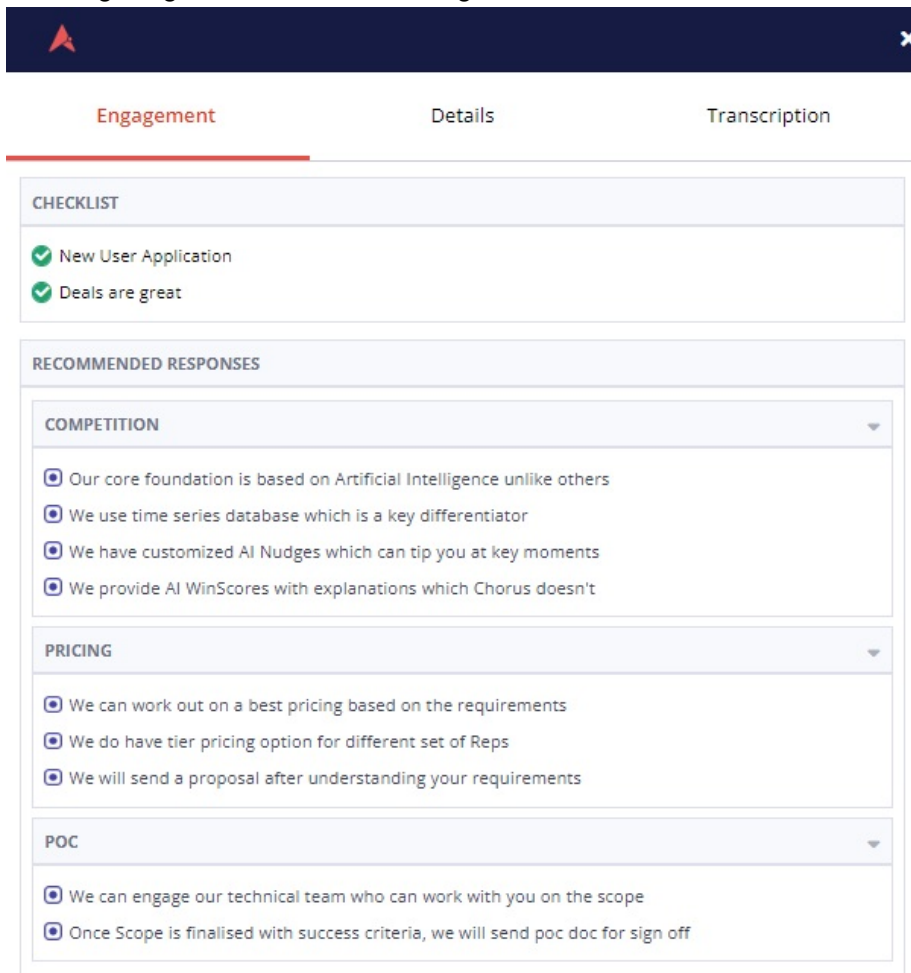
1. Activate a [deal room](#) in the deal for which you want to have meeting with your prospects. Ignore this step if you have already created a Deal room for this deal.

2. Go to the deal room and schedule a meeting.
3. Under the **Upcoming Meetings**, click **START** beside the scheduled call.



4. Click **Start with RTC**.

When the meeting starts, the Real-time call guidance screen also appears, and Aviso Notetaker bot joins your meeting as a participant to facilitate the Real-time call guidance. The following image shows Real-time call guidance screen.



Engagement tab in Real-time call guidance

The Engagement tab has Checklist and Recommended responses sections-

The Checklist section shows all the must-mention points and questions as you (reps or sales leader) **configured** before. During the conversation, when a participant mentions any keyword that is same as or semantically same as the items mentioned in the Checklist section, the mentioned points are tick marked. So you can refer to the checklist and don't have to take care of the checklist manually. Recommended responses are pre-configured with multiple keywords or phrases to help you with required clues during the call in real time. When any participant in the call mentions a specific keyword or phrases that matches with the pre-configured keywords or phrases, the recommended responses appear with the keyword to help you structure the response or set the direction of the call. There is no restriction on the number of recommended response which can be configured and displayed during the call. In the above configuration, when the prospect talks about "competition," all the recommended responses configured for the keyword "competition" appeared.

Details tab in the Real-time call guidance

The Details tab has the following critical information about the deal and next steps so you can easily refer when you need during the customer call.

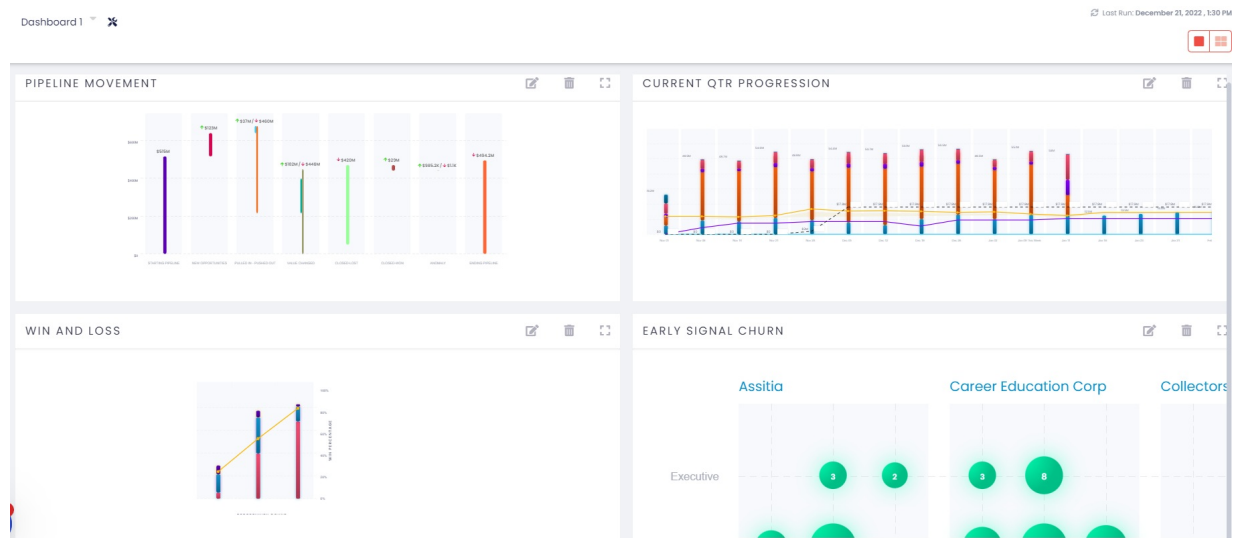
- WinScore
- Engagement grade
- SFDC amount
- Close date
- Category
- Stage
- In forecast

Transcription tab in the Real-time call guidance

The Transcription tab transcribes all the conversations in real-time. You can look for any keywords used while the call is in progress.

Create customized Dashboards with reports that you use often

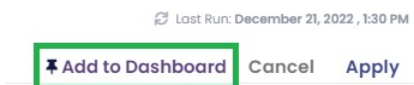
Executive Dashboard lets you add those reports from the Report screen that you use frequently together and have a consolidated view of such reports from one place within your hierarchy. You can easily create a dashboard from the Reports screen and save it for future use. You can create multiple dashboards and modify them when you want. Here is an example of an Executive Dashboard where PIPELINE MOVEMENT, CURRENT QTR PROGRESSION, WIN AND LOSS, and EARLY SIGNAL CHURN reports are added.



Create an Executive Dashboard

You can create an Executive Dashboard from the [Reports](#) screen. After you create the Executive Dashboard, you can view the dashboard from the Executive Dashboard screen.

1. Go to Reports screen.
2. Open the first report that you want to add to the Executive Dashboard.
3. After the report appears, click **Add to Dashboard**.



Select Dashboard To Pin Report dialog box appears. If you have created Executive Dashboard before, the existing dashboards appear in the dialog box.

4. If you are creating Executive Dashboard for the first time, click **+ Create New Dashboard**.
If you want to add the report to the existing dashboard, select any existing dashboard to add the report to it.

The dialog box titled 'Select Dashboard To Pin Report' contains two options: 'Dashboard 1' (unselected) and 'Dashboard 2' (selected). At the bottom, there is a button labeled '+ Create New Dashboard' highlighted with a green box, and 'Cancel' and 'Save' buttons.

After you clicked **+ Create New Dashboard**, then **Dashboard Name** field appears.

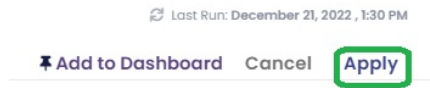
5. Enter a name of your choice in the **Dashboard Name** field and click **Save**.

The name of the newly created Dashboard appears in the dialog box.

6. Select the name of the dashboard (existing or new, where you want to add the report).

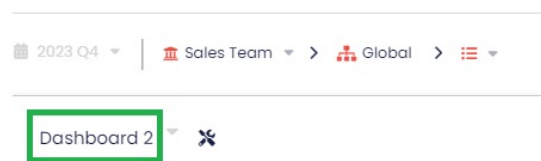
7. Click **Save**.

8. On the report screen, click **Apply**.

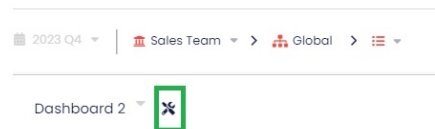


9. Go to Executive Dashboard screen.

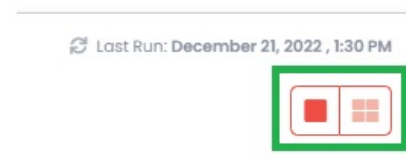
10. From the left-hand side top, click the name of your dashboard to open.



11. Click the setting icon beside the list of dashboards to set a report as default, duplicate, or delete.



You can choose from two types of view options to see the reports in your dashboard.



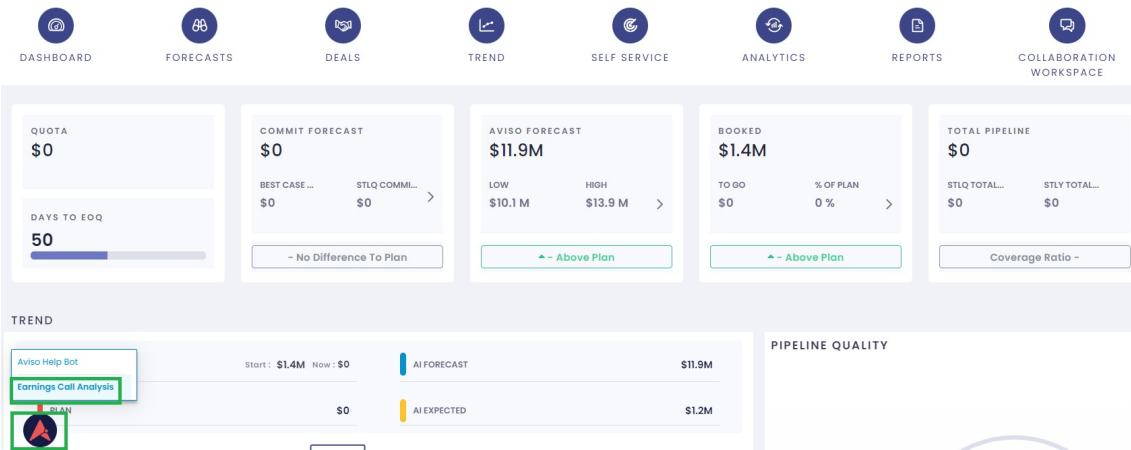
Make your earning calls affective with Aviso's Earning Call Analysis

In the fast-paced world of business, staying well-informed is essential for the success of Go-To-Market (GTM) teams. Earning Call Analysis helps GTM professionals gain a competitive edge by leveraging the advanced Retrieval Augment Generation (RAG) framework to transform the way companies analyze earnings call transcripts. GTM teams can get the following benefits from earning Call Analysis.

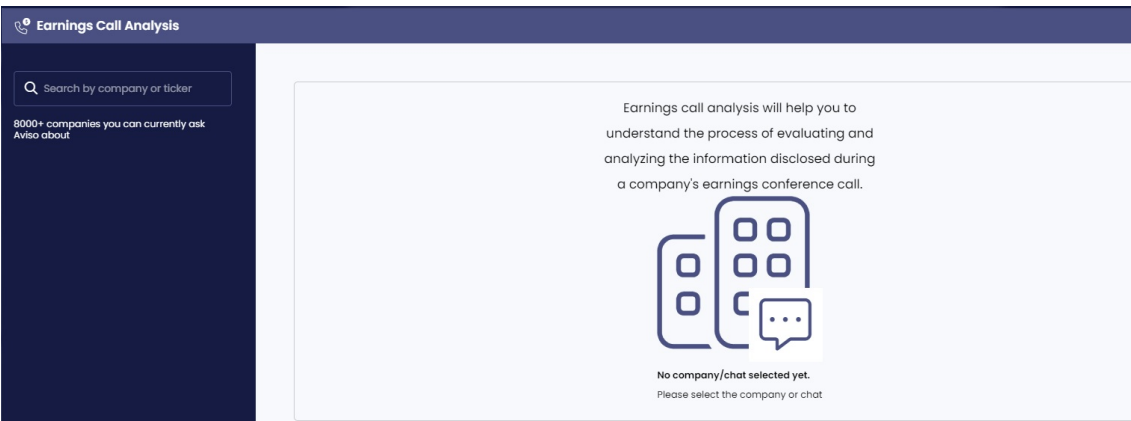
- **Comprehensive Insights:** GTM teams gain nuanced understanding of a company's financial health and strategic direction.
- **Time Efficiency:** Automation saves valuable time, allowing professionals to focus on strategic tasks and customer interactions.
- **Data-Driven Conversations:** Armed with accurate insights, GTM teams engage in informed discussions with customers, enhancing partnerships and addressing concerns.
- **Competitive Advantage:** Staying ahead in business requires staying informed, and this feature provides the latest insights for a competitive edge.

How to use Earning Call Analysis

1. After you log in to Aviso, click on the interactive assistant (Aviso Logo) and then **Earnings Call Analysis**.



The Earning Call Analysis screen appears.



2. In the search box, enter the name or the ticker symbol of the company for which you want to have the earning call transcript.
A ticker is a symbol, a unique combination of letters and numbers that represent a particular

stock or security listed on an exchange.

The list of available companies appears below the search box. The following spreadsheet has the list of supported companies for earning call transcripts.

 [Earnings Call Companies.xlsx](#)

3. Select the company.

The Earning Call Analysis shows the following three sample questions to start with.

View Summary
Explain me the summary from a sales perspective

Business Model
Explain me the core business model

Key Performance Indicators
What are the key performance indicators for this company

4. Start any questions or type a question about the selected company in the query box to get comprehensive insights.

View your sales reps' performance

Evaluate your sales reps' performance to avoid any low performance affecting your sales and perform better in a sales quarter. Aviso AI lets you evaluate your rep's performance in the following ways:

- View high and low performs-

The leaderboard section in the Dashboard screen shows low and high performers in a quarter. For every rep in the low performers and high performers board, it shows the numbers of deals closed and the amount associated with the closed deals. Click menu (ⓘ) icon beside the rep to view the deals that the rep is working on and join the [coaching room](#) if required.

- View performance reports-

The Reports screen lets you download *various* Rep activity-related [reports](#) that show what does your team's performance looks like for the deals closing in a quarter.

Use Aviso Mobile app on the go

Whether you are at your workstation or away from the workstation, sometimes being updated on your sales figure and taking required actions are important. Aviso lets you use the Aviso platform from wherever you are, using the Aviso mobile app. To log in to Aviso mobile app, ensure that you have access to the Aviso platform. The same credentials work for both the Aviso browser version and the mobile app version.

Aviso mobile app is available in Google Play Store (Android version) and The App Store (iPhone OS version). Install the Aviso app (Aviso AI) from the app store and log in using your Aviso credentials to use the Aviso features on your mobile phone or tablet.

Note

The Aviso mobile app has some features of the Aviso platform, and Aviso is working on bringing in the other features.

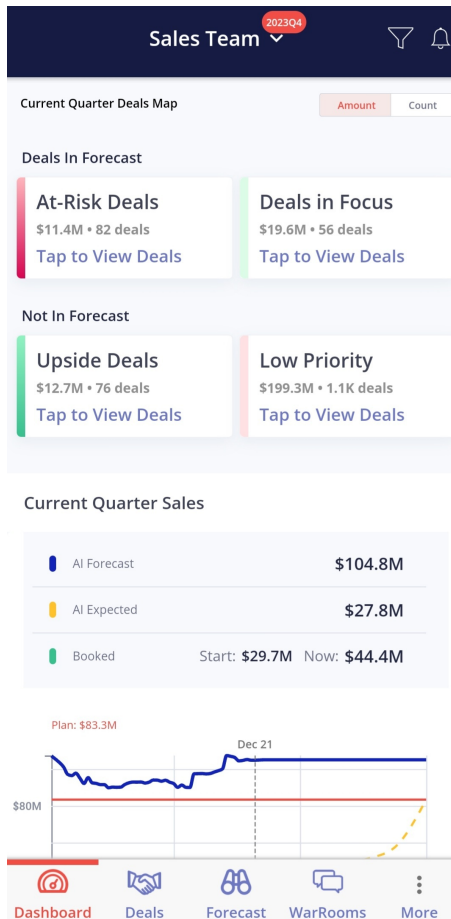
Note

Aviso lets you opt for all the capabilities (modules) or some selected capabilities. For example, your organization may have opted for only the Forecast module or the Conversational Intelligence module. Like the browser version, the Aviso mobile app also shows the modules your organization has opted for.

Install the Aviso mobile app on your device by following these instructions:

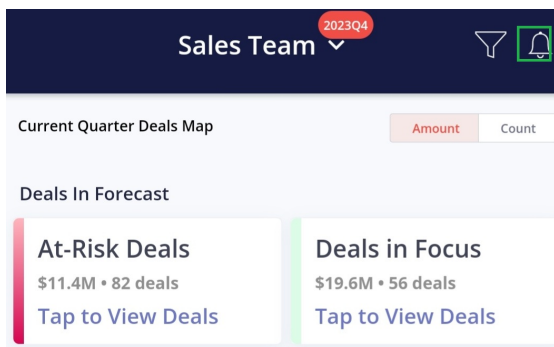
1. Go to Google Play Store or Apple App Store on your Android or iOS device.
2. Search and install Aviso AI app on your mobile.
3. After installing the app, tap **Next** button to learn more about Aviso's features, or tap **Skip** to skip all the learning instructions.
4. Click **LET'S FORECAST** and enter your Aviso credentials to start using the Aviso AI mobile functionalities.

After you log in, the Dashboard screen appears. From the Dashboard screen, you can navigate to the Deals, Forecast, WarRooms, and Menu (More) screens by tapping the icons at the bottom of the screen.



View notifications through Aviso mobile app

Aviso AI **notifies** you of various sales events to educate or alert you on certain sales discrepancies. Tap the notification icon on the top of the Dashboard, Deals, or Forecast screen in the Aviso mobile app to open the Notification screen and view the notifications.



Use hierarchy and filter to view specific opportunities

On the Aviso mobile Dashboard, tap **Sales Team** to various hierarchies based on your sales team and choose the correct hierarchy. As a sales rep, you can view the opportunities assigned to you. As a sales leader, you can view opportunities accessible at your level.

Sales Team

2023Q4

Current Quarter Deals Map

Amount Count

Deals In Forecast

At-Risk Deals

\$11.4M • 82 deals

Tap to View Deals

Deals in Focus

\$19.6M • 56 deals

Tap to View Deals

×

View Settings

✓

PERIOD	TEAM
Sales Team	✓
Americas	▼
Asia Pacific	▼
EMEA	▼
Account type	▼
Commercial	▼
Enterprise	▼
Mid-Market	▼
SMB	▼
Strategic	▼

Click the filter icon to select from the available opportunity types such as New, Upsell, Renewal, and so on, and view the associated opportunities.

×

Filters

✓

SEGMENT BY

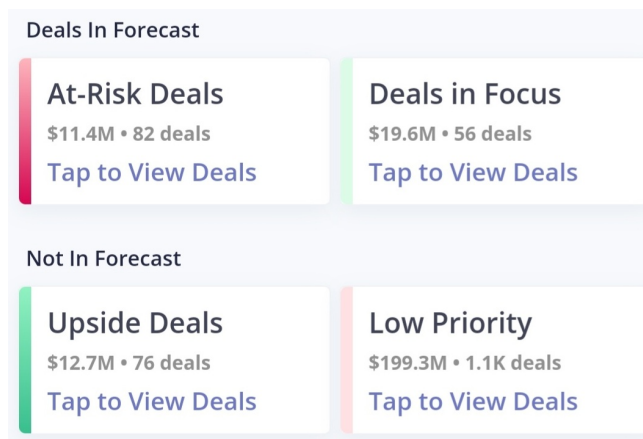
Total	✓
New	
Upsell	
Renewal	

Stay on top of your business at any point in time during a quarter using Aviso mobile app

The Dashboard screen in Aviso mobile app gives you a consolidated view of where your business stands and actionable insights with respect to sales forecasts, deals, and pipelines in a given quarter. After you log in, the Dashboard screen appears. From the Dashboard screen, you can navigate to the Deals, Forecast, WarRooms, and Menu (More) screens by tapping the icons at the bottom of the screen. The Dashboard page shows the following:

View Opportunity Map to evaluate upside deals and deals associated with risk

When sales reps work with multiple deals, sometimes it's difficult to decide which deals require more attention and what can be parked for the next quarter. Wrong sales decisions can also affect your quota attainment in the current quarter. The [Opportunity Map](#) (Deals map) in Aviso AI drills down into all the deals and categorizes them with the risk, priority, and forecast levels involved to help you take the correct decision and achieve your quota in advance.



As shown in the image, the Opportunity Map has four quadrants separated by deals in forecast and not in forecast.

- **At-risk deals:** The first quadrant shows all the deals you or your team included in the forecast but are identified by the AI to be at risk. These are the deals you expected to close in the current quarter but as AI has learned from the deals movement, these deals have fewer chances of closing in the current quarter.
- **Deals in focus:** The second quadrant shows all the deals you or your team included in the forecast and are in Commit stage. Aviso AI also predicts that there are good chances of closing these deals in the current quarter and hence these deals deserve to be focused the most.
- **Upside deals:** The third quadrant shows all the deals you didn't include in the forecast but analyzing the deals movement, Aviso AI predicts that there are good chances of these deals closing in the current quarter. You may evaluate and include these deals in forecast, which might compensate for the vacant created by the deals that are at risk.
- **Low priority:** The fourth quadrant shows all the deals you didn't include in the forecast and Aviso AI also predicts that there is significantly less possibility of closing these deals in the current quarter. These deals should be the least focused to better utilize your time with the deals with better possibilities of closing in the current quarter.

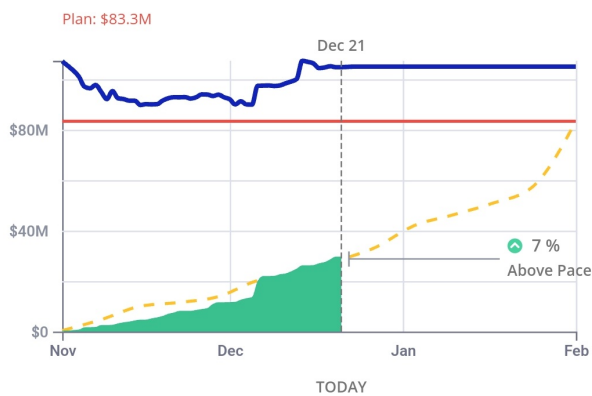
Click any quadrant to see the associated deals. You can use the following filters to view deals more specific to deal categories, amount or count, and type of deals (new or renewal).

Learn about the current-quarter sale and compare it with the AI forecasts using Aviso mobile app

This section gives you visibility into sales performance in the current quarter. The graphical representation has AI forecast value, AI expected value, and booked value to compare the gaps among what is achieved, what was expected, and what AI forecasted to evaluate your sales performance at any point in current quarter.

Current Quarter Sales

AI Forecast	\$104.8M
AI Expected	\$27.8M
Booked	Start: \$29.7M Now: \$44.4M



The following graphs show forecast to plan, and sales booked to plan values for specific sales groups. A box below each graph shows if the booked value at any given point in time is sufficient to achieve the forecast. It shows in green and red color to indicate whether you have achieved the expected sale or not respectively.

↳ Americas

Forecast to Plan



Booked to Plan



▲ 22 % Above Pace

↳ Asia Pacific

Forecast to Plan



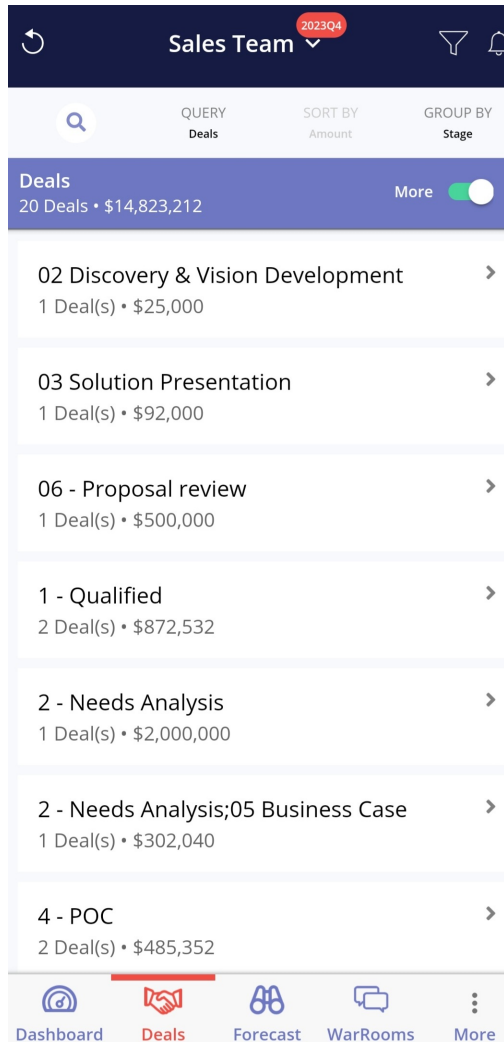
Booked to Plan



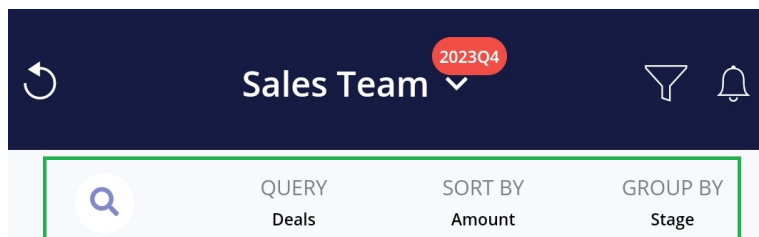
▼ 18 % Below Pace

View your active deals in the current quarter using Aviso mobile app

After you log in to the Aviso mobile app, tap the Deal icon from the bottom to open the Deals screen. It shows all the active deals in the current quarter accessible at your level.



Aviso mobile app lets you use filters and search options to find specific deals based on deals stages, risk associated, Aviso Win score, region, amount, category, close date, and so on, so you can easily find the required deals when you need them. Use the following options on the Deals screen in the Aviso mobile app to view a specific deal



- Search option - enter the deal name or deal ID used in the CRM to find a particular deal.
- Query - use queries such as deals that are in commit state, deals already owned, deals put in forecast, split deals, all deals, lost deals, deals from various regions, and many other available search criteria.
- Sort by - use the sort by filter option to sort the result by amount, Aviso Winscore, Close date, opportunity name, and category.
- Group by - use the group by filter option to group the deals by owner, category, and stage.

Deep dive into a deal using Aviso mobile app

From the list of deals on the Deals screen, tap on any deal to learn the key details of the deal. As shown in the following image, it shows whether a deal is in forecast or not, name, date of creation, amount, close date of the deal, and if there is any progress toward closing the deal. If there are any positive deal movements that would contribute to closing the deal, it shows an upward arrow in green color. The negative deal movements are accompanied by a downward arrow in red color. Click the star icon if you want to mark the deal as favorite. You can use the Query option as explained above to view all the deals marked as favorite.

IN FORECAST

23

iTropolis.com Impleme...

\$72.5K

>

Max Tarasevich • Jan 31 2023

Changes Since Last Week

☆

Stage

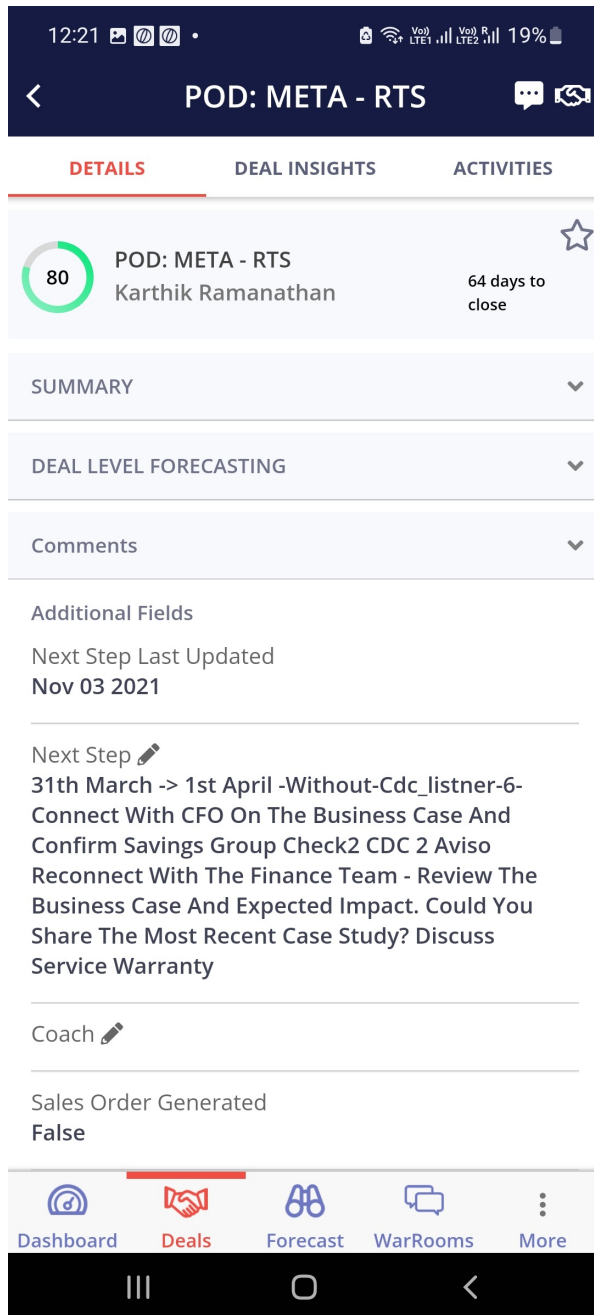
CloseDate

↑ Advanced from '1 - Qualified' to '2 - Needs...

↓ No change since last week

Click the arrow icon against a deal to have a bird eye view and actionable insights into the deal, which can help you take corrective actions to close the deal. The deal details screen appears and it has three tabs as follows:

- **DETAILS**
It has CRM details section that shows all the data from CRM and lets you write back to CRM.
- **DEAL INSIGHTS**
It has useful deal insights such as Win Score Insights, Booking Timeline, Owner Insights, and Engagement Explanation.
- **ACTIVITIES**



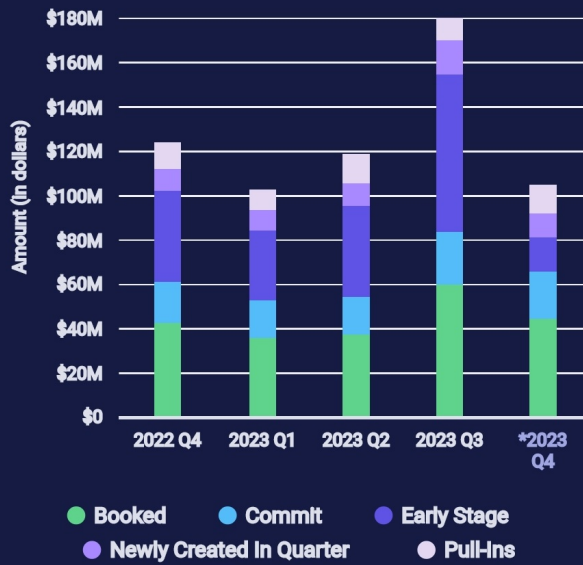
View sales forecast for a quarter using Aviso mobile app

Sales forecast is a must and pivotal component of any business as it drives sales deployment, financial planning, operations planning, and marketing planning. It must be as accurate as possible to help you make the right decisions. A human-generated sales forecast can have errors and might not be highly accurate. Aviso AI uses AI and ML to give you sales forecast with more than 98 percent accuracy. After you log in to Aviso mobile app, from the bottom menu bar, tap **Forecasts** to open Forecasts screen.

Sales Team 2023Q4  	
> PLAN	\$83.3M
> AVISO FORECAST	\$105M 
> BOOKED	\$44.4M
> COMMIT	\$56.3M  \$3.9M
> MOST LIKELY	\$94.8M  \$44.1M
> BEST CASE	\$128.3M  \$12.9M
> GAP TO QUOTA	\$38.9M
> QUOTA ATTAINED	53.32%
> COVERAGE RATIO	5.15
> DEAL LEVEL FORECAST	\$75.5M
> OPEN PIPELINE	\$429.3M
    	
Dashboard	Deals
Forecast	WarRooms
More	

Tap the Eye icon against the Aviso Forecast to open Aviso AI Forecast Explanation. The Forecast Explanation helps you decode the Aviso Forecast, which is derived from various factors such as deals from this quarter, early-stage deals, pull-in deals, and so on.

Aviso AI Forecast Explanation



- Booked amount so far is \$44.0M
- Compared to the same time last quarter, there is -\$21.0M (16.7%) decline in the current quarter AI Forecast. This decline is due to changes in the following categories - Early Stage (-\$56M), Booked (-\$16M), Newly Created in Quarter (-\$4M), Commit (-\$2M), Pull-ins (+\$3M)
- Compared to the same time last year, there is \$7.3M (7.5%) growth in the current quarter AI

> QUOTA ATTAINED 53.32%

> COVERAGE RATIO 5.15

The Forecasts screen shows sales forecast for deal level with individual and rollup values. Click each category to expand and view the forecast value or set your sales plan. The PLAN category lets you set your sales quota for a quarter. The COMMIT and BEST CASE categories let you update or rollup the commit and best case amount respectively. Tap **Group** on the top to select a quarter or group to narrow down the search results.

QUOTA	\$60,358,048
Update	
AMER (VP - Kate FitzG...	\$27,234,286
Update	
AMER FED (VP - Steve ...	\$5,612,017
Update	
APJ (VP - Matt Day)	\$6,529,955
Update	
EMEA - VP - TBH	\$18,723,128
Update	
Monthly Cloud	\$0
Update	
Dashboard Deals Forecast Profile	
> BOOKED/QUOTA % 57.21%	
> COMMIT \$42.1M	
> COMMIT/QUOTA % 69.79%	
> FORECAST \$62.4M	
> FCST/QUOTA % 103.43%	
> BEST CASE \$88.9M	
\$81,967,735 \$66,514,500 Update Rollup	
AMER (VP - KATE FITZGERA... \$43.9M -\$1.5M	
\$39,894,734 • \$32,526,794	
AMER FED (VP - STEVE COL... \$5.2M \$104.4K	
\$5,312,558 • \$5,662,741	
APJ (VP - MATT DAY) \$7.5M -\$1M	
\$7,141,268 • \$7,375,538	
EMEA - VP - TBH \$25.1M -\$3M	
\$24,393,754 • \$20,911,263	
Dashboard Deals Forecast Profile	

Collaborate digitally with team members and prospects using Aviso mobile app

Aviso mobile app lets you [collaborate digitally](#) with team members and prospects, and use various useful conversational intelligence features. These conversational intelligence features help you deep dive into conversations and get actionable insights. You can create separate WarRoom for different purposes such as meeting with a prospect, coaching a sales rep, discussing forecast, and any general sales-related discussions.

Use WarRooms for specific purposes from Aviso mobile app

After you log in to the Aviso mobile app, tap the WarRooms icon from the bottom to open the WarRooms screen. You can create a Collaboration Room and Coaching Room, View and access all the WarRooms, view all the recordings and meeting transcriptions, and deep dive into conversations using various conversational intelligence features. Currently, Aviso mobile app lets you create and access the following WarRooms:

Deals room - You can activate a deal room for a particular deal from the Deal details screen. However, you can access all the existing deal room that you are part of from the WarRooms. Deals room lets you schedule meetings with buyers of the deal.

Forecast room - You can activate a forecast room for a particular forecast from the Forecast screen. However, you can access all the existing forecast room that you are part of from the WarRooms.

Coaching room - You can activate a coaching room to coach your reps digitally from the WarRoom. You can activate coaching rooms for reps who are under your hierarchy.

Collaboration room - You can activate a collaboration room for any general sales-related discussions from the WarRoom.

Create a WarRoom from Aviso mobile app

You can create a Deal room for a particular deal from the deal detail screen. You can create a Forecast room for a particular deal from the Forecast screen. You can create a Coaching room or Collaboration room from the WarRoom.

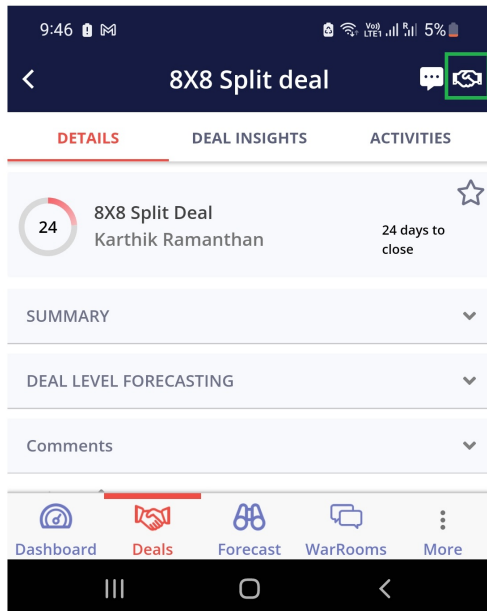
Create a Deal room from Aviso mobile app

You can create a Deal room for a particular deal from the deal detail screen. However, after a deal room is created, you can access the deal room from the Deals screen and also the WarRooms screen.

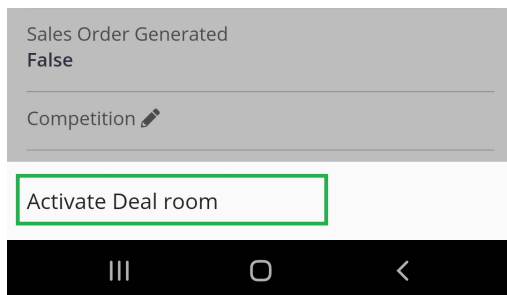
Note

You can create Deal rooms only for the deals assigned to you.

1. Go to the Deals room and tap a deal to open the details of the deal.
2. On the top, tap on the Deals room (shake-hand) icon.



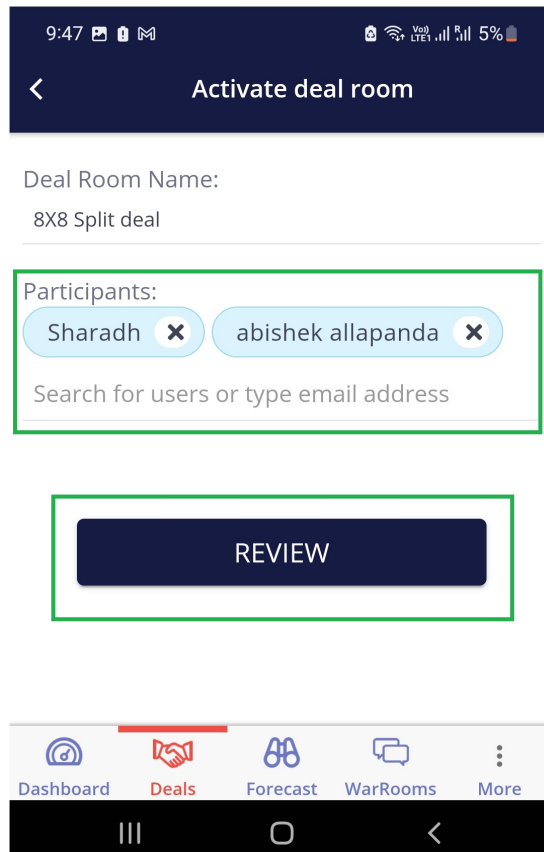
The Activate Deal room pop up appears.



3. Tap on **Activate Deal room**.

The Activate deal room screen appears and lets you add the participants.

4. In the **Participants** field, enter your participants.



5. Tap **Review**.

6. Tap Activate.

9:47 5% 5%

< Activate deal room

Review Deal room details

Deal Room Name:
8X8 Split deal

PARTICIPANTS(2)

Sharadh sharadh1911@gmail.com

abishek allapanda abishek.allapanda@aviso.com

Add Invitation Message: :
Add a message

BACK ACTIVATE

Your deal room is activated. You can schedule a meeting, start an instant meeting, join a meeting, share files, and do many activities in a deal room.

Create a Forecast room from Aviso mobile app

You can create a Forecast room from the Forecast screen. However, after a Forecast room is created, you can access the Forecast room from the Forecast screen and also the WarRooms screen.

1. Go to the Forecast screen and tap on the Menu icon on the top.

10:42 17%

Sales Team 2023Q4

COMMIT \$56.3M ↑ \$3.9M

MOST LIKELY \$94.8M ↑ \$44.1M

BEST CASE \$128.3M ↑ \$12.9M

GAP TO QUOTA \$38.9M

QUOTA ATTAINED 53.32%

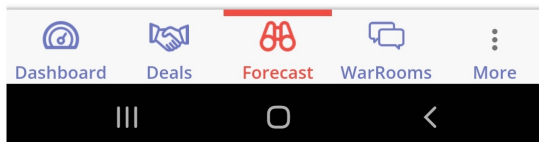
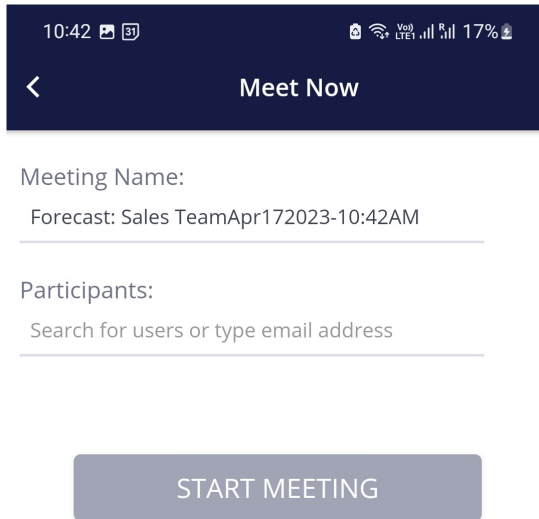
COVERAGE RATIO 5.15

DEAL LEVEL FORECAST \$75.5M

View Forecast Room

Start Forecast Call

2. To start a forecast meeting, tap Start Forecast Call.
The Meet Now screen appears.



If there are existing forecast meetings, you can view those by tapping **View Forecast Room**.

3. In the **Participants** field, enter the email IDs of the participants.

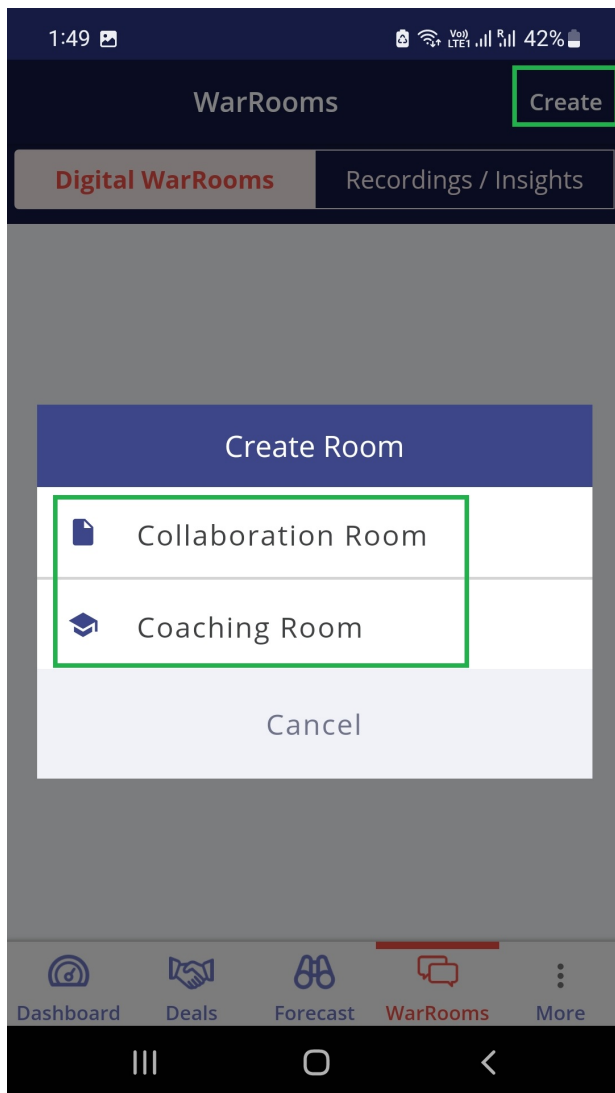
4. Tap **Start Meeting**.

Your Forecast room is activated. You can schedule a meeting, start an instant meeting, join a meeting, share files, and do many activities in a Forecast room.

Create a Coaching room or Collaboration room from Aviso mobile app

You can create a Coaching room and Collaboration room from the WarRooms screen.

1. Go to WarRooms and tap **Create**.



2. Tap **Collaboration Room** or **Coaching Room** to create a Collaboration room or Coaching room respectively.

Based on what you selected, different forms appear.

3. To create a Collaboration room, enter the room name and participants in the **Room Name** and **Participant** fields.

4. Tap **Review**.

5. Tap **Activate**.

Your coaching room or collaboration room is created. You can schedule a meeting, start an instant meeting, join a meeting, share files, and do many activities in a Collaboration room and Coaching room.

Record in-person meetings using Aviso mobile app and generate actionable insights

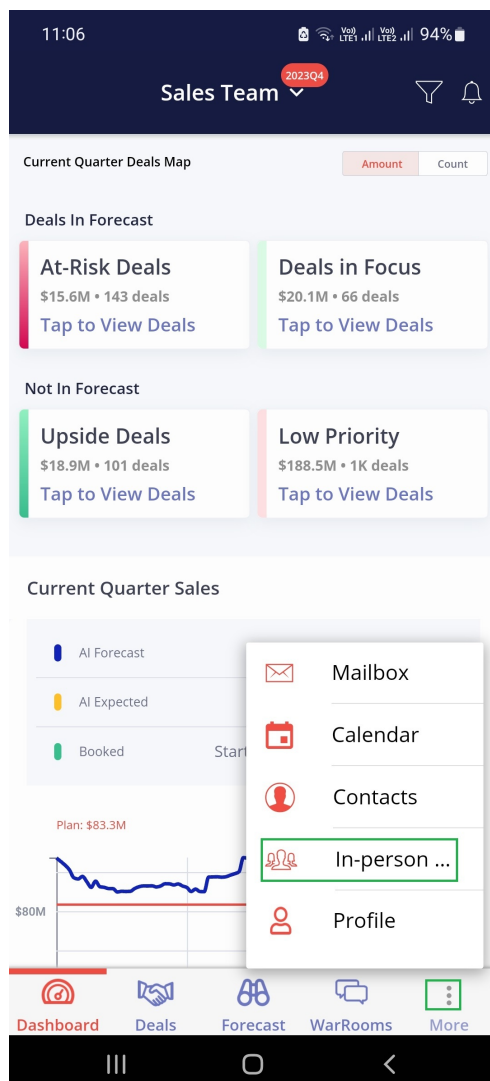
Whether it's a virtual or in-person meeting with prospects, Aviso lets you record the meeting and use all the features available in the [collaboration workspace](#) such as deep dive into a meeting using Aviso CI (Conversational Intelligence) metrics, evaluate your prospect's emotions and intent through smart transcripts. As Aviso mobile keeps your meeting notes and the key points from the meeting, it allows you to focus more on the meeting and drive it to closer. When you are meeting a prospect in person, you can use the Aviso mobile app and record the meeting with the prospect's consent. If required, you can trim a portion of the video and save only what you want to save. You can save the meeting recording in the deal room associated with the deal.

Note

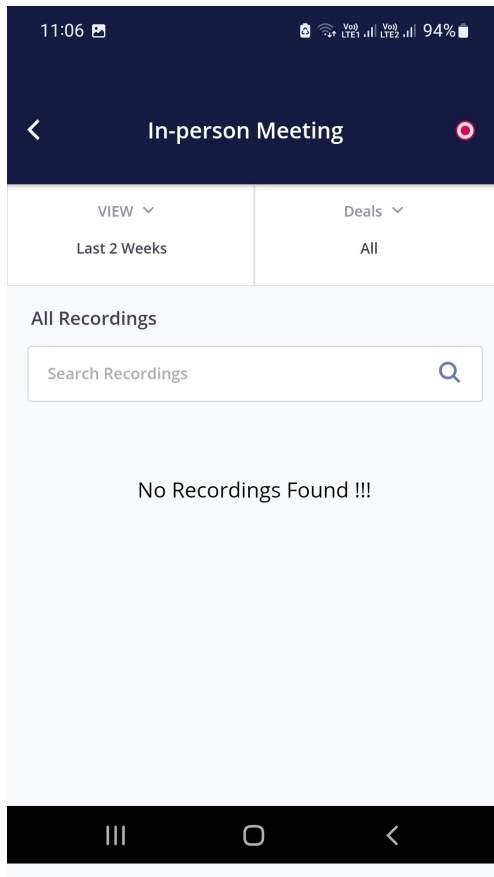
If there is no deal room created for a deal and you are recording an in-person meeting for the deal, a deal room will be created by default to save the recording.

When you are in an in-person meeting and want to record the meeting, perform the following steps to record the meeting.

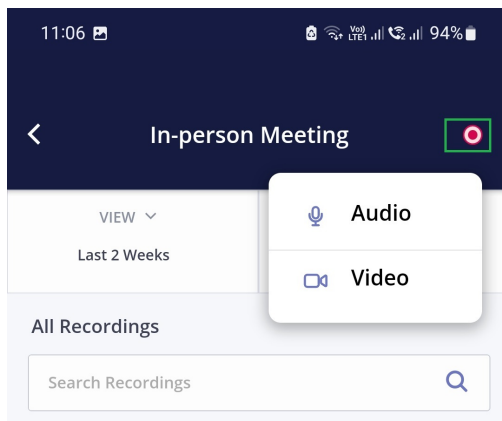
1. Open your Aviso mobile app and go to Menu icon > **In-person**.



The In-person meeting screen appears and shows all the in-person meeting recordings recorded previously.

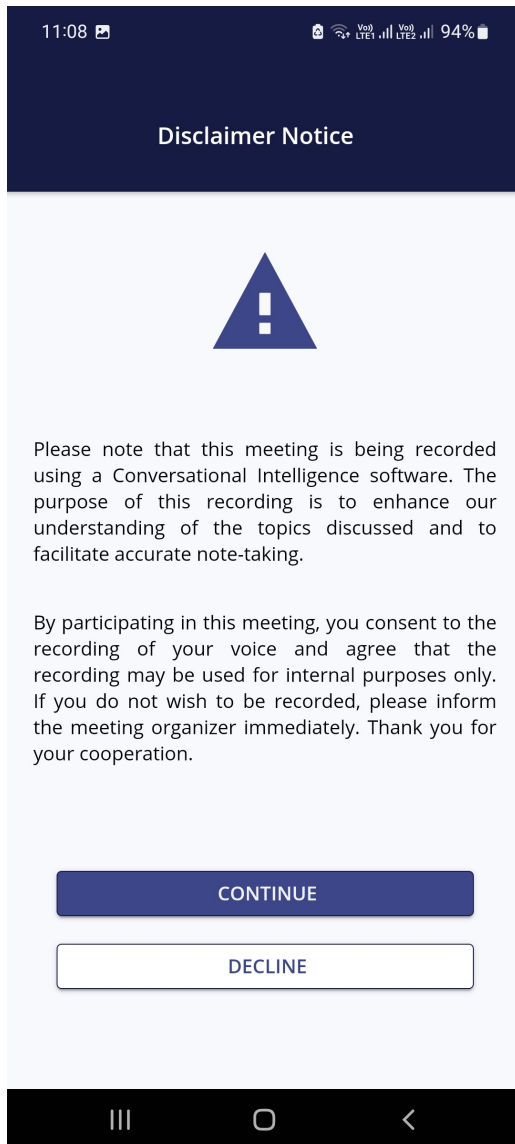


2. Tap on the record icon and select



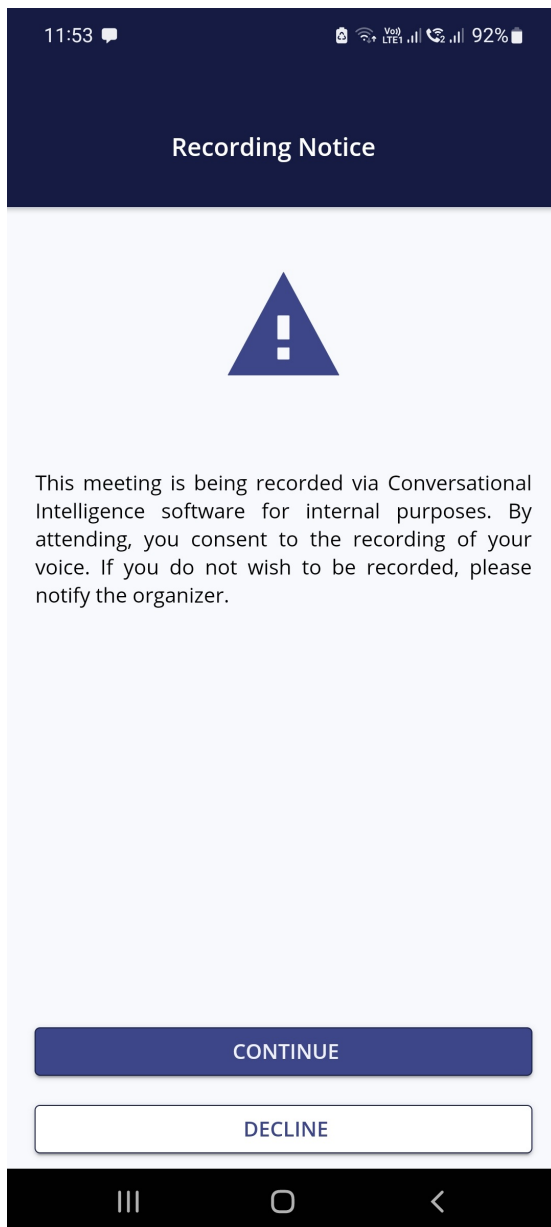
The Disclaimer Notice screen appears to take consent from the meeting participants before starting the meeting.

3. Read out the disclaimer and take consent from the participants before recording. Upon their consent, tap **CONTINUE**.



The Recording Notice screen appears to take consent from the meeting participants before starting the meeting.

4. Read out the Recording Notice and take consent from the participants before recording. Upon their consent, tap **CONTINUE**

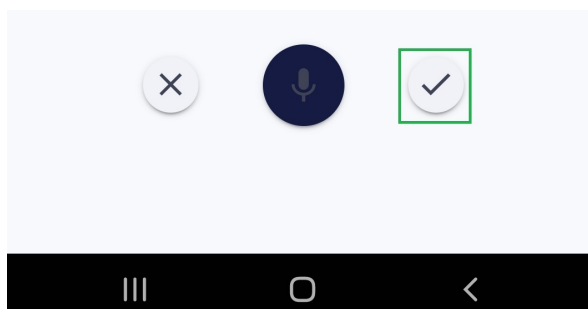


The Recording screen appears.

5. Tap on the recording icon to start recording.

You can tap on the Pause and Cancel icons to pause and cancel the recording respectively anytime while the recording is in progress.

6. Tap on the Save icon to stop and save the recording.



The Save Recording screen appears.



Name *

Doc test

Select Deal *

Search deal 

8X8 Split deal

Citi Bank New - RTS

POD: META - RTS

e. (Optional) Enter a description of the recording in the **Description** field.

f. Tap **Save**.

Your recording is saved in the associated Deal room. You can access this recording from the Deal room or In-person meeting screen.

Access your office email from Aviso mobile app

Aviso lets you access your office email using Aviso mobile app. While you use Aviso mobile app to be on top of your sales, you can access your office email too using the same app, and you don't have to use multiple apps. The mailbox syncs with your office email in real time.

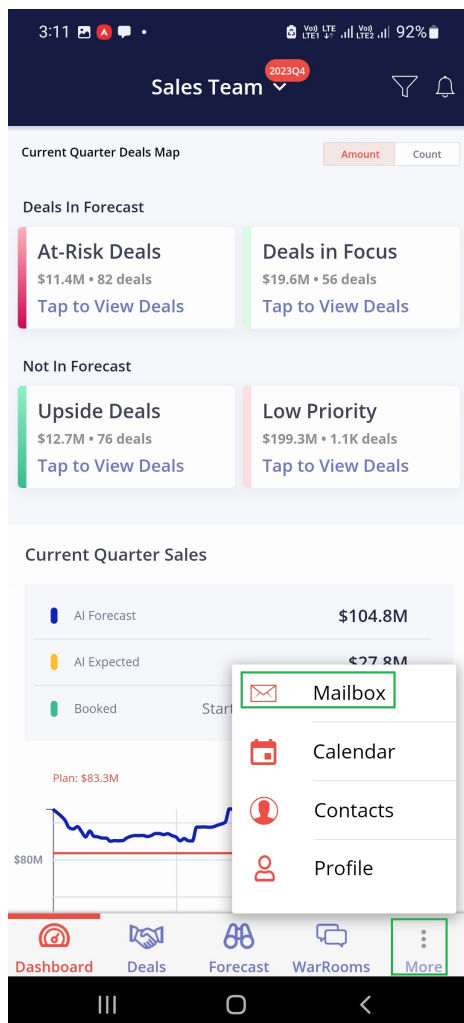
Note

Currently, the Aviso Mobile app supports only Gmail. If your organization uses Gmail services, you can sync and access your office email from Aviso mobile app.

Note

With the current capabilities, you can view all the email in your inbox and send a new email, but you can't reply to any email.

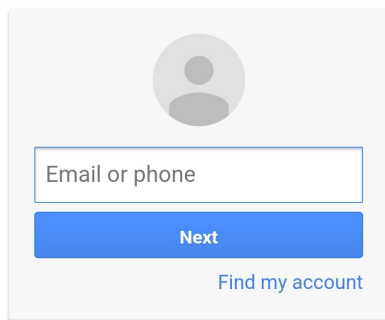
If you are using mailbox in Aviso mobile app for the first time, first you have to connect your Aviso mobile app to your office email. After you log in to your Aviso mobile app, tap on the More icon at the bottom and then tap on **Mailbox**.



You will be prompted to a Google authentication page. Enter the credentials of your office email.



One account. All of Google.

A screenshot of the Google account login interface. It features a grey circular profile icon placeholder at the top. Below it is a white rectangular input field with the placeholder text "Email or phone". Under the input field is a blue rectangular button with the text "Next" in white. At the bottom of the login box is a blue link that says "Find my account".

[Create account](#)

One Google Account for everything Google

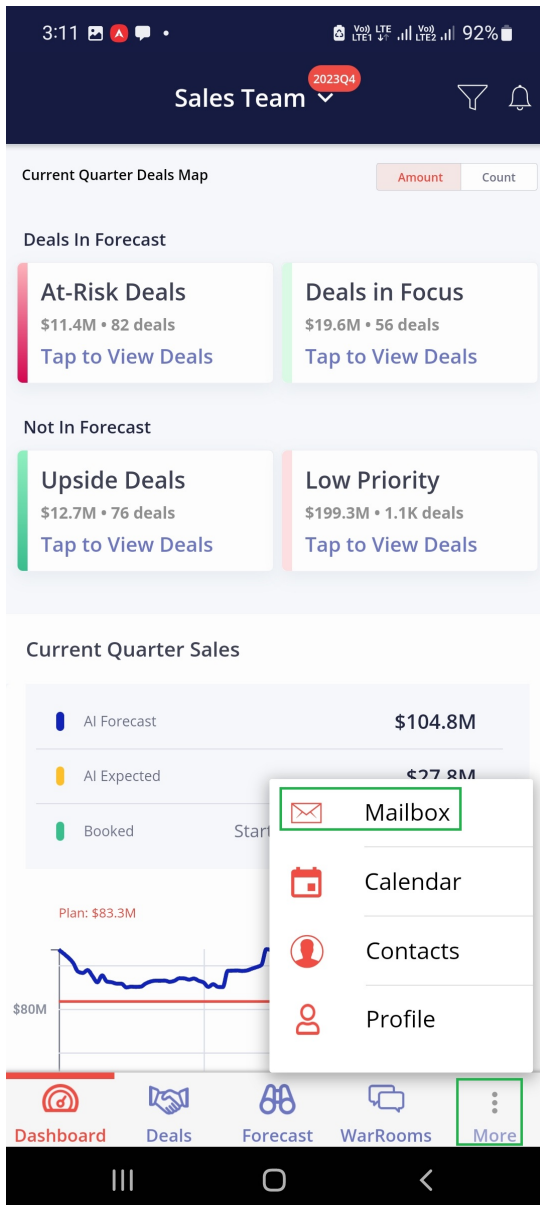


You will receive an email confirmation. After this, the Aviso mobile app starts syncing with your office email.

Log email to CRM from Aviso mobile app

The Aviso mobile app lets you log email from your inbox to CRM. For example, if you want to log an email communication with a contact to CRM, you can do so easily from the Inbox in Aviso mobile app. Before logging an email to CRM, ensure that you have access to your office email from Aviso mobile app as mentioned in the preceding section. Perform the following steps to log email to CRM.

1. Open your Aviso mobile app and go to Menu icon > **Mailbox**.



Your office email inbox opens in the Aviso mobile app.

2. Drag the email you want to log to CRM toward the left-hand side.



You can see **Log** and **Trash** options.

3. Tap on **Log**.

The **Log** screen appears and lets you select the contact in which you want to log the email.

In this content, a screenshot of Aviso mobile app connected to Salesforce is used. However, you can log the email to your respective CRMs.

4. Tap on **Select Contact** beside Name and after your list of contacts appears, select the contact.

12:17 12:17 VoLTE1 29%

< Log ✓

LOG TO SALESFORCE

From: notifications@aviso.com
Hello, Your Weekly Compass powered by Aviso AI is rea

Name * Select Contact

Related To

Enter Comments

Assigned To * Select User

Subject Hello, Your Weekly Compass powere

Due Date * Jul 20, 2023

Priority * Normal ▾

Status * Pending ▾

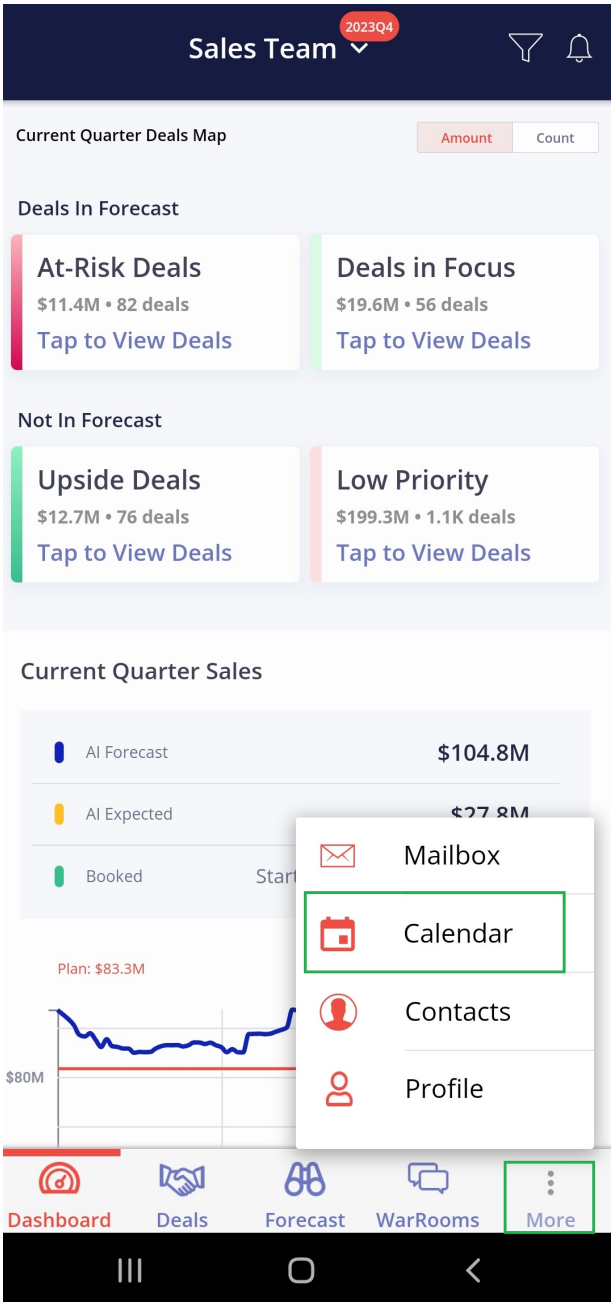
5. Tap on **Select User** beside Assigned To and after your list of users appears, select a user.
6. Select the due date, priority, and status from the respective fields and tap on the Save icon on top to log the selected email to CRM.

Access your CRM calendar from Aviso mobile app

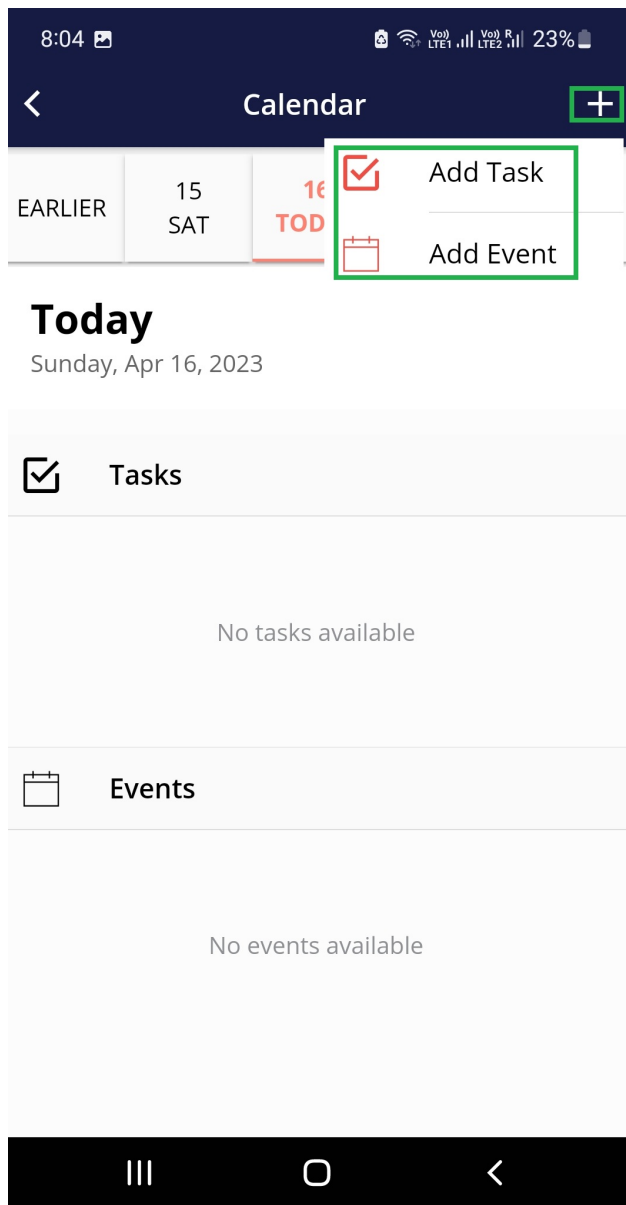
Aviso lets you access your CRM calendar using Aviso mobile app. It helps you stay updated on when you have a task or event scheduled on your CRM calendar while you are on the go and not miss any important task or event. You can also create tasks and events from Aviso mobile app, which will be reflected on your CRM calendar. The Aviso mobile app syncs with your CRM calendar in real-time. After you log in to your Aviso mobile app, tap on the More icon at the bottom and then tap on **Calendar**.

Note

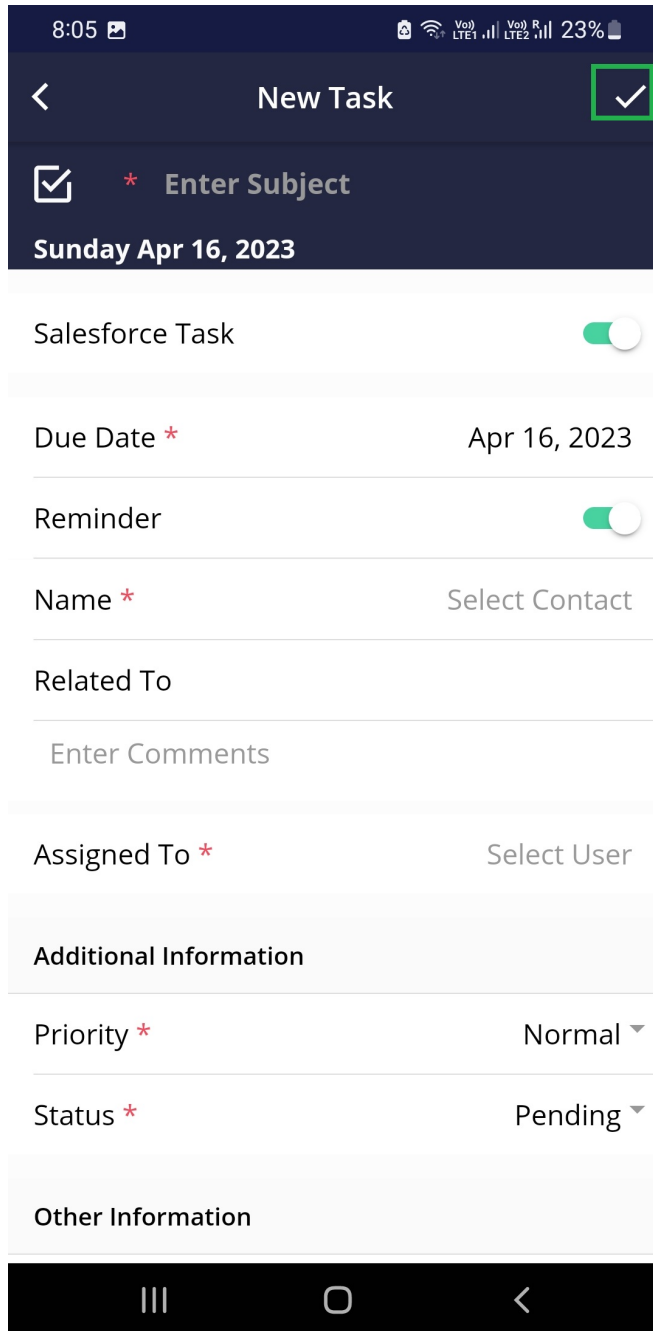
If you don't have access to any CRM, after you open Calendar in the Aviso mobile app, the following message appears: "Requested user is not present in crm".



To create a task or event from Aviso mobile app, tap on the Create icon on the top.



After you tap on **Add Task** or **Add Event**, the respective form opens.
Fill in the form to create a task or event, and tap on the Tick icon.



8:05

New Task

✓

✱ Enter Subject

Sunday Apr 16, 2023

Salesforce Task

Due Date ✱ Apr 16, 2023

Reminder

Name ✱ Select Contact

Related To

Enter Comments

Assigned To ✱ Select User

Additional Information

Priority ✱ Normal

Status ✱ Pending

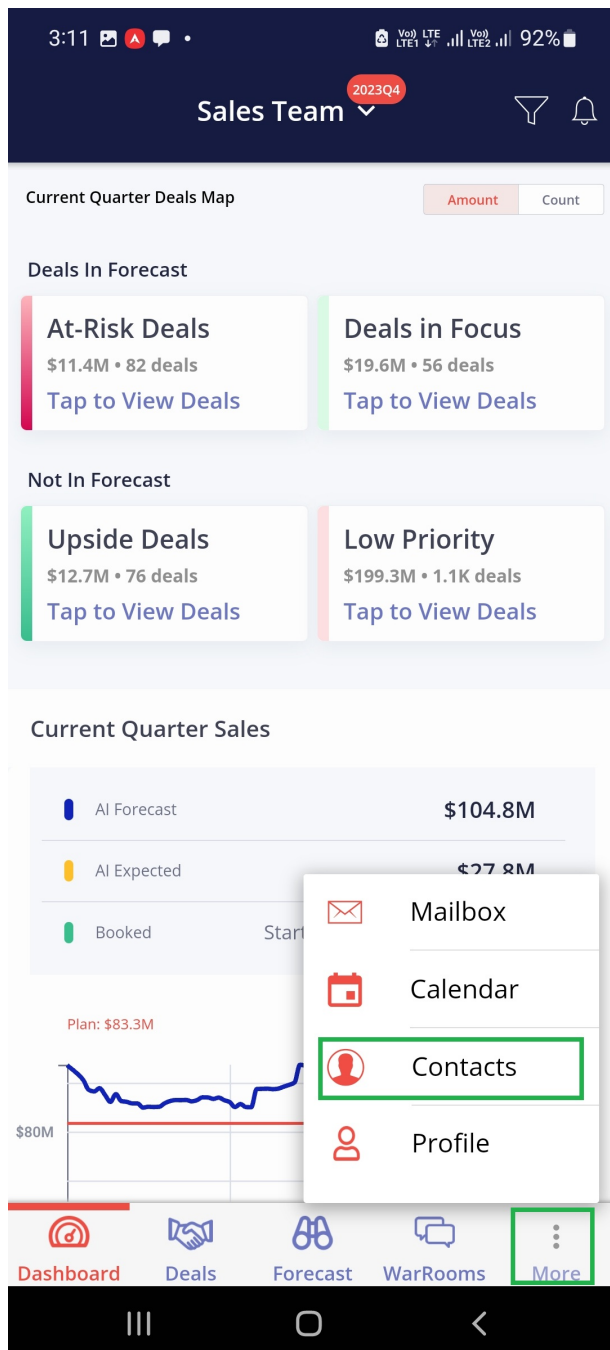
Other Information

Your task or event is created, and it will be reflected on the CRM too.

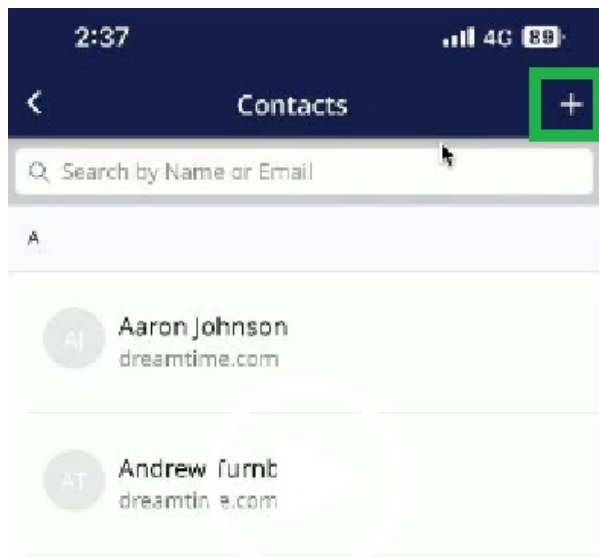
Access your CRM contacts from Aviso mobile app

Aviso lets you access your CRM contacts using Aviso mobile app. You can modify an existing contact and create a new contact from Aviso mobile app while you are on the go. It helps you stay updated of all the contacts, which is one of the keys to close more deals. The Aviso mobile app syncs with your CRM contacts in real-time.

After you log in to your Aviso mobile app, tap on the More icon at the bottom and then tap on **Contacts**.

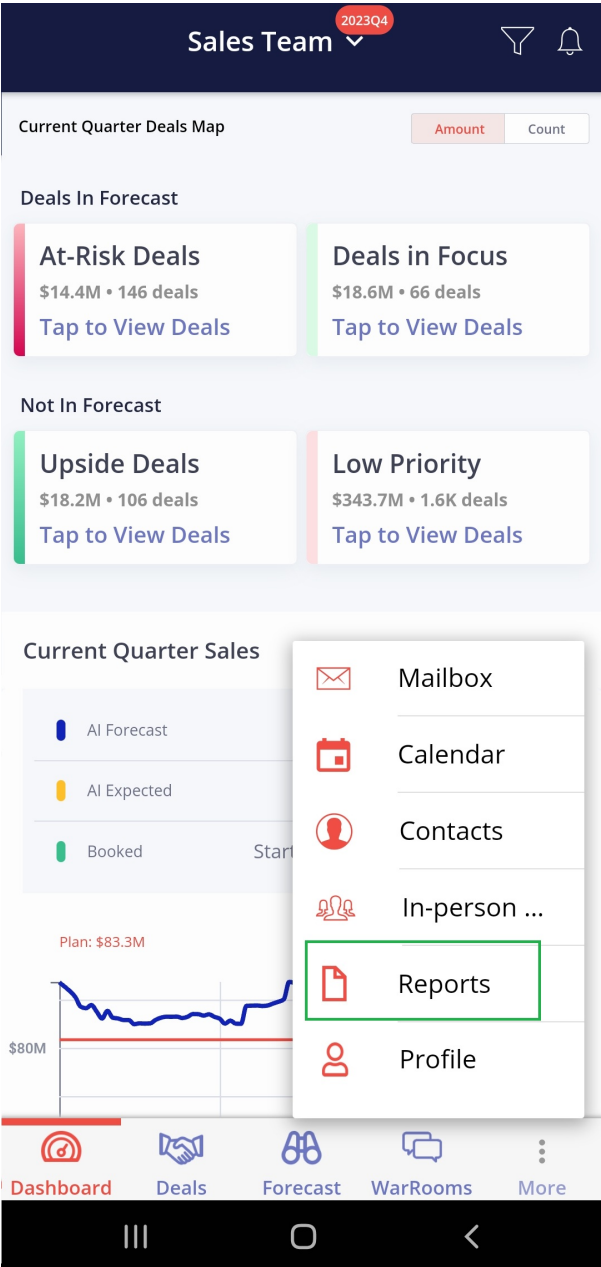


Tap on a particular contact to make any changes to it. Tap on the Create icon on the top to create a new contact.



View sales reports from Aviso mobile app

Sales reports are essential tools for businesses as they provide valuable and actionable insights into sales. They enable informed decision-making by offering data-driven clarity on what's working and what needs improvement. These reports facilitate goal setting, strategic planning, and resource allocation while also empowering businesses to adapt to changing market conditions and enhance overall efficiency. Aviso lets you view the sales reports in the Aviso mobile app. After you log in to Aviso mobile app, tap on the Menu icon and then tap on **Reports**. Tap on any report to open.



You can view the following reports:

Pipeline Projection report

The Pipeline Projection report is a powerful tool that provides you with a comprehensive understanding of your sales conversion rates, allowing you to gauge your performance in relation to the same period in the previous quarter. This report equips you with the insights necessary to refine your strategies and make data-driven decisions. Tap on the red “i” icon to view Aviso AI Forecast Explanation.



Pipeline Projection

How are our current conversation rates when compared to the same time in last 4 quarters?

BOOKED
\$44.5M

GAP TO QUOTA
\$38.8M

% ATTAINMENT
53.42%

AI FORECAST
\$105M i

COMMIT
\$70M

BEST CASE
\$257.4M

PLAN
\$83.3M

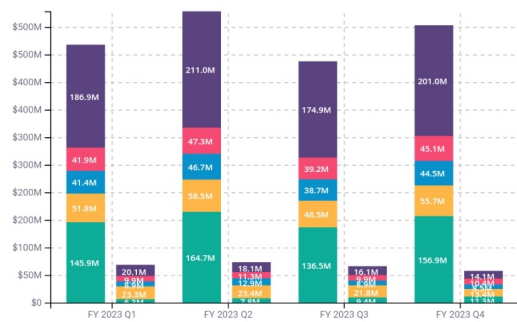
DAYS TO EOQ
41

DEAL LEVEL FORECAST
\$99.2M

OPEN PIPELINE
\$401.4M

COVERAGE RATIO
4.82x

● Pipeline ● Omitted ● Closed ● Commit ● Best Case



Pipeline

All Deals	145.9M	164.7M	136.5M	156.9M
Closed Deals	6.3M 4%	7.8M 5%	9.4M 7%	11.3M 7%

Omitted

All Deals	51.8M	58.5M	48.5M	55.7M
Closed Deals	23.3M 45%	23.4M 40%	21.8M 45%	13.4M 24%

Closed

All Deals	41.4M	46.7M	38.7M	44.5M
Closed Deals	8.9M 22%	12.9M 28%	8.9M 23%	8.5M 19%

Commit

All Deals	41.9M	47.3M	39.2M	45.1M
Closed Deals	9.9M 24%	11.3M 24%	9.9M 25%	10.4M 23%

Best Case

All Deals	186.9M	211M	174.9M	201M
Closed Deals	20.1M 11%	18.1M 9%	16.1M 9%	14.1M 7%

Win and Loss report

The Win and Loss report is a pivotal component designed to provide you with a comprehensive analysis of your sales outcomes. This insightful report empowers you to understand your deal conversions, track opportunities, and assess your win percentage. By offering granular control over the time frame and data segments, this report equips you with the information needed to refine your sales strategies and optimize success.

Choose from preset time frames—3 months, 6 months, 9 months, or 12 months—to track changes and trends over different spans of time. The graph within the report visually represents the amount of deals, opportunity count, and win percentage. This graphical element enhances your ability to identify trends, spot patterns, and draw actionable conclusions from your sales data. the Win and Loss report allows you to further investigate specific data segments. By selecting a segment within the graph, you can access detailed information related to that particular category, revealing deeper insights into your performance patterns.

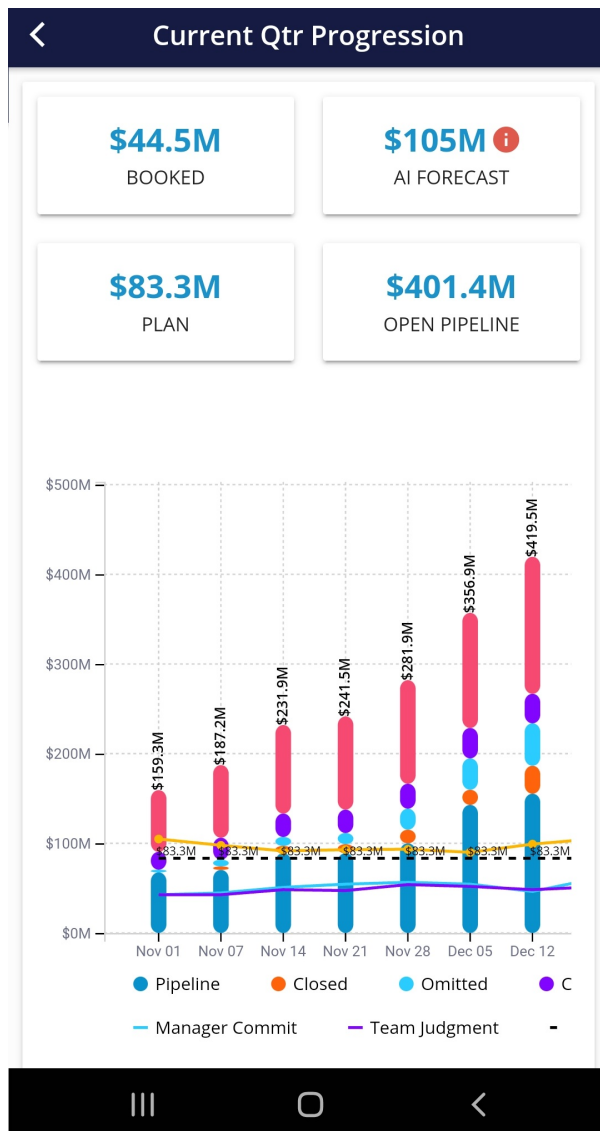
Utilizing the Win and Loss report, you can refine your sales strategies, capitalize on successful patterns, and address areas that may need improvement. Maximize your sales potential by leveraging the insights offered by the Win and Loss report. As you delve into the data, you'll uncover the keys to enhancing your win rates and achieving sustainable growth



Current Quarter Progression report

The Current Quarter Progression report is a dynamic tool that offers you an up-to-the-moment view of your sales performance within the current quarter. This report presents key metrics, a comprehensive graphical representation, and interactive features that empower you to monitor your progress, align with goals, and make informed decisions with precision.

The Current Quarter Progression report provides you with the real-time insights you need to adjust strategies, make informed decisions, and stay on track towards your goals. Whether you're a sales manager monitoring team progress or an individual contributor tracking personal targets, this report equips you with the tools to succeed and helps in decision making.



Rep Activity report

The Rep Activity report is a vital tool that provides a comprehensive overview of your sales team's engagement and interactions. This report offers a detailed account of the activities performed by each sales representative, allowing you to gain insights into their productivity, communication, and customer interactions. By offering transparency into their daily efforts, this report empowers you to assess performance, identify strengths, and tailor strategies for optimal results. Whether you're a manager looking to assess team performance or an individual sales representative aiming to track personal productivity, this report provides valuable insights for data-driven decision-making. By understanding the nuances of your sales team's interactions and communication patterns, you can optimize workflows, enhance collaboration, and tailor coaching to elevate overall performance.

Rep Activity		
Search Rep		
How actively engaged are my reps with their prospects and customers in		
Stephenie Mcelligott Emails Sent 1 Emails Received 8 Meetings Sent 1 Meetings Received 4 Meeting Acceptances 1 Meeting Declines 1 Meetings In Calend... 5 Accounts Interacted... 4		
Mary Lou Retton Emails Sent 6 Emails Received 2 Meetings Sent 3		
Donte Kiser Emails Sent 6 Emails Received 2 Meetings Sent 3		
Dollie Gracie Emails Sent 1 Emails Received 2 Meetings Sent 1		

Ask MIKI on Aviso mobile app

MIKI is an AI Assistant developed by Aviso, serving as the Chief of Staff to all personas in a Go-to-Market (GTM) function. It provides a seamless, no-UI way of accessing actionable insights generated by Aviso, catering to various needs within a GTM setup. Powered by Aviso's time-series database, actionable intelligence, product knowledge base, and tech integrations, MIKI offers unparalleled support and efficiency.

MIKI facilitates querying sales data in simple, natural language. It executes tasks such as updating CRM records or sending emails, all while sifting through vast amounts of data from different sources such as product documentation, earnings call transcripts, meeting transcripts, and emails. It then generates concise and contextually relevant responses to user queries.

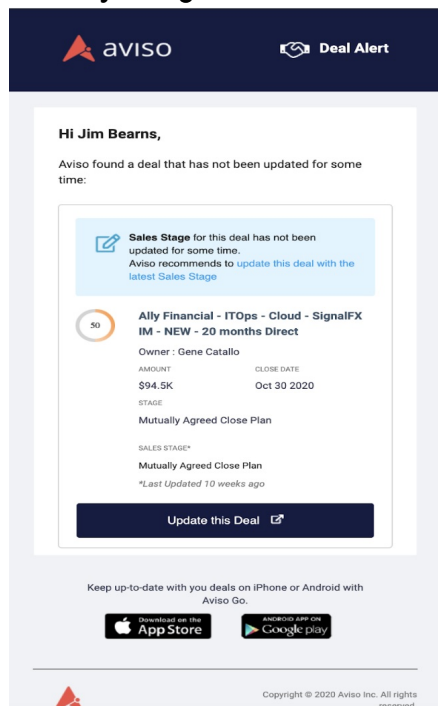
You can use MIKI on the go with the Aviso Mobile app.

Make sales performance better with nudges

Nudges are messages that Aviso AI sends to the users to remind them of their deal pipeline and alert them to new opportunities. Nudges enable sales teams to easily uncover actionable insights from a variety of sources, including their CRM data, Salesforce Analytics, and customer data, to create customized nudges. These nudges then are shared in a single place, accessible to all sales personnel, helping them drive productivity, accelerate deal growth, and grow the pipeline. Nudges are delivered through email digests, mobile notifications, and push notifications. The Nudges not only help prevent deal slippage by reminding users to act early and often, but they also expedite deal execution by nudging different sales team members with insights and actions that matter most to moving a deal forward.

Aviso AI provides many nudges to the sales personnel and recommends actions accordingly. One such example of a nudge is the Anomaly nudge. The anomaly nudge identifies the deals stuck in the same stage for over 30 days and provides the notification to the sales representative. This saves both time and money by notifying them of these potential lost opportunities.

Anomaly Nudge:



Currently, Aviso AI uses the following generic nudges:

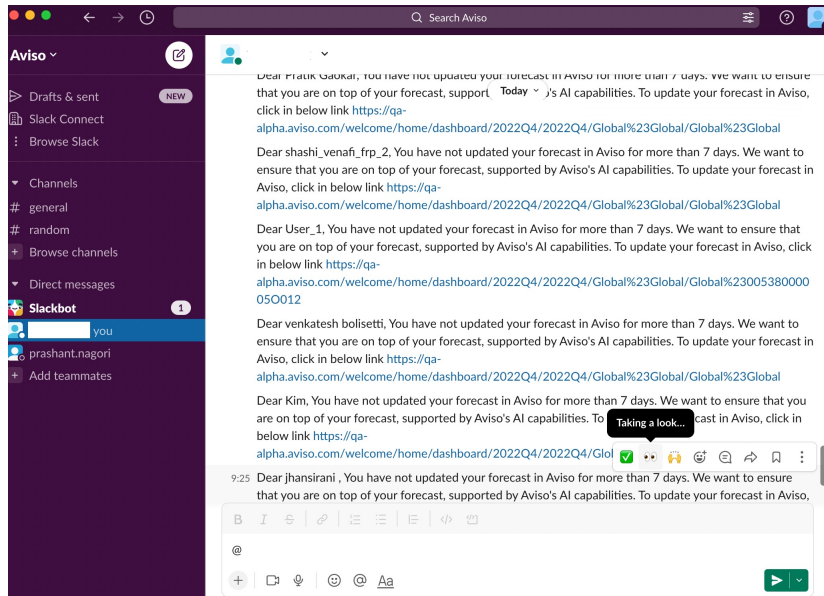
Nudges	Description
Scenario Nudges	To show a user the status of the deals in the current quarter and compare it to the past or next quarter. Also letting the user know in advance to move the deal in the right time to reduce the risk of losing a deal.
Decline in aviso Win Score	To alert the users in advance when there is a high risk of losing a deal.
Anomaly Nudge	To let a user know if the stage has not been updated for a certain period of time.
Pullin Deals Nudge	To let the user know about the deals which could be pulled in from the next quarter to the current quarter and be closed in the current quarter itself.
Next quarter Coverage ratio	To let a user track of your coverage ratio to monitor your quota.
Rep Closing Metrics Nudge	To give a view of how the user is closing the deals compared to the last quarter and the same quarter previous financial year.

Deals At Risk Nudge	To let a user know the list of deals that are in Commit but are at risk of not closing in the current quarter.
Upside Deals Stats Nudge	To let a user know the deals with a high probability of closing within this quarter.
Non-Commit Nudge	To let a user know about the deals that are not in Commit and also moving quickly through the sales stages, and have a high probability of closure in the current quarter.
DLF nudge (Deal level Forecast)	DLF accuracy - To let the seller know when there is a dip in aviso score for the deals that are marked as "in forecast" [DLF bad news]. - To let the seller know when there is a rise in aviso score for the deals that are not marked as "in forecast" [DLF good news].
Discount recommendations	To recommend an ideal discount for the deal progression.
Upsell recommendations	To recommend a product combination for the deal product mix.
Revenue pace of your team	To let you track your teams pace.
Update your competition	To provide insights related to the competition.
Account Churn due to lack of activity	To alert the accounts with low or no activity.
Next best contact	To help you identify your next best contact for the opportunity.
Service Ticket alerts	To alert the accounts with support ticket data that is sensitive to renewals.
Make or Break deals	To help you identify the deal that could make or break the quota for the quarter.
Late Stage Coverage ratio	To let you track your coverage ratio to monitor your quota.
Performance leaderboard	To let you track your low performers and coach them at the right intervals.
Stacked against competition	To recommend competition insights at right intervals
Pipeline Conversion	To let you know of your bookings from the existing pipeline.
Single Threaded Conversations	To highlight the opportunities that have single threaded conversations.
Schedule meeting	To recommend the sales rep to scheduling meetings.
Objection Moments in email conversations	To let the reps know of the objection moments in the customer email conversations.
Capture the buyer sentiment in the call conversations	To let the reps know of the negative buyer sentiment in the call conversations.
Conversion rate	To notify the user if the percentage of conversion from the commit pipeline to booking is less than the average of those of the last four quarters.
Out Quarter Pipeline	To notify the user if the pipeline being generated is not enough to meet the quota in the next quarter.
Pipeline Conversion	To notify the user of Aviso AI booking prediction from the existing pipeline.

Late Stage Coverage Ratio	To notify the user if the Late Stage Coverage Ratio is less than what it should be to meet the quota in the current quarter. Aviso AI recommends reviewing the upside deals and pullin deals to add more deals to the Commit pipeline.
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Get notified through Slack or Microsoft Teams when you have a due for forecast update

Aviso recommends that you update your forecast before it's due so you will always be on top of your sales. If you didn't update your forecast and it's due, you will receive a notification about the same through Slack or Microsoft Teams, which you have configured in your organization.



Configure Slack or Microsoft Teams for notifications on forecast update

Admin can configure Slack or Microsoft Teams to enable the sales reps or leaders receive notifications whenever there is a due to update the Forecast on the Aviso platform.

1. Create a user account on Slack or Microsoft Teams based on what you use in your organization.
2. Create authorization codes for the dummy account and share it with the Aviso implementation team.

Aviso implementation team then configures Slack or Microsoft Teams with Aviso AI. After the configuration is complete, every sales rep or leader will receive notification if there is a due for the forecast update.

About this guide

This guide aims to provide you with limitations and known issues that you might face while using Aviso AI and their solutions.

When logging in to Aviso AI, the following message appears: Not authorized into Aviso

Problem: If you don't have an account with Aviso AI and you try to log in, the following message appears- *Not authorized into Aviso*.

Solution: Contact your admin to create an account for you, and you'll be able to access Aviso AI.

I am unable to see a particular column on Deals or Forecasts screen, however, other team members can see it

Problem: Aviso AI lets you customize layouts on both the Deals and Forecast pages to hide and reorder the existing columns. You might have hidden the said column at some point.

Solution: Perform the following steps to bring up the hidden column.

1. Go to the Deals or Forecast screen where the column is hidden.
2. Click **Customize Layout**.
3. Under Hidden Forecasts columns, click on the () icon.
4. Click **Save**.

I am unable to view the desired deals that I have selected through the deal filters

Problem: The deals page allows grouping of deals. You might have applied a group filter and therefore are not seeing the desired deals.

Solution: Perform the following steps to remove any groups:

1. Go to the Deals screen
2. Select the **GROUPS** icon.
3. In the GROUP section, clear all the groups you've created by clicking the () icon against the groups.
4. Click **Apply**.

Data on my Landing page and Dashboard are mismatching

Problem: When I log in to Aviso, I see deal values on the CHANGED DETAIL section on the Landing page, which are different from the deal values shown on the Dashboard.

Solution: The data on the landing page are extracted from the Dashboard page. Hence, data shown on the Landing and Dashboard pages are always the same. Perform the following steps to validate the data on the Landing page and Dashboard page:

1. Log in to Aviso.

The Landing page appears.

2. Scroll down and go to CHANGED DETAIL section on the Landing page.
3. Select a time since when you want to see the change in deals value.

For example, you may select **Since Last Week**.

See Changes From: Since Beginning Of Quarter Since Beginning Of Month **Since Last Week** Since Yesterday

CHANGE DETAIL

STARTING PIPE		4419 Deals	\$106.9M
+	NEW PIPE	95 Deals	\$16.6M
+	WON	70 Deals	\$4.3M
+	PULLED IN	33 Deals	\$3.5M
+	INCREASE IN VALUE	77 Deals	\$28.9M
-	LOST	125 Deals	\$30.8M
-	PUSHED OUT	262 Deals	\$39.5M
-	DECREASE IN VALUE	95 Deals	\$9.5M
ENDING PIPE		1353 Deals	\$104.8M

4. Note the STARTING PIPE value and ENDING PIPE value shown in the CHANGED DETAIL section.
5. From the left-hand side menu, click **Dashboard** to open the Dashboard page.
6. Scroll down and go to DEAL CHANGES section.

You can also click **DEAL CHANGES** from the top menu to go to the DEAL CHANGES section directly.

DEAL CHANGES						See Changes From:					Since Yesterday	Since Beginning Of Month	Since Beginning Of Quarter
FORECAST	PREVIOUS PIPE	CURRENT PIPE	NEW	WON	LOST	DATE CHANGES	Since Last Week		AMOUNT CHANGES	COMMIT CHANGES	AVISO BIGGEST MOVERS		
Sales Team	\$106.9 M	\$104.8 M	\$16.6 M	\$4.3 M	\$30.8 M	↑ \$3.5 M ↓ \$39.5 M	↑ \$28.9 M ↓ \$9.5 M	↑ \$10.8 M ↓ \$1.1 M	↑ \$42.2 M ↓ \$205.3 M				
Americas	\$73.1 M	\$71.5 M	\$8.8 M	\$2.7 M	\$22.9 M	↑ \$2.1 M ↓ \$22.6 M	↑ \$15.9 M ↓ \$4.1 M	↑ \$8.1 M ↓ \$668.3 K	↑ \$27.2 M ↓ \$125.1 M				
Asia Pacific	\$10.2 M	\$10.9 M	\$1.9 M	\$816.9 K	\$4.8 M	↑ \$432.8 K ↓ \$4.3 M	↑ \$2.4 M ↓ \$2.3 M	↑ \$1.1 M ↓ \$26.4 K	↑ \$4 M ↓ \$17.2 M				
EMEA	\$23.5 M	\$22.4 M	\$5.9 M	\$785.4 K	\$3.1 M	↑ \$942.1 K ↓ \$12.6 M	↑ \$5.4 M ↓ \$3 M	↑ \$1.2 M ↓ \$445.4 K	↑ \$8.6 M ↓ \$52.8 M				

7. From the menu options, above DEAL CHANGES section, select a time since when you want to see the change in deals value.
For example, if you selected **Since Last Week** in step 3, select **Since Last Week**.
8. Note the PREVIOUS PIPE value and CURRENT PIPE value from the DEAL CHANGES section in the Dashboard.

Note

Your organization may have customized and renamed these columns. In that case, you can see different names.

The STARTING PIPE value you noted from the Landing page > CHANGED DETAIL section (in step 4) and PREVIOUS PIPE value from the Dashboard page > DEAL CHANGES section (in step 8) are the same.

The ENDING PIPE value you noted from the Landing page > CHANGED DETAIL section (in step 4) and CURRENT PIPE value from the Dashboard page > DEAL CHANGES section (in step 8) are the same.

In this way, you can check the other values such as NEW PIPE, OWN, PULLED IN, INCREASE IN VALUE, LOST, PUSHED OUT, and DECREASE IN VALUE for different time frames such as "Since Yesterday", "Since Last Week", "Since Beginning of the Month", and "Since Beginning of the Quarter". If you want to review the deals associated with the Pushedout or Pulledin, Won, Lost, or Amount changes, you can navigate to the DEAL CHANGE DETAILS on the Dashboard page.

DEAL CHANGE DETAILS						
			View: Close Date Changes Amount Changes Forecast Category Changes Pipeline Changes Biggest Movers			
Close Date Changes Deals Pulled In \$225.5K • 5 Deals			PULLED IN PUSHED OUT			
NAME	SCORE	INCREMENTAL...	FORECAST	CLOSE DATE		
Kraken Technologies Ltd. - Expansion - - Sal...	81	\$27.3K	Commit	Aug 04 2023	→	Jun 19 2023
Royal Opera House - NB - Sales - 2023	6	\$8K	Commit	Aug 18 2023	→	Jun 29 2023
7 - Eleven - NB - Enterprise - Sales - 2023	15	\$102.2K	Expect	Oct 29 2023	→	Jul 31 2023
Sony Pictures Entertainment - NB - Ent - Sale...	23	\$75K	Expect	Aug 31 2023	→	Jul 21 2023
American Homes 4 Rent - Expansion - - Sales ...	71	\$13K	Commit	Aug 16 2023	→	Jun 30 2023

I updated the close date of a deal, however, it appears in the incorrect period

Problem: If you use the write-back feature, the deal will not instantly update and appear in the new period. The write-back process takes time to move the deal into the particular period when a write-back is expected.

Solution: Aviso AI continuously updates data from CRM at a specific interval that ranges from two to five minutes, depending on the volume of data present in the CRM. Wait for five to ten minutes and then check back, the deal will be moved to the appropriate period.

When using write-back in Aviso AI, the following error message appears - SFDC session ID not available

Problem: To write back, Aviso AI requires your permission to access and modify Salesforce data. When you first attempt to write back, a pop-up window asks for authorization from Salesforce. This popup may be blocked depending upon your browser setting.

Solution: Allow the popup to let Aviso get the required permissions. After allowing the popup, you should be able to write back without any problems.

When using write-back in Aviso AI, the following error message appears - SFDC validation error

Problem: While attempting to use the write-back feature in Aviso AI, an SFDC validation error appears in your account. You may not be able to write back due to validation rules in Salesforce. You are attempting to update a field that contains validations.

Solution: Aviso cannot ignore these validations. Ensure that the input values are correct and standardized as per the validation rule before attempting write-back. For more information, contact your SFDC Admin

When using write-back in Aviso AI, the following error message appears - SFDC Authorization error

Problem: While using the write-back feature in Aviso AI, an SFDC Authorization error appears in your account. You may not have permission to update the field that you are attempting to update.

Solution: Ensure you have write-back permissions enabled for the field in Salesforce. You can contact your Salesforce admin to check if you have write-back permissions. After enabling the write-back permission in Salesforce, you have the authorization to write back.

The exported file looks different than the Aviso forecasts and deals view screen

Problem: When you download the file using the export feature, it looks different than the page that shows forecast or deal information. There may be extra columns, or certain columns may not appear at all.

Solution: Aviso AI provides custom configuration based on client requirements. The export function is set and configured during the onboarding. You can raise a request to Aviso to change the export configuration.

I have SSO configured on the Aviso account. But when I sign in I receive an error message stating 'Not authorized'

Problem: Your Identity Provider (IdPs such as OKTA, OneLogin, Internal IDP, and so on) account may be associated with a different email address than your Aviso account.

Solution: Ensure that the email address in your account for the IdP matches your Aviso's email address.

When I open the Aviso AI website on my browser, I can log in with Google Single Sign-On. However, when I attempt to log in from the Salesforce web tab, I encounter an error

Problem: When you log in to Aviso using Salesforce's web tab, it uses IFrame to load a page within Salesforce. Google does not load from IFrames like Salesforce does to avoid any security threat.

Solution: Log in to Aviso AI from your browser and now that you have an active Aviso AI session, you will be able to access Aviso AI from the web tab as well. Keep Aviso's session active while using the web tab

I can't see some recordings of my team members under the Recordings tab in the Collaboration Workspace

Problem: Some of the recordings hosted by your team members are not shown under the Recordings tab in the Collaboration Workspace.

Solution: There is a filter in the Recordings tab. You can see the values (All recordings, My team recordings, and My recordings) in this filter per the configuration made by your admin.

- All recordings- As a sales leader or VP, by selecting *All recordings*, you can view recordings of all the meetings hosted by sales reps and leaders that come under you.
- My team recordings- As a team leader, if you select My team recordings, you can view recordings of all the meetings hosted by your team members.
- My recordings- If you select My recordings, you can view all the recordings hosted by you.

To view recordings of meetings shared by your team members, you must be a sales leader. Select *My team recordings* or *All recordings* to see all the recordings hosted by your team members.

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When adding a rep, I get error message - "Not allowed to add children to non parallel parent nodes"

Problem: This error message appears because of the following two reasons.

- You have a rep node - You have removed the rep node from the hierarchy - Once removed you are trying to add this rep node to another hierarchy.
You removed a rep node from the hierarchy and tried to add it to another parent node without refreshing the rep node.
- When you add a rep node, sometimes, there is a delay in displaying the success message. Before the success message appears, you try to add the same rep node again.

Solutions: Perform the following to avoid getting this error message.

- After the rep node is removed, you have to [restore the rep node](#). After you restored, this rep node would be visible under a parent node. You have to then move that rep node to a different parent node.
- Wait for the success message to display before you perform any action.

Perform administrative activities

Aviso AI lets you perform administrative activities such as adding users and reps, modifying privileges, and managing hierarchy in the Aviso AI application.

Get started with Aviso AI

After you log in to Aviso AI, click **Admin** from the left side menu to open Admin screen. The Admin screen is accessible only with Admin access and lets you perform all the administrative activities. Aviso AI is integrated with various sales enablement tools to read (and write back in some cases, such as writing back to CRM) data and help you with revenue intelligence. Aviso AI is integrated with CRM, emails, calendars, phone calls, support ticket systems such as Zendesk and ServiceNow, learning management system, and marketing automation system.

Aviso implementation team requires the following from your Salesforce environment or any other CRM that your organization uses:

- access to your Salesforce environment or any other CRM. Aviso AI connects to the CRM and syncs data at a periodic interval to provide you with the latest data available in the CRM.
- hierarchy defined for each user in the CRM. The user hierarchies and permissions in Aviso AI are defined based on this data. However, you can customize it according to your need.
- details of deals and pipeline.
- customer and prospect contact information.

All the screens in Aviso AI are customizable. For example, you can have your own formula to show a sales number in the Deals screen and add a customized business report from the Report screen. Let the Aviso implementation team or Customer Success Manager know what data you want to see that best suits your requirements along with the readily available AI forecast data on various screens in Aviso AI.

User accesses and their privileges

Initially, Aviso implementation team gives you access to Aviso AI and sets up hierarchy based on the existing hierarchy in your CRM or your requirements. After the initial setup is complete, you can add someone as follows-

1. [Add](#) an employee as a user to Aviso AI.
2. [Add](#) an existing user as a rep to Aviso AI.

Set up hierarchy

Set up a hierarchy to form different sales teams based on geographical locations and projects.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
The list of existing users appears.
3. Choose the user whose hierarchy you wish to configure.
4. Under **EDIT USER**, perform the following:
5. Select Plan or Snapshot if you want to give the user edit access to Plan or Snapshot?
6. Select the type of access you want to give the user. The available options are as follows:
 - *Read Only Access*
 - *Is Customer*
 - *Is Administrator*
7. Under **Hierarchy Access**, in the **Search** field, enter the level of access that you want to give to the user.

If you want to give *Global* access, you can select **Global** button.

You can also select the hierarchy from the hierarchy diagram.

Add a user to Aviso AI

Add anyone from your organization as a user to give him or her access to the Aviso platform. Later, you can add a user as rep or lead to use various revenue intelligence features offered by Aviso AI.

You can add a user to Aviso AI by performing these steps:

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
3. Click **Add User**.
4. Under **ADD USER** section, perform the following:
5. Enter the user details in the **Name, Username, Email, and Function** fields.
6. Under **Allow User To Edit**, perform the following:
7. Select Plan or Snapshot if you want to give the user with edit access to Plan or Snapshot?
8. Select the type of access you want to give the user with. The available options are as follows:
 - *Read Only Access*
 - *Is Customer*
 - *Is Administrator*
9. Under **Hierarchy Access**, in the **Search** field, enter the level of access that you want to give to the user.

If you want to give *Global* access, you can select **Global** button.

You can also select from hierarchy diagram.
10. Click **Add This User**.

Modify privileges of an existing user

Edit the user details of the existing users such as user details, edit access, and access to a particular level in hierarchy in the Aviso platform. You can edit user details in Aviso platform by following these steps:

1. After you log in to Aviso, from the left menu bar, open the **Admin** screen.
The list of existing users appears.
2. Click the user or users one by one for which you want to modify the details.
Under **EDIT USER** section, the detail of the user appear.
3. Make the necessary modifications to **User details**, **Allow User To Edit**, and **Hierarchy Access** fields.
4. Click **Save Changes**.

Deactivate a user from Aviso AI

Deactivate user accounts in Aviso AI by performing these steps.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
The list of existing users appears.
2. Navigate to the user you wish to deactivate. Perform any of the following actions to navigate to the user details:
 - In the **Search** box, search and enter the user details.
 - From the existing users' list, scroll down and find the users you wish to deactivate.
3. Under the Actions column, click the Deactivate User [] icon.

Add a Rep to Aviso AI

Add a sales representative (Rep) to Aviso AI. A user with Rep access is a part of the hierarchy (also called as node) and can use all the privileges in the Aviso platform except admin privileges. You can add a rep to Aviso platform by following these steps:

Important

A rep (node) can have only one parent node. You cannot add a node to two different parent nodes. If you try to add a node to two different nodes, you get the following error message- *Not allowed to add children to non parallel parent nodes.*

Important

Before you add a rep that was removed in the past to any parent node, you must [restore the rep](#), otherwise, you will get the aforementioned error message.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
3. Click **Add Rep**
ADD REP page appears.
4. Perform any of the following actions to select a node.

Note

A node is a part of hierarchy at any level from global to the individual user as shown in the node diagram on the ADD REP page.

- In the **Select One Parent Node** field, search and enter the hierarchy to which you want to add the new Rep.
 - If you want to select Global node, you can click the **Global** checkbox that is just below the **Select One Parent Node** field.
 - **View** the node diagram and select the required node.
5. In the **Node Name** field, enter the name of the rep you want to add.
 6. In the **CRM ID** field, enter the first 15 digits of the CRM ID.

Note

You cannot add a rep if the CRM ID entered exceeds 15 digits.

The newly added Rep appears in the Aviso platform after the next refresh. You can manually refresh by clicking the refresh () icon.

Move a Rep from one node to another

You can move a rep from one node to another within the Aviso platform by performing the following steps:

Important

Any node can have a single parent node at any point in time. You can't add a node to two different parent nodes.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
3. Click **Move Reps**.
Move Rep page appears and **Select Reps** is selected by default.
4. Perform any of the following actions to select the Rep you want to move.
 - In the **Search** box, search and enter the Rep.
 - View the node diagram and select the Rep.
A breadcrumb appears below the search box and shows the selected Rep with hierarchy.
5. Click **Move Under** arrow.
6. Perform any of the following actions to select a node or a Rep under which you want to move the Rep you selected in the last step.
 - In the **Search** box, search and enter the Rep.
 - View the node diagram and select the Rep.
A breadcrumb appears below the search box and shows the selected Rep or node with hierarchy.
There is a grey box below the node diagram that also shows both the breadcrumbs.
7. Click **Next**.
8. Click **Move**.

Remove a Rep from Aviso AI

When a Rep leaves the organization or team, or because of any requirement, you can remove a Rep from Aviso platform by performing these steps.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
3. Click **Remove Reps**.
Remove Rep page appears.
4. Perform any of the following actions to select the Rep you want to move.
 - In the **Search** box, search and enter the Rep.
 - View the node diagram and select the Rep.
A breadcrumb appears below the search box and shows the selected Rep with hierarchy.
5. Click the checkbox against the breadcrumb.
6. Click **Remove**.

Restore the removed or hidden rep from Aviso AI

Restore a rep that was removed before. The RESTORE REPS page shows all the reps that were removed before.

Important

Before you [add a rep](#) (node) that was removed in the past to any parent node, you must restore the rep, otherwise, you will get an error message.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
3. Click **Restore Reps**.
RESTORE REPS page appears.
4. Perform any of the following actions to select the Rep you want to restore.
 - In the **Search** box, search and enter the Rep.
 - View the node diagram and select the Rep.
A breadcrumb appears below the search box and shows the selected Rep with hierarchy.
5. Click the checkbox against the breadcrumb.
6. Click **Restore**.
The Rep you selected is restored and appears in the list of Reps that appears on the Admin page.

Reorder the nodes within Aviso AI

Change the order of a node in the hierarchy. Select the node of which you want to change the position and then after clicking **Next**, drag it to the new position where you want to keep the node.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.

2. Click the menu () icon on the right-hand side.

3. Click **Reorder Nodes**.

REORDER NODES page appears and **Select Node** arrow is selected by default.

4. Perform any of the following actions to select the node of which you want to change the position.

- In the **Search** box, search and enter the node.

- View the node diagram and select the node.

A breadcrumb appears below the search box and shows the selected Rep with hierarchy.

5. Click the checkbox against the breadcrumb.

6. Click **Next**.

A list of nodes appears.

7. Select the node and move to the desired position.

8. Click **Reorder**.

The updated node appears in the new position.

Rename a node in Aviso AI

Rename a node by performing these steps.

1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
3. Click **Rename Node**.
RENAME NODE page appears.
4. Perform any of the following actions to select the node you want to rename.
 - In the **Search** box, search and enter the node.
 - View the node diagram and select the node.
A breadcrumb appears below the search box and shows the selected node with hierarchy.
5. Click the checkbox against the breadcrumb.
6. In the **New Node Name** field, enter the new node name.
7. Click **Rename**.

The node you renamed appears with the new name.

Export the complete hierarchy report from Aviso AI

Export a complete list of nodes in the hierarchy in CSV format.

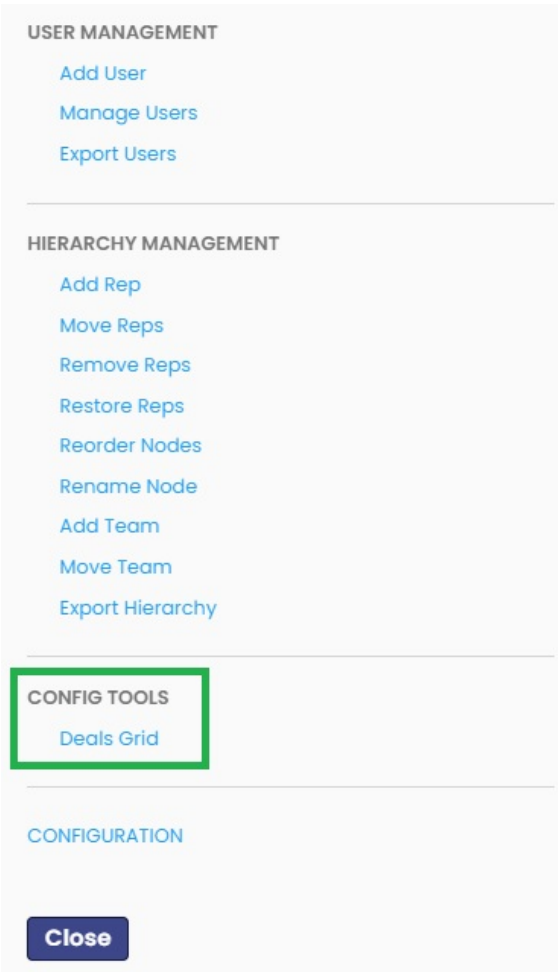
1. After you log in to Aviso AI, from the left menu bar, open the **Admin** screen.
2. Click the menu () icon on the right-hand side.
3. Click **Export hierarchy**.

A complete list of nodes in the hierarchy is downloaded in CSV format.

Customize Deals page, create new fields, and use arithmetic formulas with existing values on the Deals page

Aviso AI provides the sales team with a comprehensive view of the Deals page. This view is configured during the initial setup as agreed by your organization. However, Aviso also allows you to create new fields and custom fields using arithmetic formulas on the CRM fields and any fields present on the Deals page to cater to your specific requirements. For example, you can use arithmetic formulas using the values (CRM fields or custom fields) or text (stages, dates, and so on) on the Deals page.

From the Admin screen, under CONFIG TOOLS, click **Deals Grid** to open the Deals customization screen.



The Deals customization screen appears as shown in the following image.

Add New Field										
Edit	Delete	Order	Formula field	Label		Field	Show in mobile	Format	Secondary	
		0	☐	ID	none	OpportunityID	☒	String	☐	
		1	☐	Name	none	OpportunityName	☒	String	☐	
		2	☐	Owner	none	OpportunityOwner	☒	String	☐	
		3	☐	Engagement Grade	latest_	Engagement_grade	☐	Engagement	☐	
		4	☐	Meeting Scheduled	none	MeetingScheduled	☐	String	☐	
		5	☐	AVISO Score	none	win_prob	☒	Probability	☐	
		6	☐	Amount	none	Amount	☒	Amount	☐	
		7	☐	Deal Level Forecast	none	in_fcst	☐		☐	
		8	☐	Category	none	ForecastCategory	☒	String	☐	
		9	☐	Close Date	none	CloseDate	☒	Excel Date	☐	

Commit message Save Changes

Add a new field on the Deals page

You can create a new field on the Deals page with a formula or without a formula. Perform these steps to add a new field on the Deals page.

1. From the Admin page, under CONFIG TOOLS, click **Deals Grid** to open the Deals customization page.
2. Click **Add New Field**.

The Add Field dialog box appears.

Admin

Add Fields

Basic

Formula field

☐

Label*

Dif

☐

Field*

none

Show in mobile

☐

Format*

Secondary

☐

User role

---- None ----

Pivot

---- None ----

Ok

Cancel

Add New Field

3. If you want to apply an arithmetic formula in the new field, select the **Formula Field** check box.

Add Fields

Basic

Formula field

☒

Label*

Field*

none

Show in mobile

☐

Format*

Secondary

☐

User role

---- None ----

Pivot

---- None ----

Ok

Cancel

- a. In the **Label** field, enter the name of the new field that you want to create on the Deals screen.

Add Fields

Basic

Formula field

☒

Label*

New field

Field*

none

New field

Show in mobile

☐

Format*

Secondary

☐

User role

---- None ----

Pivot

---- None ----

Ok

Cancel

Note

If you select the **Formula Field** check box, the **Field** dropdown list is disabled. The **Field** value is the same as the value in the **Label** field. If you select the **Formula Field** check box, a **Formula** field appears at the end of the dialog box.

4. If you don't want to create a Formula field and didn't select the **Formula** checkbox, enter the name of the field that you want to create in the **Label** field.

Add Fields

Basic

Formula field ☐

Label*

Dlf ☐

Field*

Show in mobile ☐

Format*

Secondary ☐

User role

Pivot

Ok **Cancel**

5. If you want to apply deal level forecasting for the new field that you are creating, check the **Dlf** checkbox.
6. If you want to map any field value from your CRM to this new field, in the **Field**, enter the exact name of the field on your CRM.

Add Fields

Label*

Dlf ☐

Field*

Show in mobile ☐

Format*

Secondary ☐

User role

Pivot

Ok **Cancel**

7. If you want to show the new field in your Aviso mobile app, select the **Show in mobile** check box.
8. From the **Format** drop-down list, select the format of data that will be present in the new field such as *amount*, *count*, *ratio*, *percentage*, and so on.

Add Fields

Label*

Dlf ☐

Field*

Show in mobile ☐

Format*

Secondary ☐

User role

Pivot

Amount

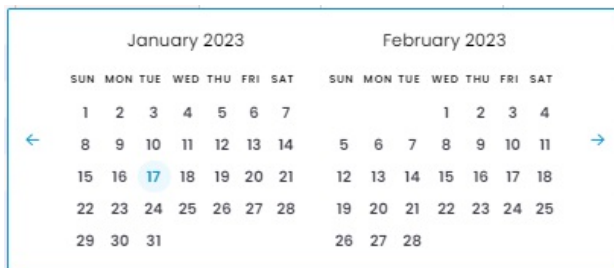
Count

Engagement

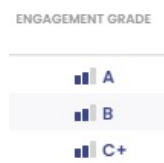
Excel Date

Ok Cancel

The format also decides how the field appears. For example, if you select *Excel date*, the following Calendar view appears.



If you select **Engagement**, the engagement grade appears as follows:



- If you don't want the new field to appear on the Deals screen, select the **Secondary** check box. The field will however appear on the Deal details page.
- From the **User Role** list, select the roles of the users who you want to see the new column that you are creating on the Deals page.

For example, if you want that users with some specific roles can only see the newly created field, you can select only those roles in the **User Role** list

Add Fields

Label*

Dlf ☐

Field*

Show in mobile ☐

Format*

Secondary ☐

User role

Pivot

Select All

Role

Customer Success

CFO

CEO

Sales Rep

CEM

Finance VP

IT

Ok Cancel

11. From the **Pivot list** field, select the pivots (hierarchies) of the users who you want to see the new column that you are creating on the Deals page.

Add Fields

Label*

Dif ☐

Field* none ▾

Show in mobile ☐

Format* Amount ▾

Secondary ☐

User role ---- None ----

Pivot ---- None ----

- ☐ TAM
- ☐ Alex Mosher

Ok Cancel

12. If you selected the **Formula** checkbox in step number 3, enter your formula in **Formula** field.

Add Fields

Field* none ▾

Show in mobile ☐

Format* ▾

Secondary ☐

User role ---- None ----

Pivot ---- None ----

Formula "A"+X

Add Formula Sources

Ok Cancel

- a. Click **Add Formula Source** to map the existing fields on the Deals screen to use in the formula.

Add Fields

Show in mobile

☐

Format*

Secondary

☐

User role

---- None ----

Pivot

---- None ----

Formula

"A"+X

Add Formula Sources

Variable

A

Field Key

ACV AVM

Ok

Cancel

13. Click **Ok**.

14. Enter a commit message in the Commit message field.

X

38

☐

Next Steps Last Updated d

none

NextSteps_Lst

X

38

☐

Renewal ACV

none

RenewalACV

X

40

☐

Recommended Actions

none

re_of_insights

X

41

☐

Copy of Stage value

none

Copy of Stage value

Commit message

Save Changes

15. Click **Save Changes**.

Wait for some time while the changes are saved and reload the Aviso URL. Go to the Deals page to see the newly created field.

Note

- You can create the same Field with unique Labels in two different pivots. But creating same field with same Labels in different Pivots is not allowed.

	X	42	☐	Comment	none	__comment__	☐	String	☐	Customer Success +19 more	Product
	X	43	☐	Forecasting Comment	none	__comment__	☐	String	☐	Customer Success +19 more	Renewals Forecast

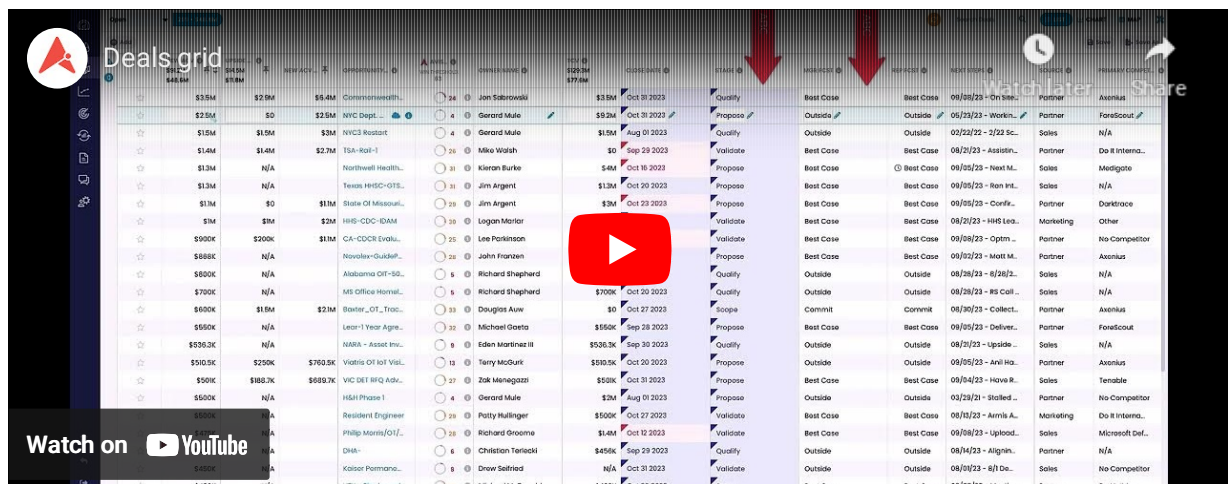
- You can't delete any field that doesn't have a formula as it is considered a CRM field in the system.
- You may consider using the DLF field as a source for formulas as it has multiple values in it.

Examples of various formulas you can use while adding a new field

Deals grid lets the admins define various formulas required to add a customized field on the Deals page and use it in the new field. It can be an easy formula to add two values or a complex formula involving multiplication and divisions of multiple values. The following video shows two examples to help you understand how to define and apply formulas while adding a new field.

Important

You need Admin access to create a new field on the Deals page.



Creating formula example 1: adding two values

Perform the following steps to add a formula to add two values (in this example, New ACV and Upside ACV):

1. From the left-hand side menu, click Admin to open the Admin page and from the Admin page click the Menu icon.

Admin

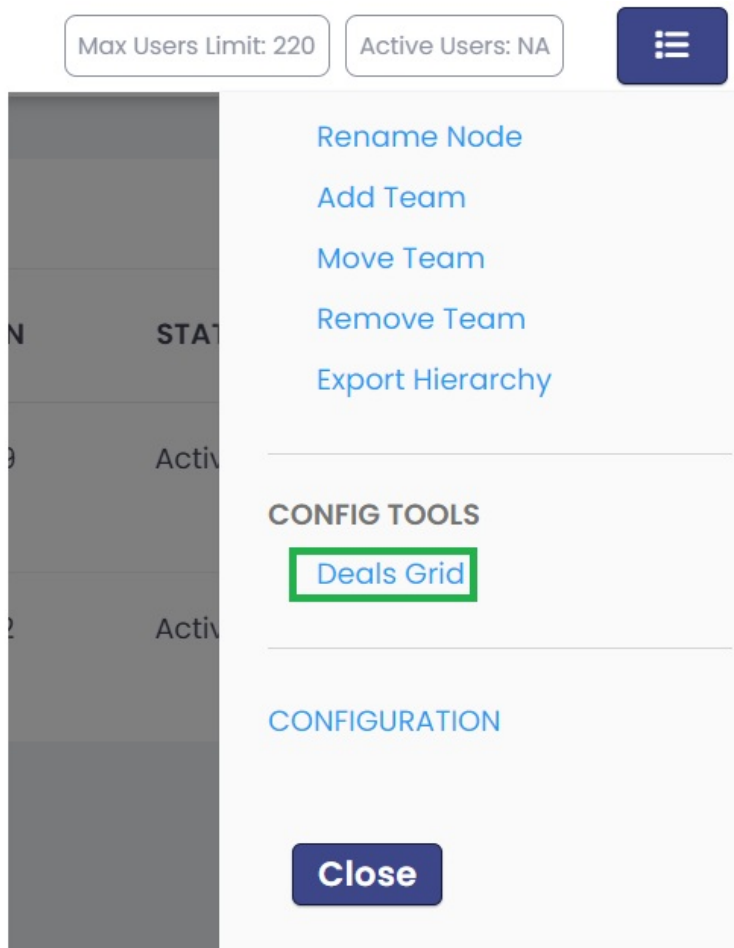
Max Users Limit: 220 Active Users: NA

Last Run: Today, 11:05 AM

Search Users

NAME	USERNAME	EMAIL	FUNCTION	USER TYPE	LAST LOGIN	STATUS	ACTIONS
custom	custom@armis_sync.com	lakshmi.gadepalli@aviso.cor	CRO	regular	2023-01-19 15:02:41	Active	
karthik	karthik@armis_sync.com	karthik.appana@aviso.com	CFO	regular	2023-10-12 12:32:47	Active	

2. Under Config Tools, click Deals Grid.



The Deals Grid page appears and shows all the existing fields present on the Deals page.

You will be using the Field names of the existing fields on the Deals page to use them in the formula. For example, if you want to use this New ACV field in the formula, you have to use its Field name that is "Amount".

3. Click **Add New Field**.

Admin

Admin						
Edit	Delete	Order	Formula field	Label		Field
	×	0	☐	Opportunity Name	none	OpportunityName
	×	1	☐	Owner Name	none	OpportunityOwner
	×	2	☐	Aviso Score	none	win_prob
	×	3	☐	Engagement Grade	latest_	Engagement_grade

The Add Fields dialog box appears.

4. On the "Add Fields" dialog box, select the **Formula Field** checkbox.

After selecting the **Formula field** checkbox, the **Field** dropdown list is deactivated and Formula field appears at the bottom of the dialog box.

Add Fields

Basic

Formula field

☒

Label*

Field*

none

Show in mobile

☐

Format*

Secondary

☐

User role

---- None ----

Pivot

---- None ----

Ok

Cancel

5. Enter a name of the new field in the **Label** field.

In this example, we have entered *New ACV+Upside ACV*.

Basic

Formula field

☒

Label*

New ACV + Upside ACV

Field*

none

New ACV + Upside ACV

6. As the value that the new field will show is amount of the deals, select *Amount* from the **Format** dropdown list.

Add Fields

Field* none ▾ New ACV + Upside ACV ▾

Show in mobile ☐

Format* ▾

- Amount
- Count
- Engagement
- Excel Date

Secondary ☐

User role ☐

Pivot ☐

Formula Input your formula **Add Formula Sources**

7. Update the other fields such as **Shown in mobile**, **Secondary**, **User role**, and **Pivot** as required.

Note

In the **Formula** field, you can use any variables such as a, b, c or x, y, z, to add your desired formula and then define the variables. These variables represent the sources of your formula.

8. Enter $a+b$ in the **Formula** field.

Add Fields

Field*

none

New ACV + Upside ACV

Show in mobile

☐

Format*

Amount

Secondary

☐

User role

---- None ----

Pivot

---- None ----

Formula

a+b

Add Formula Sources

Ok

Cancel

9. To define these two variables ($a+b$), click **Add Formula Sources** twice.

Add Fields

Format*

Amount

Secondary

☐

User role

---- None ----

Pivot

---- None ----

a+b

Add Formula Sources

Variable

Field Key

Formula

Add variable

x

Add variable

x

Ok

Cancel

10. Define variable *a* in the first **Variable** field and select the correct Field name from the **Field Key** dropdown list.

Add Fields

Format*

Amount

Secondary

☐

User role

---- None ----

Pivot

---- None ----

a+b

Add Formula Sources

Variable

Field Key

Formula

a

Amount

x

b

Upside_ACV

x

Ok

Cancel

11. Define variable *b* in the second **Variable** field and select the correct Field name from the **Field Key** dropdown list.

12. Click Ok.

If you scroll down, you can see the newly added field on the Admin page.

Admin

Add New Field

	x	32	☐	Identify_Pain_Business	none	Identify_Pain_Business	☐	String	▼	☒
	x	33	☐	Champion	none	Champion	☐	String	▼	☒
	x	34	☐	Economic Buyer	none	Economic_Buyer	☐	String	▼	☒
	x	35	☐	Biz Decision Criteria	none	Biz_Decision_Criteria	☐	String	▼	☒
	x	36	☐	Tech Decision Criteria	none	Tech_Decision_Criteria	☐	String	▼	☒
	x	37	☐	Paper Process	none	Paper_Process	☐	String	▼	☒
	x	38	☐	Next Steps Last Updated d	none	NextSteps_lud	☐	Excel Date	▼	☐
	x	39	☐	Renewal ACV	none	RenewalACV	☐	Amount	▼	☐
	x	40	☒	New ACV + Upside ACV	none	New ACV + Upside ACV	☐	Amount	▼	☐

Commit message

Save Changes

13. Enter a commit message in the **Commit message** field and click **Save Changes**.

Admin Add New Field

		32	☐	Identify_Pain_Business	none	Identify_Pain_Business	☐	String		☒
		33	☐	Champion	none	Champion	☐	String		☒
		34	☐	Economic Buyer	none	Economic_Buyer	☐	String		☒
		35	☐	Biz Decision Criteria	none	Biz_Decision_Criteria	☐	String		☒
		36	☐	Tech Decision Criteria	none	Tech_Decision_Criteria	☐	String		☒
		37	☐	Paper Process	none	Paper_Process	☐	String		☒
		38	☐	Next Steps Last Updated d	none	NextSteps_lud	☐	Excel Date		☐
		39	☐	Renewal ACV	none	RenewalACV	☐	Amount		☐
		40	☒	New ACV + Upside ACV	none	New ACV + Upside ACV	☐	Amount		☐

Added a new field. Save Changes

14. Wait for some time as the changes are being updated.

15. Open your Deals page and reload it.

You can see the newly added field **New ACV+Upside ACV**.

You can see that the new field, **New ACV+Upside ACV**, shows values that are summation of the values in the **New ACV** and **Upside ACV** fields.

In this way, you can also create a combined value of two text fields such as **Stage** and the **Manager** forecast. While adding two text values, on the Add Field dialog box, from the **Format** dropdown list, you have to select *String*. The new field will show texts from both these fields together.

Creating formula example 2: adding two values, multiplying it by 200, dividing by 15, and subtracting from another value

Perform the following steps to add two values (in this example, **New ACV+Upside ACV**), multiply it by 200, divide by 15, and subtract from another value (**TCV**):

1. From the left-hand side menu, click **Admin** to open the Admin page and from the Admin page click the Menu icon.

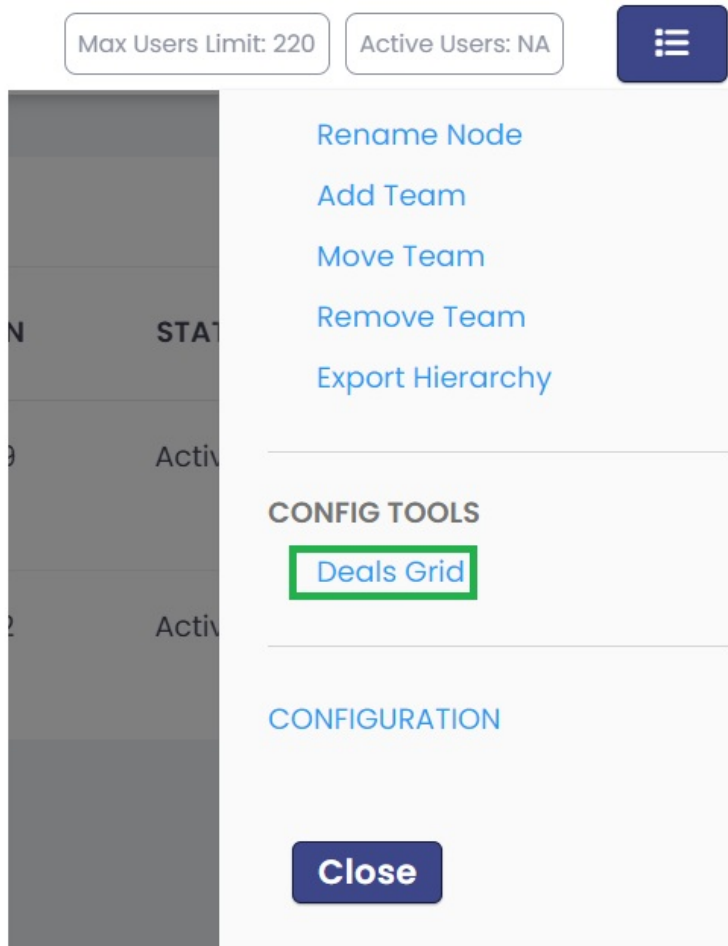
Admin Last Run: Today, 11:05 AM

Max Users Limit: 220 Active Users: NA

User Configuration Search Users

NAME	USERNAME	EMAIL	FUNCTION	USER TYPE	LAST LOGIN	STATUS	ACTIONS
custom	custom@armis_sync.com	lakshmi.gadepalli@aviso.cor	CRO	regular	2023-01-19 15:02:41	Active	
karthik	karthik@armis_sync.com	karthik.appana@aviso.com	CFO	regular	2023-10-12 12:32:47	Active	

2. Under **Config Tools**, click **Deals Grid**.



The Deals Grid page appears and shows all the existing fields present on the Deals page.

You will be using the Field names of the existing fields on the Deals page to use them in the formula. For example, if you want to use this New ACV field in the formula, you have to use its Field name that is "Amount".

3. Click **Add New Field**.

Admin

Admin							Add New Field
Edit	Delete	Order	Formula field	Label		Field	
	×	0	☐	Opportunity Name	none	OpportunityName	
	×	1	☐	Owner Name	none	OpportunityOwner	
	×	2	☐	Aviso Score	none	win_prob	
	×	3	☐	Engagement Grade	latest_	Engagement_grade	

The Add Fields dialog box appears.

4. On the "Add Fields" dialog box, select the **Formula Field** checkbox.

After selecting the **Formula field** checkbox, the **Field** dropdown list is deactivated and Formula field appears at the bottom of the dialog box.

Add Fields

Basic

Formula field

☒

Label*

Field*

none

Show in mobile

☐

Format*

Secondary

☐

User role

---- None ----

Pivot

---- None ----

Ok

Cancel

5. Enter a name of the new field in the **Label** field.

In this example, we have entered *New reference*.

Formula field

☒

Label*

New reference

Field*

none

New reference

6. As the value that the new field will show is amount of the deals, select *Amount* from the **Format** dropdown list.

Add Fields

Field* none ▼ New ACV + Upside ACV ▼

Show in mobile ☐

Format*

Secondary ☐

User role

Pivot

Formula Input your formula

Add Formula Sources

7. Update the other fields such as **Shown in mobile**, **Secondary**, **User role**, and **Pivot** as required.

Note

In the **Formula** field, you can use any variables such as a, b, c or x, y, z, to add your desired formula and then define the variables. These variables represent the sources of your formula.

8. Enter $a+b200/15 - c^*$ in the **Formula** field.

Add Fields

Field* none ▼ New ACV + Upside ACV ▼

Show in mobile ☐

Format* Amount ▼

Secondary ☐

User role ---- None ----

Pivot ---- None ----

Formula $(a+b)*200/15 - c$

Add Formula Sources

Ok Cancel

In this example, *c* is the new variable to represent the TCV field.

9. To define these variables (*a*, *b*, and *c*), click **Add Formula Sources** three times.

10. Define variable *a* in the first **Variable** field and select the correct Field name from the **Field Key** dropdown list.

Add Fields

Format*

Amount

Secondary

☐

User role

---- None ----

Pivot

---- None ----

a+b

Add Formula Sources

Variable

Field Key

Formula

a

Amount

x

b

Upside_ACV

x

Ok

Cancel

11. Define variable *b* in the second **Variable** field and select the correct Field name from the **Field Key** dropdown list.
12. Define variable *c* in the third **Variable** field and select the correct Field name from the **Field Key** dropdown list.
13. Click **Ok**.

If you scroll down, you can see the newly added field on the Admin page.

Admin

Add New Field

		31	☐	Identify Pain Technical	none	Identify_Pain_Technical	☐	String	☒	Customer Suc
		32	☐	Identify_Pain_Business	none	Identify_Pain_Business	☐	String	☒	Customer Suc
		33	☐	Champion	none	Champion	☐	String	☒	Customer Suc
		34	☐	Economic Buyer	none	Economic_Buyer	☐	String	☒	Customer Suc
		35	☐	Biz Decision Criteria	none	Biz_Decision_Criteria	☐	String	☒	Customer Suc
		36	☐	Tech Decision Criteria	none	Tech_Decision_Criteria	☐	String	☒	Customer Suc
		37	☐	Paper Process	none	Paper_Process	☐	String	☒	Customer Suc
		38	☐	Next Steps Last Updated d	none	NextSteps_lud	☐	Excel Date	☐	Customer Suc
		39	☐	Renewal ACV	none	RenewalACV	☐	Amount	☐	Customer Suc
		40	☒	New reference	none	New reference	☐	Amount	☐	---- None ----

Added a new field.

Save Changes

14. Enter a commit message in the **Commit message** field and click **Save Changes**.

Admin

Add New Field

		32	☐	Identify_Pain_Business	none	Identify_Pain_Business	☐	String		☒
		33	☐	Champion	none	Champion	☐	String		☒
		34	☐	Economic Buyer	none	Economic_Buyer	☐	String		☒
		35	☐	Biz Decision Criteria	none	Biz_Decision_Criteria	☐	String		☒
		36	☐	Tech Decision Criteria	none	Tech_Decision_Criteria	☐	String		☒
		37	☐	Paper Process	none	Paper_Process	☐	String		☒
		38	☐	Next Steps Last Updated d	none	NextSteps_lud	☐	Excel Date		☐
		39	☐	Renewal ACV	none	RenewalACV	☐	Amount		☐
		40	☒	New ACV + Upside ACV	none	New ACV + Upside ACV	☐	Amount		☐

Added a new field.

Save Changes

15. Wait for some time as the changes are being updated.

16. Open your Deals page and reload it.

You can see the newly added field **New reference**.

You can see that the new field, **New reference**, shows values that are summation of the **New ACV** and **Upside ACV** fields, multiplied by 200, divided by 200 and subtract from TCV value.

Modify an existing field on the Deals page

Deals Grid lets admins modify existing fields present on the Deals page.

Note

You can only delete fields marked as Formula fields however, you can only modify the fields not marked as Formula fields as these are considered as CRM fields.

On the Deals grid > Admin page, only Label, Format, User Role, Pivot, or other checkbox-related columns can be modified.

1. From the Admin screen, under CONFIG TOOLS, click **Deals Grid** to open the Deals customization page.

Admin

Add New Field

Edit	Delete	Order	Formula field	Label		Field	Show in mobile	Format	Secondary
		0	☐	ID	none	OpportunityID		String	☐
		1	☐	Name	none	OpportunityName		String	☐
		2	☐	Owner	none	OpportunityOwner		String	☐
		3	☐	Engagement Grade	latest	Engagement_grade	☐	Engagement	☐
		4	☐	Meeting Scheduled	none	MeetingScheduled	☐	String	☐
		5	☐	AVISO Score	none	win_prob		Probability	☐
		6	☐	Amount	none	Amount		Amount	☐
		7	☐	Deal Level Forecast	none	in_fcst	☐		☐
		8	☐	Category	none	ForecastCategory		String	☐
		9	☐	Close Date	none	CloseDate		Excel Date	☐

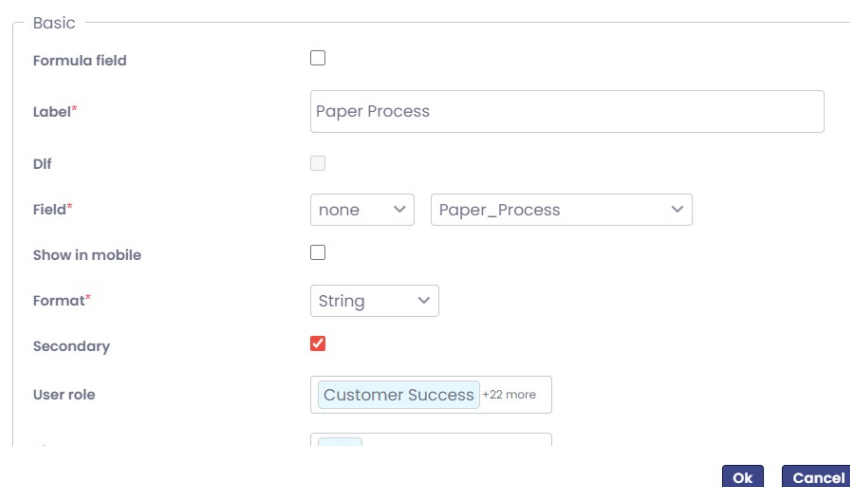
Commit message

Save Changes

2. Click on the Edit icon against the field that you want to modify.

The Edit Fields dialog box appears and populates all the fields with present values.

Edit Fields



Basic

Formula field ☐

Label*

Dif ☐

Field*

Show in mobile ☐

Format*

Secondary ☒

User role +22 more

Ok Cancel

3. Make the necessary changes to the fields as required.
4. Click Ok.
5. Enter a commit message in the **Commit message** field.

Admin





33

☐

Champion

none

Champion





34

☐

Economic Buyer

none

Economic_Buyer





35

☐

Biz Decision Criteria

none

Biz_Decision_Criteria





36

☐

Tech Decision Criteria

none

Tech_Decision_Criteria





37

☐

Paper Process

none

Paper_Process





38

☐

Next Steps Last Updated d

none

NextSteps_lud





39

☐

Renewal ACV

none

RenewalACV





40

☐

Recommended Actions

none

no_of_insights





41

☐

FIELD

none

ACV

Add New Field

Commit message

Save Changes

6. Click **Save Changes**.

Wait for some time while the changes are saved and reload the Aviso URL. Go to the Deals page to see the modified field.

Get notified when the number of remaining license count is less than 10

Aviso AI notifies all the admins when the difference between the number of active users and number of the purchased license is less than 10. It helps you be aware of the new license requirements so that you can purchase in advance and avoid shortage of licenses.

User License Expiry

The remaining user license count is <10
Reach out to CSM to purchase additional licenses.

Remind me in 10 days

January

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in January 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Note

This list contains generic features and updates. To know more about any features customized for you, talk to your customer success manager.

Newly released features

- [Get notified when there is a forecast update due](#)
Aviso notifies you through Slack and Microsoft Teams when a forecast update is due.
- [Let Aviso identify the opportunity associated with an uploaded meeting recording and tags the recording to the appropriate deals room or account room](#)
Aviso scans through various information used in the meeting and tags the meetings to the respective deals in the current quarter or an account room as required.
- [Enhance customer interaction with Real-time call guidance](#)
Real-time call guidance lets you configure checklist of must mention points and recommended responses specific to every stage in a deal in advance. When you are on a scheduled customer call, Real-time call guidance shows the checklist and recommended responses with a user-friendly interface. The Real-time call guidance also shows many other deal-related key information which you would require during the call. So you don't have to memorize all the information and successfully deliver an effective customer call.
- [View sentiment scores of all the meetings held for a deal from Sentiment Score Insights](#)
The Sentiment Score Insights helps you understand the overall emotions of your prospects in the meetings over time so that you can better prepare for the upcoming meetings and define the best course of actions to close the deal.
- [Find your engaging questions for prospects to know what engages them more and understand their pain-points](#)
Aviso AI tags your questions as engaging questions if it meets certain criteria such as the prospect responding for more than 30 seconds. Knowing what are the engaging questions for a prospect can help you understand their requirements and pain-points better, which you can use to close the deal.

New enhancements and updates

- [Validate your Zoom account in Aviso](#)
The Zoom integration with Aviso is changed from account level to user level. Every user must validate their zoom account before using it.
- [Find separate sentiment scores for buyers and sellers to evaluate specifically how positive or negative was your prospect's sentiment](#)
The Collaboration Workspace lets you find separate average sentiment scores for buyers and sellers.

February

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in February 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Note

This list contains generic features and updates. To know more about any features customized for you, talk to your customer success manager.

Newly released feature

- [Use filters in Comments section in the Smart transcription to make your comments visible to a specific team member, group, or all the team members](#)

The Comments section in the Smart transcription lets you make your comments visible to a specific team member, group, or all the team members. You can also have chat with team members by selecting the required team members.

New enhancements and updates

- [Switch to the new Forecast screen to have a more intuitive and user-friendly screen with more valuable forecast insights](#)

The Forecast screen is updated to make it more intuitive, user-friendly, and present more valuable insights. You can [switch to the new Forecast screen anytime](#). After switching to the new Forecast screen, because of any reason, if you want to use the old Forecast screen, you can switch back to the old screen.

- [Learn more about your sales forecast and the factors driving it from Forecast Insights](#)

The Forecast Insights on the Forecast screen gives you bird's eye views into your forecast and help you with actionable insights that can further enhance your sales.

- [Use the following newly introduced nudges to improve your sales in the current quarter and next quarter:](#)

- Conversion rate
- Our Quarter Pipeline
- Pipeline Conversion
- Late Stage Coverage Ratio

- [Use the newly introduced "Pipeline by Risk" report to evaluate the risks involved in the current and next quarter pipelines](#)

- Integrate your pipedrive CRM to get valuable and actionable insights from your CRM data. Aviso supports pipedrive CRM along with the existing list of CRMs

March

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in March 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Newly released feature

- [Identify your make-or-break deals that can help you achieve quota in the current quarter](#)
Make-or-break deals are critical to achieving quota in the current quarter as these deals have higher probabilities of being closed in the current quarter and are associated with large values. Aviso helps you identify your make-or-break deals through make-or-break nudges.

New enhancements and updates

- [Aviso WinScore is further enhanced to predict the probability of a deal being closed in the current quarter with more accuracy](#)
Aviso AI scans text from the key CRM fields such as **Next Step and Manager's Comment**, processes the text using NLP, and contributes to generating a high-accuracy WinScore.
- [Evaluate the performance of your sales reps with a 360-degree view](#)
The updated Leaderboard lets you evaluate the performance of your sales reps from various important aspects such as deal risk, forecast accuracy and addons, deal progression, CRM hygiene, email activity, and engagement (meeting). You can also view the associated deals, meeting recordings, and if required activate coaching rooms to coach your sales reps.
- [Add Aviso Notetaker to a live call to upload meeting recordings and generate actionable meeting insights](#)
If you are not joining a meeting through Aviso Collaboration Workspace, you can still upload the meeting recordings without any manual intervention and generate actionable meeting insights. Along with the existing ways of inviting the Aviso Notetaker to a meeting, you can now add it to live meetings by using the meeting link.

New features, enhancements, and updates to Aviso mobile app

- [Access your office email from Aviso mobile app](#)
You can access your office email from Aviso mobile app. The Mailbox feature in Aviso mobile app syncs with your office email in real-time.
- [Access your CRM calendar from Aviso mobile app](#)
You can access your CRM calendar from Aviso mobile app when you are traveling or away from your desk. The Calendar feature in Aviso mobile app syncs with your CRM Calendar in real-time.
- [Access your CRM Contacts from Aviso mobile app](#)
You can access your CRM Contacts from Aviso mobile app. You can also make any changes to an existing contact or create a new contact when you traveling or away from your desk.

April

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in April 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Newly released feature

- [Easily search for a sales hierarchy in Aviso](#)
Use the **Search Hierarchy** search box beside your profile icon to directly search for a hierarchy within your access level.

New enhancements and updates

- [Get notified when the number of remaining license count is less than 10](#)
Aviso AI notifies all the admins when the difference between the number of available licenses and number of active users is less than 10. The admins can purchase additional licenses in advance to avoid a shortage of licenses in the near future.

May

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in May 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Note

This list contains generic features and updates. To know more about any features customized for you, talk to your customer success manager.

Newly enhanced feature

- [Use enhanced real-time call guidance with improved performance](#)
Real-time call guidance is improved for better performance. You can also launch meeting from the real-time call guidance widget.
- [Log email from your office email inbox to CRM using Aviso mobile app](#)
Aviso mobile app lets you log emails to CRM from your office email inbox. You can [configure](#) Aviso mobile app to access your office email inbox and from there, you can log required emails to CRM.

June

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in June 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Note

This list contains generic features and updates. To know more about any features customized for you, talk to your customer success manager.

Newly released features

- [Record In-person meetings and generate actionable meeting insights](#)

When you are visiting a prospect in-person, use Aviso mobile app to record the meeting and generate actionable meeting insights. As the Aviso mobile keeps your meeting notes, you can focus more on the meeting.

July

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in July 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Note

This list contains generic features and updates. To know more about any features customized for you, talk to your customer success manager.

Newly released features

- [Use the new CI Dashboard to get real-time actionable insights and analytics into sales conversations](#)

The CI Dashboard is a comprehensive interface that provides you with various valuable CI insights that can help you improve your sales conversations and close more deals.

New enhancements to Aviso mobile app

- [View consolidated sales reports from Aviso mobile app](#)
 - **Pipeline Projection report:** Anticipate future sales trends by comparing conversion rates to the previous quarter. Make strategic decisions based on accurate projections.
 - **Win and Loss report:** Uncover insights into your successes and setbacks. Understand why deals are won or lost to refine your strategies effectively.
 - **Current Quarter Progression report:** Keep your finger on the pulse of your sales performance in real time. Compare actual results to forecasts and sales plans.
 - **Rep Activities report:** Gain transparency into your sales team's engagements. Track emails, meetings, account interactions, and more to optimize productivity.

August

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in August 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Note

This list contains generic features and updates. To know more about any features customized for you, talk to your customer success manager.

New enhancements

- [Enhance your sales operations with upgraded Organization Chart, designed to visualize team structure and foster collaboration effectively](#)

Org Chart gives you a visual representation of the hierarchical structure within a sales department or organization. It helps in understanding the relationships and roles of individuals or teams within an organization, which helps you define better sales strategies.

October

Aviso AI thrives on bringing in new features, enhancements, and updates to make your sales journey hassle-free and close more deals. These are the newly released features, enhancements, and updates introduced in October 2023. Every point mentioned in these lists is a clickable link that redirects you to a detailed explanation.

Note

This list contains generic features and updates. To know more about any features customized for you, talk to your customer success manager.

Newly released features

- [Create new fields or customize the existing fields with arithmetic formulas on the Deals page](#)
Aviso also allows you to create new fields and custom fields using arithmetic formulas on the CRM fields and any fields present on the Deals page to cater to your specific requirements.
- Use Recommended Actions (Next Best Actions) to streamline sales processes and receive precise roadmaps for more efficient deal closure
Recommended Actions serves as a personal strategic advisor for sales reps and provides sales reps with a real-time roadmap for each opportunity.

CATEGORY	CLOSE DATE	RECOMMENDED ACTIONS
Best Case	Jan 17 2023	6
Best Case	Dec 17 2022	1
Up		4
Be		5
For		5
Cl		4
Be		2
Co		4
Pip		1
Up		2
Be		2

•

What's new - Archive

Newly released features

Aviso AI thrives on bringing in new features to help your sales journey hassle-free and close more deals. These are the newly released features. The heading of every feature mentioned in this list is a clickable link that takes you to a detailed explanation of the feature. This list contains the generic features and not the features specific to any user. To know more about any features customized for you, talk to your customer success manager.

- [Edit topic tags in transcriptions to have more relevant topics tags](#)

Aviso AI assigns topic tags to every speaker-wise transcription to provide you insights into a meeting and understand its purpose, intent, themes, positive aspects, negative aspects, and so on. A topic tag is one of the words spoken in the speaker-wise conversation and is assigned to a category such as intent, themes, positive aspects, negative aspects, and so on.

- Track the follow-up emails that you sent after every meeting from the Relationship Insights of a deal
Sending a follow-up email after every meeting is important to a deal. The Meeting tab in Relationship Insights has a **Follow Up Email** column that lets you track and view the follow-up email that you sent after every meeting.

- [View Positive and Negative Aspects of a conversation easily from SmartTranscription](#)

Aviso AI assigns topic tags to every speaker-wise transcription to provide you insights into a meeting and understand its purpose, intent, themes, positive aspects, negative aspects, and so on.

- [View sales reports that you often use together from a customized dashboard](#)

Executive Dashboard lets you add multiple sales reports from the list of available reports and have a consolidated view of the reports.

- [Use Action Plan to define sales process and increase reps productivity](#)

The Action Plan equips sales organizations to manage a sales cycle effectively from deal creation to closure by defining a series of milestones and steps that sellers should accomplish to move forward in a deal cycle.

- [Use Opportunity Map to shift your focus toward the deals that have higher chances of closing in the current quarter and achieve your quota](#)

The Opportunity Map in Aviso AI gives you a bird's eye view of the deals by categorizing all the deals by the chances of closing in the current quarter and levels of risk involved so you can focus on the deals with higher chances of closing in the current quarter to achieve quota.

Next Quarter Pull-in Deals option on the Opportunity Map identifies the deals that are marked to close in the next quarter but have the potential to close in the current quarter. You can leverage these deals to compensate for the deals at risk.

- [Use sales quarter tabs to open sales forecast for any quarter and months](#)

Along with the existing sales cycle dropdown list, the forecast screen also has tabs for every quarter in the current year. Click any tab to see the sales forecast for the selected quarter.

- [Auto-populate missing contacts and auto-update the incomplete contacts in your CRM contact database](#)

Having a rich contact database is important while closing a deal. But while sales reps are burdened with sales targets, they also have to make manual entries of contacts in the CRM. In this manual process, many contacts are escaped. Use the Contact screen in Aviso to auto-populate and auto-update contacts. Aviso sync-ups with the existing contact database only after your approval.

- [Use third-party call service provider that you prefer in your organization for making any calls](#)

from Aviso

The Collaboration Workspace in Aviso lets you make calls and provides various conversational intelligence features to deep dive into a call. Hence you don't have to move among multiple calls and waste your time; rather you can perform most of your sales-related activities from the Aviso platform.

Along with Aviso's inbuilt call type, you can also use the following call service providers if you use any of these in your organization. So you have the option to make calls from either the inbuilt call type or the one that you use in your organization.

- Zoom
 - Microsoft Teams
 - Cisco Webex
 - Google Meets
 - RingCentral
- [Import recordings of the external meetings without any manual intervention and generate meeting insights to deep dive into the meeting](#)

Aviso Notetaker lets you import recordings of external meetings without any manual intervention. After the recordings are stored in Aviso Collaboration Workspace, you can generate meeting insights and deep dive into the meeting. When your prospect hosts a meeting or when your meeting platform doesn't allow you to record any meeting, you can use Aviso Notetaker to import the recording to Aviso Collaboration Workspace.

- [Use WinScore Projection to evaluate the best and worst path forward from the current stage of a deal](#)

Along with WinScore, now you can have WinScore Projection to predict the deal's movement in the remaining weeks. Aviso AI compares deal movements of similar deals from the past and gives you-

- how 20% of similar past closed-won deals have moved through their sales cycles at pace which was this fast or faster.
- how 20% of similar past closed (both won and lost) deals have moved at pace which was this slow or slower.

When you hover over any dot on the graph, you will get the key factors that impacted the change in WinScore from its previous value.

New enhancements and updates

These are the new enhancements to Aviso AI. This list contains the generic enhancements and not the enhancements specific to any user. To know more about any enhancements customized for you, talk to your customer success manager.

- [View email content of objection moments and positive moments from the Relationship insights](#)
The Relationship Insights in Aviso AI shows the objection moments and positive moments. You can also view the email content where the positive or objection moment is present from the Relationship Insights screen itself.
- [View the designation of the sender from the Relationship insights](#)
The Subject and Sender column under the **Emails** tab in the Relationship Insights in Aviso AI shows the designation of the sender.
- Enrich your contact database with options to choose from Email signature or third-party data source
The contact screen lets you choose to sync the updates from Email signature or third-party data source.
- Find seniority level of your contacts from Relationship Diagram

The Relationship diagram that shows all the engagements such as email and meetings, shows the contacts with seniority level to help sales reps and sales leaders understand if they are engaged with contacts with appropriate seniority level or not.

- Evaluate the performance of your sales reps from the updated Leaderboard

The updated Leaderboard lets the sales leader evaluate sales performance of the reps from various important perspectives such as quota attainment, amount committed against the amount forecasted, deal progression, maintaining CRM hygiene, conversational intelligence, and so on.

- Aviso AI supports Microsoft Dynamics

Along with the other existing supported CRMs, Aviso AI supports Microsoft Dynamics too.

- Use Pull-in deals with higher accuracy to close in the current quarter

The Pull-in capability is enhanced to show deals with higher chances of closing in the current quarter.

- Use sales cycle tabs on the Forecast screen to view forecast for different sales cycles (quarters) and months

To select a quarter, along with the sales cycle dropdown list, you can also use tabs on the Forecast screen.

HubSpot Integration

Aviso AI is an integrated revenue platform that helps modern sales organizations and revenue teams close more deals, drive revenue growth, and mitigate risk through patented AI guidance. As the industry leader in AI-based revenue operations solutions, Aviso AI is the only player with the most comprehensive set of intelligent tools and solutions for sales, marketing, and customer success teams that uncover the hidden revenue opportunity from each customer.

Perform the following steps to download and install the Aviso app from HubSpot App Marketplace:

1. [Click here](#) to initiate integration of the Aviso app with HubSpot.

You are redirected to the following page on HubSpot where you can select your Aviso account.



Connecting **AvisoIntegrationApp** to **HubSpot**

AvisoIntegrationApp by [aviso.com](#)

Choose an account

NAME	DETAILS
☒ Aviso AI	aviso.com 47208653

Choose Account

If you are not logged in to HubSpot, you will be asked to log in to HubSpot first and then you can see the aforementioned page.

2. Under **Choose and account**, select your Aviso account and click **Choose Account**.

AvisoIntegrationApp by [aviso.com](#)

Choose an account

NAME	DETAILS
☒ Aviso AI	aviso.com 47208653

Choose Account

You are redirected to the following page to give Aviso the required access to connect to your HubSpot CRM. Expanding the **Manage and view your CRM data** shows all the required accesses.



Connecting **AvisoIntegrationApp** to **HubSpot**

AvisoIntegrationApp
by [aviso.com](#)

This app is requesting access to your HubSpot account. Continue connecting if you agree.

> **Manage and view your CRM data**

Tickets
This includes access to tickets.

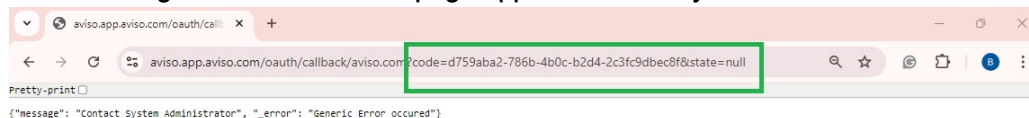
Connect app

Cancel

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

3. Click **Connect app**.

The following Aviso-authorization page appears and lets you collect the authorization key.



4. Collect the authorization code from the URL and share it with your dedicated Customer Success Manager from Aviso.

For example, assume you received the following URL on the Aviso-authorization page:

<https://aviso.app.aviso.com/oauth/callback/aviso.com?code=d759aba2-786b-4b0c-b2d4-2c3fc9dbec8f&state=null>

In this case, you can share the colored text (*d759aba2-786b-4b0c-b2d4-2c3fc9dbec8f*) as your authorization code with Aviso.

After you share your authorization code with Aviso, wait for the confirmation from Aviso.

5. Log in to HubSpot and go to **HubSpot Account > Settings > ConnectedApp**.

You can see Aviso (AvisoIntegrationApp) app on the ConnectedApp page.

Search HubSpot

Ctrl + K

Upgrade

Learn about the new navigation

test auth acc

Back

Settings

Your Preferences

General

Notifications

Account Setup

Account Defaults

Users & Teams

Integrations

Connected Apps

Private Apps

Email Service Provider

Marketplace Downloads

Tracking & Analytics

Privacy & Consent



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[Visit App Marketplace](#)

Connected apps

All appsAlerts

Search for an app



AvisoIntegrationApp

Actions



MyHubSpotApp

Actions

Page: 256 of 420

Integrating Zoom

Introduction

Aviso AI seamlessly integrates with Zoom to let users have virtual meetings with their buyers. Aviso AI is then able to analyze the meeting recording, transcribe it, and provide rich insights to both reps and managers that ultimately help move the conversation forward and provide managers with improvement or coaching areas for sales representatives. This document explains how to integrate Zoom with Aviso AI.

Important

The procedures mentioned in this document are performed by the IT admins to facilitate Zoom calls from Aviso AI and these are one-time activities. After Zoom is integrated with Aviso AI, everyone from your organization with access to Aviso AI can make audio and video calls from Aviso AI using Zoom.

Important

After you perform the procedures mentioned in this document, collect the authorization codes from Zoom and provide them to the Aviso executive to integrate Zoom with Aviso AI.

Integrating Zoom with Aviso requires the following procedures:

- [Prerequisites](#)
- [Setting up Zoom authorization](#)
- [Group settings for sales group](#)
- [Configuring Aviso AI to integrate Zoom](#)

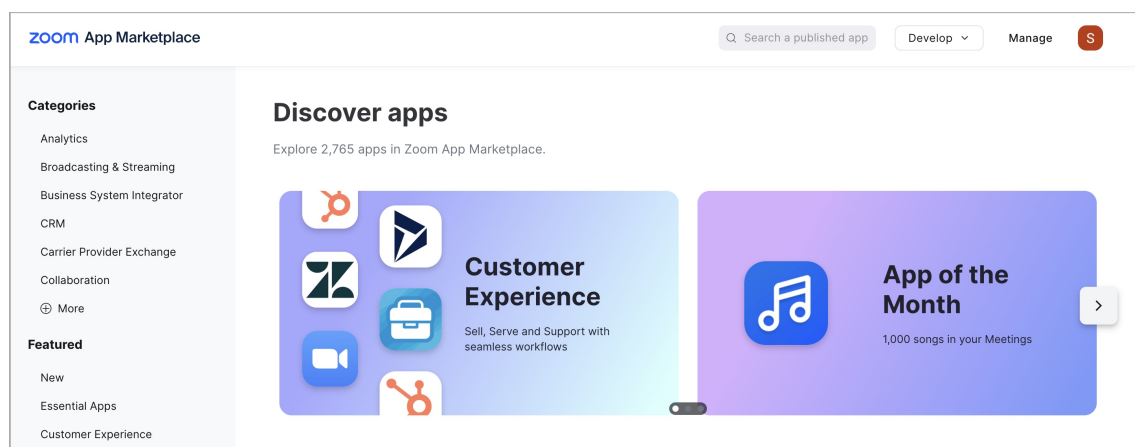
Prerequisites

Ensure you have a Zoom license and admin access to Zoom.

Setting up Zoom authorization

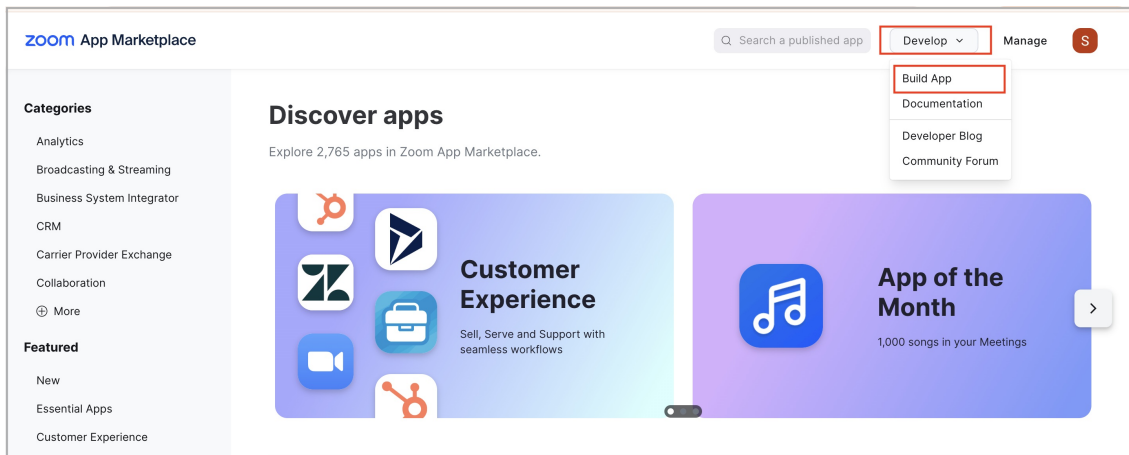
Perform these steps to set up Zoom authorization:

1. Go to [Zoom marketplace](#) and log in with your admin credentials.

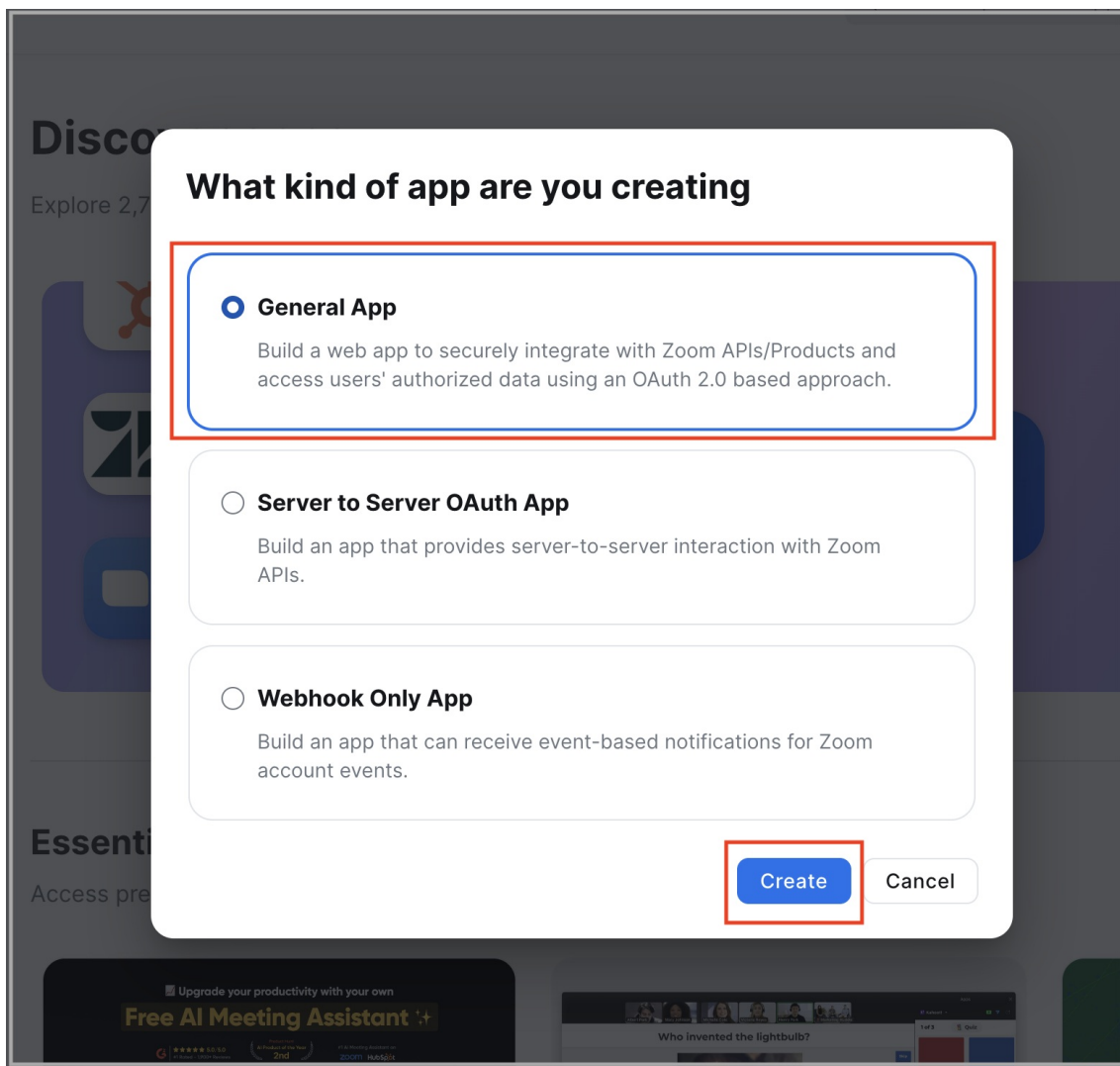


2. Hover over the **Develop** button and select *Build App*.

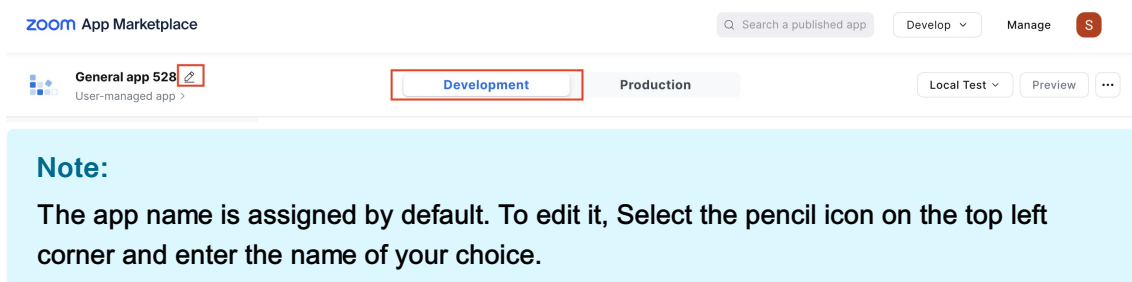
A pop screen appears asking you to select the kind of app you want to create.



3. Select **General App** and click **Create**.



4. You will be redirected to the Basic Information page. Go to the **Development** tab.



5. Select **User-managed** radio button under the *Select how the app is managed* section.

zoom App Marketplace Search a published app

General app 528 [User-managed app >](#)

Development **Production**

App Credentials **Development**

Client ID mymxxpr8TymLnEi...

Client Secret

Build your app

Basic Information

Features

Access

Surface

Embed

Scopes

Basic Information

Provide information about your app. [Learn More](#)

Select how the app is managed

This may affect Features, Scopes, and permissions to add the app.

☐ Admin-managed

Account admins can add and manage this app. It can access and manage users' data depending on the scope selection.

☒ **User-managed**

Individual users can add and manage this app. The app only has access to authorized users' data.

6. Copy the Client ID and Client secret from the *App credential* section to use it in the later steps.

General app 528 [User-managed app >](#)

Development **Production**

App Credentials **Development**

Client ID mymxxpr8TymLnEi...

Client Secret

Build your app

Basic Information

Features

Access

Surface

Embed

Scopes

☐ Admin-managed

Account admins can add and manage this app. It can access and manage users' data depending on the scope selection.

☒ **User-managed**

Individual users can add and manage this app. The app only has access to authorized users' data.

App Credentials **Development**

Client ID mymxxpr8TymLnEIE5KbAYw [Copy](#)

Client Secret [Regenerate](#) [Show](#) [Copy](#)

7. Scroll down to the **OAuth Information** section. In the **OAuthRedirect URL** field, enter the following URL.

App Credentials **Development**

Client ID mymxxpr8TymLnEi...

Client Secret

Build your app

Basic Information

Features

Access

Surface

Embed

Scopes

Add your app

Local Test Not ready

OAuth Information **Development**

OAuth Redirect URL

Provide the development redirect URL to generate an authorization URL for development testing.

e.g. <https://yourcompany.com/redirect>

☐ Use Strict Mode for Redirect URLs

This option only allows the redirections that exactly match the valid OAuth redirect URLs.

☐ Subdomain Check

This is for security check that can prohibit others from tampering with the redirected URLs. This option only allows the redirections that exactly match the subdomain of the valid OAuth redirect URLs.

OAuth Allow Lists

<https://yourcompany.com/allowlist> [Copy](#)

[+ Add Allow List](#)

None	Copy
https://<tenant_domain>.app.aviso.com/collaboration/register/zoom	

Note:

If the tenant name in the aviso app is "abc_customer.com", then the tenant domain will be "abc-customer" and the URL will be "https://abc-customer.app.aviso.com/collaboration/register/zoom".

The underscore (_) in the tenant name is replaced by a hyphen (-) in the **tenant domain**.

- From the left-hand side menu, click **Surface**. Under *Select where to use your app* section, **Select Meetings**.

- In the **Domain Allow List** field, enter the following URL:

None	Copy
<tenant_domain>.app.aviso.com	

- From the left-hand side menu, click **Scopes** to open the Scopes screen to add required scopes. Click **+Add Scopes**.

App Credentials
Development
Client ID
mymxxpr8TymLnEi...
Client Secret
.....

Build your app

Basic Information
Features
Access
Surface
Embed
Scopes

Add your app
Local Test
Not ready

Add Scopes

Scopes define the API methods this app is allowed to call, and thus which information and capabilities are available on Zoom. Scopes are restricted to specific resources like channels or files. If your app is submitted to Zoom, we will review your request for each scope. After your app is live, it will only be able to use permission scopes that Zoom approved. [Learn more about Zoom's scopes.](#)

Scopes	Description	Optional ⓘ
Zoom App		
Enable Zoom App within Zoom Meeting Client		
zoomapp:inmeeting	Enable Zoom App within Zoom Meeting Client	☐

Scope Description

Specify how this data is used within the application, and whether or not the data is stored. If stored, please denote how the data is stored (encrypted, plain text)

11. Add scopes dialog box appears and shows various scope types and available scopes for every scope type. Select the following scope type and scopes. Click **Done**.

Under **Meeting** section, select the following scopes:

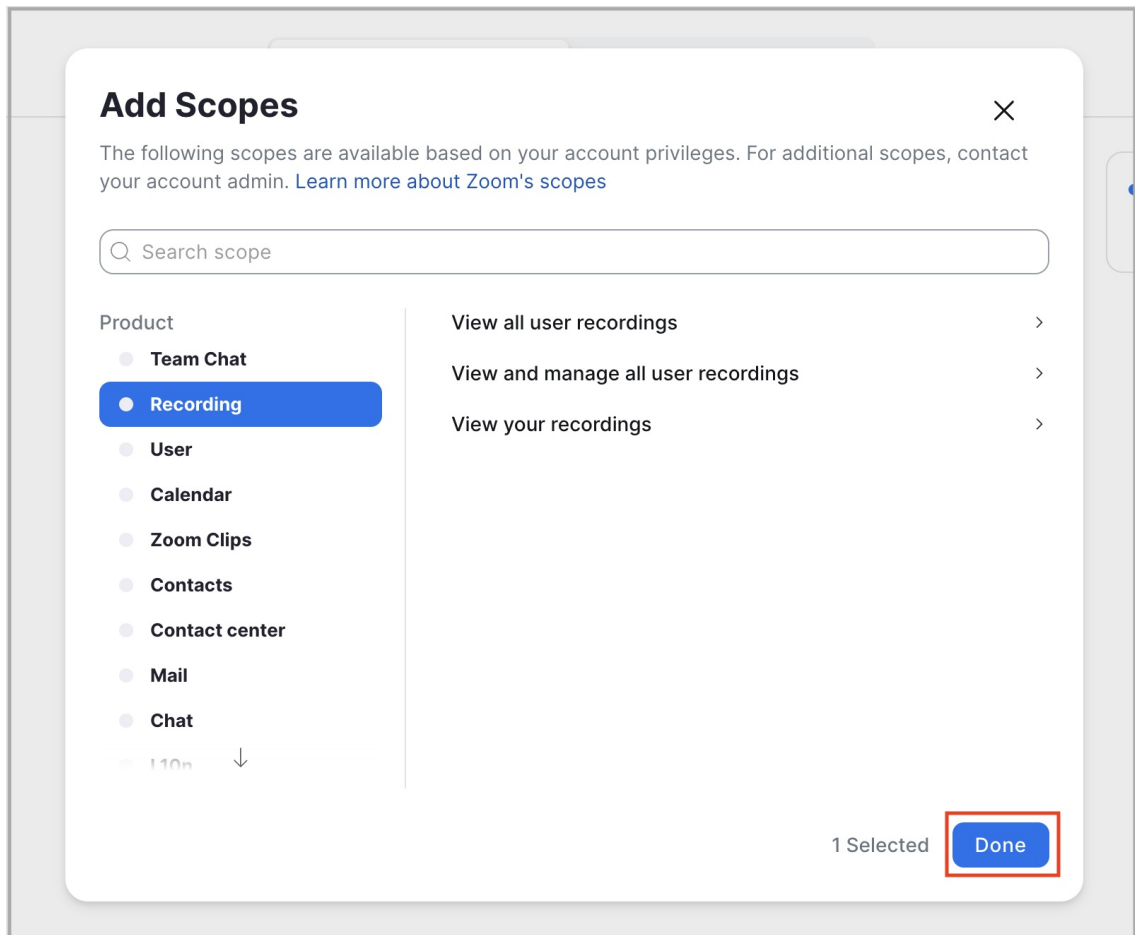
- View upcoming meetings
- View past meetings
- View a user's meeting
- View a past meeting's instances
- View a meeting
- View a past meeting's participants
- Delete a meeting
- Create a meeting for a user
- Update a meeting

Under **User** section, select the following scope:

- View a user
- Verify a user's email

Under **Recordings** section, select the following scopes:

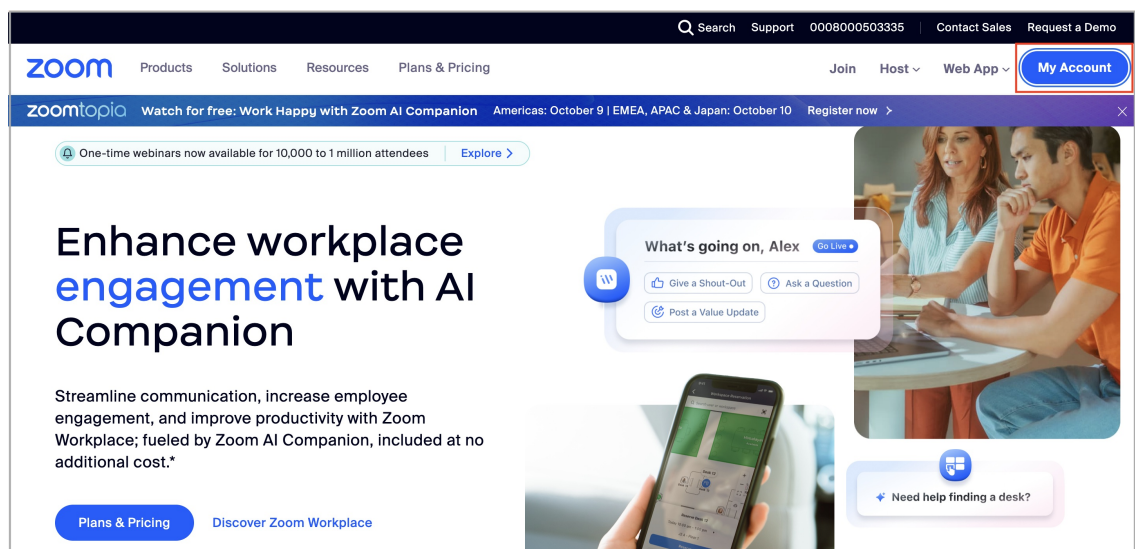
- View a recording
- Returns all of a meeting's recordings
- Lists all cloud recordings for a user



Group settings for sales group

Follow these steps to set group settings for sales group:

1. Go to <https://zoom.us/> and log in with your admin credentials.
2. Go to My Account on the top right of the page.



3. On the left menu bar, under Admin, click User Management > Groups.

The screenshot shows the Zoom Admin Console interface. In the left sidebar, under the 'ADMIN' section, the 'User Management' option is highlighted with a red box. Other options in the sidebar include Clips, Scheduler, Settings, Data & Privacy, Reports, and ADMIN. The main content area displays account settings, including a Host Key, Account section, License, Team Chat (Enabled), and Zoom Meetings (Basic). A red box also highlights the 'Groups' option under 'User Management' in the sidebar.

4. Select the respective sales group and add the required members to this group.

Groups

Q Search

Group Name	Description	Number of Members	Last Modified
Human Resources		0	Nov 24, 2021, AM
Sales		0	Nov 23, 2021, PM

5. Open the group and go to the **Meeting** tab.

The screenshot shows the 'Meeting' tab for a group in the Zoom Admin Console. The 'Meeting' tab is highlighted with a red box. The page displays the 'Profile of Group' section with fields for Group Name (Limited Recording) and Group Description (Local recording is disabled for these users). Below this, the 'Member' section shows 'Group Admins' (No group admins added) and 'Total Members' (0).

6. Enable **Waiting room**. This is an optional step.

If **Waiting room** is enabled, whenever someone tries to join a meeting, until the host admits, the person cannot join the meeting.

The screenshot shows the 'Waiting Room' settings in the Zoom Admin Console. The 'Waiting Room' toggle switch is highlighted with a red box and is currently turned on. Below the toggle, there is a description of the waiting room feature and a section for 'Waiting Room Options'. The 'Waiting Room Options' section states that the options apply to meetings hosted by users who turned 'Waiting Room' on. The option 'Everyone will go in the waiting room' is checked. Links for 'Edit Options' and 'Customize Waiting Room' are also visible.

7. Enable **Allow participants to join before host**.

Allow participants to join before host  

Allow participants to join the meeting before the host arrives

☒ Participants can join before start time

If **Allow participants to join before host** is enabled, participants can join the meeting before the host joins the meeting.

8. Under **Recording** tab, enable **Cloud recording** and lock this setting.

Groups > Aviso-Group > Settings

Profile Meeting **Recording** Telephone

Groups members will use the following settings by default. If you don't want the settings below to be changed, you can lock the settings here. [Learn More](#)

Local recording  

Allow hosts and participants to record the meeting to a local file

☒ Hosts can give participants the permission to record locally

Cloud recording  

Allow hosts to record and save the meeting / webinar in the cloud

9. Enable **Audio Transcription** option in advanced cloud recording settings and lock this setting.

Cloud recording  

Allow hosts to record and save the meeting / webinar in the cloud

☒ Record active speaker with shared screen

☐ Record gallery view with shared screen 

☐ Record active speaker, gallery view and shared screen separately

☒ Record audio-only files

☒ Record one audio file for all participants

☐ Record a separate audio file of each participant 

☒ Save chat messages from the meeting / webinar

Advanced cloud recording settings

☐ Add a timestamp to the recording 

☒ Display participants' names in the recording

☒ Record thumbnails when sharing 

☐ Optimize the recording for 3rd party video editor 

☒ Create audio transcript 

☐ Create recording highlights 

☐ Save panelist chat to the recording 

☒ Save closed caption as a VTT file 





10. Select the settings as shown in this image. Scroll down, enable **Automatic Recording**, lock the setting, and select **Record in the cloud**.

Automatic recording  

Record meetings automatically as they start

☐ Record on the local computer

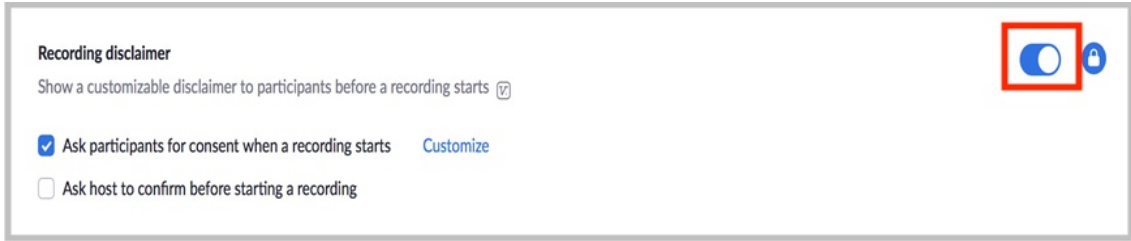
☒ Record in the cloud

☒ Host can pause/stop the auto recording in the cloud 

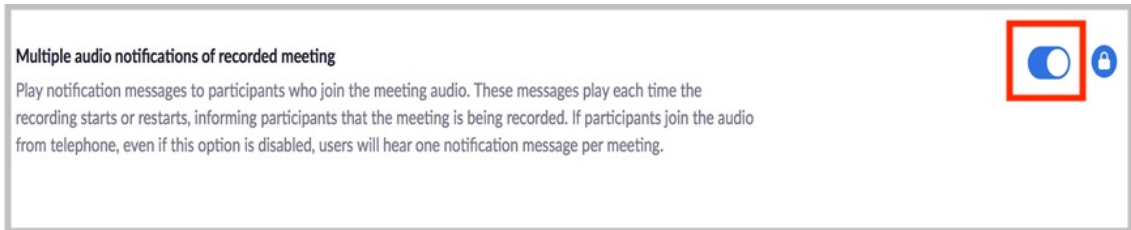
11. Scroll down and enable **Recording disclaimer**.

You can customize the consent form by clicking **Customize**. After you customize, lock the

settings.

A screenshot of the Zoom settings interface for the 'Recording disclaimer' section. The title 'Recording disclaimer' is at the top left. Below it is the text 'Show a customizable disclaimer to participants before a recording starts' followed by a help icon. To the right is a toggle switch and a lock icon, both highlighted with a red square. Below the toggle are two checkboxes: 'Ask participants for consent when a recording starts' (checked) with a 'Customize' link, and 'Ask host to confirm before starting a recording' (unchecked).

12. Scroll and enable **Multiple audio notifications of recorded meeting**, and lock the setting for all the members.

A screenshot of the Zoom settings interface for the 'Multiple audio notifications of recorded meeting' section. The title 'Multiple audio notifications of recorded meeting' is at the top left. Below it is a paragraph of text explaining the feature. To the right is a toggle switch and a lock icon, both highlighted with a red square.

Configuring Aviso AI to integrate Zoom

Provide the following information to the Aviso implementation team to integrate Zoom with your Aviso AI instance:

- Client ID
- Client Secret
- Installation URL

For security purposes, you can use a password-protected excel sheet to share the information with the Aviso implementation team and share the password in a separate email or chat.

Integrating Gong

Introduction

If you are using Gong and Aviso's Conversational Intelligence platforms, Aviso lets you integrate with Gong so that you can minimize jumping forth and back between Gong and Aviso. From the integration, you can achieve any of the following:

- **Sync with Gong and have the choice of using both or anyone from Aviso or Gong's platform**

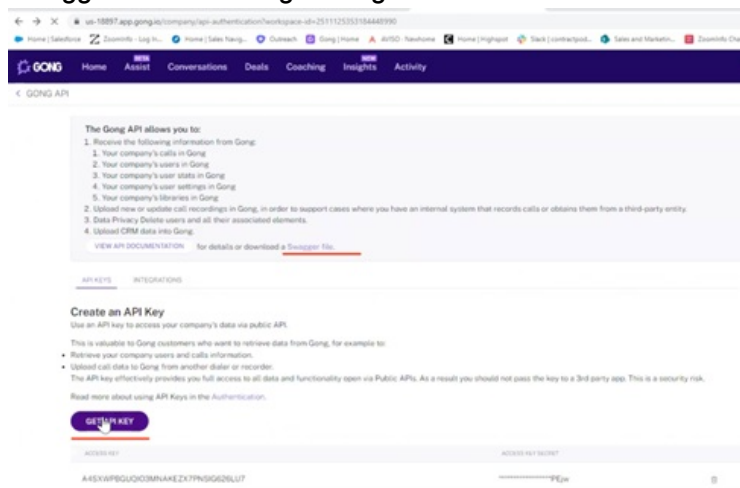
Using Gong's APIs, Aviso pulls in sales call engagement data and gives you actionable insights into your sales. Aviso pulls data at scheduled intervals, for example, once a day. You may use both Gong and Aviso to compare the insights you get from both platforms, which would help you make the choice of using better and more useful sales insights.

- **Migrate sales engagement data from Gong to Aviso platform**

If you decide to use Aviso's Conversational Intelligence platform only, this integration helps you migrate the sales engagement data from Gong to Aviso.

1. Provide Aviso with the following data for the integration:

- Gong API secret and access key from Gong settings.
- Swagger file from Gong Settings.



- List of accounts for which you want to migrate the sales call engagement data from Gong or sync with Gong.

You can sync with or migrate sales engagement data of any particular (active) deals or all the deals. Based on your requirements, the Aviso's implementation team can configure it.

- Historic backfill start date
- Aviso users list with persona mapping

It helps the Aviso implementation team in creating deal rooms and assigning the deal rooms to the deal owners.

2. What happens next?

- Based on your choice, whether you want to migrate or sync with Gong, Aviso pulls sales call engagement data.
- Aviso's implementation team will create deal rooms and make the deal owner as deal room owner.

- If the deal owner is not an Aviso user, the Aviso implementation team will make another preferred Aviso user the deal owner, based on your instructions.
For example, you have a list of active deals and the deal owners are not Aviso users.
You may want to assign these deals to a sales manager.

Integrating Outreach

Introduction

Aviso AI seamlessly integrates with Outreach to extract calls, prospects, opportunities, accounts, and user data from Outreach. Aviso AI is then able to analyze the meeting recording, transcribe it, and provide rich insights to both reps and managers that ultimately help move the conversation forward as well as provide managers with improvement or coaching areas for reps. This document explains how to integrate Outreach with Aviso AI.

Important

The procedures mentioned in this document are performed by the IT admins to facilitate usage of Outreach data from Aviso AI and these are one-time activities. After Outreach is integrated with Aviso AI, everyone from your organization with access to Aviso AI can read data that are there in Outreach from Aviso AI and also write back to Outreach.

Important

After you perform the procedures mentioned in this document, collect the access token from Outreach and share it with the Aviso implementation team to integrate Outreach with Aviso AI.

Scope of Aviso integration with Outreach

Scope	Purpose
prospects.read	Grant access to read prospects.
calls.read	Grant access to read the calls.
callPurposes.read	Categorizes and reads the call logs.
events.read	Grant users to read events such as email messages and calendar access.
accounts.read	Grant access to read user account.
users.read	Read the list of users associated with the team.
phones.read	Read the phone numbers associated with the prospect.
profiles.read	Grant access to read the prospect's profile.
opportunities.read	Grant access to read the opportunities associated with the prospect.
teams.read	Grant access to the linked team or teams the user belongs to.
opportunityStages.read	Read all open opportunities stages associated with the prospects.
phoneNumbers.read	Read the prospects' phone numbers.

Integrating Outreach with Aviso AI requires the following procedures:

- [Prerequisites](#)
- [Generate authorization code from Outreach](#)
- [Generate access token from Outreach](#)

Prerequisites

Ensure you have an Outreach license and admin access to Outreach.

Generate authorization code from Outreach

Perform the following steps to generate authorization code from Outreach using Aviso URI:

Prerequisite- If you have opened Outreach site, ensure that you have logged in as an admin. If you have logged in to Outreach with access other than admin, log out of the Outreach session.

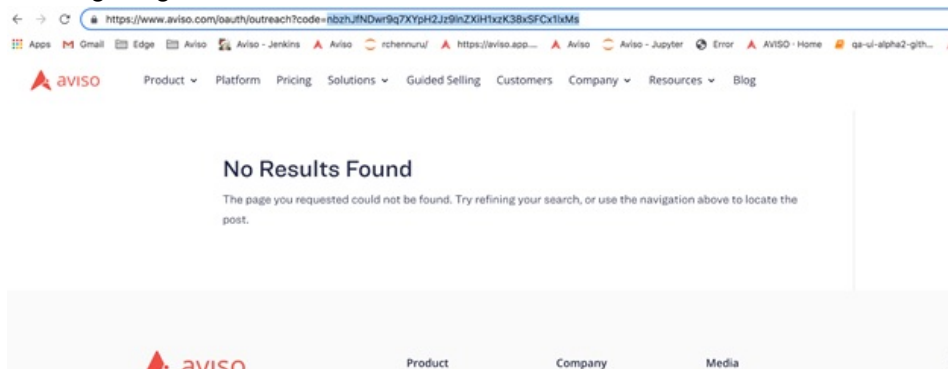
1. Open the following URL.

[https://api.outreach.io/oauth/authorize?](https://api.outreach.io/oauth/authorize?client_id=PFa2O_iF8T10hXMqZj0qiMUEDZtkAo3j0OCvFmTilDw&redirect_uri=https://www.aviso.com/oauth/outreach&response_type=code&scope=prospects.read+calls.read+callPurposes.read+events.read+accounts.read+users.read+phones.read+profiles.read+opportunities.read+teams.read+opportunityStages.read+phoneNumbers.read)

[client_id=PFa2O_iF8T10hXMqZj0qiMUEDZtkAo3j0OCvFmTilDw&redirect_uri=https://www.aviso.com/oauth/outreach&response_type=code&scope=prospects.read+calls.read+callPurposes.read+events.read+accounts.read+users.read+phones.read+profiles.read+opportunities.read+teams.read+opportunityStages.read+phoneNumbers.read](https://api.outreach.io/oauth/authorize?client_id=PFa2O_iF8T10hXMqZj0qiMUEDZtkAo3j0OCvFmTilDw&redirect_uri=https://www.aviso.com/oauth/outreach&response_type=code&scope=prospects.read+calls.read+callPurposes.read+events.read+accounts.read+users.read+phones.read+profiles.read+opportunities.read+teams.read+opportunityStages.read+phoneNumbers.read)

Avios AI site opens and displays “No Results Found”.

2. From the URI, which appears in the search bar, copy the code value as shown in the following image.



3. Share the authorization code with Aviso implementation team and perform the steps mentioned in [Generate access token from Outreach](#) as soon as possible.

Important

This authorization is valid for ten minutes only from the time you generated the code.

Generate access token from Outreach

Perform the following steps to generate an access token from Outreach using Command Line Interface (CLI).

1. Run the following command in a CLI such as shell or any online CLI such as [online curl](#) and replace **<authorization_code>** with the authorization code that you generated in the [Generate authorization code from Outreach](#) task.

```
curl https://api.outreach.io/oauth/token -X POST -d
client_id=PFa2O_iF8T10hXMqZj0qiMUEDZtkAo3j0OCvFmTilDw -d
client_secret=cZnd6FgrJ9vdHJAs9MmTuNm93Z17dJqvJLHNhKM_FDo -d
redirect_uri=https://www.aviso.com/oauth/outreach -d grant_type=authorization_code -d
code=<authorization_code>
```

An **access token** is generated in the command output.

2. Share the access token with the Aviso implementation team.

See [Outreach API Documentation](#) to know more about Outreach integration.

Integrating Microsoft Teams

Introduction

Aviso AI seamlessly integrates with Microsoft Teams to let users have virtual meetings with their buyers. Aviso AI is then able to analyze the meeting recording, transcribe it, and provide rich insights to both reps and managers that ultimately help move the conversation forward as well as provide managers with improvement or coaching areas for reps. This document explains how to integrate Microsoft Teams with Aviso AI.

Important

The procedures mentioned in this document are performed by the IT admins to facilitate Microsoft Teams calls from Aviso AI and these are one-time activities. After Microsoft Teams is integrated with Aviso AI, every user needs to validate their Microsoft Teams account from Aviso AI.

Important

After you perform the procedures mentioned in this document, collect the authorization codes from Microsoft and provide them to the Aviso implementation team to integrate Microsoft Teams with Aviso AI.

Integrating Microsoft Teams with Aviso requires the following procedures:

- [Prerequisites](#)
- [Register your application with Microsoft Teams](#)
- [Generate certificate and secret values from Microsoft Azure portal](#)
- [Add API permissions to your Microsoft Teams application](#)
- [Copy unique ID of your Sales group from Microsoft 365 admin center](#)
- [Provide the credentials to Aviso executives](#)

Prerequisites

Ensure that you have a Microsoft Teams admin license.

Register your application with Microsoft Teams

To integrate Microsoft Teams with Aviso, register with Microsoft Teams and collect Application (client) ID and Directory (tenant) ID that will be required in the later steps.

1. Log in to [Microsoft Azure](#).
Microsoft Azure portal appears.
2. In the search box, type App registration and click App Registration from the search results.
App registration page appears.
3. On the App registration portal, click **New registration**.

App registrations ⚙️ ...

[+ New registration](#)
[Endpoints](#)
[Troubleshooting](#)
[Refresh](#)
[Download](#)
[Preview features](#)
[Got feedback?](#)

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We will continue to provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

[All applications](#)
[Owned applications](#)
[Deleted applications](#)

Start typing a display name to filter these results

Application (client) ID starts with

Add filters

Register an application page appears.

Register an application ...

* Name

The user-facing display name for this application (this can be changed later).

TestApp ✓

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (Aviso, Inc only - Single tenant)
☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
☐ Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web http://localhost:8000/callback ✓

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from [Enterprise applications](#).

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

4. In the Name field, enter a name of your choice.

For example, you may enter *Aviso MS Teams*.

5. Under **Supported account types**, select the following option- *Account in this organizational directory only (Aviso Inc only - Single tenant)*.

6. Under Redirect URI (optional), perform the following:

- From the list, select **Web**.
- In the URI field that appears next to the dropdown list, enter the following redirect URI:

https://<tenant_domain>.app.aviso.com/collaboration/register/ms-team

Note

If the tenant name in the Aviso app is "abc_customer.com", then the tenant domain will be "abc-customer" and the URI will be "https://abc-customer.app.aviso.com/collaboration/register/ms-team".

*The underscore (_) in the tenant name is replaced by a hyphen (-) in the **tenant domain**.*

7. Click **Register**.

Essentials page appears and displays the following:

- Display name
- Application (client) ID
- Object ID
- Directory (tenant) ID
- Supported account types

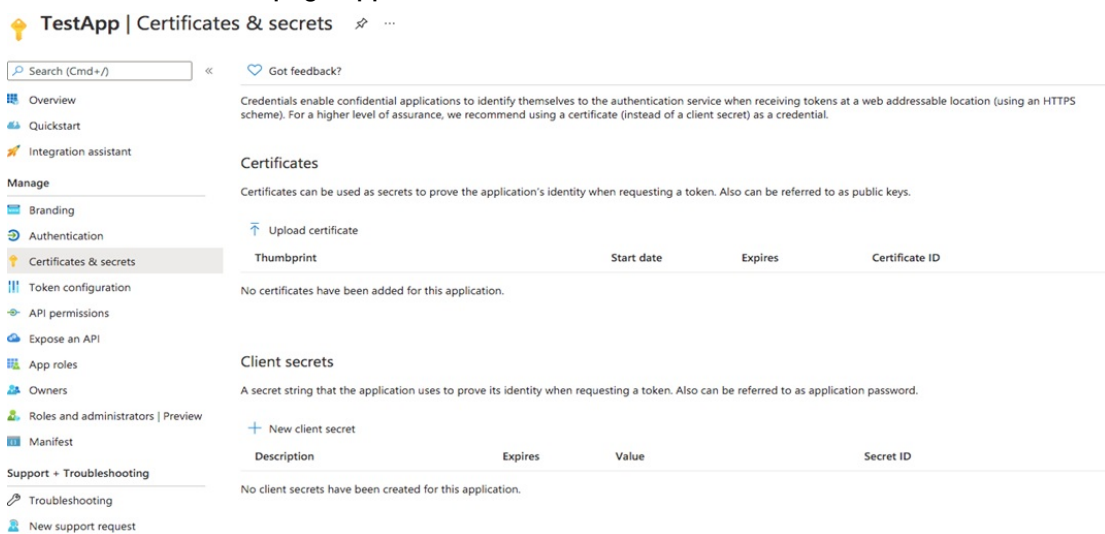
8. Note and save the Application (client) ID and the Directory (tenant) ID to use in the later steps.
Your application is registered and you received the Application (client) ID and the Directory (tenant) ID.

Generate certificate and secret values from Microsoft Azure portal

Perform the following steps to generate certificate and secret values from the Microsoft Azure portal.

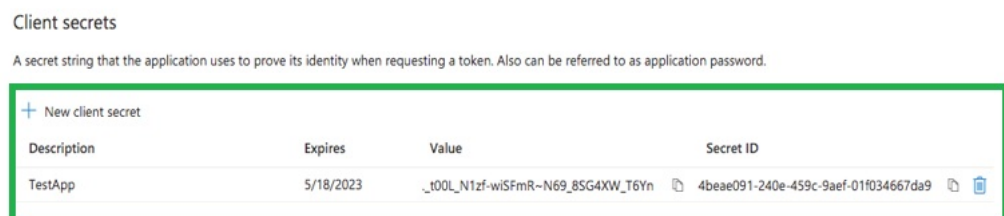
1. On the Microsoft Azure portal, go to **Home > App registration**
2. From the left-hand menu bar, click **Certificates & secrets**.

Certificates & secrets page appears.



3. Under **Client secrets** tab, click **+ New client secret**.
Add a client secret section appears.
4. In the **Add a client secret** section, perform the following steps.
 - a. In the **Description** field, add a short description, for example, “Credentials for Aviso MS Teams”.
 - b. In the **Expires** field, select the maximum value.
Select **Custom** to add the maximum possible value.
 - c. Click **Add**.

The client value and the client secret ID appear under the Client secrets tab.



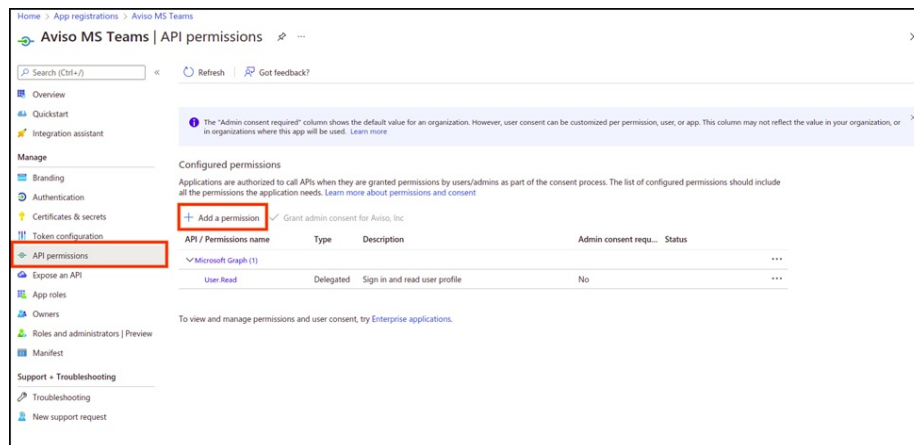
5. Note and save the client value and the secret ID.

Add API permissions to your Microsoft Teams application

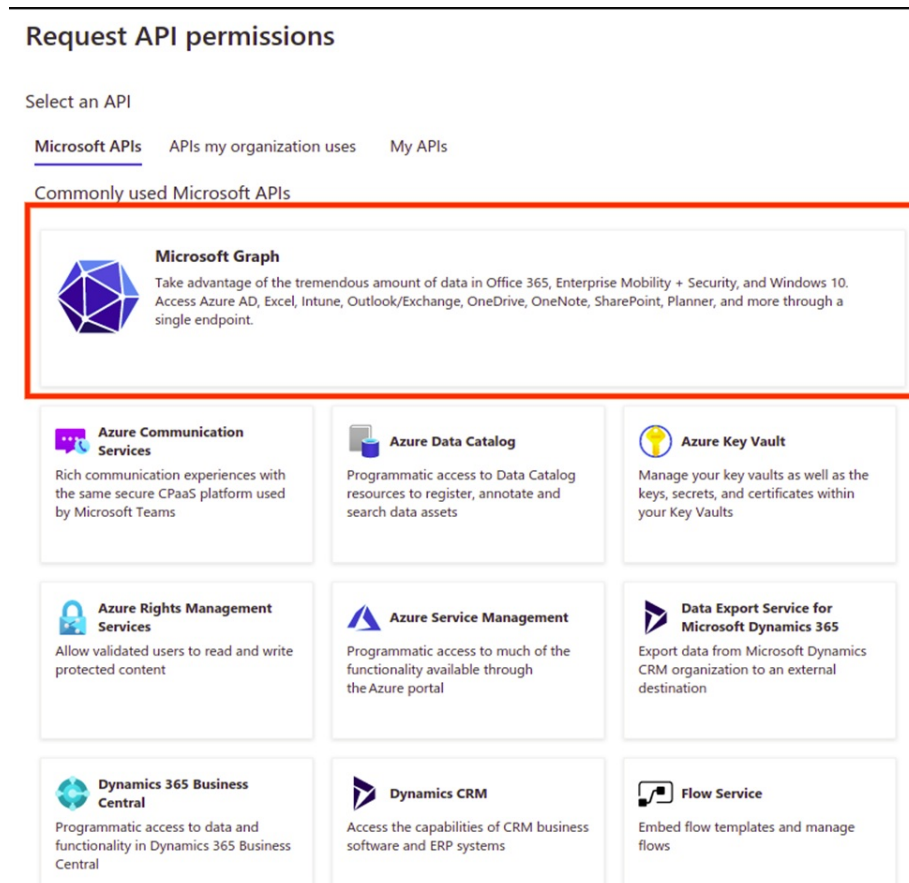
Perform the following steps to add API permissions to your Microsoft Teams account that enable you to use Microsoft Teams from Aviso AI.

1. On the Microsoft Azure portal, go to **Home > App registration > Aviso MS Teams**.
2. On the left menu bar, click **API Permissions**.

The API Permissions page appears.



3. Under Configured permissions, click **+ Add a permission**.
Request API permissions section appears.
4. Under **Microsoft APIs**, Click **Microsoft Graph**.



5. Click **Application permissions**.
Select permissions section appears and shows the list of available permissions categories under a search box. You can expand the permissions categories to view all the available permissions.

6. Select the following permissions:

If you can't find a permission, search the permission using the search box.

Permissions	Purpose
Files.Read.All	Read all files that the user can access to download the recording of meetings.
Chat.ReadBasic.All	Read newly created chat in teams.

7. Click **Add permissions**.

The app permission page shows all the permissions you added.

8. For the permissions in which the value of Admin consent required is *Yes*, grant admin consent using your organizational admin account.

9. Perform steps 1 to 3 again and select **Delegated Permissions**.

Select permissions section appears and shows the list of available delegated permissions categories under a search box. You can expand the permissions categories to view all the available delegated permissions.

10. Select the following delegated permissions:

If you can't find delegated permission, search the delegate permission using the search box.

Delegated Permissions	Purpose
User.Read	Allows the app to read user profiles without a signed in user.
Chat.Read	Read user chat messages to check if the recording is started for a meeting or not.
OnlineMeetings.ReadWrite	Read and create user's online/instant meetings.
Calendars.ReadWrite.All	Read and write user schedule items and create scheduled meetings.

The selected permissions are added to your integration application.

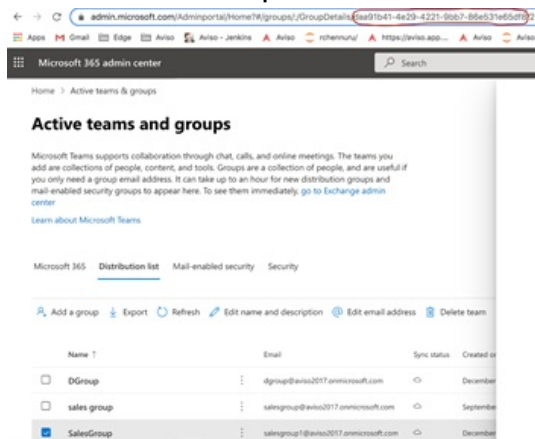
Copy unique ID of your Sales group from Microsoft 365 admin center

Copy the unique ID of the sales group by selecting the sales group. You can get the unique ID from the URI when you select the sales group. A sales group is the one that you create to maintain a distribution list (DL) of users.

If you don't have a sales group in the Microsoft 365 admin center, perform the following steps to create a sales group and copy the unique ID.

1. Open [Office 365](#).
2. Navigate to Microsoft 365 Admin center.
3. Under **User**, click **Teams & groups**.
4. Under **Teams & groups**, select **Active teams & groups**.
5. On the Active teams & groups page, under Microsoft 365 tab, click **Add a group**.
Choose a group type page appears.
6. On the Choose a group type page, select **Distribution** option and click **Next**.
Set up the basics page appears.
7. On the Set up the basics page, in the name field, add a name, for example, SalesGroup.
8. In the **Description** field, add a short description of the group and click **Next**.
Edit settings page appears.
9. On the Edit settings page, in the **Group email address** field, enter email ID of the group and click **Next**.
Review and finish adding group page appears and shows the details of what you added to the group.
10. On the Review and finish adding group page, click **Create group**.
In the Microsoft 365 admin center > Users > Active teams and groups page, under the **Distribution list** tab, the sales group that you created appears.
11. Select the sales group that you created.

The URI shows a unique ID.



12. Copy the unique ID and share it with the aviso implementation team.

Provide the credentials to Aviso implementation team

Provide the following

- Application (client) ID and the Directory (tenant) ID that you created in the [Register your application with Microsoft Teams](#) topic.
- Client value and the client secret ID that you created in the [Generate certificate and secret](#) topic.
- Unique ID that you copied in the [Copy unique ID of your Sales group from Microsoft 365 admin center](#) topic.

After you provide the Aviso implementation team with the above-mentioned credentials and keys, the team integrates Microsoft Teams with your Avisos instance.

Validate your Microsoft Teams account in Aviso

After Microsoft Teams is integrated with Aviso AI, before using Microsoft Teams from Aviso AI, every user must validate their Microsoft Teams account.

Perform the following steps to validate your Microsoft Teams account from Aviso AI.

Prerequisites-

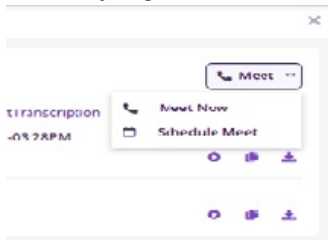
- Ensure that Microsoft Teams is integrated with your Aviso instance.
- Ensure that you have logged in to Microsoft portal with the correct credentials.

Important

If you use incorrect credentials to log in to Microsoft portal and validate your Microsoft Teams, you can't revert it later.

Perform the following steps to validate Microsoft Teams from Aviso AI.

1. From any digital war room in the Aviso AI, click **Meet Now**.



Meet Now dialog box appears.

A screenshot of the 'Meet Now' dialog box. It has a title bar with a close button. The main content area contains three sections: 'Meeting Name' with a text input field showing 'For Teams_Dec092021-02:54PM'; 'Participants' with a search bar and a list of participants, currently showing 'jhansi'; and 'Call Type' with two radio buttons, 'Aviso Call' (selected) and 'Teams'. A purple button labeled 'Validate Mteams Account' is positioned to the right of the 'Call Type' section. At the bottom, there are two buttons: 'Cancel' and 'Start Meeting'.

2. Click **Validate Mteams Account**.

You are redirected to the Microsoft account page. If you have not logged in to Microsoft, you are asked to log in to your Microsoft account.

3. Log in to your Microsoft account.

After you successfully log in to Microsoft account, the following message appears:

```
{“msg”: “Your account is linked successfully to Aviso, please go back to Aviso to continue .”,  
“success”: true}
```


Integrating Google Meet

Introduction

Aviso AI seamlessly integrates with Google Meet to let users have virtual meetings with their buyers. Aviso AI is then able to analyze the meeting recording, transcribe it, and provide rich insights to both reps and managers that ultimately help move the conversation forward and provide managers with improvement or coaching areas for reps. This document explains how to integrate Google Meet with Aviso AI.

Important:

The procedures mentioned in this document are performed by the IT admins to facilitate Google Meet calls from Aviso AI, and these are one-time activities. After Google Meet is integrated with Aviso AI, everyone from your organization with access to Aviso AI can make audio and video calls from Aviso AI using Google Meet.

Important:

After you perform the procedures mentioned in this document, collect the authorization codes from Google Cloud and share them with the Aviso implementation team to integrate Google Meet with Aviso AI.

Integrating Google Meet with Aviso requires the following procedures:

- [Prerequisites](#)
- [Create a Project in Google Cloud platform](#)
- [Enable APIs from APIs & Services library in the Google Cloud Platform](#)
- [Enable Credentials from API & Services in the Google Cloud Platform](#)
 - [Add Scopes to your project](#)
 - [Add Authorized redirect URIs](#)
- [Create Service Account from IAM & Admin in the Google Cloud Platform](#)
- [Create Keys from Service Account](#)
- [Obtain the Client ID and Client Secret from the registry](#)
- [Add Scope to Service account](#)
- [Share the credentials with the Aviso implementation team](#)

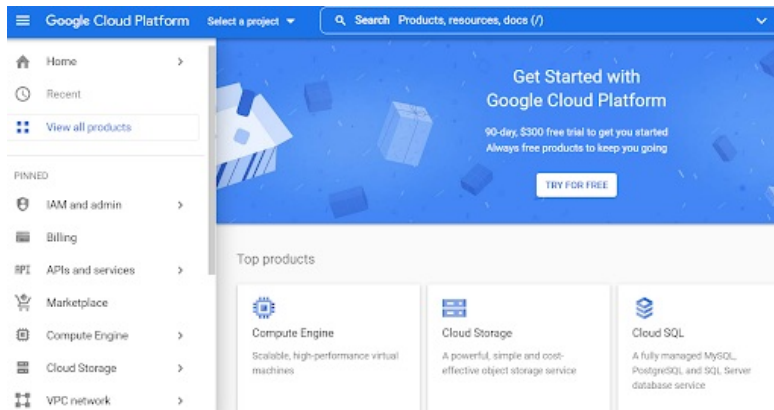
Prerequisites

Ensure that you have a Google Meet admin license.

Create a Project in Google Cloud platform

Perform the following steps to create a Google Cloud project.

1. Log in to Google Cloud platform.
Google Cloud platform appears.



2. On Google Cloud Platform, click **Select a Project**.

A new dialog box appears.

3. Select **New Project**.

A new page named New Project appears.

Note

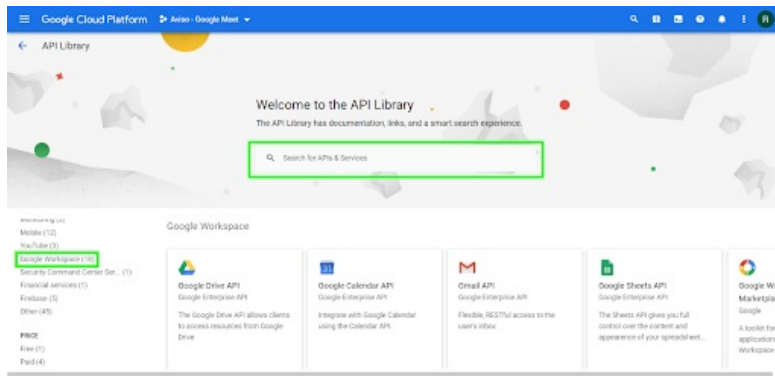
While creating a new project, a Project ID is assigned to you by default. The Project ID is the globally unique identifier for your project. You cannot change the project ID after the project is created. To change the project ID, click **Edit** below the **Project ID** field.

4. In the **Project Name** field, enter the project name on the new page.
For example, you may enter Aviso - Google Meet.
5. From the **Organization** dropdown list, select your organization.
Your organization's name appears by default.
6. Click **Create**.
Your project is created.

Enable APIs from API & Services library in the Google Cloud Platform

Perform the following steps to enable APIs.

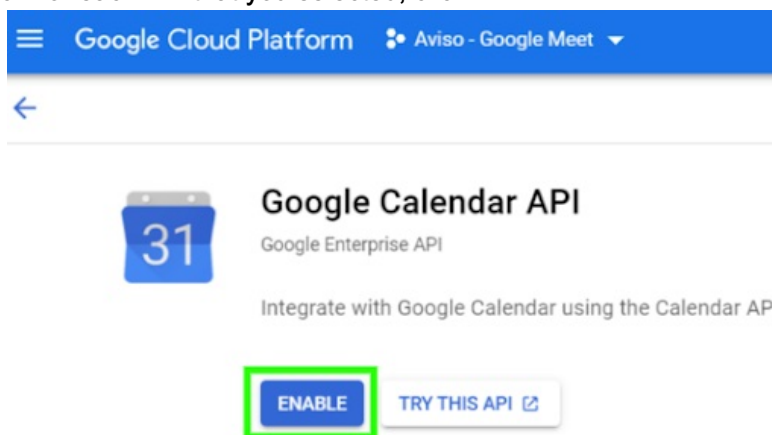
1. Go to Navigation Menu on the Google Cloud Platform.
2. Click **API & Services** and from the list of services, select **Library**.
An API library page appears.
3. Perform any of the following actions to select the required APIs. For example, select Google Workspace from the **Category** if you want to enable Google Calendar API and Google Drive API.
 - On the left-hand side of the page, select a category and then select the desired Google APIs.
 - In the search box, you can search for the desired Google APIs.



4. Select the following APIs from the library.

- Google Calendar API
- Google Drive API
- Admin SDK API

5. For each API that you selected, click **ENABLE**.

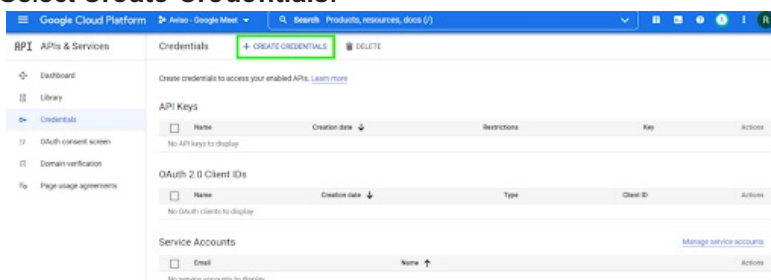


You can now access the selected API from your project.

Enable Credentials from API & Services screen in the Google Cloud Platform

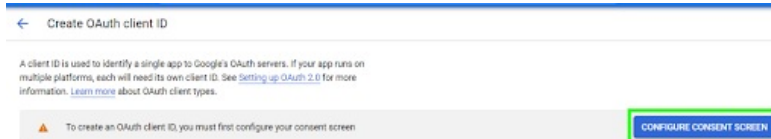
To use your enabled APIs, you must create credentials. Perform the following steps to create credentials for your project.

1. Go to the Navigation Menu on the Google Cloud Platform.
2. Click **API & Services** and from the list of services, select **Credentials**.
A new page appears.
3. Select **Create Credentials**.



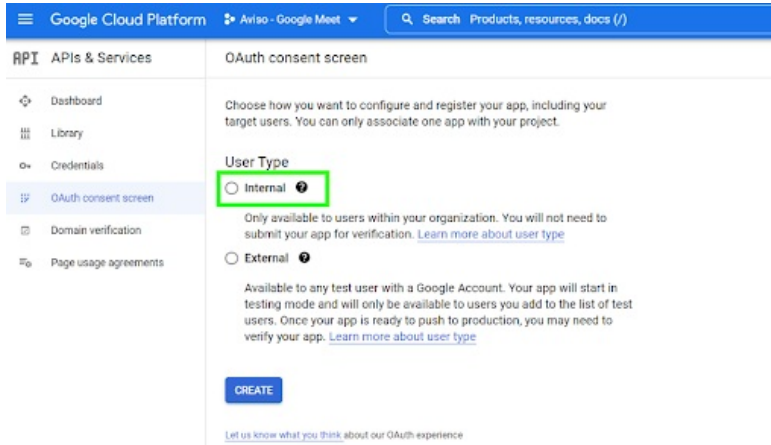
4. Under Create Credentials, select **OAuth client ID**.
Create OAuth client ID page appears.
After selecting OAuth client ID, your application can access the data from the user's account.
5. Select **Configure Consent Screen**.

OAuth consent page appears.



6. Under User Type, select Internal.

Selecting **Internal** makes your application available to users within your organization only.



7. Click **Create**.

You are redirected to OAuth consent screen > Edit app registration page.

8. On the Edit app registration page, fill in the following information.

- Under **App information**:
 - App Name
 - User support email
- Under **Developer contact information**:
 - [Email address](#)

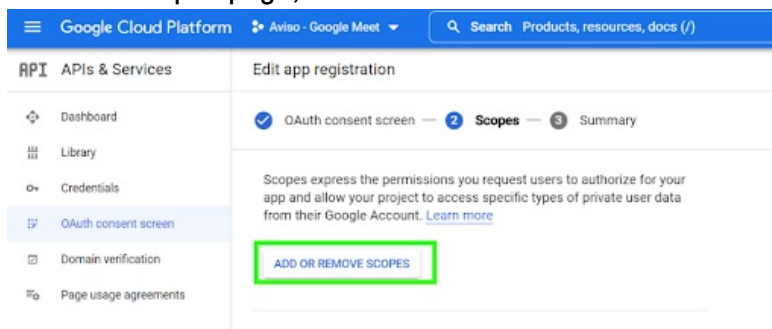
9. Click **SAVE AND CONTINUE**.

You are redirected to the Scopes page.

Add Scopes to your project

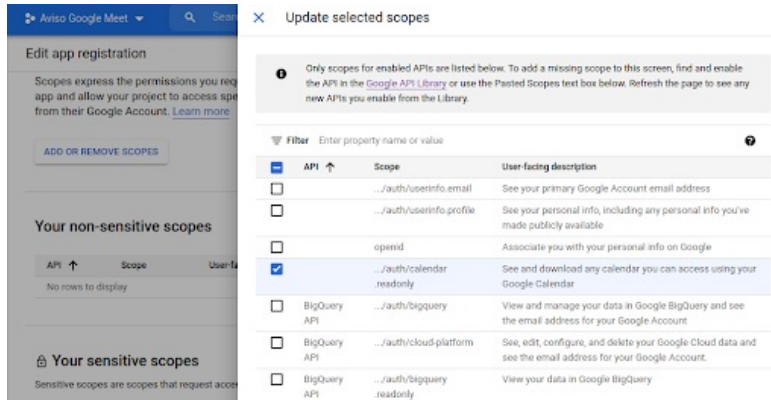
Scopes define which permissions you need from a user's Google account to provide your service or collect information.

1. On the Scopes page, click **ADD OR REMOVE SCOPES**.



A dialog box appears that displays the scopes for only the APIs that you enabled previously.

2. Select the Scopes from the list of APIs.



If you are unable to locate any Scopes, you can manually search for them. Perform the following steps to manually add the scopes.

- a. Under Manually add scopes, enter the full scope string in the text box. for example

<https://www.googleapis.com/auth/admin.directory.user>

Manually add scopes

If the scopes you would like to add do not appear in the table above, you can enter them here. Each scope should be on a new line or separated by commas. Please provide the full scope string (beginning with "https://"). When you are finished, click "Add to table".

ADD TO TABLE

UPDATE

- b. Click **ADD TO TABLE**.

3. After adding the scopes to your project, click **UPDATE**.

A new page appears where you can see a list of all your selected scopes.

4. Click **SAVE AND CONTINUE**.

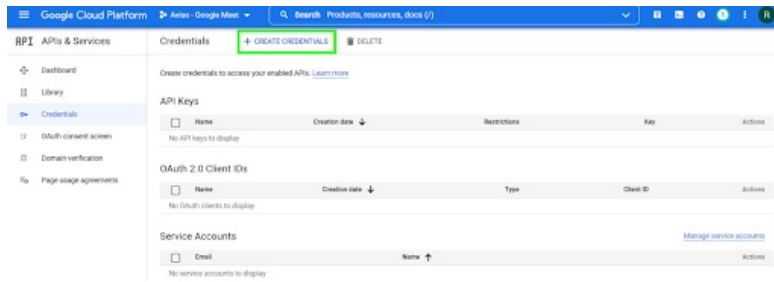
These are the scopes necessary for creating meetings, fetching meetings from calendar, fetching recordings, fetching users, and scheduling meetings.

Scope	Purpose
https://www.googleapis.com/auth/drive.file	This Scope is required to provide full access to read a specific recording file or to download a recording file that is stored on the drive in the "Recordings" folder.
https://www.googleapis.com/auth/calendar.events	This scope is required to provide full access on the user's primary calendar where he is going to create meeting events.
https://www.googleapis.com/auth/drive.readonly	This scope is used to get access to the drive to read recording files from the "Meetings Recordings" folder.

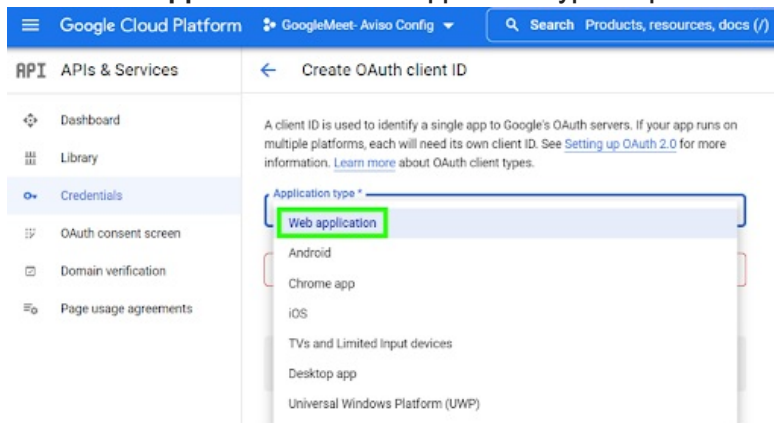
Add Authorized redirect URIs

Adding redirect URI helps you to handle OAuth 2.0 callback flow for web clients. It redirects the user back to the client application. Perform the following steps to add authorized URI.

1. Navigate back to **Credentials** on the left-hand side of your dashboard.



2. Under Create Credentials, click **OAuth client ID**.
3. Select **Web Application** from the Application type dropdown list.



4. Scroll down to Authorized redirect URIs and click on **ADD URI**.

5. Enter the URI in the following format.

https://<tenantname>.<collaborationservice>.aviso.com

For example

https://your-org.qa-ds-alpha2.aviso.com/collaboration/register/google_meet

In this case, <tenant_name> = your-org and <collaboration_service> = qa-ds-alpha2

Authorized redirect URIs

For use with requests from a web server

URIs 1 *

https://your-org.qa-ds-alpha2.aviso.com/collaboration/register/google_meet

+ ADD URI

Note: It may take 5 minutes to a few hours for settings to take effect

SAVE

CANCEL

6. Click **SAVE**.

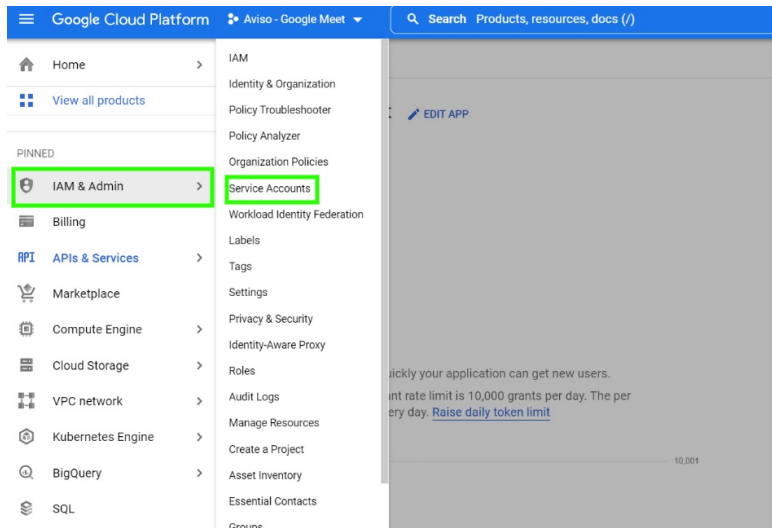
Create Service Account from IAM & Admin screen in the Google Cloud Platform

A service account is an account that uses the credentials of another Google user to retrieve data when necessary. We will use a service account which will be used solely to retrieve and create meetings on behalf of users and the main application.

Perform the following steps to create Service Account.

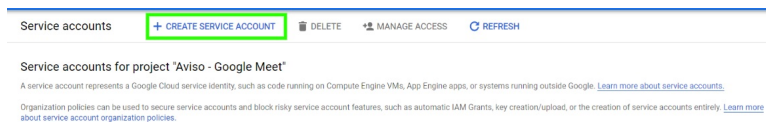
1. Go to the Navigation Menu on the Google Cloud Platform.

2. Click IAM & Admin and select Service Accounts



A new page appears.

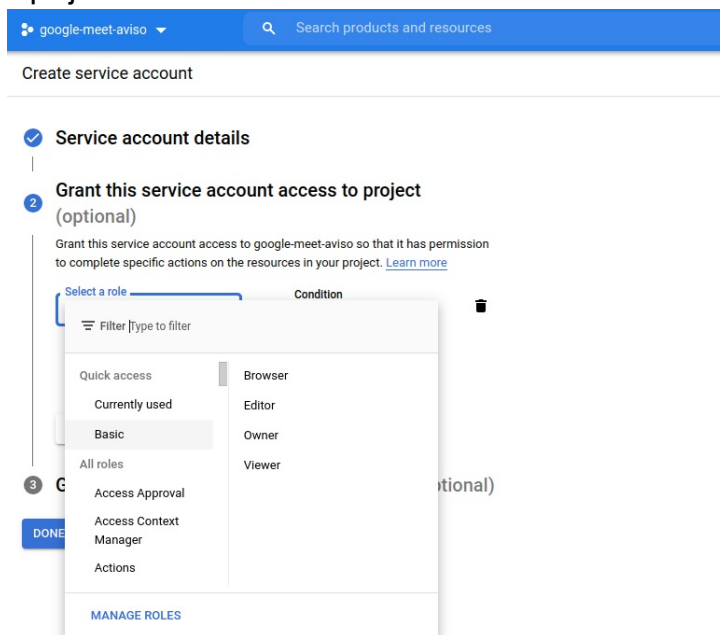
3. Click on CREATE SERVICE ACCOUNT .



4. In the Service Account Details, enter the desired name of service account and description.

5. Click Create and Continue.

6. After creating a service account, Select Owner Role from “Grant this service account access to project”.



7. Click Continue.

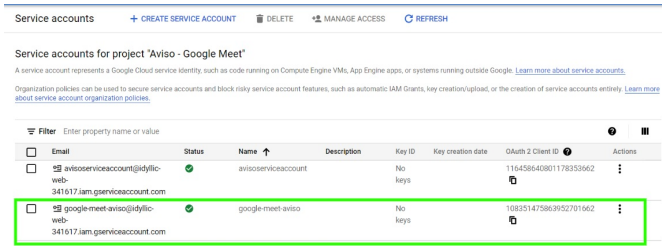
8. After granting access to the service account, click DONE.

Your browser will redirect you to the page that lists all the service accounts.

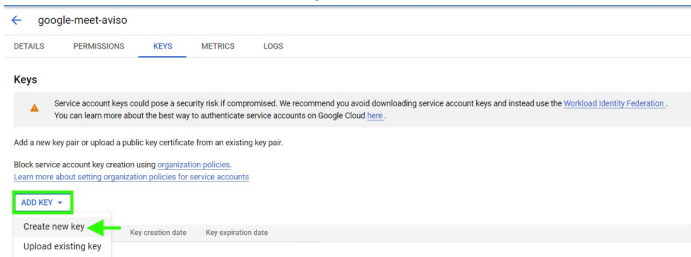
Create Keys from Service Account

Service accounts are often associated with shared resources, and their access cannot be restricted to only certain users. For this reason, service accounts use a secret key to access computer, networking, and storage assets. After creating a Service account, follow the steps below to create Keys in your Service Account.

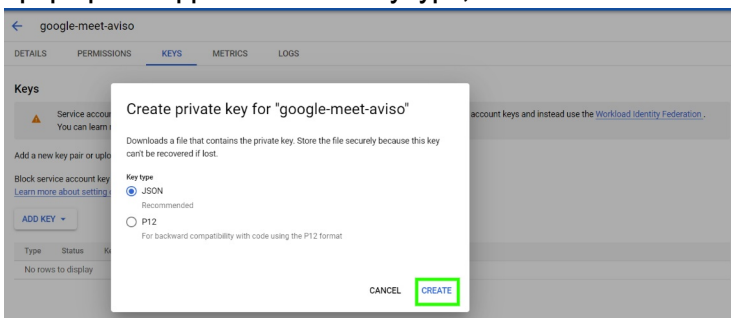
1. Click the service account whose key you wish to generate from the list.



2. Click on the **Keys** tab.
3. Click **ADD KEY** in the drop-down menu, then select **Create new key**.



4. A pop up box appears. Under **Key type**, select **JSON** and click **Create**.



A private key in JSON format is downloaded to your local computer.

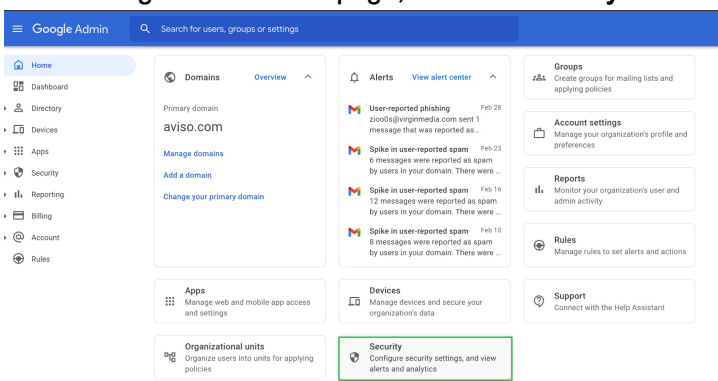
Share the JSON file with your email ID (email ID of the person who downloaded this JSON file) with the Aviso implementation team.

The credentials in this JSON file are used to retrieve users, create meetings, retrieve recordings, and to download recording files from drive. After the JSON file is downloaded on your computer, ensure that the following scope is granted to your service project.

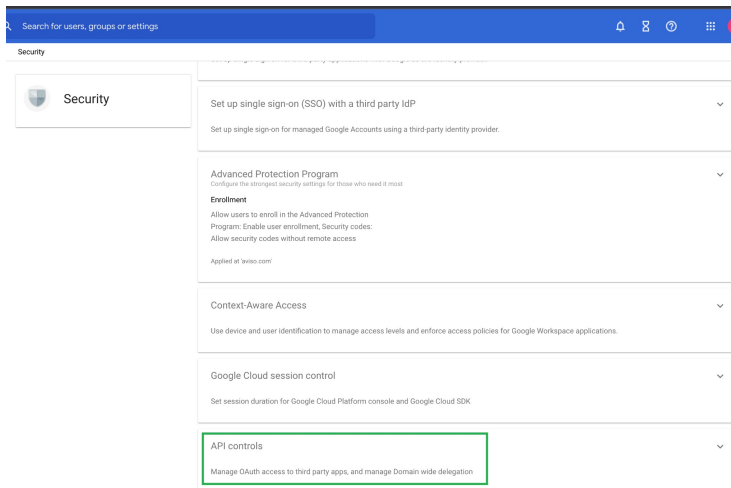
Add Scopes to Service account

Adding scopes in a service account authorizes the service account to access data on behalf of users in a domain. Perform the following steps to add scope to your service account.

1. Go to admin.google.com.
2. Log in to your Google admin account.
3. On the Google admin home page, click on **Security**.



4. Scroll down and click **API controls**.



5. Click on **MANAGE DOMAIN WIDE DELEGATION**.

This is where you can add scopes to your service account.

6. Click **Add New** on Domain-wide Delegation page.

A dialog box appears where you can authorize the scopes.

7. Enter the following details in the dialog box.

- **Client ID**

Enter the Client ID you generated earlier.

Click [Obtain the Client ID and Client Secret from the registry](#) to discover your client ID.

- **OAuth scopes (comma-delimited)**

Enter the following scope in this field.

<https://www.googleapis.com/auth/admin.directory.user>

8. Click **Authorize**.

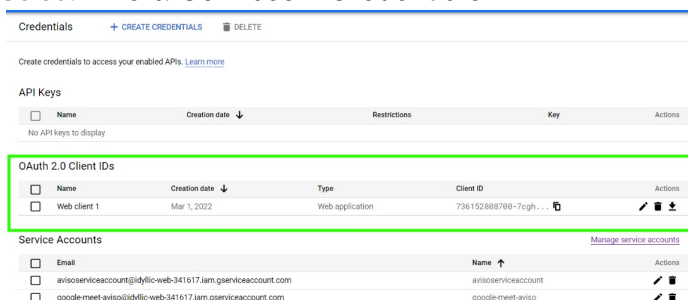
You can also follow this link to add scopes and delegate domain-wide authority for service account.

<https://developers.google.com/identity/protocols/oauth2/service-account#delegatingauthority>

Obtain the Client ID and Client Secret from the registry

After completing the above steps, head back to Navigation Menu on the left pane, and perform the following steps:

1. Select **APIs & Services > Credentials**.



2. Under OAuth 2.0 Client IDs, select your project.

3. On the new page, you can now see Client ID and Client Secret as shown below.

Client ID	1702913573-59itbdc7dsqvkru5ca7f983d246fa0av.apps.googleusercontent.com
Client secret	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
Creation date	December 1, 2021 at 3:05:21 PM GMT+5

Share the credentials with the Aviso implementation team

Provide the following

- Client ID and Client Secret that you created in the [Obtain the Client ID and Client Secret from the registry](#).
- Customer-id for your Google-Workspace-Account that you can find here <https://support.google.com/a/answer/10070793?hl=en>
- Email address of the user from which you have created the service account.
- Service Account credentials that you created in the [Create Service Account from IAM & Admin](#).

Introduction

Aviso is the AI compass that guides sales and go-to-market teams to close more deals, accelerate growth, and find their Revenue True North. Aviso AI delivers revenue intelligence, drives informed team-wide actions and course corrections and gives precise guidance so sellers and teams do not get lost in the fog of CRM and augment themselves with predictive AI.

Aviso's activity analytics enable sales leaders to understand prospect enthusiasm and deal progress without any extra effort required by their sales representatives. Using Aviso's activity analytics, administrators can integrate your platform with gmail email service by using IMAP. This is an old method that requires a username and password for a shared mailbox when retrieving emails from the mail server.

Aviso uses email and calendar information to provide sales leaders with detailed insights on deal progress. Aviso AI detects upsell opportunities in your CRM so sales reps can identify any potential upsides quickly and determine the probability of closing that deal in a timely manner.

By integrating Gmail, top sales executives no longer need to spend their time and energy dealing with deals that do not have the potential to generate revenue. As a result, they are able to increase their revenue potential by eliminating false hopes of closing a deal.

Important: The procedures mentioned in this document are performed by the IT admins to integrate Gmail with Aviso AI, and these are one-time activities.

Important: After you perform the procedures mentioned in this document, collect the authorization codes from Google Cloud and provide it to the Aviso executive to integrate the Gmail service account with Aviso AI.

Integrating Gmail

Gmail is an email service offered by Google that allows users to access their email via the internet on their computers and mobile devices. To know more about Gmail, see [Gmail](#). Integrating Gmail with Aviso requires the following procedures:

- Prerequisites
- Create email to use for the shared mailbox
- Configure the routing for mailbox
- Provide the credentials to Aviso executives

Prerequisites

- Ensure that you have super administrator access to Gsuite. It is necessary to set up an account for activity tracking, to which all the emails and calendar invitations from the sales organization will be copied. If the account is not created, follow the steps below.

Create email for the shared mailbox

Create an email account for the shared mailbox. Any team member with access to this mailbox can access this shared email address. To create an email address for a shared mailbox, perform the following steps.

1. Log in to [Google admin](#) console.
Google admin console appears.
2. Click on the gear symbol on the top right-hand side of the screen.
3. Under Add or remove people from Google Workspace, click Add user.
4. Enter the following details:
 - first name
 - last name
 - username
5. Select the role.
6. Click **Add**.

An alias email address is created.

Create email for the shared mailbox

Create an email account for the shared mailbox. Any team member with access to this mailbox can access this shared email address. To create an email address for a shared mailbox, perform the following steps.

1. Log in to [Google admin](#) console.
Google admin console appears.
2. Click on the gear symbol on the top right-hand side of the screen.
3. Under Add or remove people from Google Workspace, click Add user.
4. Enter the following details:
 - first name
 - last name
 - username
5. Select the role
6. Click **Add**.
An alias email address is created.

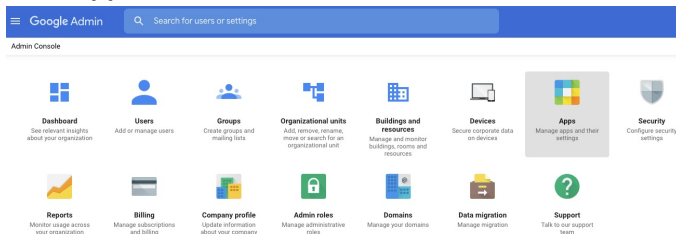
Configure the routing for mailbox

Routing enables you to manage multiple users' accounts. The feature allows you to specify which user accounts are able to access the inbound and outbound messages in a shared mailbox. Perform the following steps to configure routing for mailbox.

1. Log in to [Google admin](#) console.

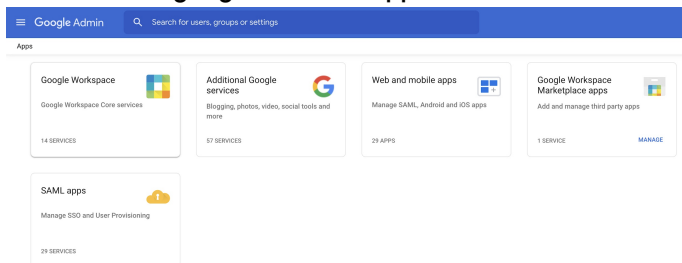
Google admin console appears.

2. Go to **Apps**.

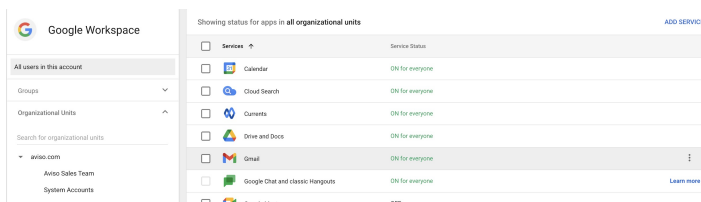


3. Click on **Google Workspace**.

A list of all the google services appears.

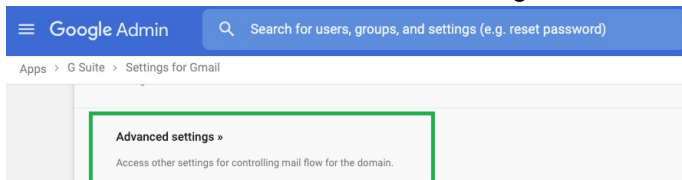


4. Click on **Gmail**.



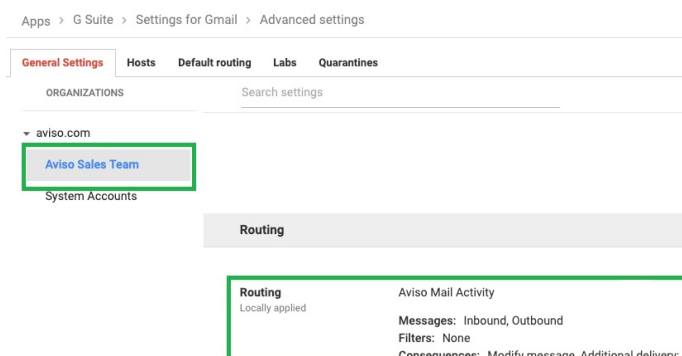
Settings page for Gmail appears.

5. Scroll down and find the **Advanced settings**. Click **Advanced settings**.



After clicking in advance settings, you can view general settings and routing options.

6. Click on the **Alias email address**. In this case **Aviso Sales Team**.



After clicking on **Aviso Sales Team**, you can find **Configure** option under **Routing**.

7. Click Configure.

A new page called Edit setting appears.

8. Check both the inbound and outbound boxes.

Edit setting

Routing

Aviso Mail Activity [Edit](#)

1. Messages to affect

☒ Inbound

☒ Outbound

☐ Internal - sending

☐ Internal - receiving

9. Under **Also deliver to** click the checkbox named **Add more recipients**. All other options should be left unchanged.

Also deliver to

☒ Add more recipients

Recipients	ADD
Deliver to: aviso.mail.activity@aviso.com Do not deliver spam to this recipient Suppress bounces from this recipient	

Encryption (onward delivery only)

☐ Require secure transport (TLS)

[Show options](#)

10. In case you need to restrict specific emails/domains while forwarding to the email account, follow [Additional - Bypass specific email addresses/domain](#) steps and [Additional - Only allow specific email addresses/domains](#) steps, otherwise skip these steps and click **Save**.

Additional - Bypass specific email addresses/domains

This setting allows you to restrict the forwarding of Aviso email to a specific email address or domains. Perform the following steps to bypass specific email addresses and domains.

1. After you select the checkbox named Add more recipients, select **Show options**.

The page expands into the address lists to be bypassed and allowed.

Hide options

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

No lists used yet. [Use existing](#) or [create a new one](#).

2. Under the Address lists, select the checkbox named **Use address lists to bypass or control application of this setting**.

3. Choose the radio button **Bypass this setting for specific addresses / domains**.

4. Click on **Use existing or create a new one**.

After you click on this option, you can view or create a list of email addresses and domains.

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

[Use existing](#) or [create a new one](#).

Create new list:

B. Test

CREATE

5. To create new list, perform the following steps.

- i. Click **+** icon at the right-hand side of the lists.
- ii. Enter the email address or domain name in the text box.

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

Test (0)

Test

Address Authentication (received mail only) ?

Email address or domain name:
aviso2017.onmicrosoft.com

☐ Require sender authentication (recommended). [Learn more](#)

CANCEL SAVE

6. If you wish to allow specific email addresses/domains to forward the email, continue to [Only allow specific email addresses/domains](#) or click **Save**.

Note:

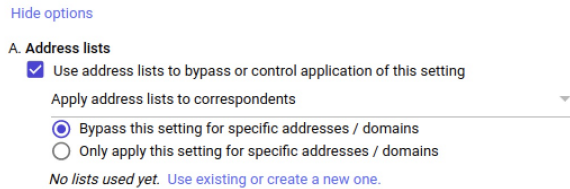
The + icon appears only after you have created the lists as mentioned in step 4.

Additional - Only allow specific email addresses/domains

With this setting, you can only forward Aviso emails to specific e-mail addresses and domains. Perform the following steps to allow only specific email addresses and domains.

1. Select **Show options**.

The page expands into the address lists to be bypassed and allowed.



Hide options

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

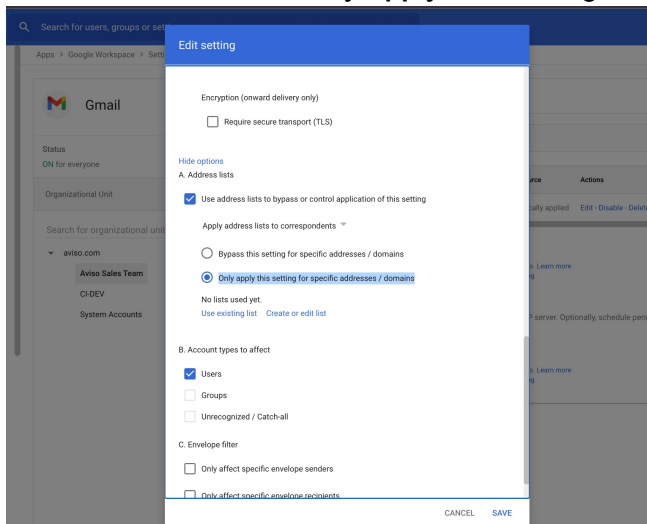
☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

No lists used yet. [Use existing](#) or [create a new one](#).

2. Under the Address lists, select the checkbox named **Use address lists to bypass or control application of this setting**.

3. Choose the radio button **Only apply this setting for specific addresses / domains**.



Search for users, groups or settings

Apps > Google Workspace > Settings

Gmail

Status
ON for everyone

Organizational Unit

Search for organizational unit

aviso.com

Aviso Sales Team

CH-DEV

System Accounts

Encryption (onward delivery only)

☐ Require secure transport (TLS)

Hide options

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☐ Bypass this setting for specific addresses / domains

☒ Only apply this setting for specific addresses / domains

No lists used yet.
[Use existing list](#) [Create or edit list](#)

B. Account types to affect

☒ Users

☐ Groups

☐ Unrecognized / Catch-all

C. Envelope filter

☐ Only affect specific envelope senders

☐ Only affect specific envelope recipients

CANCEL SAVE

4. Click on **Use existing or create a new one**.

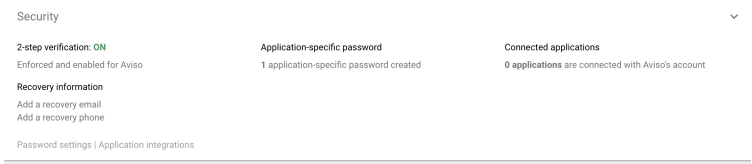
After you click on this option, you can view or create a list of email addresses and domains.

5. Click **Save**.

Enable 2-step verification

Perform the following steps to enable 2-step verification for the newly created email address.

- 1. In the [Google admin](#) home page, click on Users.
- 2. Click **Security**.
A new page that contains information about security and recovery information appears.
- 3. Choose **ON** on 2-step verification field.



Provide the credentials to Aviso Implementation team

To configure Gmail to read email body content, Aviso Implementation team needs the following credentials.

- Email id created for your domain from [Create email for the shared mailbox](#).
- Password for newly generated email for the shared mailbox.

Introduction

Aviso is the AI compass that guides sales and go-to-market teams to close more deals, accelerate growth, and find their Revenue True North. Aviso AI delivers revenue intelligence, drives informed team-wide actions and course corrections and gives precise guidance so sellers and teams do not get lost in the fog of CRM and augment themselves with predictive AI.

Aviso's activity analytics enable sales leaders to understand prospect enthusiasm and deal progress without any extra effort required by their sales representatives. Using Aviso's activity analytics, administrators can integrate the platform with gmail email service to extract the header information of emails in a shared mailbox. This integration doesn't extract the email body from email; it extracts only basic header information.

Aviso uses email and calendar information to provide sales leaders with detailed insights on deal progress. Aviso AI detects upsell opportunities in your CRM so sales reps can identify any potential upsides quickly and determine the probability of closing that deal in a timely manner.

By integrating gmail, top sales executives no longer need to spend their time and energy dealing with deals that do not have the potential to generate revenue. As a result, they are able to increase their revenue potential by eliminating false hopes of closing a deal.

Important

The procedures mentioned in this document are performed by the IT admins to integrate Gmail with Aviso AI, and these are one-time activities.

Important

After you perform the procedures mentioned in this document, collect the authorization codes from Google Cloud and provide it to the Aviso executive to integrate the Gmail service account with Aviso AI.

Integrating Gmail

Gmail is an email service offered by Google that allows users to access their email via the internet on their computers and mobile devices. To know more about Gmail, see [Gmail](#). Integrating Gmail with Aviso requires the following procedures:

- Prerequisites
- Create email to use for the shared mailbox
- Configure the routing for mailbox
- Create a Project in Google Cloud platform
- Enable APIs & Services in Google Cloud platform
- Enable Credentials from APIs & Services
- Provide the credentials to Aviso executives

Prerequisites

Ensure that you have super administrator access to Gsuite. It is necessary to set up an account for activity tracking, to which all the emails and calendar invitations from the sales organization will be copied. If the account is not created, follow the steps below.

Create email for the shared mailbox

Create an email account for the shared mailbox. Any team member with access to this mailbox can access this shared email address. To create an email address for a shared mailbox, perform the following steps.

1. Log in to [Google admin](#) console.
Google admin console appears.
2. Click on the gear symbol on the top right-hand side of the screen.
3. Under Add or remove people from Google Workspace, click Add user.
4. Enter the following details:
 - first name
 - last name
 - username
5. Select the role.
6. Click **Add**.

An alias email address is created.

Create email for the shared mailbox

Create an email account for the shared mailbox. Any team member with access to this mailbox can access this shared email address. To create an email address for a shared mailbox, perform the following steps.

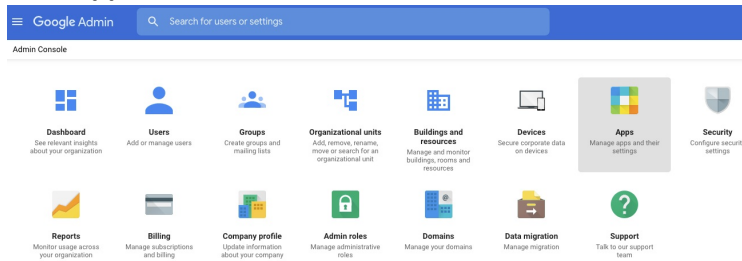
1. Log in to [Google admin](#) console.
Google admin console appears.
2. Click on the gear symbol on the top right-hand side of the screen.
3. Under Add or remove people from Google Workspace, click Add user.
4. Enter the following details:
 - first name
 - last name
 - username
5. Select the role.
6. Click **Add**.
An alias email address is created.

Configure the routing for mailbox

Routing enables you to manage multiple users' accounts. The feature allows you to specify which user accounts are able to access the inbound and outbound messages in a shared mailbox. Perform the following steps to configure routing for mailbox.

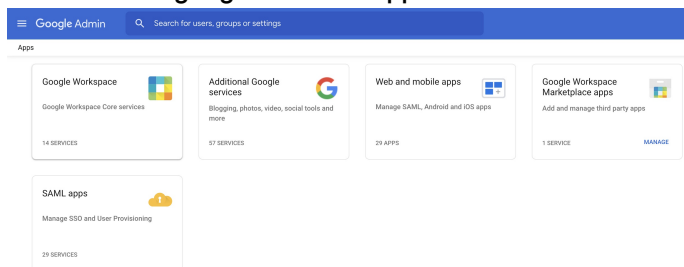
1. Log in to [Google admin](#) console.
Google admin console appears.

2. Go to **Apps**.

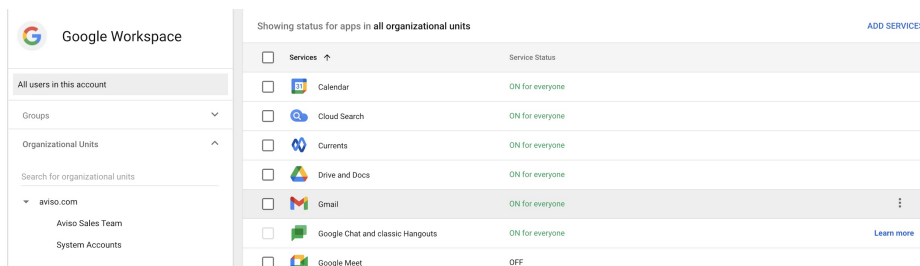


3. Click on **Google Workspace**.

A list of all the google services appears.

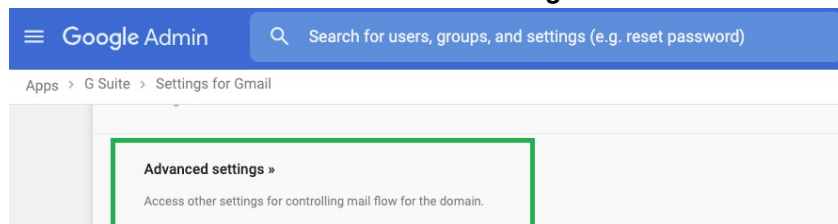


4. Click on **Gmail**.



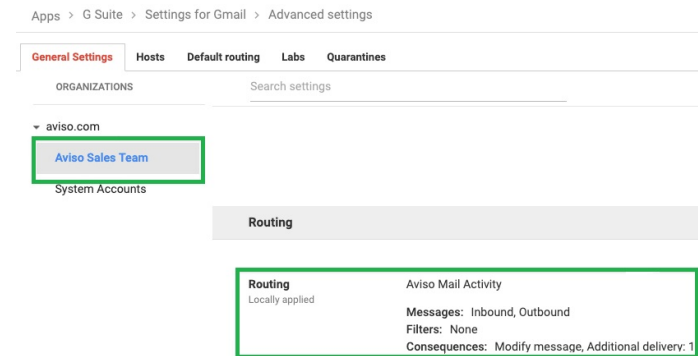
Settings page for Gmail appears.

5. Scroll down and find the **Advanced settings**. Click **Advanced settings**.



After clicking in advance settings, you can view general settings and routing options.

6. Click on the Alias email address. In this case Aviso Sales Team.

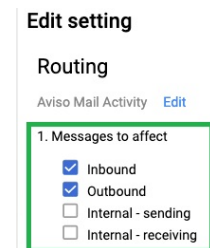


After clicking on Aviso Sales Team, you can find Configure option under Routing.

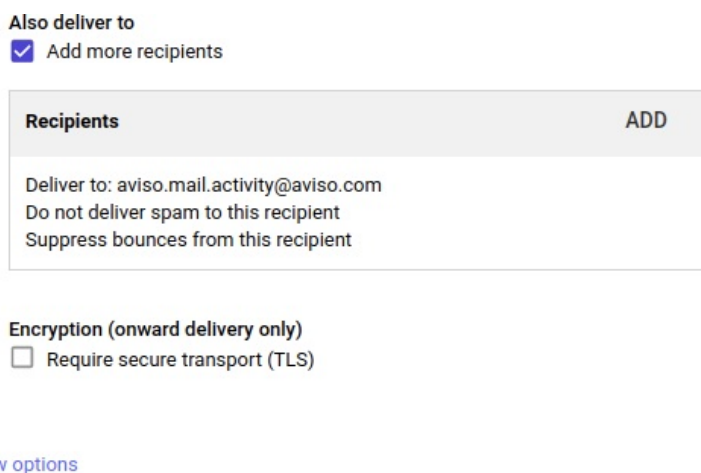
7. Click Configure.

A new page called Edit setting appears.

8. Check both the inbound and outbound boxes.



9. Under **Also deliver to** click the checkbox named **Add more recipients**. All other options should be left unchanged.



10. In case you need to restrict specific emails/domains while forwarding to the Aviso Email account, follow [Additional - Bypass specific email addresses/domain](#) steps and [Additional - Only allow specific email addresses/domains](#) steps, otherwise skip these steps and click **Save**.

Additional - Bypass specific email addresses/domains

This setting allows you to restrict the forwarding of Aviso email to a specific email address or domains. Perform the following steps to bypass specific email addresses and domains.

1. After you select the checkbox named Add more recipients, select **Show options**.

The page expands into the address lists to be bypassed and allowed.

[Hide options](#)

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

No lists used yet. [Use existing or create a new one.](#)

2. Under the Address lists, select the checkbox named **Use address lists to bypass or control application of this setting**.

3. Choose the radio button **Bypass this setting for specific addresses / domains**.

4. Click on **Use existing or create a new one**.

After you click on this option, you can view or create a list of email addresses and domains.

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

[Use existing or create a new one.](#)

B. Create new list:

Test

CREATE

5. To create new list, perform the following steps.

- i. Click **+** icon at the right-hand side of the lists.

- ii. Enter the email address or domain name in the text box.

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

Test (0)

Test	+
Address	Authentication (received mail only) ?
Email address or domain name: aviso2017.onmicrosoft.com	
☐ Require sender authentication (recommended). Learn more	
CANCEL SAVE	

6. If you wish to allow specific email addresses/domains to forward the email, continue to [Only allow specific email addresses/domains](#) or click **Save**.

Note:

The + icon appears only after you have created the lists as mentioned in step 4.

Additional - Only allow specific email addresses/domains

With this setting, you can only forward Aviso emails to specific e-mail addresses and domains. Perform the following steps to allow only specific email addresses and domains.

1. Select Show options.

The page expands into the address lists to be bypassed and allowed.

[Hide options](#)

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

No lists used yet. [Use existing](#) or [create a new one](#).

2. Under the Address lists, select the checkbox named **Use address lists to bypass or control application of this setting**.

3. Choose the radio button **Only apply this setting for specific addresses / domains**.

Search for users, groups or sets

Apps > Google Workspace > Settings

 Gmail

Status
ON for everyone

Organizational Unit

Search for organizational units

▼

aviso.com

Ariso Sales Team

CI-DEV

System Accounts

Edit setting

Encryption (onward delivery only)
☐ Require secure transport (TLS)

Hide options

A. Address lists

☒ Use address lists to bypass or control application of this setting
Apply address lists to correspondents ▼
☐ Bypass this setting for specific addresses / domains
☒ Only apply this setting for specific addresses / domains
No lists used yet.
[Use existing list](#) [Create or edit list](#)

B. Account types to affect

☒ Users
☐ Groups
☐ Unrecognized / Catch-all

C. Envelope filter

☐ Only affect specific envelope senders
☐ Only affect specific envelope recipients

CANCEL

SAVE

4. Click on **Use existing or create a new one.**

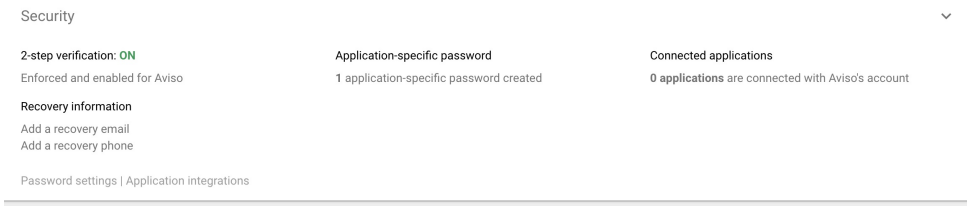
After you click on this option, you can view or create a list of email addresses and domains.

5. Click Save.

Enable 2-step verification

Perform the following steps to enable 2-step verification for the newly created email address.

- 1. In the [Google admin](#) home page, click on Users.
- 2. Click **Security**.
A new page that contains information about security and recovery information appears.
- 3. Choose **ON** on 2-step verification field.



Note:
Aviso Administrator requires your password to set up email activity. You can change your password later from the Security option.

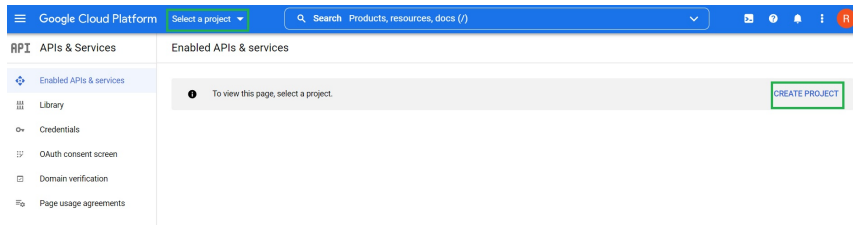
Create a Project in Google Cloud platform

Perform the following steps to create a project in Google Cloud platform.

1. Go to [Google Cloud](#) platform.

Google Developer Cloud platform appears.

2. Login with the administrator account in Google Cloud platform.



3. On Google Cloud Platform, there are two ways to create a project.

- o Click **Create Project**.

A new page named New Project appears. Next, proceed to Step 3.

- o Click **Select a project**.

A dialog box appears. Select **New Project**.

Note:

While creating a new project, a Project ID is assigned to you by default. The Project ID is the globally unique identifier for your project. You cannot change the project ID after the project is created. To change the project ID, click *Edit* below the Project ID field.

4. In the **Project Name** field, enter the project name on the new page.

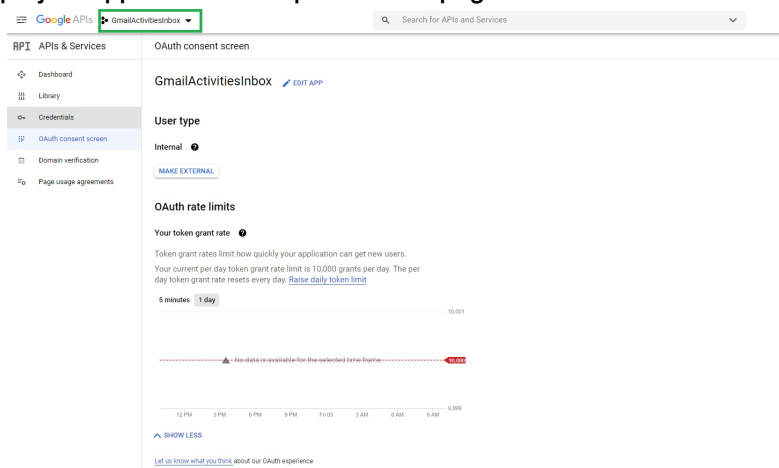
For example, you may enter “*GmailActivitiesInbox.*”

5. From the **Organization** dropdown list, select your organization.

Your organization's name appears by default.

6. Click **Create**.

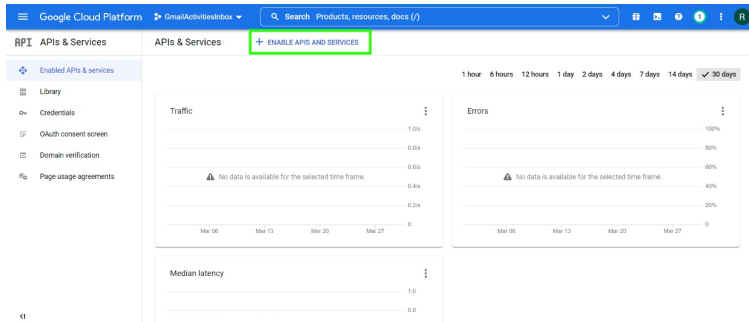
Your project is created. You are redirected to the dashboard, where your newly created project appears at the top bar of the page as shown below.



Enable APIs & Services in Google Cloud platform

Perform the following steps to enable these APIs.

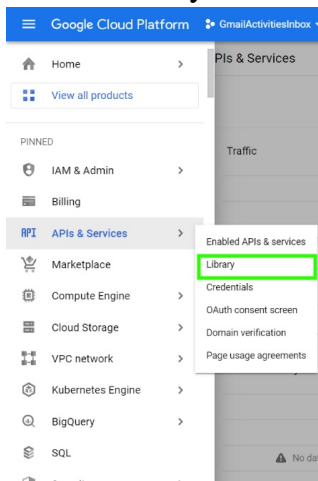
1. Click **ENABLE APIS AND SERVICES** on your dashboard.



A new page named API Library appears. Next, proceed to Step 2.

Alternatively, you can follow these steps to visit the API Library page.

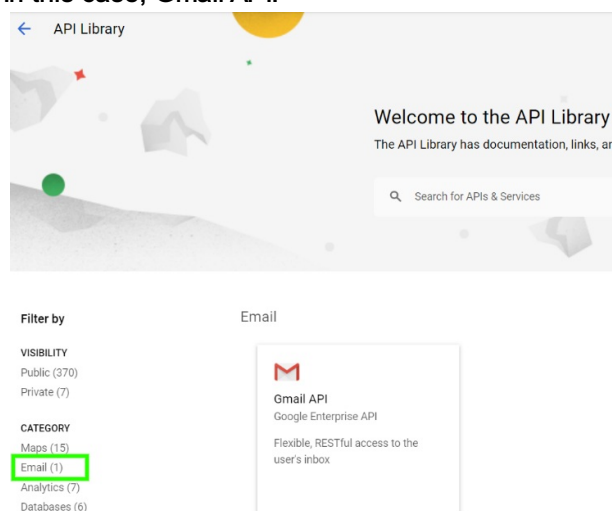
- i. Go to Navigation Menu on the Google Cloud Platform.
- ii. Click **API & Services** and from the list of services.
- iii. select **Library**.



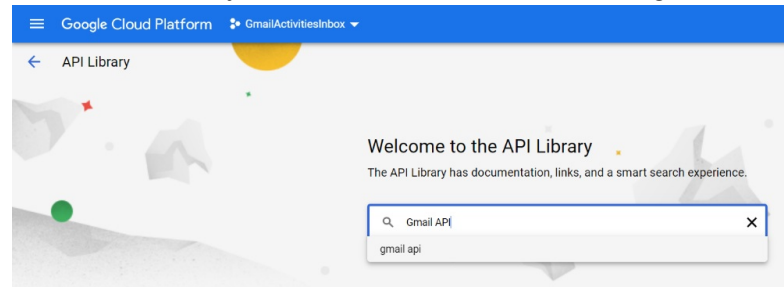
2. An API library page appears.

3. Perform any of the following actions to select the required APIs.

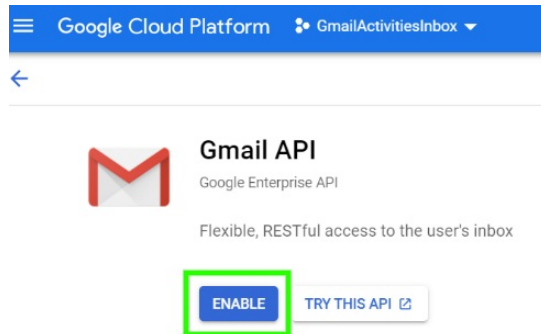
- o On the left-hand side of the page, select a category. For example, select Email from the **Category** if you want to enable Gmail API. Then select the desired Google APIs. In this case, Gmail API.



- In the search box, you can search for the desired Google APIs. In this case, Gmail API.



4. After you select the API, click **ENABLE**.

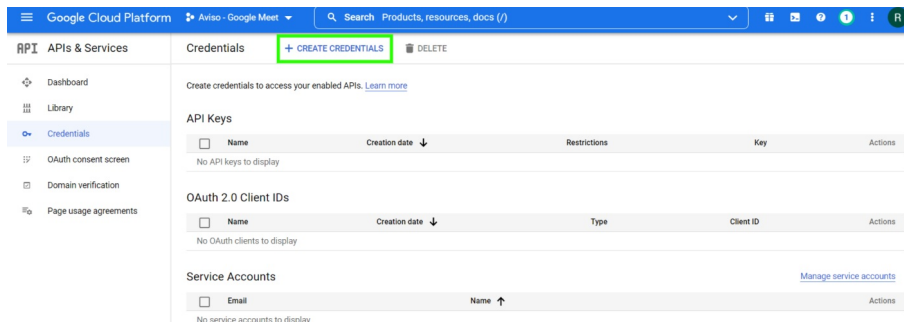


You can now access the selected API from your project.

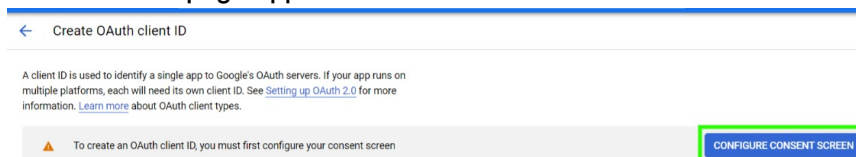
Enable Credentials from APIs & Services

To use your enabled APIs, you must create credentials. Perform the following steps to create credentials for your project.

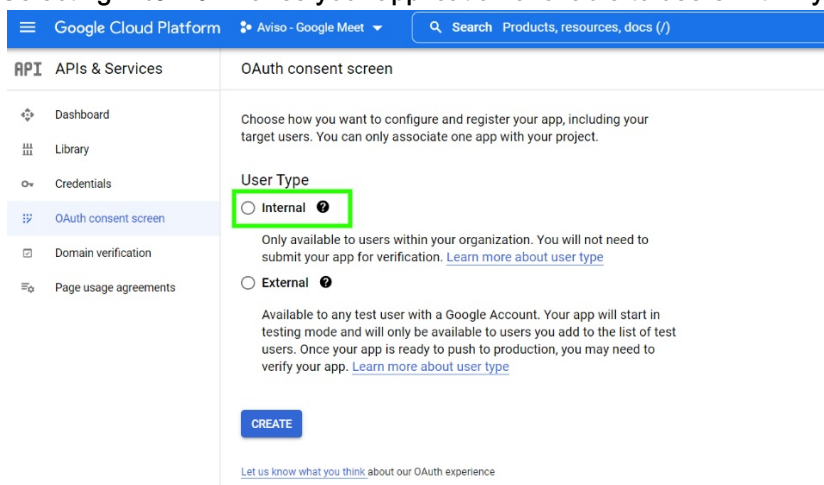
1. Go to the Navigation Menu on the Google Cloud Platform.
2. Click **API & Services** and from the list of services, select **Credentials**.
A new page appears.
3. Select **Create Credentials**.



4. Under Create Credentials, select **OAuth client ID**.
Create OAuth client ID page appears.
After selecting OAuth client ID, your application can access the data from the user's account.
5. Select **Configure Consent Screen**.
OAuth consent page appears.



6. Under User Type, select **Internal**.
Selecting **Internal** makes your application available to users within your organization only.



7. Click **Create**.
You are redirected to OAuth consent screen > Edit app registration page.

8. On the Edit app registration page, fill in the following information.

- Under **App information**:
 - App Name
 - User support email
- Under **Developer contact information**
 - Email address

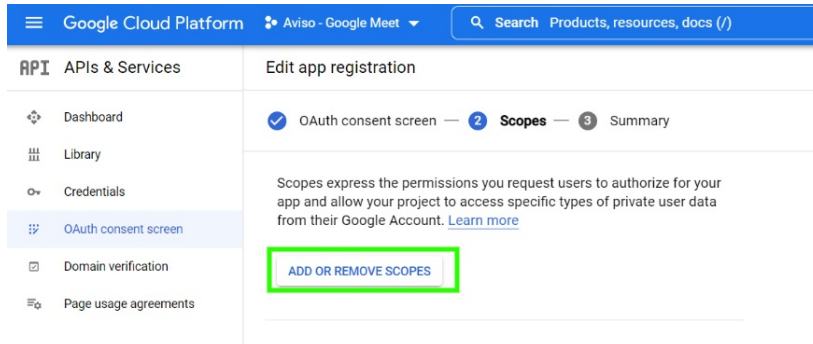
9. Click **SAVE AND CONTINUE**.

You are redirected to the [Scopes](#) page.

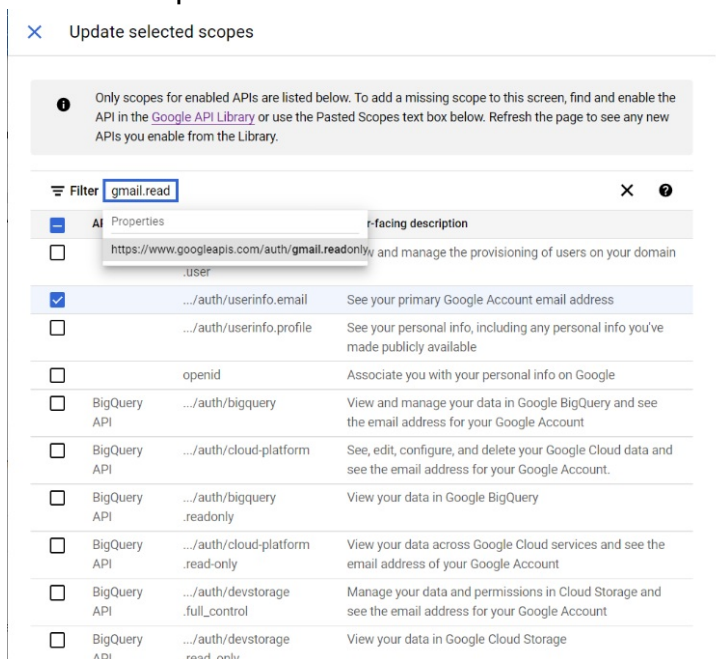
Add Scopes to your project

Scopes define which permissions you need from a user's Google account to provide your service or collect information.

1. On the Scopes page, click **ADD OR REMOVE SCOPES**.



2. Select the Scopes from the list of APIs.



If you are unable to locate any Scopes, you can manually search for them. Perform the following steps to manually add the scopes.

- i. Under Manually add scopes, enter the following full scope string in the text box.

- <https://www.googleapis.com/auth/userinfo.email>,
- <https://www.googleapis.com/auth/gmail.readonly>,
- <https://www.googleapis.com/auth/gmail.metadata>

As a result of adding the above scopes, the metadata of emails in the shared inbox can be retrieved.

Manually add scopes

If the scopes you would like to add do not appear in the table above, you can enter them here. Each scope should be on a new line or separated by commas. Please provide the full scope string (beginning with "https://"). When you are finished, click "Add to table".

ADD TO TABLE

UPDATE

- ii. Click **ADD TO TABLE**.

3. After adding the scopes to your project, click **UPDATE**.

A new page appears where you can see a list of all your selected scopes.

4. Click **SAVE AND CONTINUE**.

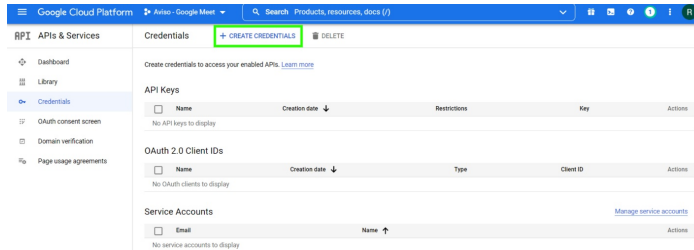
Below is a summary of the added scopes to your project.

Scope	Purpose
https://www.googleapis.com/auth/userinfo.email	This scope is required to view the user's email address.
https://www.googleapis.com/auth/gmail.readonly	This scope is required to view the email address and settings of the user.
https://www.googleapis.com/auth/gmail.metadata	This scope is required to view the email message metadata such as labels and headers, but not the email body.

Create OAuth Client ID

OAuth client ID allows third party applications to access protected resources (such as Gmail) based on the user's credentials. Perform the following steps to create OAuth Client ID.

1. From the left-hand navigation pane, select Credentials.



2. Under Create Credentials, click OAuth client ID.

3. In the new page named Create OAuth client ID, enter the following information.

- o Select **Desktop App** from the Application type dropdown list.
- o In the Name field, enter the unique name of your OAuth 2.0 client.

A screenshot of the 'Create OAuth client ID' form. It shows a dropdown for 'Application type' set to 'Desktop app'. Below it, the 'Name' field contains the text 'AvisoGmailActivityToken'. At the bottom, there are 'CREATE' and 'CANCEL' buttons.

← Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information.

Application type *
Desktop app

[Learn more](#) about OAuth client types

Name *
AvisoGmailActivityToken

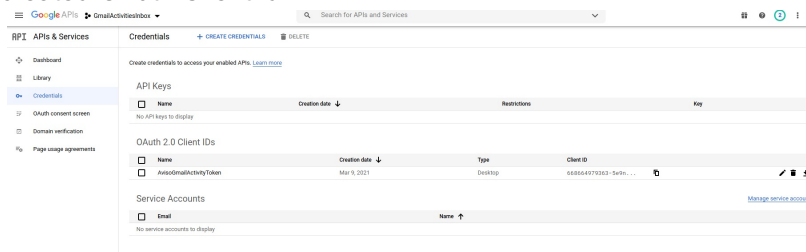
The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

CREATE CANCEL

4. Click **Create**.

Client Id and Client Secret would appear in a pop-up window.

5. Click Credentials in the left menu bar and click on Download Credentials against the newly created OAuth Client Id.



Provide the credentials to Aviso Implementation team

To configure Gmail to read email body content, Aviso implementation team needs the following credentials.

- Email id created for your domain from [Create email for the shared mailbox](#).
- Client ID from [Create OAuth Client ID](#).
- A list of e-mail addresses for which email integration needs to be enabled.
- file which was downloaded into your local machine while creating keys.

Integrating Gmail

Gmail is an email service offered by Google that allows users to access their email via the internet on their computers and mobile devices. To know more about Gmail, see [Gmail](#). Integrating Gmail with Aviso requires the following procedures:

- Prerequisites
- Create email to use for the shared mailbox
- Configure the routing for mailbox
- Create a Project in Google Cloud platform
- Enable APIs & Services in Google Cloud platform
- Enable Credentials from APIs & Services
- Provide the credentials to Aviso executives
- More information on Email forwarding rules

Introduction

Aviso is the AI compass that guides sales and go-to-market teams to close more deals, accelerate growth, and find their Revenue True North. Aviso AI delivers revenue intelligence, drives informed team-wide actions and course corrections and gives precise guidance so sellers and teams do not get lost in the fog of CRM and augment themselves with predictive AI.

Aviso's activity analytics enable sales leaders to understand prospect enthusiasm and deal progress without any extra effort required by their sales representatives. Using Aviso's activity analytics, administrators can integrate the platform with gmail email service to extract the header information of emails in a shared mailbox. This integration doesn't extract the email body from email; it extracts only basic header information.

Aviso uses email and calendar information to provide sales leaders with detailed insights on deal progress. Aviso AI detects upsell opportunities in your CRM so sales reps can identify any potential upsides quickly and determine the probability of closing that deal in a timely manner.

By integrating gmail, top sales executives no longer need to spend their time and energy dealing with deals that do not have the potential to generate revenue. As a result, they are able to increase their revenue potential by eliminating false hopes of closing a deal.

Important

The procedures mentioned in this document are performed by the IT admins to integrate Gmail with Aviso AI, and these are one-time activities.

Important

After you perform the procedures mentioned in this document, collect the authorization codes from Google Cloud and provide it to the Aviso executive to integrate the Gmail service account with Aviso AI.

Prerequisites

Ensure that you have super administrator access to Gsuite. It is necessary to set up an account for activity tracking, to which all the emails and calendar invitations from the sales organization will be copied. If the account is not created, follow the steps below.

Create email for the shared mailbox

Create an email account for the shared mailbox. Any team member with access to this mailbox can access this shared email address. To create an email address for a shared mailbox, perform the following steps.

1. Log in to [Google admin](#) console.
Google admin console appears.
2. Click on the gear symbol on the top right hand side of the screen.
3. Under Add or remove people from Google Workspace, click Add user.
4. Enter the following details:
 - first name
 - last name
 - username
5. Select the role.
6. Click **Add**.

Create email for the shared mailbox

Create an email account for the shared mailbox. Any team member with access to this mailbox can access this shared email address. To create an email address for a shared mailbox, perform the following steps.

1. Log in to [Google admin](#) console.
Google admin console appears.
2. Click on the gear symbol on the top right-hand side of the screen.
3. Under Add or remove people from Google Workspace, click Add user.
4. Enter the following details:
 - first name
 - last name
 - username
5. Select the role.
6. Click **Add**.
An alias email address is created.

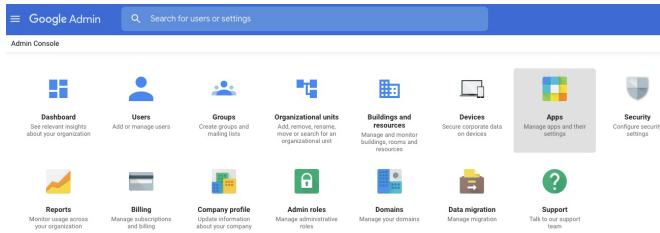
Configure the routing for mailbox

Routing enables you to manage multiple users' accounts. The feature allows you to specify which user accounts are able to access the inbound and outbound messages in a shared mailbox. Perform the following steps to configure routing for mailbox.

1. Log in to [Google admin](#) console.

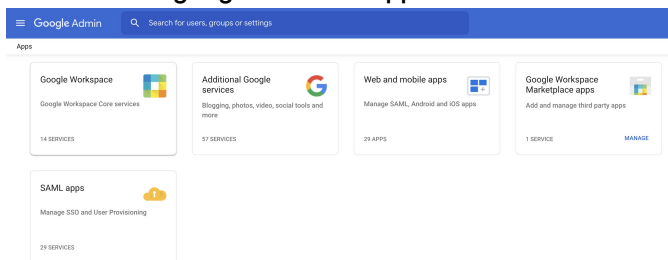
Google admin console appears.

2. Go to **Apps**.

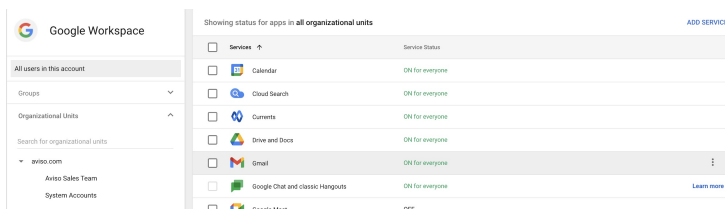


3. Click on **Google Workspace**.

A list of all the google services appears.

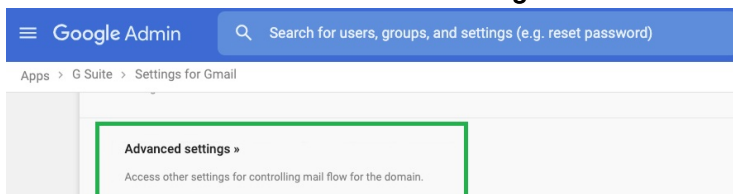


4. Click on **Gmail**.



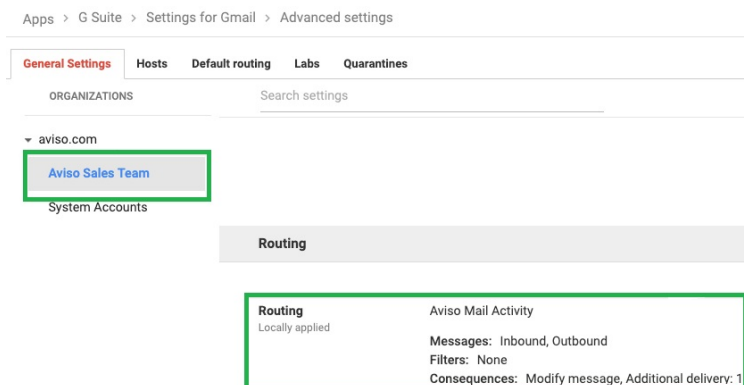
Settings page for Gmail appears.

5. Scroll down and find the **Advanced settings**. Click **Advanced settings**.



After clicking in advance settings, you can view general settings and routing options.

6. Click on the Alias email address. In this case Aviso Sales Team.

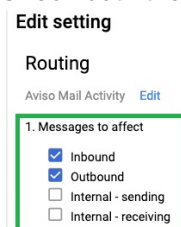


After clicking on Aviso Sales Team, you can find Configure option under Routing.

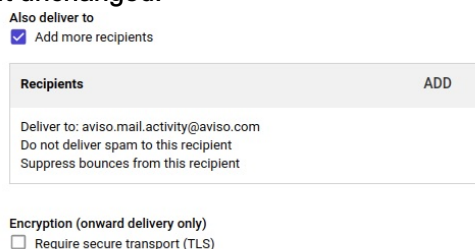
7. Click Configure.

A new page called Edit setting appears.

8. Check both the inbound and outbound boxes.



9. Under **Also deliver to** click checkbox named **Add more recipients**. All other options should be left unchanged.



[Show options](#)

10. In case you need to restrict specific emails/domains while forwarding to the Aviso Email account, follow [Additional - Bypass specific email addresses/domain](#) steps and [Additional - Only allow specific email addresses/domains](#) steps, otherwise skip these steps and click **Save**.

Additional - Bypass specific email addresses/domains

This setting allows you to restrict the forwarding of Aviso email to a specific email address or domains. Perform the following steps to bypass specific email addresses and domains.

1. After you select the checkbox named Add more recipients, select **Show options**.

The page expands into the address lists to be bypassed and allowed.

[Hide options](#)

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

No lists used yet. [Use existing or create a new one.](#)

2. Under the Address lists, select the checkbox named **Use address lists to bypass or control application of this setting**.

3. Choose the radio button **Bypass this setting for specific addresses / domains**.

4. Click on **Use existing or create a new one**.

After you click on this option, you can view or create a list of email addresses and domains.

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

[Use existing or create a new one.](#)

Create new list:

B. Test

CREATE

5. To create new list, perform the following steps.

- i. Click **+** icon at the right-hand side of the lists.

- ii. Enter the email address or domain name in the text box.

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

Test (0)

Test	Q +
Address	Authentication (received mail only) ?
Email address or domain name: aviso2017.onmicrosoft.com	
☐ Require sender authentication (recommended). Learn more	
CANCEL SAVE	

6. If you wish to allow specific email addresses/domains to forward the email, continue to [Only allow specific email addresses/domains](#) or click **Save**.

Note:

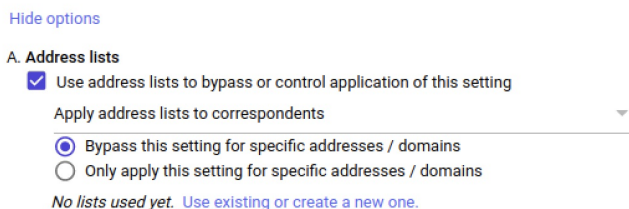
The + icon appears only after you have created the lists as mentioned in step 4.

Additional - Only allow specific email addresses/domains

With this setting, you can only forward Aviso emails to specific e-mail addresses and domains. Perform the following steps to allow only specific email addresses and domains.

1. Select **Show options**.

The page expands into the address lists to be bypassed and allowed.



Hide options

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents

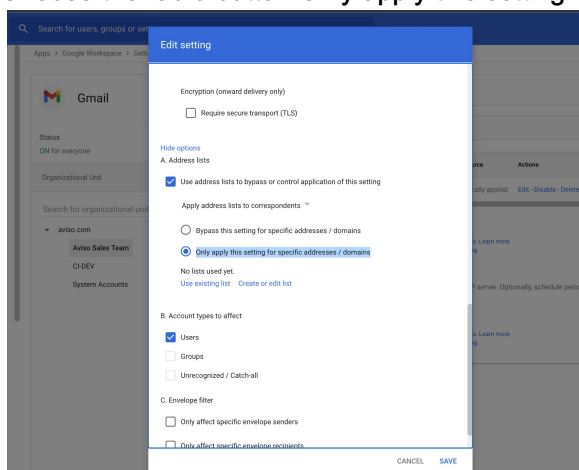
☒ Bypass this setting for specific addresses / domains

☐ Only apply this setting for specific addresses / domains

No lists used yet. [Use existing](#) or [create a new one](#).

2. Under the Address lists, select the checkbox named **Use address lists to bypass or control application of this setting**.

3. Choose the radio button **Only apply this setting for specific addresses / domains**.



Search for users, groups or organizational units

Apps > Google Workspace > Settings > Gmail

Status: ON for everyone

Organizational Unit: Search for organizational units

▼ aviso.com

 Aviso Sales Team

 CHREV

 System Accounts

Edit setting

Encryption (outward delivery only)

☐ Require secure transport (TLS)

Hide options

A. Address lists

☒ Use address lists to bypass or control application of this setting

Apply address lists to correspondents *

☐ Bypass this setting for specific addresses / domains

☒ Only apply this setting for specific addresses / domains

No lists used yet. [Use existing list](#) [Create or edit list](#)

B. Account types to affect

☒ Users

☐ Groups

☐ Unrecognized / Catch-all

C. Envelope filter

☐ Only affect specific envelope senders

☐ Only affect specific envelope recipients

CANCEL SAVE

4. Click on **Use existing** or **create a new one**.

After you click on this option, you can view or create a list of email addresses and domains.

5. Click **Save**.

Enable 2-step verification

Perform the following steps to enable 2-step verification for the newly created email address.

1. In the [Google admin](#) home page, click on Users.

2. Click **Security**.

A new page that contains information about security and recovery information appears.

3. Choose **ON** on 2-step verification field.

Security ▼

2-step verification: ON
Enforced and enabled for Aviso

Application-specific password
1 application-specific password created

Connected applications
0 applications are connected with Aviso's account

Recovery information
Add a recovery email
Add a recovery phone

Password settings | Application integrations

Note:

Aviso Administrator requires your password to set up email activity. You can change your password later from the Security option.

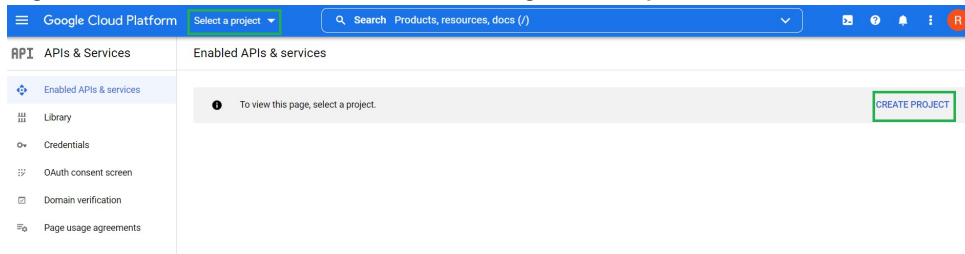
Create a Project in Google Cloud platform

Perform the following steps to create a project in Google Cloud platform.

1. Go to [Google Cloud](#) platform.

Google Developer Cloud platform appears.

2. Login with the administrator account in Google Cloud platform.



3. On Google Cloud Platform, there are two ways to create a project.

- Click **Create Project**.

A new page named New Project appears. Next, proceed to Step 3.

- Click **Select a project**.

A dialog box appears. Select **New Project**.

Note:

While creating a new project, a Project ID is assigned to you by default. The Project ID is the globally unique identifier for your project. You cannot change the project ID after the project is created. To change the project ID, click **Edit** below the **Project ID** field.

4. In the **Project Name** field, enter the project name on the new page.

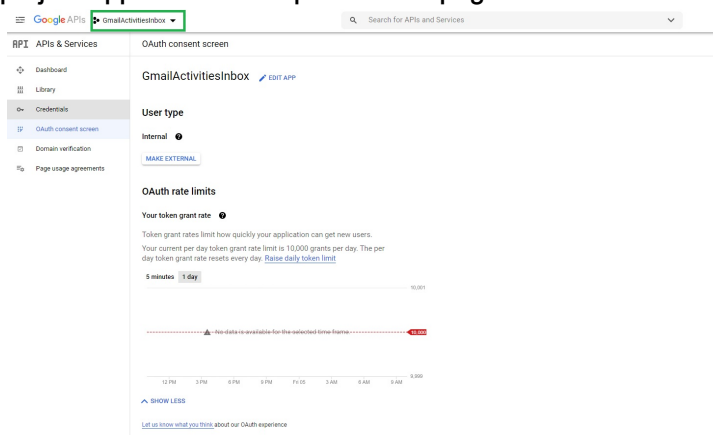
For example, you may enter “*GmailActivitiesInbox*.”

5. From the **Organization** dropdown list, select your organization.

Your organization's name appears by default.

6. Click **Create**.

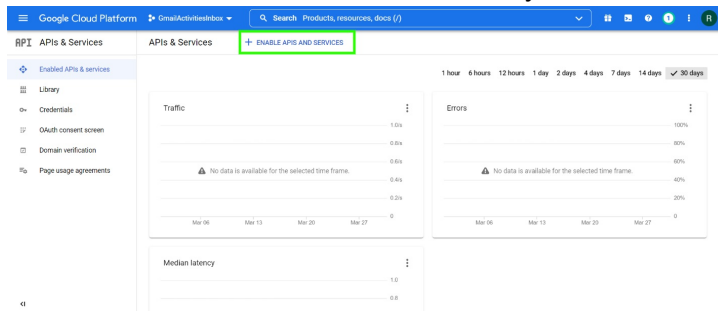
Your project is created. You are redirected to the dashboard, where your newly created project appears at the top bar of the page as shown below.



Enable APIs & Services in Google Cloud platform

Perform the following steps to enable these APIs.

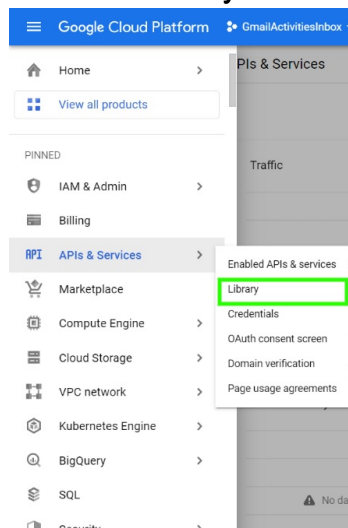
1. Click **ENABLE APIS AND SERVICES** on your dashboard.



A new page named API Library appears. Next, proceed to Step 2.

Alternatively, you can follow these steps to visit the API Library page.

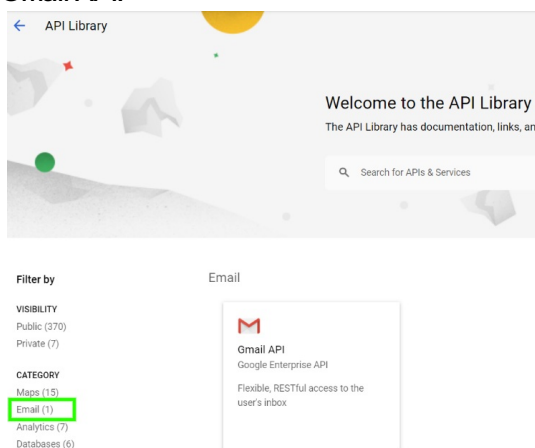
- i. Go to Navigation Menu on the Google Cloud Platform.
- ii. Click **API & Services** and from the list of services.
- iii. select **Library**.



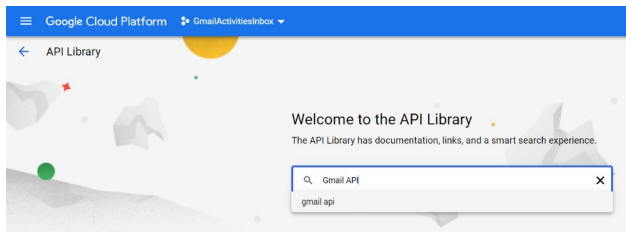
An API library page appears.

2. Perform any of the following actions to select the required APIs.

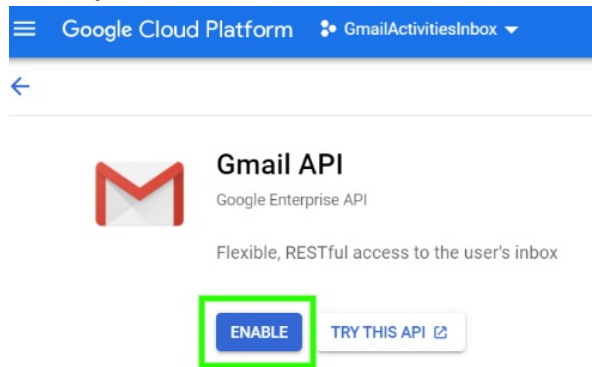
- On the left-hand side of the page, select a category. For example, select Email from the **Category** if you want to enable Gmail API. Then select the desired Google APIs. In this case, Gmail API.



- In the search box, you can search for the desired Google APIs. In this case, Gmail API.



3. After you select the API, click **ENABLE**.

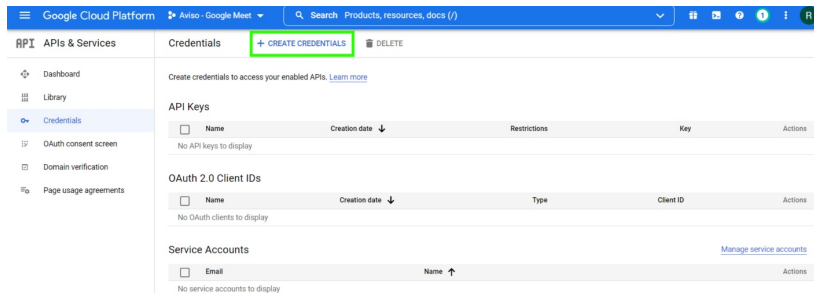


You can now access the selected API from your project.

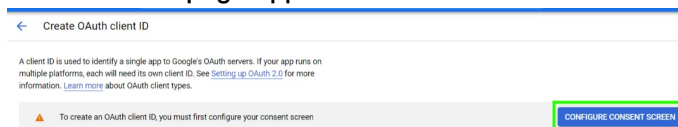
Enable Credentials from APIs & Services

To use your enabled APIs, you must create credentials. Perform the following steps to create credentials for your project.

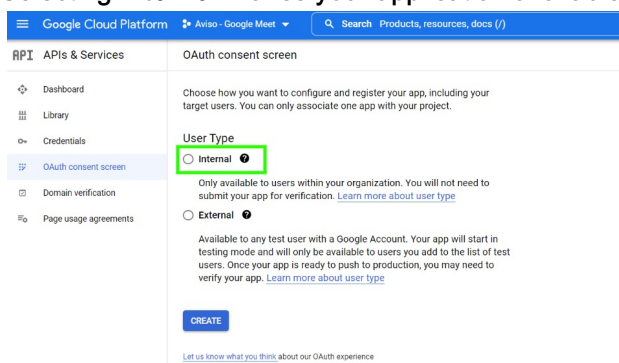
1. Go to the Navigation Menu on the Google Cloud Platform.
2. Click **API & Services** and from the list of services, select **Credentials**.
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4. Under Create Credentials, select **OAuth client ID**.
Create OAuth client ID page appears.
After selecting OAuth client ID, your application can access the data from the user's account.
5. Select **Configure Consent Screen**.
OAuth consent page appears.



6. Under User Type, select **Internal**.
Selecting **Internal** makes your application available to users within your organization only.



7. Click **Create**.
You are redirected to OAuth consent screen > Edit app registration page.
8. On the Edit app registration page, fill in the following information.
 - o Under **App information**:
 - App Name
 - User support email

- Under **Developer contact information**
 - Email address

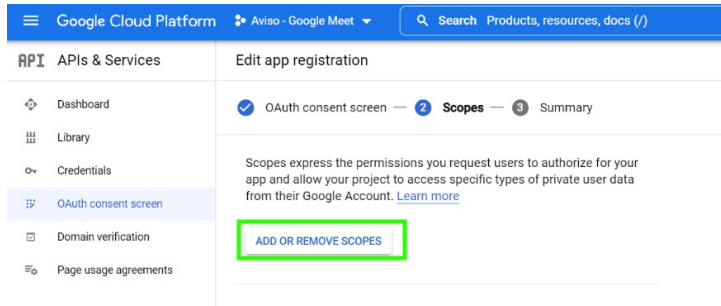
9. Click **SAVE AND CONTINUE**.

You are redirected to the [Scopes](#) page.

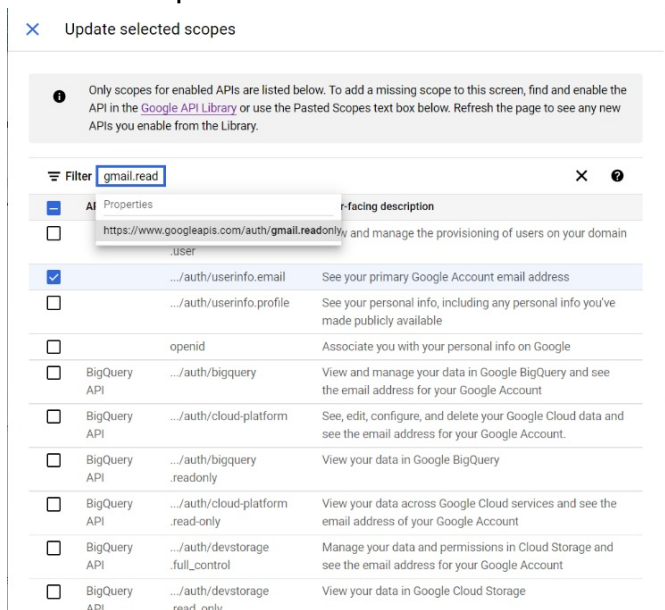
Add Scopes to your project

Scopes define which permissions you need from a user's Google account to provide your service or collect information.

1. On the Scopes page, click **ADD OR REMOVE SCOPES**.



2. Select the Scopes from the list of APIs.



If you are unable to locate any Scopes, you can manually search for them. Perform the following steps to manually add the scopes.

- i. Under Manually add scopes, enter the following full scope string in the text box.

- <https://www.googleapis.com/auth/userinfo.email>,
- <https://www.googleapis.com/auth/gmail.readonly>

As a result of adding the above scopes, the metadata of emails in the shared inbox can be retrieved.

Manually add scopes

If the scopes you would like to add do not appear in the table above, you can enter them here. Each scope should be on a new line or separated by commas. Please provide the full scope string (beginning with "https://"). When you are finished, click "Add to table".

ADD TO TABLE

UPDATE

- ii. Click **ADD TO TABLE**.

3. After adding the scopes to your project, click **UPDATE**.

A new page appears where you can see a list of all your selected scopes.

4. Click **SAVE AND CONTINUE**.

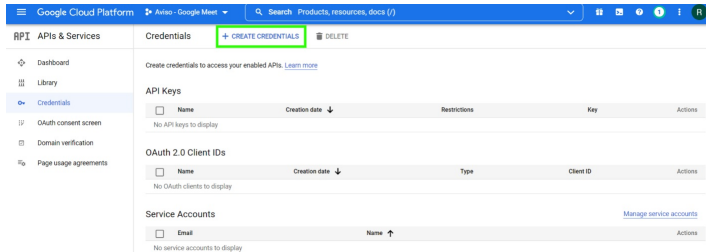
Below is a summary of the added scopes to your project.

Scope	Purpose
https://www.googleapis.com/auth/userinfo.email	This scope is required to view the user's email address.
https://www.googleapis.com/auth/gmail.readonly	This scope is required to view the email address and settings of the user.

Create OAuth Client ID

OAuth client ID allows third party applications to access protected resources (such as Gmail) based on the user's credentials. Perform the following steps to create OAuth Client ID.

1. From the left-hand navigation pane, select Credentials.



2. Under Create Credentials, click OAuth client ID.

3. In the new page named Create OAuth client ID, enter the following information.

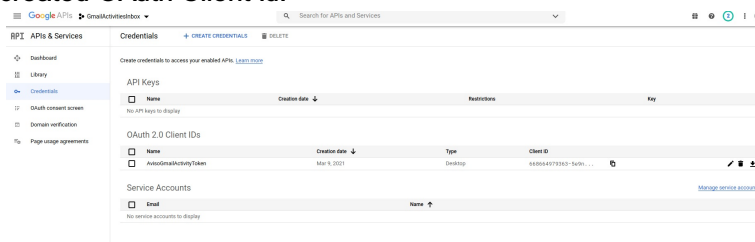
- o Select **Desktop App** from the Application type dropdown list.
- o In the Name field, enter the unique name of your OAuth 2.0 client.

A screenshot of the 'Create OAuth client ID' form. It has a back arrow and the title 'Create OAuth client ID'. Below the title is a paragraph explaining the client ID. There is a dropdown menu for 'Application type' with 'Desktop app' selected. Below that is a link 'Learn more about OAuth client types'. Then there is a text input field for 'Name' with the value 'AvisoGmailActivityToken' entered. Below the input field is a note: 'The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.' At the bottom are 'CREATE' and 'CANCEL' buttons.

4. Click **Create**.

Client Id and Client Secret would appear in a pop-up window.

5. Click Credentials in the left menu bar and click on Download Credentials against the newly created OAuth Client Id.



Provide the credentials to Aviso Implementation team

To configure Gmail to read email body content, Aviso implementation team needs the following credentials.

- Email id created for your domain from [Create email for the shared mailbox](#).
- Client ID from [Create OAuth Client ID](#).
- A list of e-mail addresses for which email integration needs to be enabled.
- file which was downloaded into your local machine while creating keys.

Introduction

Aviso is the AI compass that guides sales and go-to-market teams to close more deals, accelerate growth, and find their Revenue True North. Aviso AI delivers revenue intelligence, drives informed team-wide actions and course corrections, gives precise guidance so sellers and teams do not get lost in the fog of CRM, and augment themselves with predictive AI.

Aviso's activity analytics enable sales leaders to understand prospect enthusiasm and deal progress without any extra effort required by their sales representatives. Using Aviso's activity analytics, administrators can integrate the platform with gmail environments to track two-way email exchanges, meeting schedules, and meeting attendees. No client software or browser plugins are required.

Aviso uses email and calendar information to provide sales leaders with detailed insights on deal progress. Aviso AI detects upsell opportunities in your CRM so sales reps can identify any potential upsides quickly and determine the probability of closing that deal in a timely manner.

By integrating Gmail, top sales executives no longer need to spend their time and energy dealing with deals that do not have the potential to generate revenue. As a result, they are able to increase their revenue potential by eliminating false hopes of closing a deal.

Important

The procedures mentioned in this document are performed by the IT admins to integrate Gmail with Aviso AI, and these are one-time activities.

Important

After you perform the procedures mentioned in this document, collect the authorization codes from Google Cloud and provide it to the Aviso executive to integrate the Gmail service account with Aviso AI.

Integrating Gmail

Gmail is an email service offered by Google that allows users to access their email. To know more about Gmail, see [Gmail](#). Integrating Gmail with Aviso requires the following procedures:

- Prerequisites
- Create a Project in Google Cloud platform
- Enable APIs from the APIs & Services library
- Create Service Account from IAM & Admin
- Enable Domain-wide delegation to your service account
- Create Keys from Service Account
- Manage API access via Google workspace
- Obtain the Client ID and Client Secret from the registry
- Provide the credentials to Aviso executives

Prerequisites

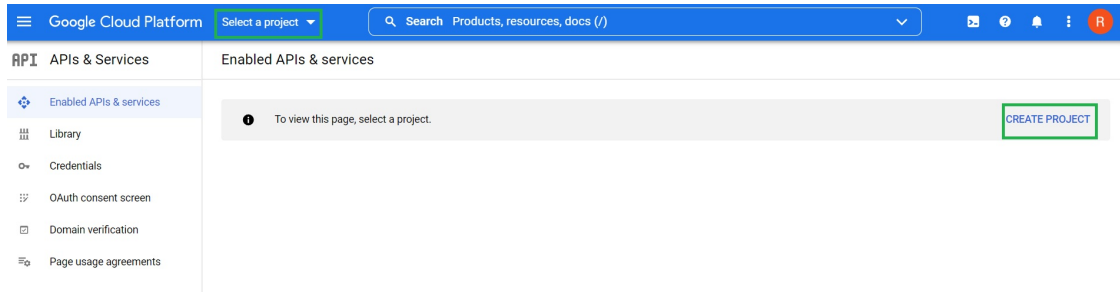
Ensure that you have super administrator access to Gsuite.

Create a Project in Google Cloud platform

Perform the following steps to create a Google Cloud project.

1. Log in to [Google Cloud](#) platform.

Google Developer Cloud platform appears.



2. On Google Cloud Platform, there are two ways to create a project as follows.

- Click **Create Project**.

A new page named New Project appears. Next, proceed to Step 3.

- Click **Select a project**.

A dialog box appears. Select **New Project**.

Note

While creating a new project, a Project ID is assigned to you by default. The Project ID is the globally unique identifier for your project. You cannot change the project ID after the project is created. To change the project ID, click **Edit** below the Project ID field.

3. In the **Project Name** field, enter the project name on the new page.

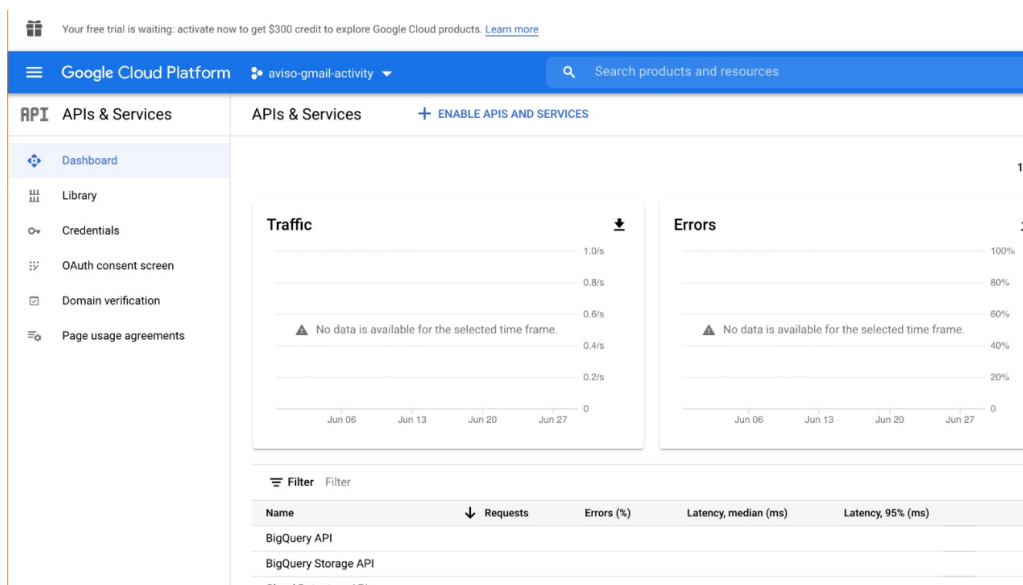
For example, you may enter “*aviso-gmail-activity*.”

4. From the **Organization** dropdown list, select your organization.

Your organization's name appears by default.

5. Click **Create**.

Your project is created. You are redirected to the dashboard, where your newly created project appears at the top bar of the page.

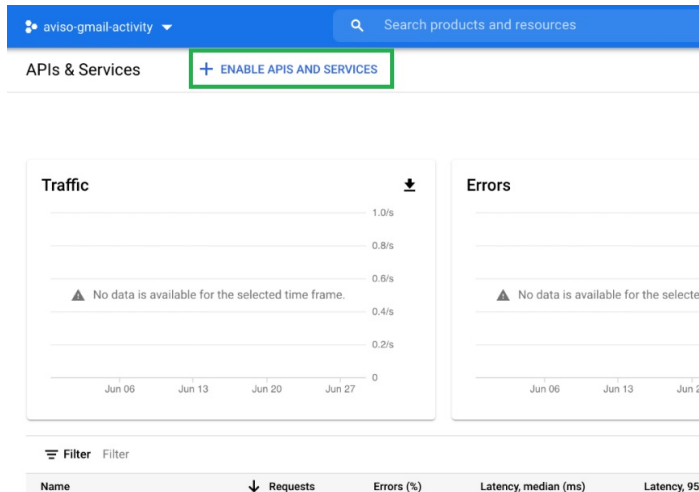


Enable APIs from the API & Services library

Enable Gmail API and Calendar API on your project. You can use Google Calendar to notify users of an event or update their status. You can use Gmail API to send email messages. Perform the following steps to enable these APIs.

1. Click **ENABLE APIS AND SERVICES** on your dashboard.

A new page named API Library appears. Next, proceed to Step 2.



Alternatively, you can follow these steps to visit the API Library page.

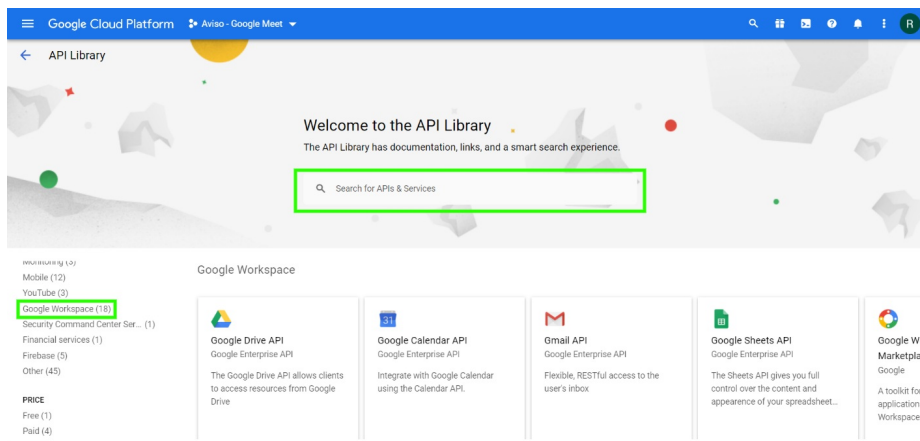
A. Go to Navigation Menu on the Google Cloud Platform.

B. Click **API & Services** and from the list of services select **Library**.

An API library page appears.

2. Perform any of the following actions to select the required APIs. For example, select Google Workspace from the **Category** if you want to enable Google Calendar API and Gmail API.

- On the left-hand side of the page, select a category and then select the desired Google APIs.
- In the search box, you can search for the desired Google APIs.



3. Select the following APIs from the library.

- Google Calendar API
- Gmail API

4. For each API that you selected, click **ENABLE**.



Google Calendar API

Google Enterprise API

Integrate with Google Calendar using the Calendar API.

ENABLE

TRY THIS API [↗](#)

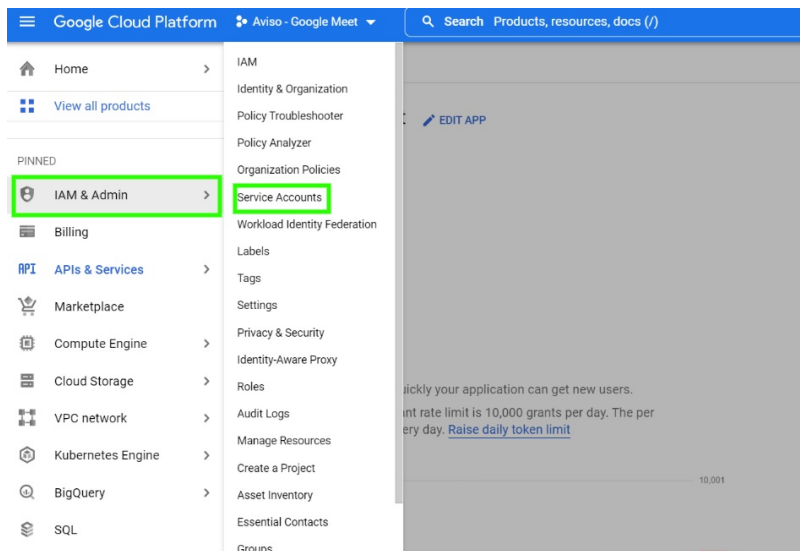
You can now access the selected API from your project.

Create Service Account from IAM & Admin

After you create the project, you can create a service account in that project. A service account is an account that uses the credentials of another Google user to retrieve data when required. Use a service account which is used solely to retrieve and create meetings on behalf of users and the main application.

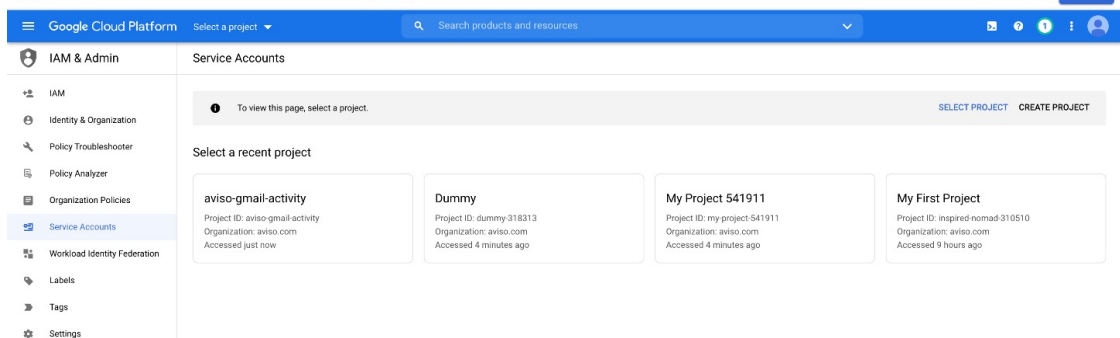
Perform the following steps to create Service Account

1. Go to the Navigation Menu on the Google Cloud Platform.
2. Click **IAM & Admin** and select **Service Accounts**.



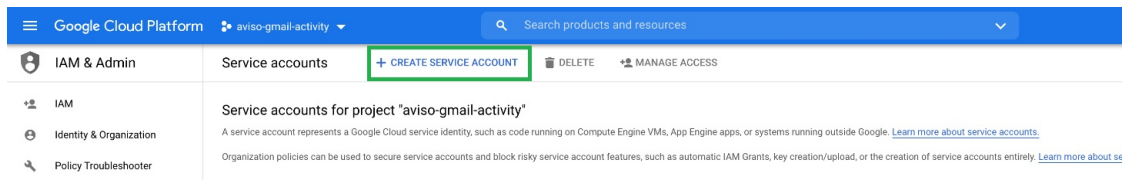
A new page appears.

3. Select the project you created previously. In this case, select "aviso-gmail-activity."

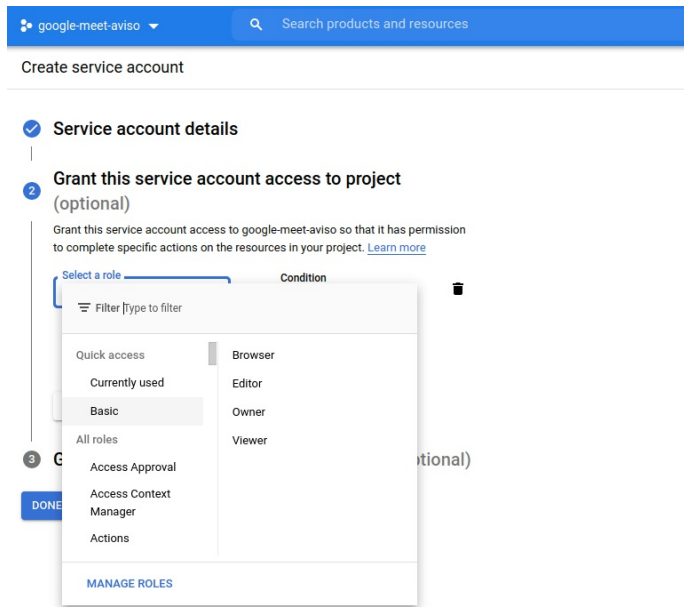


A new Service Accounts page appears.

4. Click **+CREATE SERVICE ACCOUNT**.



5. In the Service Account Details, enter the following fields.
 - Service account name
For example, you may enter **aviso-email-activity-service**.
 - Service account ID
 - Service account description
6. Click **Create and Continue**.
7. After creating a service account, select **Viewer** role from **Grant this service account access to project**.

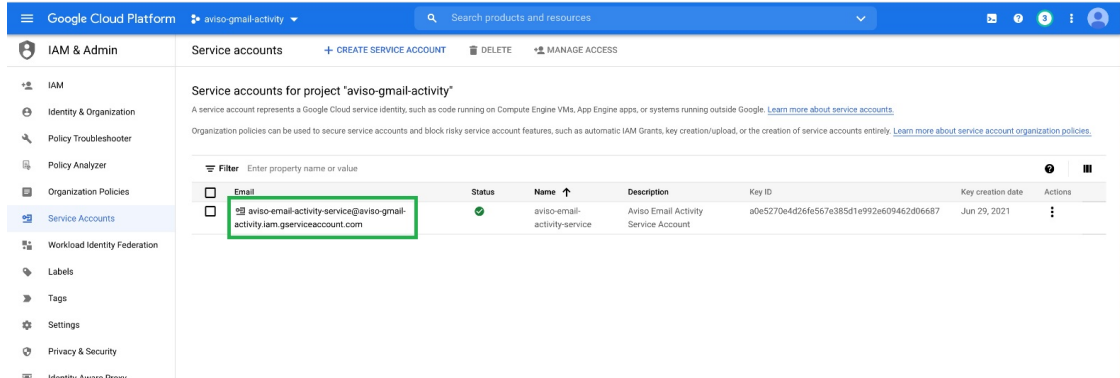


8. Click **Continue**.
9. After granting access to the service account, click **DONE**.
Your browser will redirect you to the page that lists all the service accounts.

Enable Domain-wide delegation to your service account

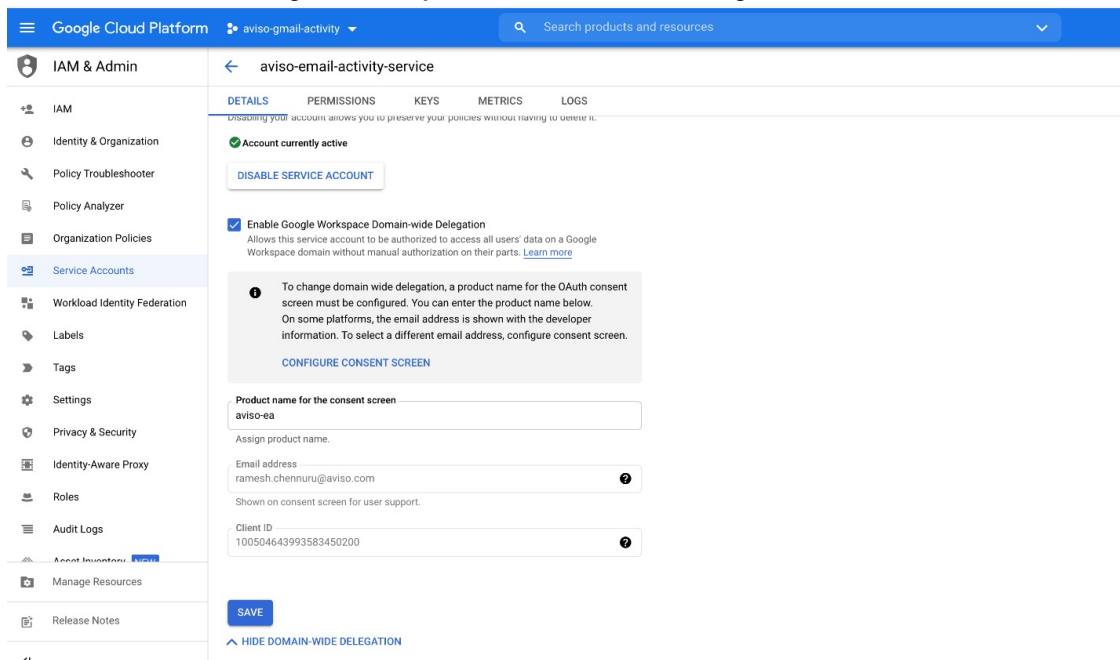
Delegating domain-wide authority allows an application to access data on behalf of a group of users. Perform the following steps to enable the domain-wide delegation to your service account.

1. Select your service account that you created in the preceding step.



A new page appears containing the details of your service account.

2. Select the Enable Google Workspace domain-wide delegation check box.



3. From the Client ID field, copy the client ID.
4. Click SAVE.

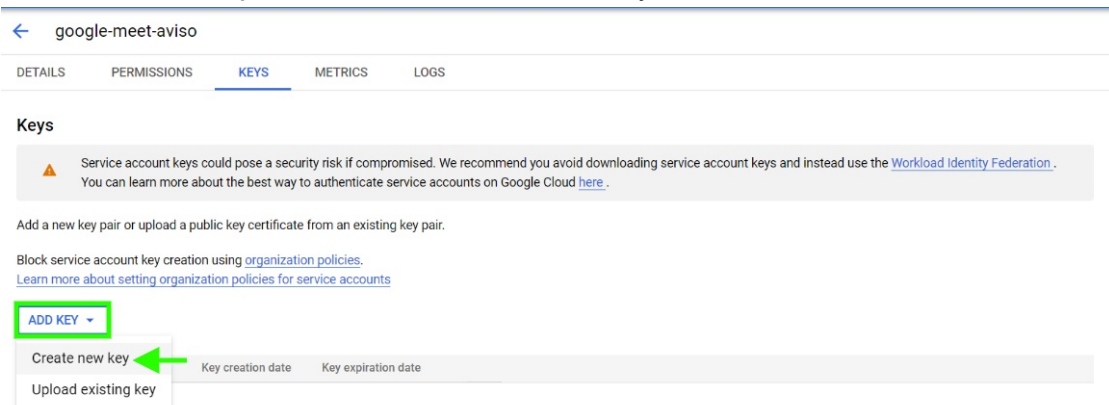
When you enable domain-wide delegation to your service account, you give that account permission to perform necessary administrative tasks, such as managing groups, editing user accounts, and changing passwords on a domain-wide basis.

Create Keys from service account

Service accounts are often associated with shared resources, and their access cannot be restricted to only certain users. The associated private key gives you the ability to access the account, which is like logging in with a password.

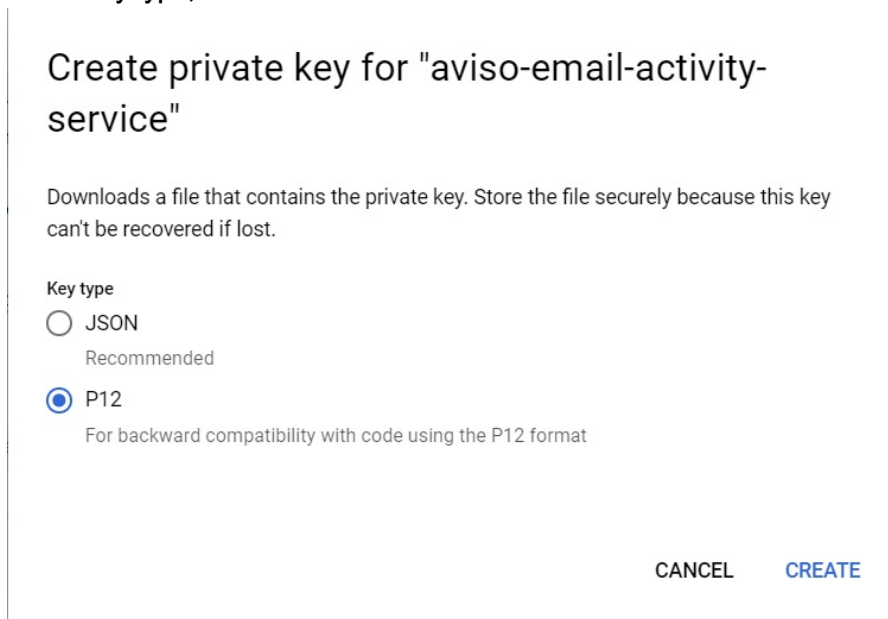
Perform the following steps to create key from your service account.

1. From your service account, click **Keys** tab.
2. From **ADD KEY** drop-down list, select *Create new key*.



A dialog box appears.

3. Under Key type, select JSON and click **Create**.



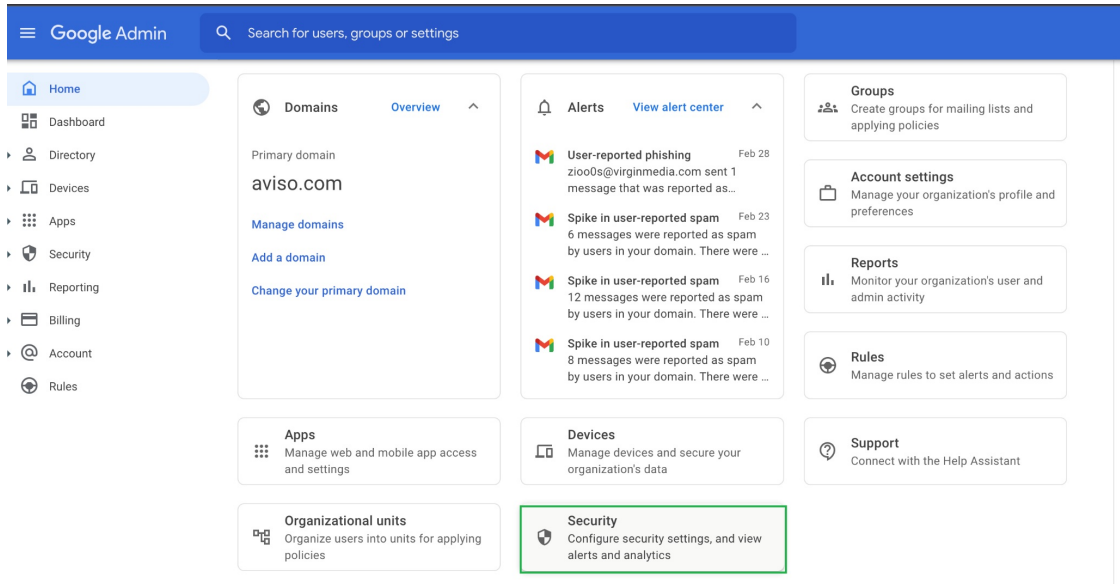
4. A private key is downloaded on your local computer.

Keep this file safe and **provide it to Aviso executives**. After the P12 file is downloaded on your computer, ensure to add scopes via google admin workspace.

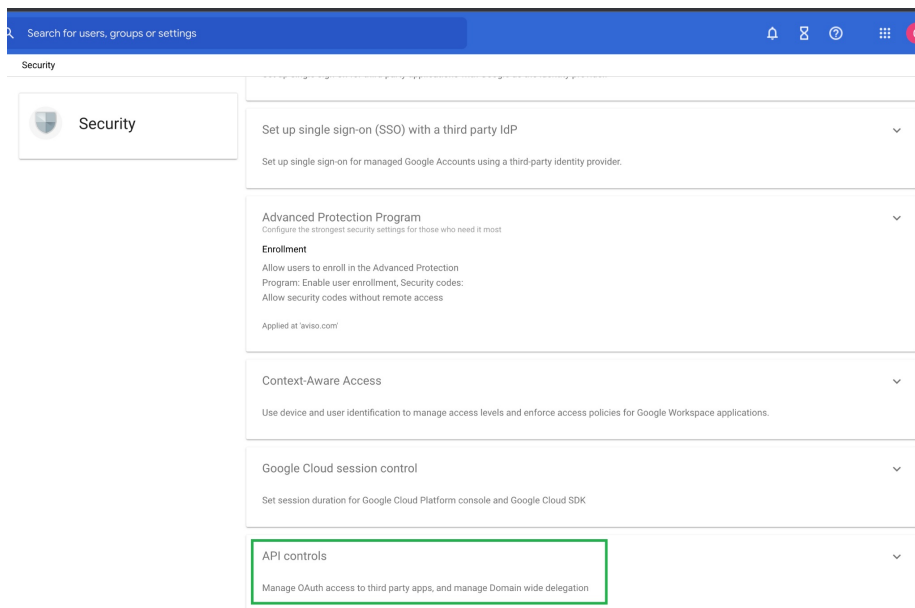
Manage API access via Google workspace

Perform the following steps to add scope to your service account.

1. Go to admin.google.com.
2. Log in to your Google admin account.
3. On the Google admin home page, click on **Security**.



4. Scroll down and click **API controls**.



5. Click on **MANAGE DOMAIN WIDE DELEGATION**.
This is where you can add scopes to your service account.
6. Click **Add New** on Domain-wide Delegation page.
A dialog box appears where you can authorize the scopes.
7. Enter the following details in the dialog box.

- o **Client ID**

Enter the Client ID you generated earlier.

Click [Obtain the Client ID](#) to discover your client ID.

- o **OAuth scopes (comma-delimited)**

Enter the following scopes in this field, separated by a comma (,).

<https://www.googleapis.com/auth/gmail.readonly>,

[https://www.googleapis.com/auth/calendar.readonly,](https://www.googleapis.com/auth/calendar.readonly)
[https://www.googleapis.com/auth/userinfo.email,](https://www.googleapis.com/auth/userinfo.email)

Scopes

.../auth

Add a new client ID

Client ID

100504643993583478987

☐ Overwrite existing client ID ?

OAuth scopes (comma-delimited)

https://www.googleapis.com/auth/gmail.readonly,h

OAuth scopes (comma-delimited)

CANCEL AUTHORIZE

8. Click **Authorize**.

Obtain the Client ID from APIs & Services

After completing the above steps, go back to Navigation Menu on the left pane, and perform the following steps:

1. Select APIs & Services > Credentials.

Credentials

[+ CREATE CREDENTIALS](#)

DELETE

Create credentials to access your enabled APIs. [Learn more](#)

API Keys

☐	Name	Creation date ↓	Restrictions	Key	Actions
No API keys to display					

OAuth 2.0 Client IDs

☐	Name	Creation date ↓	Type	Client ID	Actions
☐	Web client 1	Mar 1, 2022	Web application	736152888700-7cgh...	

Service Accounts

[Manage service accounts](#)

☐	Email	Name ↑	Actions
☐	avisoserviceaccount@idylic-web-341617.iam.gserviceaccount.com	avisoserviceaccount	
☐	google-meet-aviso@idylic-web-341617.iam.gserviceaccount.com	google-meet-aviso	

2. Under OAuth 2.0 Client IDs, select your project.

3. On the new page, you can now see Client ID and Client Secret as shown below.

Client ID	1702913573-59itbdc7dsqvkru5ca7f983d246fa0av.apps.googleusercontent.com
Client secret	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
Creation date	December 1, 2021 at 3:05:21 PM GMT+5

Provide the credentials to Aviso implementation team

Provide the following information to Aviso Implementation team.

- Client ID that you created in the [Obtain the Client ID from APIs & Services](#).
- Service account email ID.
- P12 file that was downloaded into your local machine while creating keys.
- A list of e-mail addresses for which email integration needs to be enabled.

Introduction

Aviso AI seamlessly integrates with Microsoft Outlook to extract email body along with historical emails of the shared mailbox. This integration allows sales leaders to obtain a comprehensive and up-to-date understanding of the status of deals via their Microsoft Outlook inbox. This document explains how to integrate Microsoft Outlook with Aviso AI.

Integrating Microsoft Outlook

Outlook is an email service provider by Microsoft that enables users to send and receive emails and also manage their calendars, contacts, and so on. To know more about Outlook, see [Microsoft Outlook](#). Integrating Outlook with Aviso requires the following procedures:

- Prerequisites
- Register your application with Microsoft Outlook
- Add API permissions to your Microsoft Outlook application
- Generate client secret value from Microsoft Azure portal
- Create Administrator consent for Microsoft Outlook mailbox
- Copy unique ID of your Sales group from Microsoft 365 admin center
- Retention Policy Setup for shared mailbox
- Provide the credentials to Aviso implementation team

Prerequisites

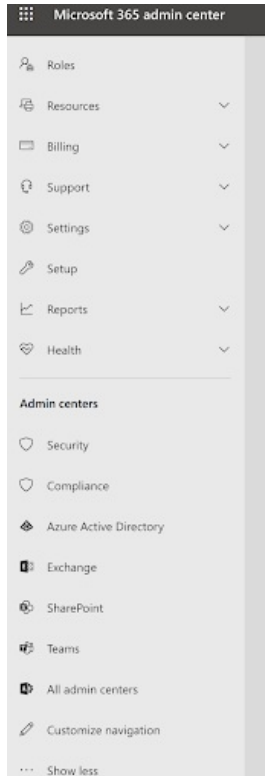
Ensure that you have a Microsoft 365 admin license.

Register your application with Microsoft Outlook

To integrate Outlook with Aviso, log on to the Microsoft 365 admin center as an administrator.

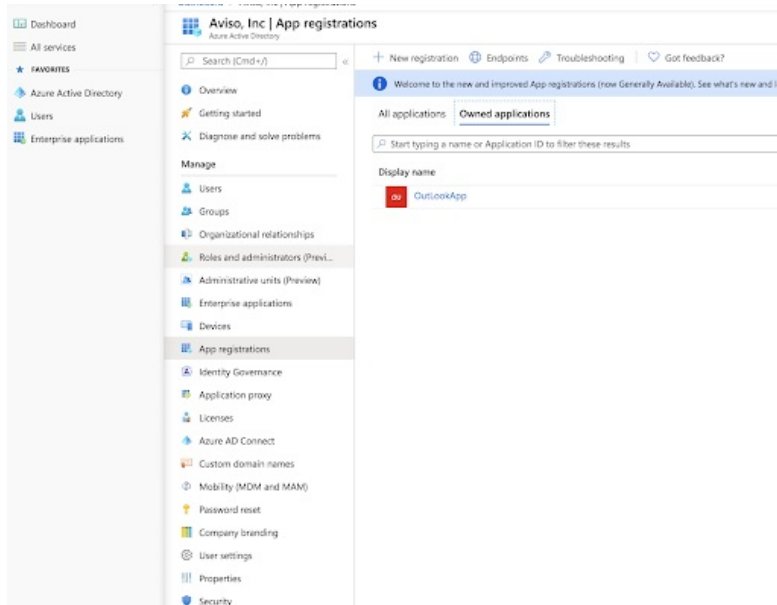
1. Log in to [Microsoft 365 admin center](#).

Microsoft 365 admin center portal appears.

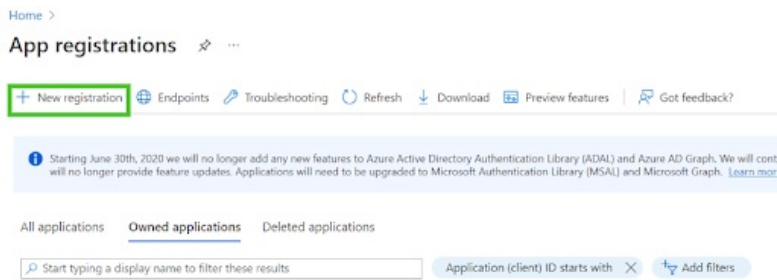


2. On the left-hand navigation pane, click Azure Active Directory.

App registration page appears.



3. On the App registration portal, click New registration.



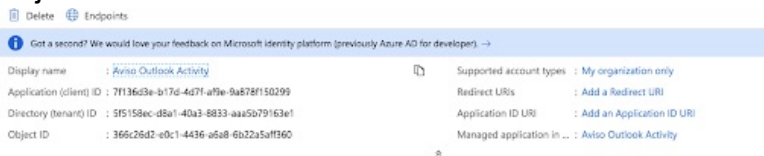
4. On the new page named Register an application, enter the following information.

- In the **Name** field, enter a name.
For example, you may enter **Aviso Outlook Activity**.
- Under **Supported account types**, select the following option- Account in this organizational directory only (Aviso Inc only - Single tenant)
- Under **Redirect URI (optional)**, perform the following:
 - From the dropdown list, select **Web**.
 - In the URI field that appears next to the dropdown list, enter a redirect URI. In this case, you may enter:
https://myapp.com/auth

5. Click **Register**.

Aviso Outlook Activity app is now registered and displays the following information.

- Display name
- Application (client) ID
- Directory (tenant) ID
- Object ID



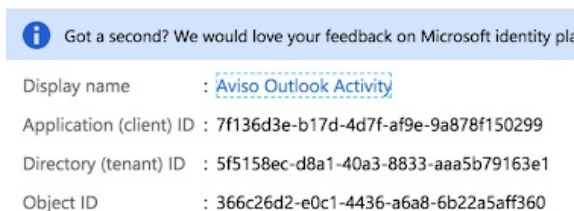
{height="" width=""}

Your application is registered.

Add API permissions to your Microsoft Outlook application

Perform the following steps to add API permissions to your Outlook account that enable you to use Outlook from Aviso AI.

1. After you register the Aviso Outlook Activity app, Click API Permissions.



 Welcome to the new and improved App registrations. Looking to learn more?

```
{height="" width=""}
```

Call APIs



Build more powerful apps with rich user and business data from Microsoft services and your own company's data sources.

[View API permissions](#)

Alternatively, you can perform the following steps to View API Permissions.

- On the Microsoft Azure portal, go to Home page.
- Click **App registration**.
- Select **Aviso Outlook Activity**.
- On the left menu bar, click **API Permissions**.

The API Permissions page appears.

2. Under Configured permissions, click **+ Add a permission**.

Request API permissions section appears.

- ### 3. Under Microsoft APIs, Click Microsoft Graph.

4. Click Application permissions.

Select permissions section appears and shows the list of available permissions categories under a search box. You can expand the permissions categories to view all the available permissions.

5. Select the following permissions:

If you can't find a permission, search the permission using the search box.

Permissions	Purpose
Mail.Read	Allows the app to read mail in all mailboxes.
GroupMember.Read.All	Allows the app to read membership and basic group properties for all groups without a signed-in user.

Click **Add permissions**.

The app permission page shows all the permissions you added.

6. Ensure that **User.Read** permission is NOT added to the Configured Permissions screen. In case you find the **User.Read** permission under Configured Permissions, remove it by clicking the three dots, and click delete.

Note

User.Read permission is automatically added when a user account is created. It is recommended that **User.Read** permission be removed to protect the Personally Identifiable Information (PII) of the users who are associated with the customer account.

7. On the Configured Permissions screen, click **Grant admin consent** to grant the permissions added in the previous step.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission **Grant admin consent for Aviso, Inc.**

API / Permissions name	Type	Description	Admin consent required	Status
Microsoft Graph (2)				
GroupMember.Read.All	Application	Read all group memberships	Yes	Granted for Aviso, Inc.
Mail.Read	Application	Read mail in all mailboxes	Yes	Granted for Aviso, Inc.

To view and manage permissions and user consent, try [Enterprise applications](#).

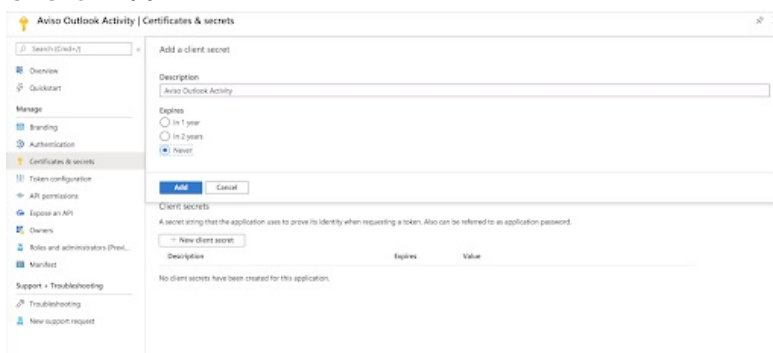
8. Navigate back to the **Aviso Outlook Activity** app and click **Overview** from the left navigation pane.

Application (Client ID) and **Directory (tenant ID)** appear. Share these credentials with the Aviso implementation team.

Generate client secret value from Microsoft Azure portal

Perform the following steps to generate the certificate and secret values from the Microsoft Azure portal.

1. On the Microsoft Azure portal, click **Certificates & secrets** from the left navigation pane.
Certificates & secrets page appears.
2. Under Client secrets tab, click **+ New client secret**.
Add a client secret section appears.
3. In the **Add a client secret** section, perform the following steps.
 - A. In the **Description** field, add a short description, for example, you may enter **Aviso Outlook Activity**.
 - B. In the **Expires** field, select **Never** button.
 - C. Click **Add**.



The screenshot shows the 'Add a client secret' form in the Microsoft Azure portal. The left navigation pane is visible with 'Certificates & secrets' selected. The main form has a 'Description' field with the text 'Aviso Outlook Activity'. The 'Expires' section has three radio buttons: 'in 1 year', 'in 2 years', and 'Never', with 'Never' selected. There are 'Add' and 'Cancel' buttons at the bottom of the form. Below the form, the 'Client secrets' section is visible, showing a table with columns 'Description', 'Expires', and 'Value'. The table is currently empty, with a message stating 'No client secrets have been created for this application.'

The client secret value is now created. The client secret appears in the encrypted format under Client secrets tab.

4. Note down and share the client value to Aviso implementation team.
Share the client secret value in a password-protected Word or XLS file, and share the password in a separate email.

Create Administrator consent for Microsoft Outlook mailbox

You can obtain the admin consent using the admin consent URL. Perform the following steps to create Admin consent for the shared mailbox.

1. Create an admin consent URL using the Application ID (Client ID), Directory ID (Tenant ID), and Redirect URI that you generated while [registering your application with Microsoft Outlook](#). For creating URL, follow the pattern provided below.

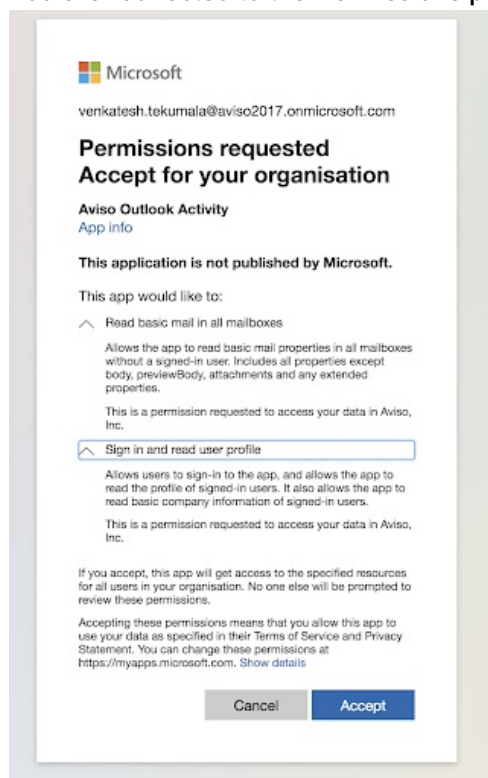
None	Copy
<code>https://login.microsoftonline.com/<Tenant ID>/adminconsent?client_id=<Client ID>&state=12345&redirect_uri=<Redirect URI></code>	

None	Copy
For example: <code>https://login.microsoftonline.com/abcd12345-xyz-1234-abcd-1234/adminconsent?client_id=abcdwqr-124653-asfasf-213r3rfa-afdf&state=12345&redirect_uri=https://outlook.oauth.aviso.com/abcxyz.com</code>	

Note

Ensure that your personal and official Microsoft account are logged out before performing the above action.

2. Enter the above URL in any browser.
The page is redirected to Microsoft login page. If You are prompted to enter login credentials, enter only the administrator credentials.
3. You are redirected to the Permissions page. Click **Accept**.



{height="" width=""}

After you accept the permissions, the browser redirects you to the Redirect URI. Ignore if the site doesn't open.



DNS_PROBE_FINISHED_NXDOMAIN

Released

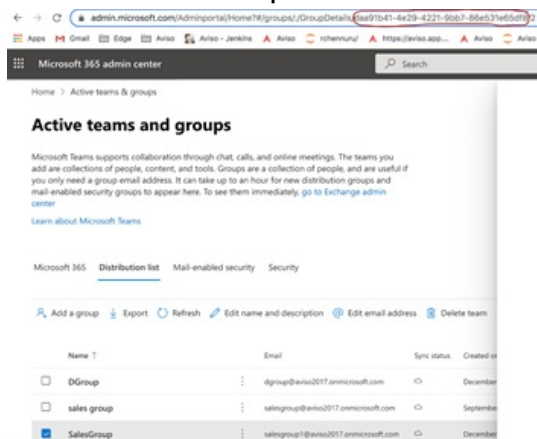
Copy unique ID of your Sales group from Microsoft 365 admin center

Copy the unique ID of the sales group by selecting the sales group. You can get the unique ID from the URI when you select the sales group. A sales group is the one that you create to maintain a distribution list (DL) of users.

If you don't have a sales group in the Microsoft 365 admin center, perform the following steps to create a sales group and copy the unique ID.

1. Open [Office 365](#).
2. Navigate to Microsoft 365 Admin center.
3. Under User, click **Teams & groups**.
4. Under Teams & groups, select **Active teams & groups**.
5. On the Active teams & groups page, under Microsoft 365 tab, click **Add a group**.
Choose a group type page appears.
6. On the Choose a group type page, select **Distribution** option and click **Next**.
Set up the basics page appears.
7. On the Set up the basics page, in the **Name** field, add a name, for example, SalesGroup.
8. In the **Description** field, add a short description of the group and click **Next**.
Edit settings page appears.
9. On the Edit settings page, in the **Group email address** field, enter email ID of the group and click **Next**.
Review and finish adding group page appears and shows the details of what you added to the group.
10. On the Review and finish adding group page, click **Create group**.
In the Microsoft 365 admin center > Users > Active teams and groups page, under the **Distribution list** tab, the sales group that you created appears.
11. Select the sales group that you created.

The URI shows a unique ID.

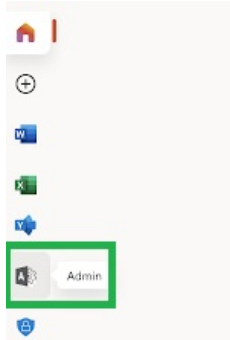


12. Copy the unique ID and share it with the Aviso implementation team.

Set up retention policy for shared mailbox

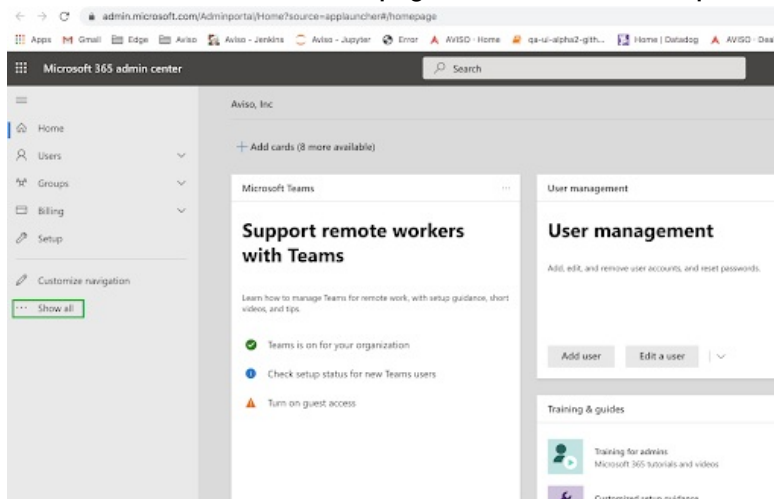
Retention policy specifies the number of days and months you would like to retain mailboxes for each user account. The retention policy allows you to configure your mailbox to delete emails at a time specified by you. Therefore, we recommend that you use retention policy setup to manage retention of your mailbox and space usage. Perform the following steps to setup retention policy for shared mailbox.

1. Login to [Office365](#) using your administrator credentials.
2. From the left hand navigation pane, click **Admin**.



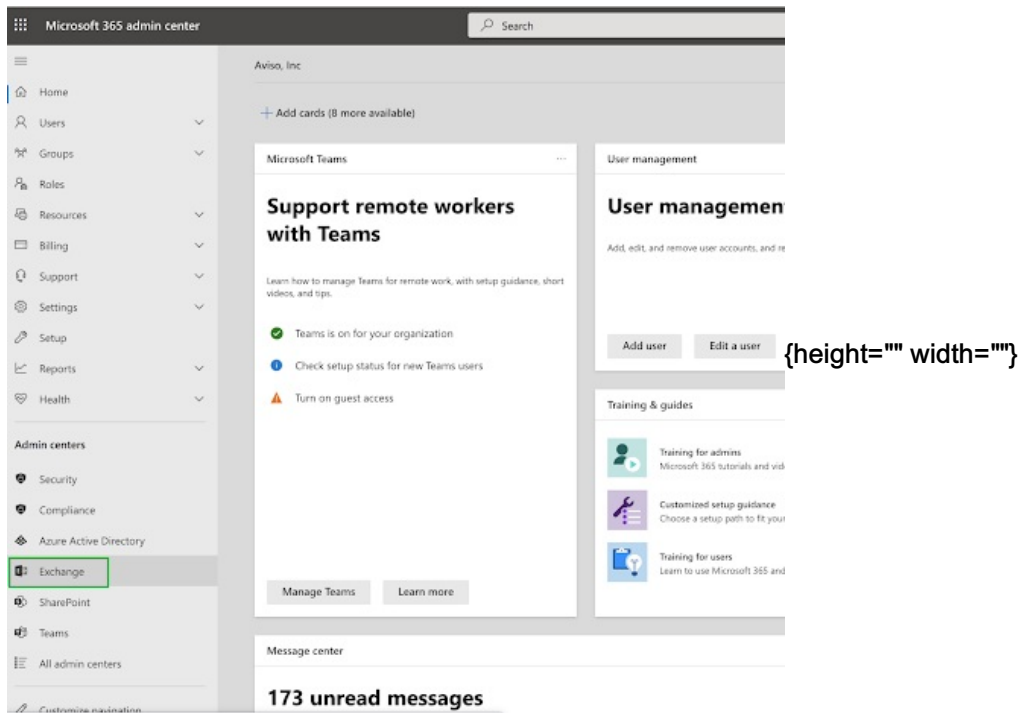
Microsoft 365 admin center page appears.

3. On the Microsoft admin center page, click **Show all** to expand more options.



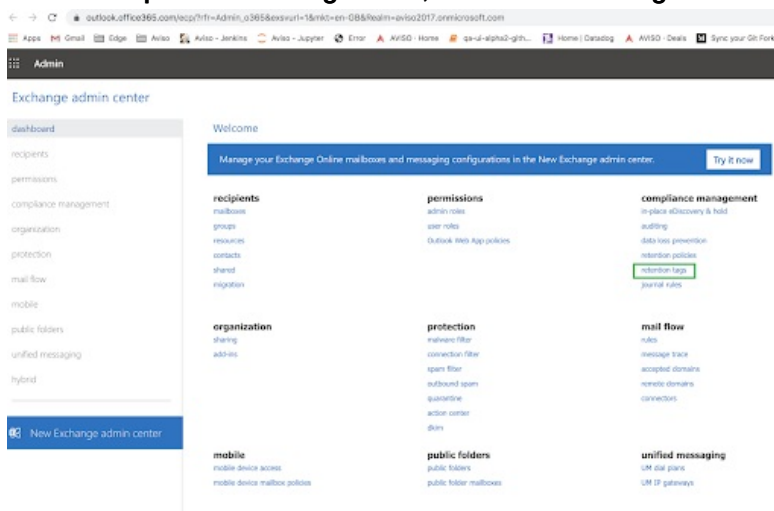
After clicking Show All additional options related to admin centers appears.

4. Under Admin centers, click **Exchange**.



A new page named Exchange admin center appears.

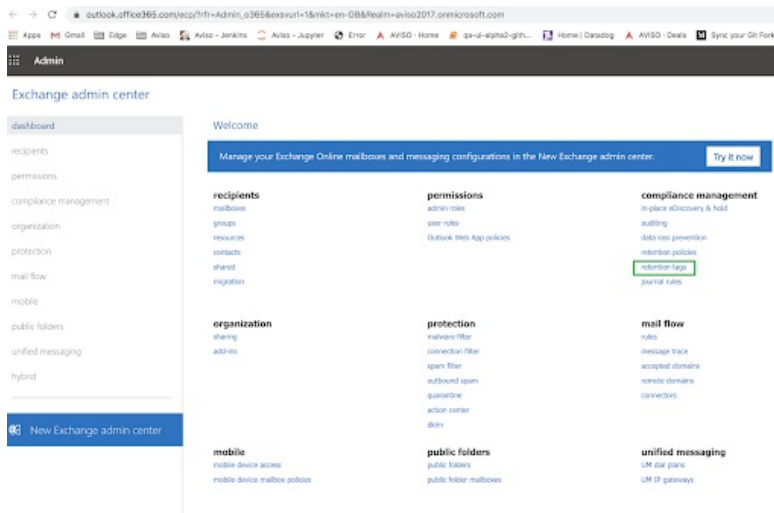
5. Under compliance management, click retention tags.



6. Click on the add (+) icon and select applied automatically to entire mailbox (default).

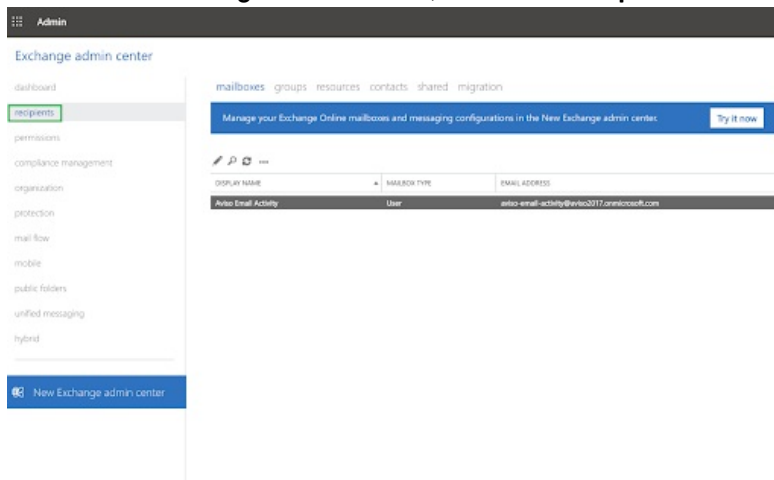
7. On the new page, enter the following information to assign the tag to the retention policy.

- **Name**
In the **Name** field, assign the name to your newly created retention policy.
- **Retention action**
Under **Retention action**, select the Permanently Delete option.
- **Retention period**
Under **Retention period**, select the option **When the item reaches the following age (in days)** and enter the number of days. Set the number of days you would like the mails to remain in your shared mailbox.
- **Comment**
Under the **Comment** section, you can add any comments regarding the retention policy.



8. Click **Save**.

9. Go back to Exchange admin center, and click **Recipients**.

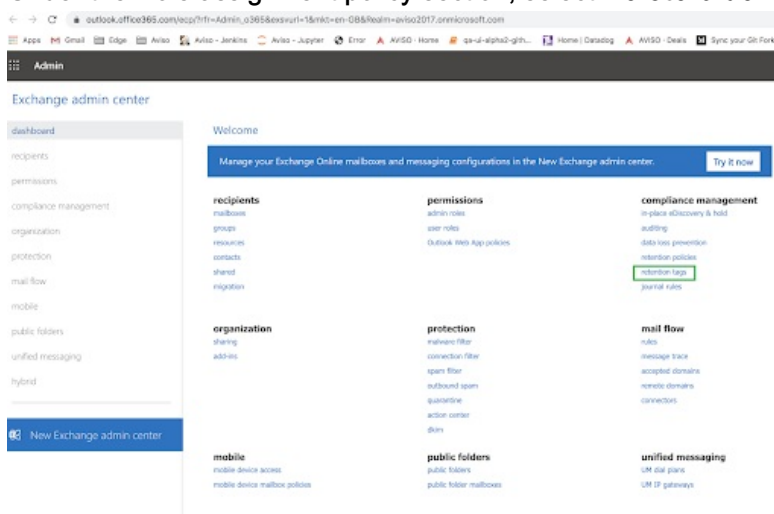


10. Under **Mailboxes** tab, select your newly created shared mailbox.

The General Setting page for the shared mailbox appears.

11. From the left menu bar of your shared mailbox, select **mailbox features**.

12. Under the Role assignment policy section, select **Delete older emails of shared mailbox**.



13. Click **Save**.

After this setup is complete, emails will be automatically removed from the central inbox at a predetermined frequency, which is defined while creating the Retention tag.

Provide the credentials to Aviso implementation team

Provide the following Provide the following.

- Application (client) ID and the Directory (tenant) ID that you created in the [Register your application with Microsoft Outlook](#) topic.
- Client value and the client secret ID that you created in the [Generate client secret value from Microsoft Azure portal](#) topic.
- Unique ID that you copied in the [Copy unique ID of your Sales group from Microsoft 365 admin center](#) topic.

After you provide the Aviso implementation team with the above-mentioned credentials and keys, the team integrates Microsoft Outlook with your Aviso instance.

Introduction

Aviso AI seamlessly integrates with Microsoft Outlook to extract the email body of the shared mailbox. This integration allows sales leaders to obtain a comprehensive and up-to-date understanding of the status of deals via their Microsoft Outlook inbox. This document explains how to integrate Microsoft Outlook with Aviso AI.

Integrating Microsoft Outlook

Microsoft Outlook is an email service provider by Microsoft that enables users to send and receive emails and also manage their calendars, contacts, and so on. To know more about Outlook, see [Microsoft Outlook](#). Integrating Outlook with Aviso requires the following procedures:

- [Prerequisites](#)
- [Register your application with Microsoft Outlook](#)
- [Add API permissions to your Microsoft Outlook application](#)
- [Generate client secret value from Microsoft Azure portal](#)
- [Add users to the shared mailbox](#)
- [Create Administrator consent for Microsoft Outlook mailbox](#)
- [Adding Rules to the shared mailbox](#)
- [Copy unique ID of your Sales group from Microsoft 365 admin center](#)
- [Retention Policy Setup for shared mailbox](#)
- [Provide the credentials to Aviso implementation team](#)

Prerequisites

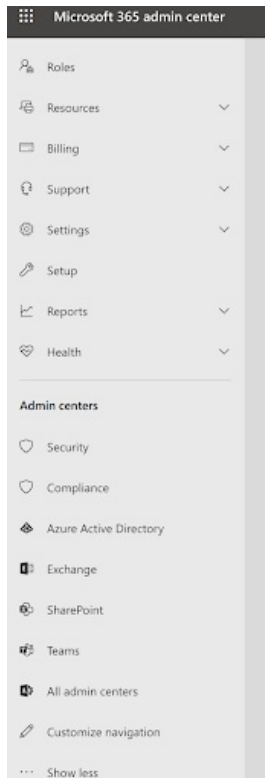
Ensure that you have a Microsoft 365 admin license.

Register your application with Microsoft Outlook

To integrate MS Outlook with Aviso, log on to the Microsoft 365 admin center as an administrator.

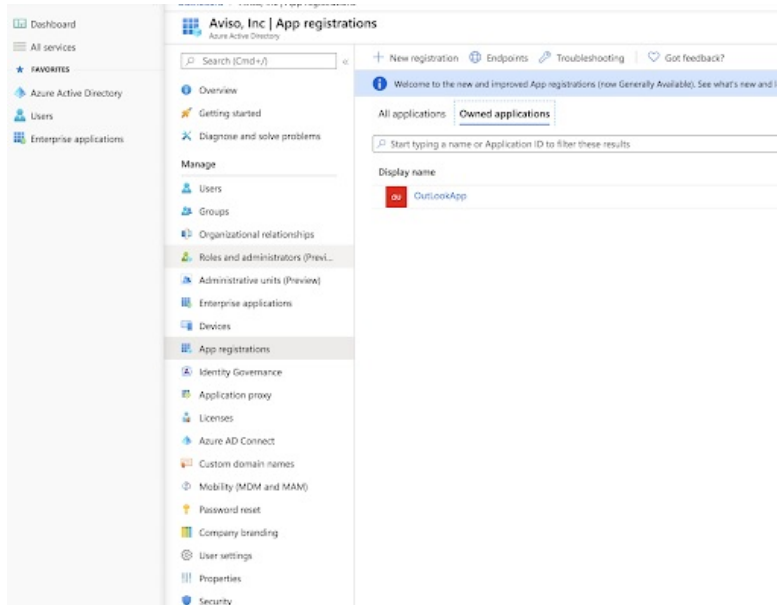
1. Log in to Microsoft 365 admin center.

Microsoft 365 admin center portal appears.



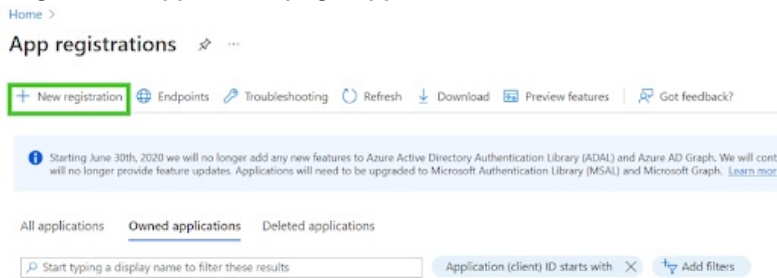
2. On the left-hand navigation pane, click Azure Active Directory.

App registration page appears.



3. On the App registration portal, click New registration.

Register an application page appears.



4. On the new page named Register an application, enter the following information.

- In the Name field, enter a name.
For example, you may enter Aviso Outlook Activity.
- Under Supported account types, select the following option- Account in this organizational directory only (Aviso Inc only - Single tenant)
- Under Redirect URI (optional), perform the following:
 - From the dropdown list, select Web.
 - In the URI field that appears next to the dropdown list, enter a redirect URI. In this case, you may enter:
`https://myapp.com/auth`

5. Click Register.

Aviso Outlook Activity app is now registered and displays the following information.

- Display name
- Application (client) ID
- Directory (tenant) ID
- Object ID



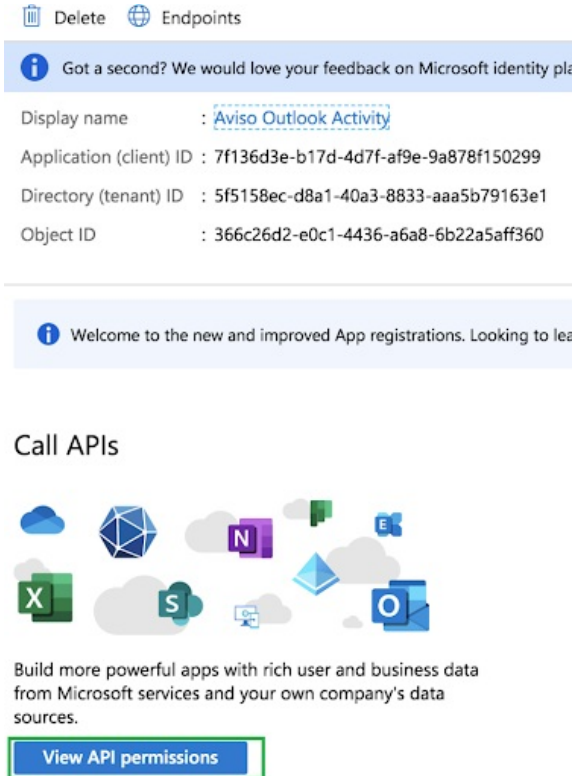
6. Note down and save the Application (client) ID and the Directory (tenant) ID to use in the upcoming steps.

Your application is registered.

Add API permissions to your Microsoft Outlook application

Perform the following steps to add API permissions to your Outlook account that enable you to use Outlook from Aviso AI.

1. After you register the Aviso Outlook Activity app, Click **API Permissions**.



Alternatively, you can perform the following steps to View API Permissions.

- i. On the Microsoft Azure portal, go to Home page.
- ii. Click App registration.
- iii. Select Aviso Outlook Activity.
- iv. On the left menu bar, click API Permissions.

The API Permissions page appears.

2. Under Configured permissions, click **+ Add a permission**.
Request API permissions section appears.
3. Under Microsoft APIs, Click **Microsoft Graph**.
4. Click Application permissions.
Select permissions section appears and shows the list of available permissions categories under a search box. You can expand the permissions categories to view all the available permissions.
5. Select the following permissions:
If you can't find a permission, search the permission using the search box.

Permissions	Purpose
Mail.Read	Allows the app to read email body content along with header information in the mailbox.

Click **Add permissions**.

The app permission page shows all the permissions you added.

6. Ensure that **User.Read** permission is NOT added to the Configured Permissions screen. In case you find the **User.Read** permission under Configured Permissions, remove it by clicking

the three dots, and click delete.

Note

User.Read permission is automatically added when a user account is created. It is recommended that **User.Read** permission be removed to protect the Personally Identifiable Information (PII) of the users who are associated with the customer account.

7. On the Configured Permissions screen, click **Grant admin consent** to grant the permissions added in the previous step.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+

 Add a permission

✓ Grant admin consent for Aviso, Inc.

API / Permissions name	Type	Description	Admin consent req...	Status
Microsoft Graph (2)				
GroupMember.Read.All	Application	Read all group memberships	Yes	Granted for Aviso, Inc. ---
Mail.Read	Application	Read mail in all mailboxes	Yes	Granted for Aviso, Inc. ---

To view and manage permissions and user consent, try [Enterprise applications](#).

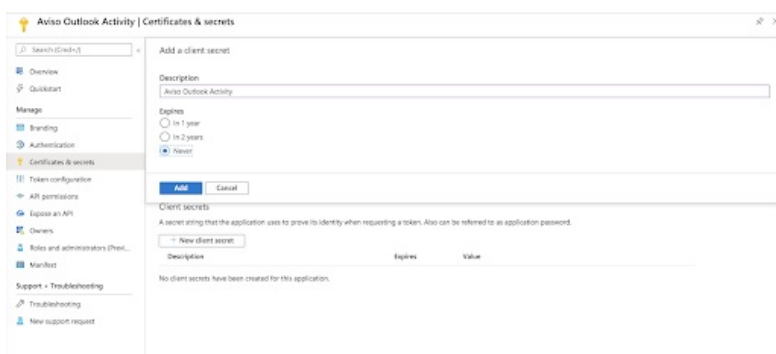
8. Navigate back to the **Aviso Outlook Activity** app and click Overview from the left navigation pane.

Application (Client ID) and **Directory (tenant ID)** appears. Share these credentials with Aviso implementation team.

Generate client secret value from Microsoft Azure portal

Perform the following steps to generate the certificate and secret values from the Microsoft Azure portal.

1. On the Microsoft Azure portal, click **Certificates & secrets** from the left navigation pane.
Certificates & secrets page appears.
2. Under **Client secrets** tab, click **+ New client secret**.
Add a client secret section appears.
3. In the **Add a client secret** section, perform the following steps.
 - o In the **Description** field, add a short description, for example, you may enter **Aviso Outlook Activity**.
 - o In the **Expires** field, select **Never** button.
 - o Click **Add**.



The screenshot shows the 'Add a client secret' form in the Microsoft Azure portal. The left navigation pane is visible with 'Certificates & secrets' selected. The main area has a 'Description' field containing 'Aviso Outlook Activity', an 'Expires' section with radio buttons for 'In 1 year', 'In 2 years', and 'Never' (which is selected), and an 'Add' button. Below this is a 'Client secrets' section with a '+ New client secret' button and a table with columns 'Description', 'Expires', and 'Value'. The table is currently empty, showing a message: 'No client secrets have been created for this application.'

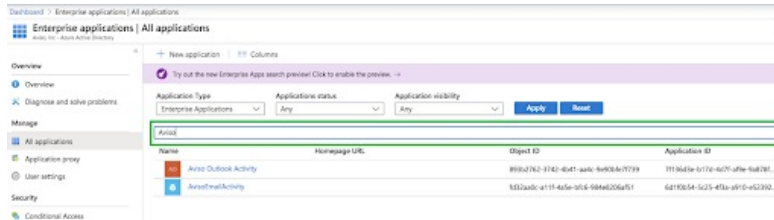
The client secret value is now created. The client secret appears in the encrypted format under **Client secrets** tab.

4. Note down and share the client value to Aviso implementation team.
Share the client secret value in a password-protected Word or XLS file, and share the password in a separate email.

Add users to the shared mailbox

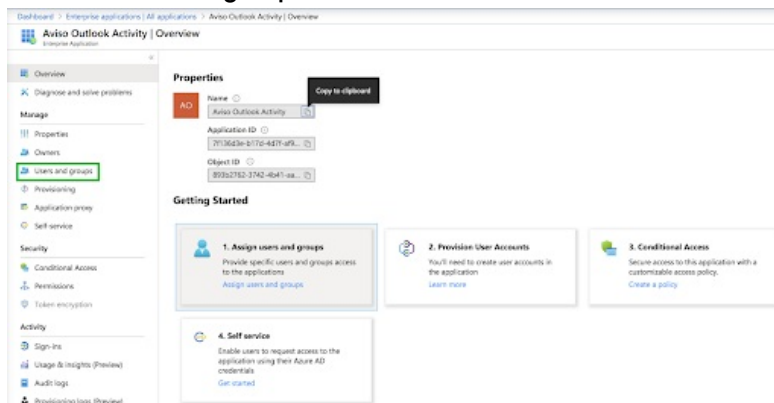
Perform the following steps to add users to the newly created shared mailbox.

1. On the Azure Active Directory admin center, click **Enterprise applications**.
A list of all available apps appears.
2. In the search box, type **Aviso Outlook Activity** and select it.



An overview page of the selected application appears.

3. Select **Users and groups** from the left-hand menu bar.



4. In the **Users and groups** screen, click on **+Add user**.
A new screen named **Add assignment** appears.
5. Click **Users** field.
The user list appears on a side screen.
6. Enter the name of the user in the search box and assign the application, i.e., the shared mailbox, to the user.



7. Click **Select > Assign**.
The app is assigned to the selected users.

Create Administrator consent for Microsoft Outlook mailbox

You can obtain the admin consent using the admin consent URL. Perform the following steps to create Admin consent for the shared mailbox.

1. Create an admin consent URL using the Application ID (Client ID), Directory ID (Tenant ID), and Redirect URI that you generated while registering your application with Microsoft Outlook. For creating URL, follow the pattern provided below.

URL: https://login.microsoftonline.com/<Tenant ID>/adminconsent?client_id=<Client ID>&state=12345&redirect_uri=<RedirectURI>

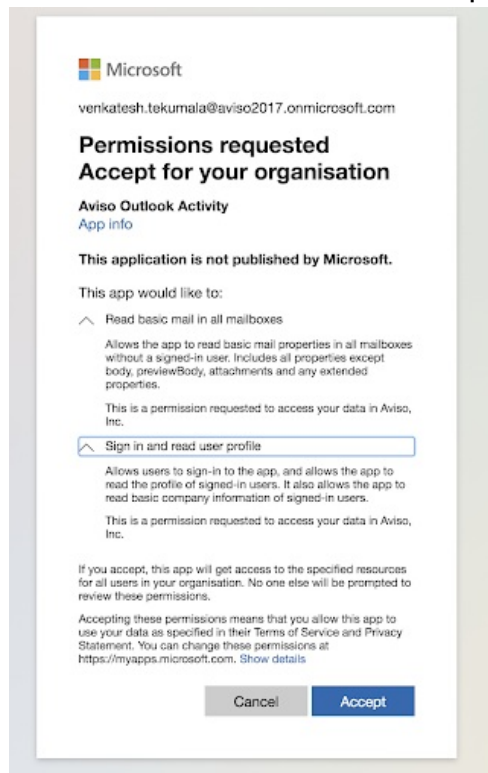
For example:

https://login.microsoftonline.com/abcd12345-xyz-1234-abcd-1234/adminconsent?client_id=abcdwqr-124653-asfasf-213r3rfa-afdf&state=12345&redirect_uri=https://outlook.oauth.aviso.com/abcxyz.com

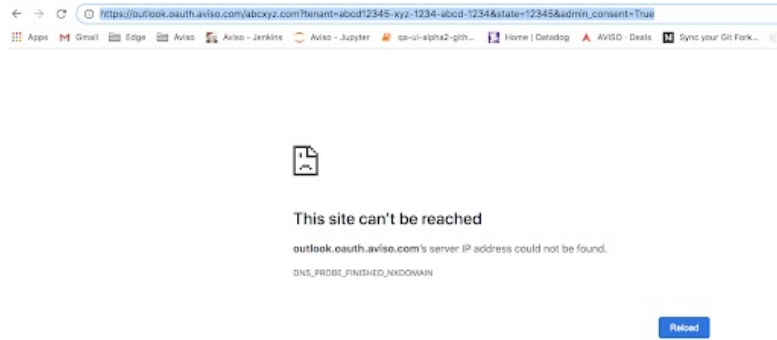
NOTE:

Ensure that your personal and official Microsoft accounts are logged out before performing the above action.

2. Enter the above URL in any browser. The page is redirected to Microsoft login page. If You are prompted for login credentials. Enter only administrator credentials.
3. You are redirected to the Permissions page. Click **Accept**.



4. After you accept the permissions, the web browser redirects you to the Redirect URI.



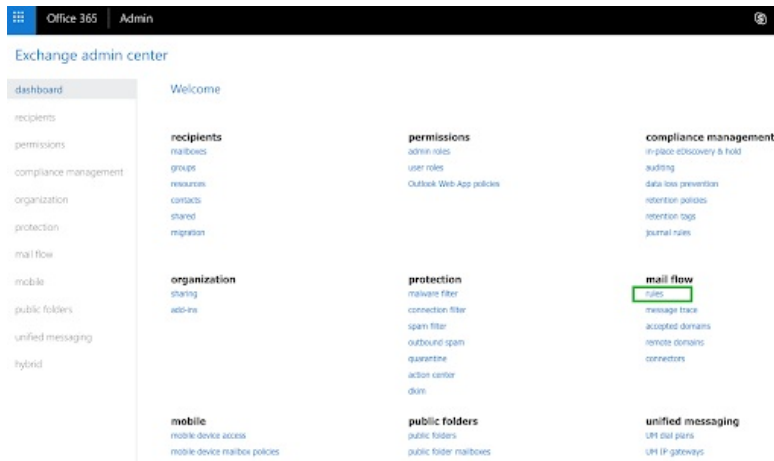
Your administrator content is created.

Adding rules to the shared mailbox

Adding a rule in Aviso Outlook Activity can provide guidelines for how inbound and outbound email activity associated with your shared mailbox is handled by your Office 365 account when a particular user or group of users sends or receives emails.

Perform the following steps to setup rules to your shared mailbox.

1. Open [Microsoft Office 365](#) using your administrative credentials.
2. Navigate to Microsoft 365 Admin center.
3. Under mailflow, click rules.



4. Click on the + icon to create a new rule. These rules are for routing activity to the tracking account.

NOTE:

All activities pertaining to the addition of rules are controlled by the customer, and the customer has full access and authority in determining what activities are permitted.

Setup Inbound rules for the shared mailbox

On the routing page, set up an inbound rule so that any email coming into your organization is automatically BCC'd to the activity tracking inbox.

1. Enter the following information to set up inbound rules.

- In the **Name** field, enter the name for the rule. In this case, you may enter Sales Activity Inbound.
- In the **Do the following** field, select **Bcc the message to**.
- In the **Priority** field, specify the priority level in numbers.
- In the **Audit this rule with severity level** checkbox, select the checkbox.
- In Choose a mode for this rule field, choose the **Enforce** radio button.
- You can configure the frequency of this rule by selecting a date range. Select the date from **Activate this rule on the following date** field.
- You can configure the rule to be deactivated based on the entered date by clicking **Deactivate this rule on the following date** field.

Name:
Sales Activity Inbound

*Apply this rule if...
The recipient is a member of... 'sales_group'
add condition

*Do the following...
Bcc the message to... 'Aviso Outlook Activity'
add action

Except if...
add exception

Properties of this rule:
Priority:
1

☒ Audit this rule with severity level:
Not specified

Choose a mode for this rule:
☒ Enforce
☐ Test with Policy Tips
☐ Test without Policy Tips

☐ Activate this rule on the following date:
Mon 12/16/2019 1:30 PM

☐ Deactivate this rule on the following date:
Mon 12/16/2019 1:30 PM

☐ Stop processing more rules
☐ Defer the message if rule processing doesn't complete

Save Cancel

2. Click **Save**.

Now, all the incoming mails for the assigned users in **Aviso Outlook Activity** will be bcc'd to the shared mailbox.

Setup Outbound Rules for the shared mailbox

Next, you need to create an outbound rule so that all mail sent from an organization is bcc'd to the activity tracking account. Perform the following steps to setup outbound rules to your shared mailbox.

1. Click on the + icon to create a new rule. These rules are for routing activity to the tracking account.
2. Enter the following information to set up inbound rules.
 - In the **Name** field, enter the name for the rule. In this case, you may enter Sales Activity Outbound.
 - In the **Do the following** field, select **Bcc the message to**.
 - In the **Priority** field, specify the priority level in numbers.
 - In the **Audit this rule with severity level** checkbox, select the checkbox.
 - In Choose a mode for this rule field, choose the **Enforce** radio button.
 - You can configure the frequency of this rule by selecting a date range. Select the date from **Activate this rule on the following date:** field.
 - You can configure the rule to be deactivated based on the entered date by clicking **Deactivate this rule on the following date:** field.
3. Click **Save**.

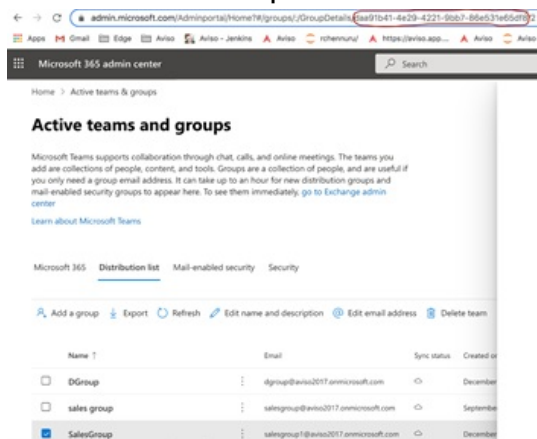
Now, all the outgoing mails of the assigned users in **Aviso Outlook Activity** will be bcc'd to the shared mailbox.

Copy unique ID of your Sales group from Microsoft 365 admin center

Copy the unique ID of the sales group by selecting the sales group. You can get the unique ID from the URI when you select the sales group. A sales group is the one that you create to maintain a distribution list (DL) of users.

If you don't have a sales group in the Microsoft 365 admin center, perform the following steps to create a sales group and copy the unique ID.

1. Open Office 365.
2. Navigate to Microsoft 365 Admin center.
3. Under **User**, click **Teams & groups**.
4. Under **Teams & groups**, select **Active teams & groups**.
5. On the Active teams & groups page, under Microsoft 365 tab, click **Add a group**.
Choose a group type page appears.
6. On the Choose a group type page, select **Distribution** option and click **Next**.
Set up the basics page appears.
7. On the Set up the basics page, in the name field, add a name, for example, SalesGroup.
8. In the **Description** field, add a short description of the group and click **Next**.
Edit settings page appears.
9. On the Edit settings page, in the **Group email address** field, enter email ID of the group and click **Next**.
Review and finish adding group page appears and shows the details of what you added to the group.
10. On the Review and finish adding group page, click **Create group**.
In the Microsoft 365 admin center > Users > Active teams and groups page, under the **Distribution list** tab, the sales group that you created appears.
11. Select the sales group that you created.
The URI shows a unique ID.

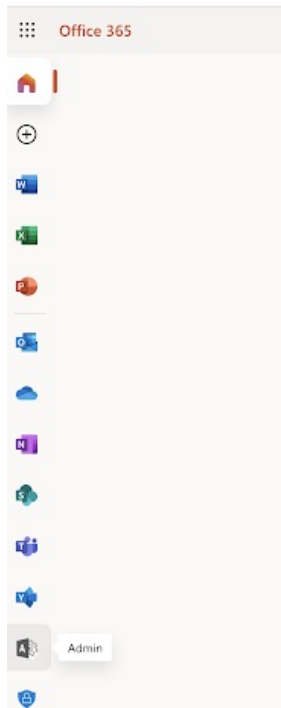


12. Copy the unique ID and share it with the Aviso implementation team.

Retention Policy Setup for shared mailbox

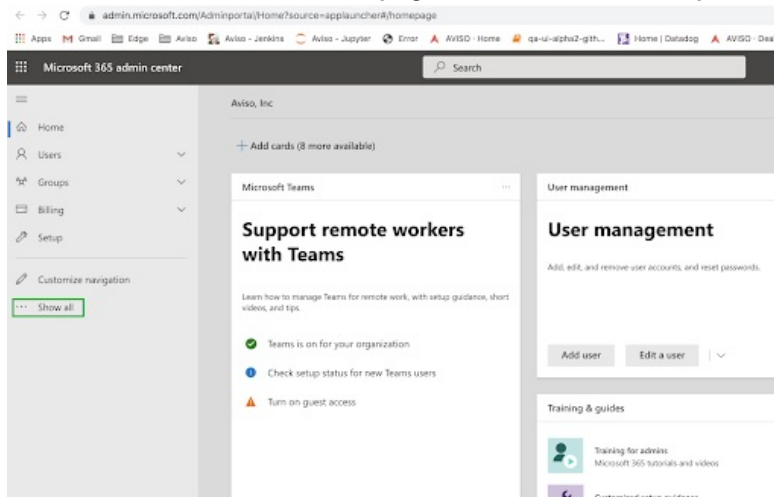
Retention policy specifies the number of days and months you would like to retain mailboxes for each user account. The retention policy allows you to configure your mailbox to delete emails at a time specified by you. Therefore, we recommend that you use retention policy setup to manage retention of your mailbox and space usage. Perform the following steps to setup retention policy for shared mailbox.

1. Login to [Office365](#) using your administrator credentials.
2. From the left hand navigation pane, click **Admin**.



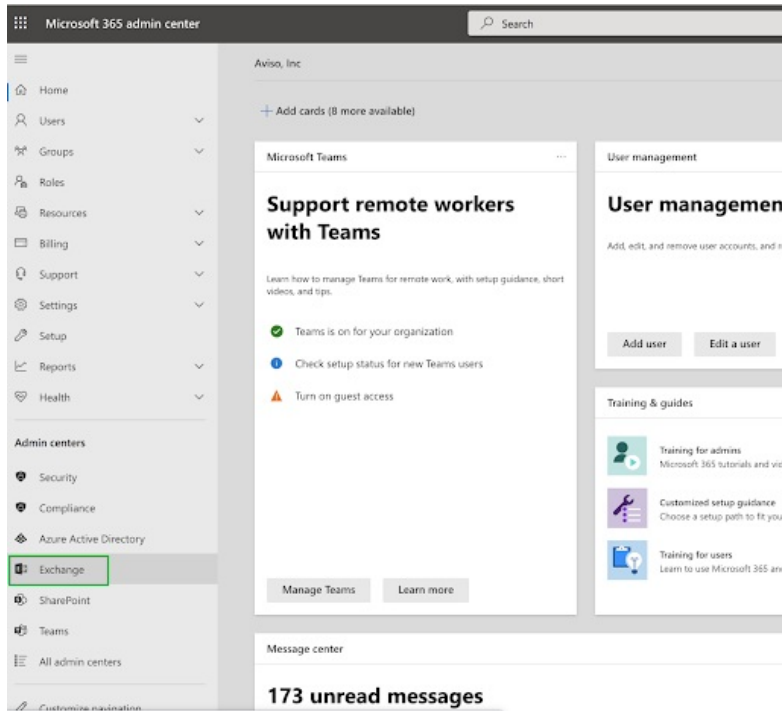
Microsoft 365 admin center page appears.

3. On the Microsoft admin center page, click **Show all** to expand more options.



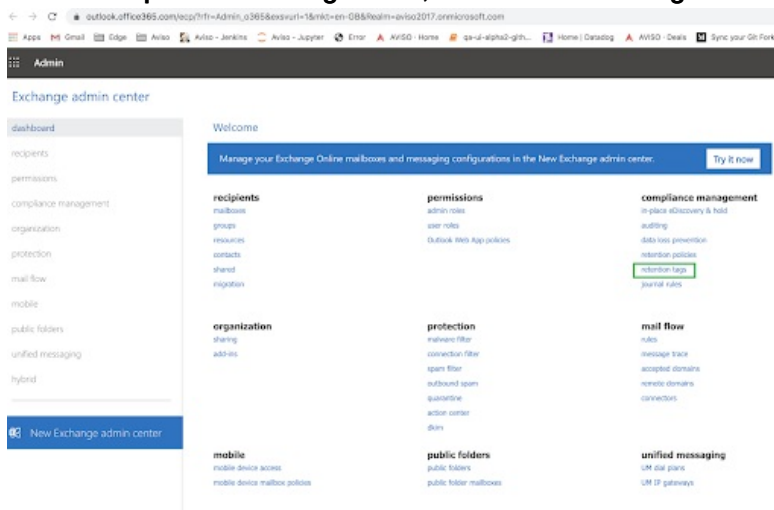
After clicking Show All additional options related to admin centers appears.

4. Under Admin centers, click Exchange.

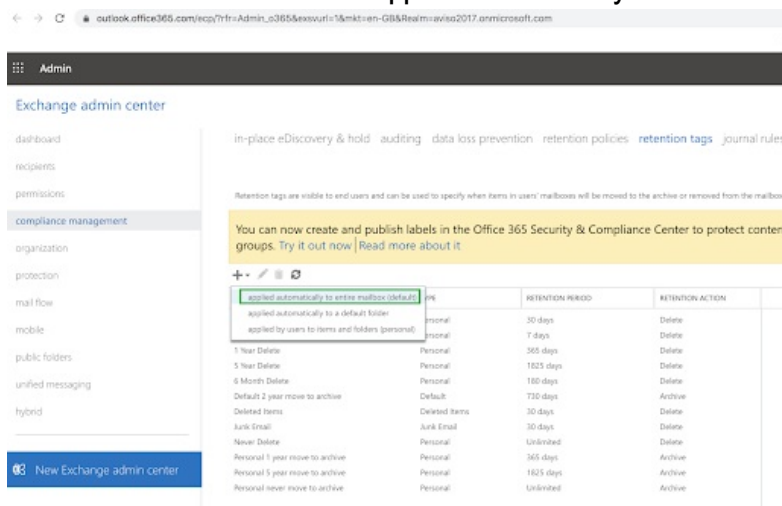


A new page named Exchange admin center appears.

5. Under compliance management, select retention tags.



6. Click on the + icon and select applied automatically to entire mailbox (default).



7. On the new page, enter the following information to assign the tag to the retention policy.

- o Name

In the Name field, assign the name to your newly created retention policy.

- **Retention action**

Under **Retention action**, choose the **Permanently Delete** option.

- **Retention period**

Under **Retention period**, choose the option **When the item reaches the following age (in days)** and enter the number of days. Set the number of days you would like the mails to remain in your shared mailbox.

- **Comment**

Under the **Comment** section, you can add any comments regarding the retention policy.

8. Click Save.

new tag applied automatically to entire mailbox (default)

Name

Retention action

☐ Delete and Allow Recovery

☒ Permanently Delete

☐ Move to Archive

Retention period

☐ Never

☒ When the item reaches the following age (in days)

Comment

Save Cancel

9. Go back to Exchange admin center, and click recipients.

Admin

Exchange admin center

dashboard

recipients

permissions

compliance management

organization

protection

mail flow

mobile

public folders

unified messaging

hybrid

New Exchange admin center

mailboxes groups resources contacts shared migration

Manage your Exchange Online mailboxes and messaging configurations in the New Exchange admin center. Try it now

DISPLAY NAME	MAILBOX TYPE	EMAIL ADDRESS
Avizo Email Activity	User	avizo-email-activity@avizo2017.onmicrosoft.com

10. Under mailboxes tab, select your newly created shared mailbox.

The General Setting page for the shared mailbox appears.

11. From the left menu bar of your shared mailbox, select mailbox features.

12. Under the role assignment policy section, choose Delete older emails of shared mailbox.

13. Click Save.

After this setup is complete, emails will be automatically removed from the central inbox at a predetermined frequency which is defined while creating the Retention tag.

Provide the credentials to Aviso implementation team

Provide the following

- Application (client) ID and the Directory (tenant) ID that you created in the [Register your application with Microsoft Outlook](#) topic.
- Client value and the client secret ID that you created in the [Generate certificate and secret](#) topic.
- Unique ID that you copied in the [Copy unique ID of your Sales group from Microsoft 365 admin center](#) topic.

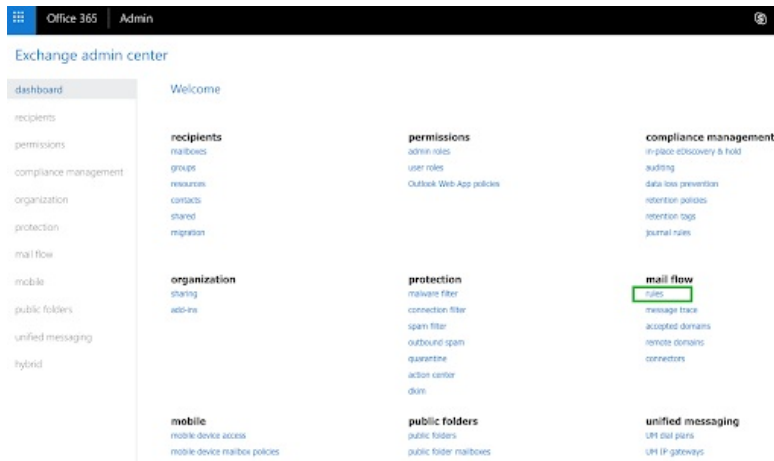
After you provide the Aviso implementation team with the above-mentioned credentials and keys, the team integrates Microsoft Outlook with your Aviso instance.

Adding rules to the shared mailbox

Adding a rule in Aviso Outlook Activity can provide guidelines for how inbound and outbound email activity associated with your shared mailbox is handled by your Office 365 account when a particular user or group of users sends or receives emails.

Perform the following steps to setup rules to your shared mailbox.

1. Open [Microsoft Office 365](#) using your administrative credentials.
2. Navigate to Microsoft 365 Admin center.
3. Under mailflow, click rules.



4. Click on the + icon to create a new rule. These rules are for routing activity to the tracking account.

Note:

All activities pertaining to the addition of rules are controlled by the customer, and the customer has full access and authority in determining what activities are permitted.

Integrating RingCentral

Introduction

Aviso AI seamlessly integrates with RingCentral to let users have virtual meetings with their buyers. Aviso AI is then able to analyze the meeting recording, transcribe it, and provide rich insights to both reps and managers that ultimately help move the conversation forward and provide managers with improvement or coaching areas for sales reps. This document explains how to integrate RingCentral with Aviso AI.

Important

The procedures mentioned in this document are performed by the IT admins to facilitate RingCentral calls from Aviso AI, and these are one-time activities. After RingCentral is integrated with Aviso AI, every user needs to validate their RingCentral account from Aviso AI.

Important

After you perform the procedures mentioned in this document, collect the authorization codes from RingCentral and provide them to the Aviso implementation team to integrate RingCentral with Aviso AI.

Integrating RingCentral with Aviso requires the following procedures:

- [Prerequisites](#)
- [Register an Application with RingCentral](#)
- [Provide the credentials to the Implementation team](#)
- [Validate your RingCentral account in Aviso](#)

Prerequisites

Ensure you have a RingCentral license and admin access to RingCentral.

Register an application with RingCentral

To integrate RingCentral with Aviso, register with RingCentral and collect Client ID, Client Secret, OAuth Authorization URL, and Redirect URI that will be required in the upcoming tasks.

1. Navigate to <https://developers.ringcentral.com/console/applications/create> and log in with your RingCentral Administrator credentials.
Create App form appears.
2. In the **What type of app are you creating?** field, select *REST API App* and click on **Next**.
3. In the **App Name** field, enter a name.
For example, you may enter *Aviso RingCentral Integration*.
4. In the **App Description** field, enter a short description.
For example, you may enter *This Integration is used to request permissions to invoke RingCentral REST API on behalf of another RingCentral user.*
The **Primary Contact** field is auto-populated with your login account email ID.
5. In the **Do you intend to promote this app in the RingCentral App Gallery?** field, select

Yes or No based on your preference.

6. In the **App Card** -> **Display Name** field, enter a name such as *Aviso RingCentral Integration*. In the **App Card** -> **Summary** field, enter a short summary of App. In the **App Card** -> **App Icon**, choose an image icon file of your choice.
7. In the **Auth** section, select *3-legged OAuth flow authorization code*. Under **From what type of app will you be calling the API?**, select *Server-side web app*. In the **OAuth Redirect URI** field, if your Aviso tenant name is xyz-a.com, then enter redirect URI in the following format *https://xyz-a.app.aviso.com/collaboration/register/rcentral*.
8. In the **Issue refresh tokens?** list, select Yes.
9. In **App Permissions**, add the following permissions -
 - Read Contacts
 - Read Accounts
 - Meetings and Role Management.

10. In **'Who will be authorized to access your app?'** field, select *This app is private*.

11. Click **Create**.

The following message appears.

"Your app has been successfully created!

To start your development, please use your sandbox account and application credentials.

Additional information can be found in our Getting Started."

12. Click on the **Credentials** link in the above message.

Credentials page of the Sandbox Application you just created appears.

13. From this screen, note down the following keys and keep them safe for use in the upcoming steps.

- Client ID
- Client Secret

Provide the credentials to the Implementation team

Provide the Aviso Implementation team with the following keys.

- Client ID
- Client Secret
- Redirect URI (The same that you used in step 7 in the [Register an application with RingCentral](#) section).

After you provide the Aviso Implementation team with the above-mentioned credentials and keys, the team integrates RingCentral with your Aviso instance.

Validate your RingCentral account in Aviso

After RingCentral is integrated with Aviso AI, before using RingCentral from Aviso AI, every user must validate their RingCentral account.

Perform the following steps to validate your RingCentral account from Aviso AI.

Prerequisites-

- Ensure that RingCentral is integrated with your Aviso instance.
- Ensure that you have logged in to the RingCentral portal with the correct credentials.

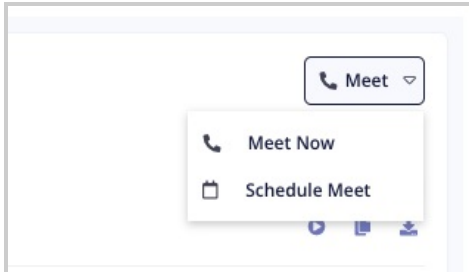


Note

If you use incorrect credentials to log in to RingCentral portal and validate your RingCentral, you can't revert it later.

Perform the following steps to validate Microsoft Teams from Aviso AI.

1. From any digital war room in the Aviso AI, click **Meet Now**.



Meet Now dialog box appears.

Meet Now

Meeting Name: *

Aspects 2_Sep272022-05:33PM

Participants:*

Search for user, or type email address

Call Type*

☐  Aviso Call

☐  Webex Call

☒  RingCentral Call

Validate Ring Central Account

Cancel

Start Meeting

2. Click **Validate RingCentral Account**.

You are redirected to the RingCentral account page. If you have not logged in to RingCentral, you are asked to log in to your RingCentral account.

3. Log in to your RingCentral account.

After you successfully log in to RingCentral account, the following message appears:

```
{“msg”: “Your account is linked successfully to Aviso, please go back to Aviso to continue .”,  
“success”: true}
```

Introduction

Aviso AI seamlessly integrates with Microsoft Outlook to extract the email body of the shared mailbox. This integration allows sales leaders to obtain a comprehensive and up-to-date understanding of the status of deals via their Microsoft Outlook inbox. This document explains how to integrate Microsoft Outlook with Aviso AI.

Integrating Microsoft Outlook

Microsoft Outlook is an email service provider by Microsoft that enables users to send and receive emails and also manage their calendars, contacts, and so on. To know more about Outlook, see [Microsoft Outlook](#). Integrating Outlook with Aviso requires the following procedures:

- Prerequisites
- Register your application with Microsoft Outlook
- Add API permissions to your Microsoft Outlook application
- Generate client secret value from Microsoft Azure portal
- Add users to the shared mailbox
- Create Administrator consent for Microsoft Outlook mailbox
- Adding Rules to the shared mailbox
- Copy unique ID of your Sales group from Microsoft 365 admin center
- Retention Policy Setup for shared mailbox
- Provide the credentials to Aviso implementation team

Prerequisites

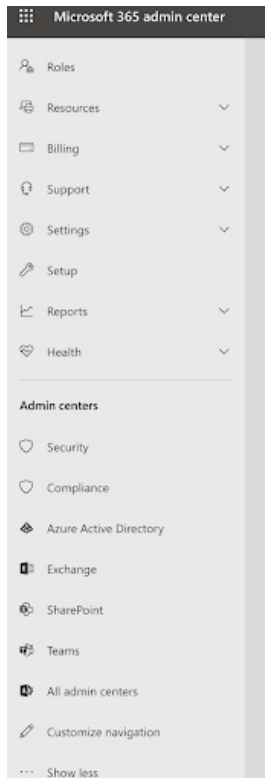
Ensure that you have a Microsoft 365 admin license.

Register your application with Microsoft Outlook

To integrate MS Outlook with Aviso, log on to the Microsoft 365 admin center as an administrator.

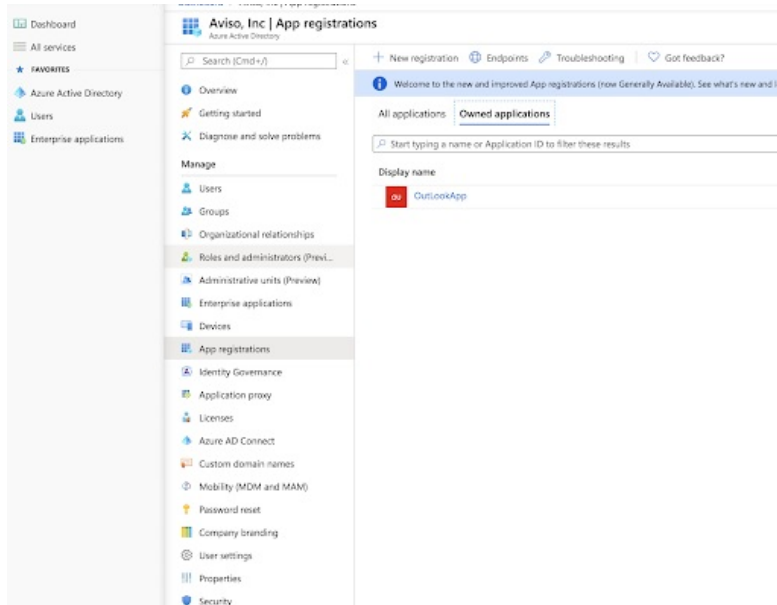
1. Log in to Microsoft 365 admin center.

Microsoft 365 admin center portal appears.



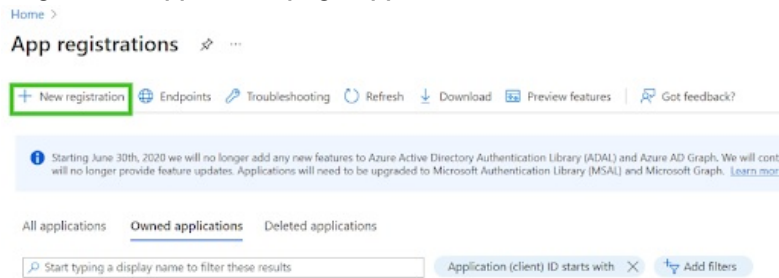
2. On the left-hand navigation pane, click Azure Active Directory.

App registration page appears.



3. On the App registration portal, click New registration.

Register an application page appears.



4. On the new page named Register an application, enter the following information.

- In the Name field, enter a name.
For example, you may enter Aviso Outlook Activity.
- Under Supported account types, select the following option- Account in this organizational directory only (Aviso Inc only - Single tenant)
- Under Redirect URI (optional), perform the following:
 - From the dropdown list, select Web.
 - In the URI field that appears next to the dropdown list, enter a redirect URI. In this case, you may enter:
https://myapp.com/auth

5. Click Register.

Aviso Outlook Activity app is now registered and displays the following information.

- Display name
- Application (client) ID
- Directory (tenant) ID
- Object ID



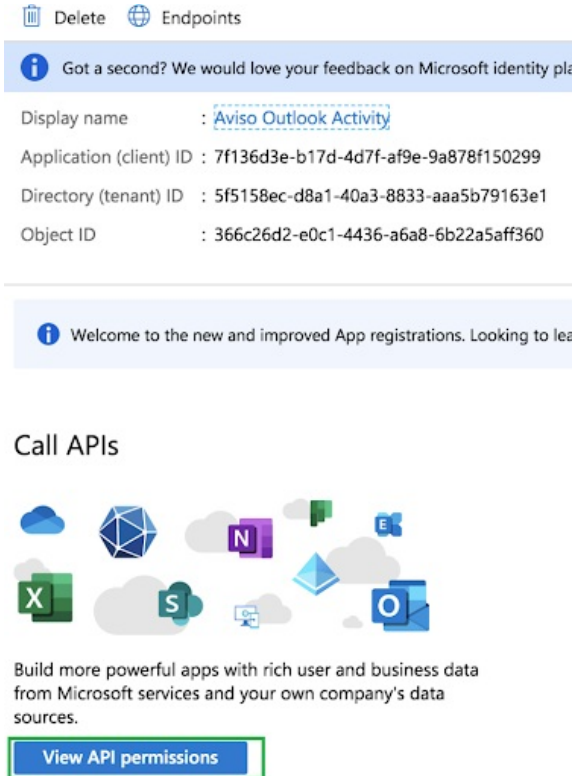
6. Note down and save the Application (client) ID and the Directory (tenant) ID to use in the upcoming steps.

Your application is registered.

Add API permissions to your Microsoft Outlook application

Perform the following steps to add API permissions to your Outlook account that enable you to use Outlook from Aviso AI.

1. After you register the Aviso Outlook Activity app, Click **API Permissions**.



Alternatively, you can perform the following steps to View API Permissions.

- i. On the Microsoft Azure portal, go to Home page.
- ii. Click App registration.
- iii. Select Aviso Outlook Activity.
- iv. On the left menu bar, click API Permissions.

The API Permissions page appears.

2. Under Configured permissions, click **+ Add a permission**.

Request API permissions section appears.

3. Under Microsoft APIs, Click **Microsoft Graph**.

4. Click Application permissions.

Select permissions section appears and shows the list of available permissions categories under a search box. You can expand the permissions categories to view all the available permissions.

5. Select the following permissions:

If you can't find a permission, search the permission using the search box.

Permissions	Purpose
Mail.ReadBasic	Allows the app to read email headers in the mailbox. Emails will not be accessed by the Aviso app; only headers will be accessed.

Click **Add permissions**.

The app permission page shows all the permissions you added.

6. Ensure that **User.Read** permission is NOT added to the Configured Permissions screen. In case you find the **User.Read** permission under Configured Permissions, remove it by clicking

the three dots, and click delete.

Note

User.Read permission is automatically added when a user account is created. It is recommended that **User.Read** permission be removed to protect the Personally Identifiable Information (PII) of the users who are associated with the customer account.

7. On the Configured Permissions screen, click **Grant admin consent** to grant the permissions added in the previous step.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+

 Add a permission

✓ Grant admin consent for Aviso, Inc.

API / Permissions name	Type	Description	Admin consent req...	Status
Microsoft Graph (2)				
GroupMember.Read.All	Application	Read all group memberships	Yes	Granted for Aviso, Inc. ...
Mail.Read	Application	Read mail in all mailboxes	Yes	Granted for Aviso, Inc. ...

To view and manage permissions and user consent, try [Enterprise applications](#).

8. Navigate back to the **Aviso Outlook Activity** app and click **Overview** from the left navigation pane.

Application (Client ID) and **Directory (tenant ID)** appears. Share these credentials with Aviso implementation team.

Generate client secret value from Microsoft Azure portal

Perform the following steps to generate the certificate and secret values from the Microsoft Azure portal.

1. On the Microsoft Azure portal, click **Certificates & secrets** from the left navigation pane.
Certificates & secrets page appears.
2. Under **Client secrets** tab, click **+ New client secret**.
Add a client secret section appears.
3. In the **Add a client secret** section, perform the following steps.
 - o In the **Description** field, add a short description, for example, you may enter **Aviso Outlook Activity**.
 - o In the **Expires** field, select **Never** button.
 - o Click **Add**.

The screenshot shows the 'Add a client secret' form in the Azure portal. The form is titled 'Add a client secret' and is part of the 'Certificates & secrets' section for the application 'Aviso Outlook Activity'. It contains a 'Description' field with the value 'Aviso Outlook Activity', an 'Expires' section with radio buttons for 'In 1 year', 'In 2 years', and 'Never' (which is selected), and 'Add' and 'Cancel' buttons. Below the form, there is a 'Client secrets' table with columns 'Description', 'Expires', and 'Value'. A message states 'No client secrets have been created for this application.' The left navigation pane shows 'Certificates & secrets' as the active section.

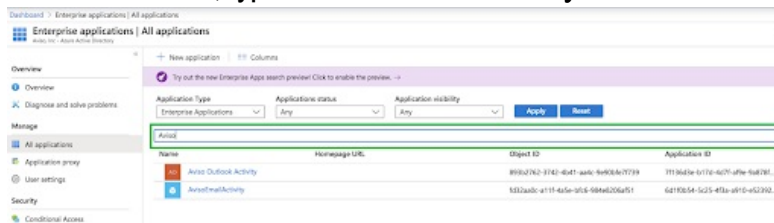
The client secret value is now created. The client secret appears in the encrypted format under Client secrets tab.

4. Note down and share the client value to Aviso implementation team.
Share the client secret value in a password-protected Word or XLS file, and share the password in a separate email.

Add users to the shared mailbox

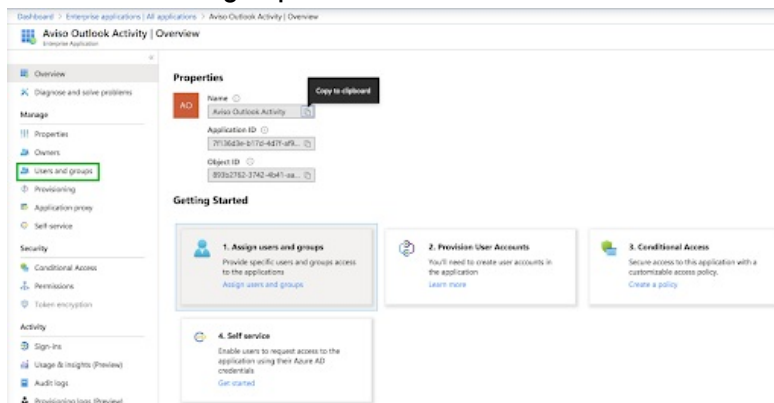
Perform the following steps to add users to the newly created shared mailbox.

1. On the Azure Active Directory admin center, click **Enterprise applications**.
A list of all available apps appears.
2. In the search box, type **Aviso Outlook Activity** and select it.



An overview page of the selected application appears.

3. Select **Users and groups** from the left-hand menu bar.



4. In the **Users and groups** screen, click on **+Add user**.
A new screen named **Add assignment** appears.
5. Click **Users** field.
The user list appears on a side screen.
6. Enter the name of the user in the search box and assign the application, i.e., the shared mailbox, to the user.



7. Click **Select > Assign**.
The app is assigned to the selected users.

Create Administrator consent for Microsoft Outlook mailbox

You can obtain the admin consent using the admin consent URL. Perform the following steps to create Admin consent for the shared mailbox.

1. Create an admin consent URL using the Application ID (Client ID), Directory ID (Tenant ID), and Redirect URI that you generated while registering your application with Microsoft Outlook. For creating URL, follow the pattern provided below.

URL: https://login.microsoftonline.com/<Tenant ID>/adminconsent?client_id=<Client ID>&state=12345&redirect_uri=<RedirectURI>

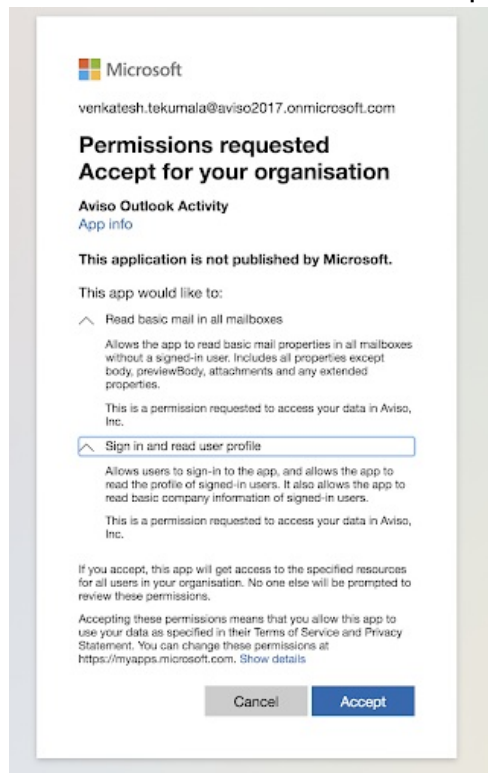
For example:

https://login.microsoftonline.com/abcd12345-xyz-1234-abcd-1234/adminconsent?client_id=abcdwqr-124653-asfasf-213r3rfa-afdf&state=12345&redirect_uri=https://outlook.oauth.aviso.com/abcxyz.com

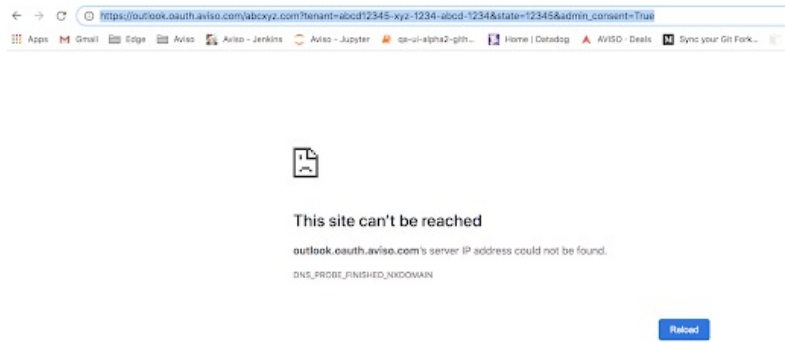
NOTE:

Ensure that your personal and official Microsoft accounts are logged out before performing the above action.

2. Enter the above URL in any browser. The page is redirected to Microsoft login page. If You are prompted for login credentials. Enter only administrator credentials.
3. You are redirected to the Permissions page. Click **Accept**.



4. After you accept the permissions, the web browser redirects you to the Redirect URI.



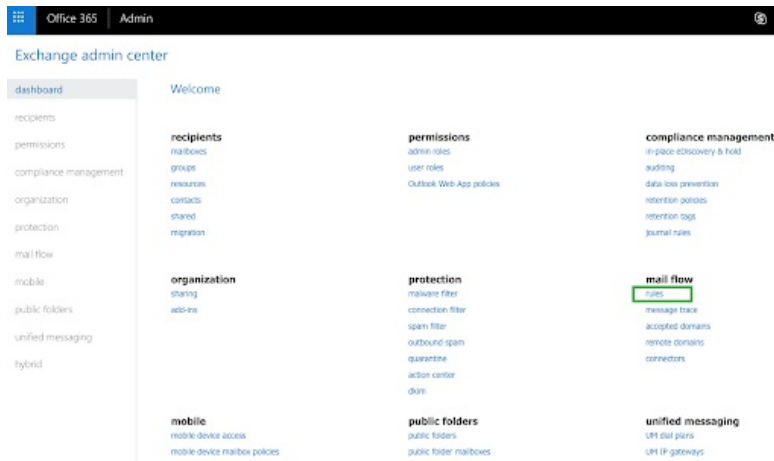
Your administrator content is created.

Adding Rules to the shared mailbox

Adding a rule in Aviso Outlook Activity can provide guidelines for how inbound and outbound email activity associated with your shared mailbox is handled by your Office 365 account when a particular user or group of users sends or receives emails.

Perform the following steps to setup rules to your shared mailbox.

1. Open [Microsoft Office 365](#) using your administrative credentials.
2. Navigate to Microsoft 365 Admin center.
3. Under mailflow, click rules.



4. Click on the + icon to create a new rule. These rules are for routing activity to the tracking account.

Note:

All activities pertaining to the addition of rules are controlled by the customer, and the customer has full access and authority in determining what activities are permitted.

Setup Inbound Rules for the shared mailbox

On the routing page, set up an inbound rule so that any email coming into your organization is automatically BCC'd to the activity tracking inbox.

1. Enter the following information to set up inbound rules.

- In the **Name** field, enter the name for the rule. In this case, you may enter Sales Activity Inbound.
- In the **Do the following** field, select **Bcc the message to**.
- In the **Priority** field, specify the priority level in numbers.
- In the **Audit this rule with severity level** checkbox, select the checkbox.
- In Choose a mode for this rule field, choose the **Enforce** radio button.
- You can configure the frequency of this rule by selecting a date range. Select the date from **Activate this rule on the following date** field.
- You can configure the rule to be deactivated based on the entered date by clicking **Deactivate this rule on the following date** field.

The screenshot shows the 'New Rule' configuration window in Outlook. The 'Name' field is set to 'Sales Activity Inbound'. Under 'Apply this rule if...', the condition is 'The recipient is a member of...' with a dropdown menu showing 'sales_group'. There is an 'add condition' button. Under 'Do the following...', the action is 'Bcc the message to...' with a dropdown menu showing 'Aviso Outlook Activity'. There is an 'add action' button. The 'Except if...' section has an 'add exception' button. The 'Properties of this rule:' section shows 'Priority' set to '1'. The 'Audit this rule with severity level:' checkbox is checked, with a dropdown set to 'Not specified'. The 'Choose a mode for this rule:' section has three radio buttons: 'Enforce' (selected), 'Test with Policy Tips', and 'Test without Policy Tips'. There are two date range options: 'Activate this rule on the following date:' and 'Deactivate this rule on the following date:', both set to 'Mon 12/16/2019' at '1:30 PM'. At the bottom, there are checkboxes for 'Stop processing more rules' and 'Defer the message if rule processing doesn't complete'. The 'Save' button is highlighted with a green border, and the 'Cancel' button is also visible.

2. Click **Save**.

Now, all the incoming mails for the assigned users in **Aviso Outlook Activity** will be bcc'd to the shared mailbox.

Setup Outbound Rules for the shared mailbox

Next, you need to create an outbound rule so that all mail sent from an organization is bcc'd to the activity tracking account. Perform the following steps to setup outbound rules to your shared mailbox.

1. Click on the + icon to create a new rule. These rules are for routing activity to the tracking account.
2. Enter the following information to set up inbound rules.
 - In the **Name** field, enter the name for the rule. In this case, you may enter Sales Activity Outbound.
 - In the **Do the following** field, select **Bcc the message to**.
 - In the **Priority** field, specify the priority level in numbers.
 - In the **Audit this rule with severity level** checkbox, select the checkbox.
 - In Choose a mode for this rule field, choose the **Enforce** radio button.
 - You can configure the frequency of this rule by selecting a date range. Select the date from **Activate this rule on the following date:** field.
 - You can configure the rule to be deactivated based on the entered date by clicking **Deactivate this rule on the following date:** field.
3. Click **Save**.

Now, all the outgoing mails of the assigned users in **Aviso Outlook Activity** will be bcc'd to the shared mailbox.

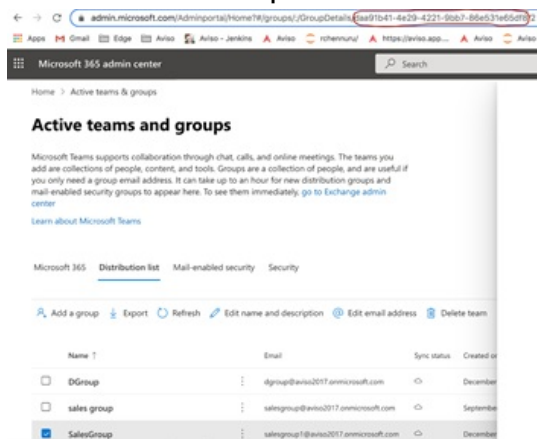
Copy unique ID of your Sales group from Microsoft 365 admin center

Copy the unique ID of the sales group by selecting the sales group. You can get the unique ID from the URI when you select the sales group. A sales group is the one that you create to maintain a distribution list (DL) of users.

If you don't have a sales group in the Microsoft 365 admin center, perform the following steps to create a sales group and copy the unique ID.

1. Open Office 365.
2. Navigate to Microsoft 365 Admin center.
3. Under **User**, click **Teams & groups**.
4. Under **Teams & groups**, select **Active teams & groups**.
5. On the Active teams & groups page, under Microsoft 365 tab, click **Add a group**.
Choose a group type page appears.
6. On the Choose a group type page, select **Distribution** option and click **Next**.
Set up the basics page appears.
7. On the Set up the basics page, in the name field, add a name, for example, SalesGroup.
8. In the **Description** field, add a short description of the group and click **Next**.
Edit settings page appears.
9. On the Edit settings page, in the **Group email address** field, enter email ID of the group and click **Next**.
Review and finish adding group page appears and shows the details of what you added to the group.
10. On the Review and finish adding group page, click **Create group**.
In the Microsoft 365 admin center > Users > Active teams and groups page, under the **Distribution list** tab, the sales group that you created appears.
11. Select the sales group that you created.

The URI shows a unique ID.

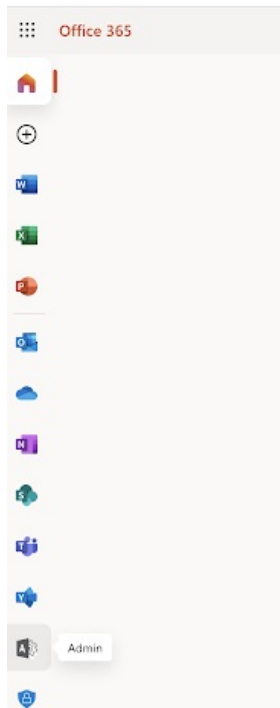


12. Copy the unique ID and share it with the Aviso implementation team.

Retention Policy Setup for shared mailbox

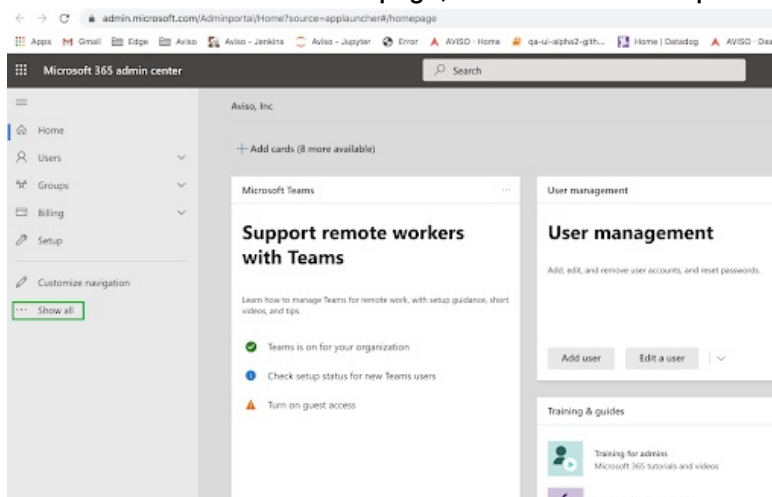
Retention policy specifies the number of days and months you would like to retain mailboxes for each user account. The retention policy allows you to configure your mailbox to delete emails at a time specified by you. Therefore, we recommend that you use retention policy setup to manage retention of your mailbox and space usage. Perform the following steps to setup retention policy for shared mailbox.

1. Login to [Office365](#) using your administrator credentials.
2. From the left hand navigation pane, click **Admin**.



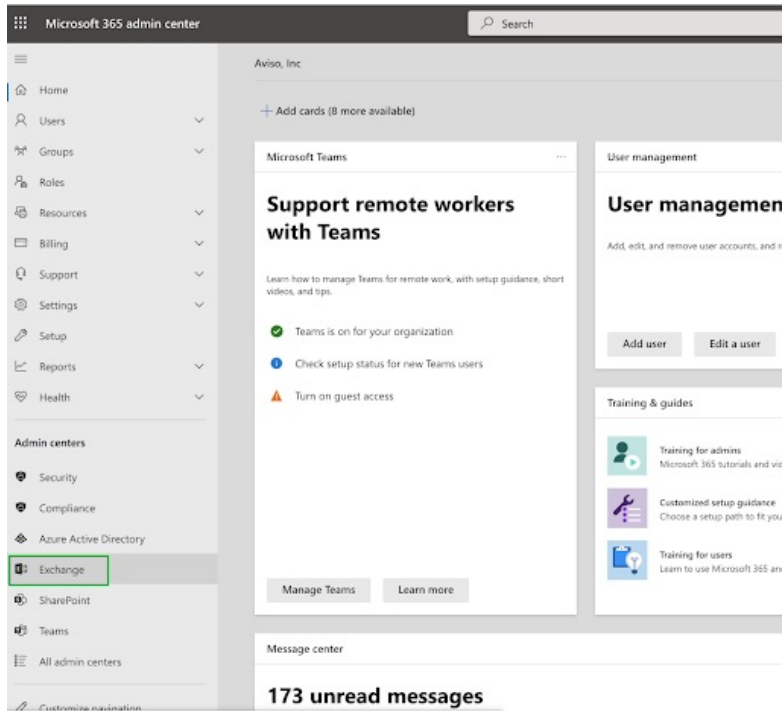
Microsoft 365 admin center page appears.

3. On the Microsoft admin center page, click **Show all** to expand more options.



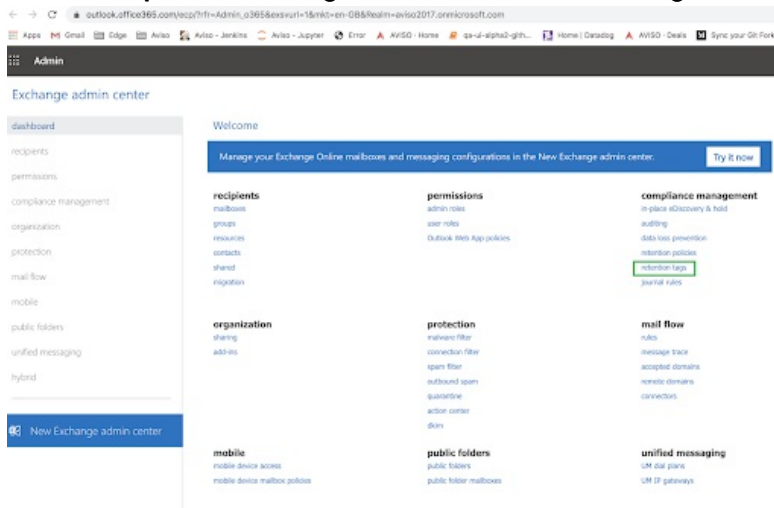
After clicking Show All additional options related to admin centers appears.

4. Under Admin centers, click Exchange.

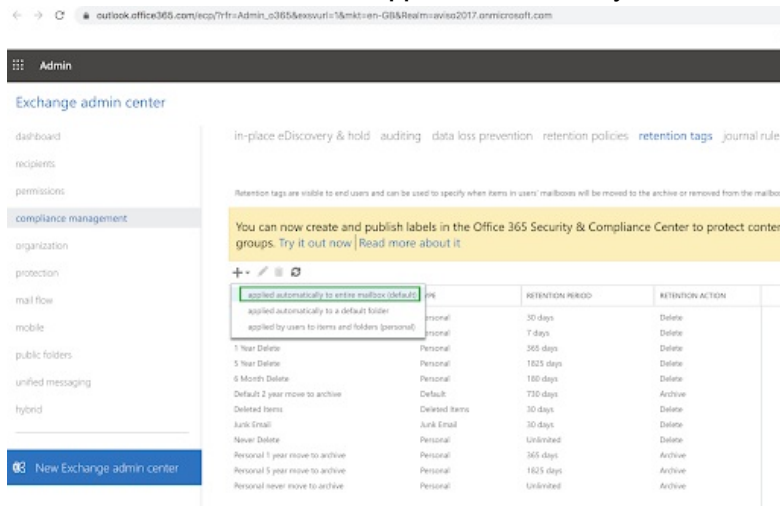


A new page named Exchange admin center appears.

5. Under compliance management, select retention tags.



6. Click on the + icon and select applied automatically to entire mailbox (default).



7. On the new page, enter the following information to assign the tag to the retention policy.

- o Name

In the Name field, assign the name to your newly created retention policy.

- Retention action

Under **Retention action**, choose the Permanently Delete option.

- Retention period

Under **Retention period**, choose the option **When the item reaches the following age (in days)** and enter the number of days. Set the number of days you would like the mails to remain in your shared mailbox.

- Comment

Under the **Comment** section, you can add any comments regarding the retention policy.

8. Click **Save**.

new tag applied automatically to entire mailbox (default)

Name

Retention action

Retention period

Comment

Save Cancel

9. Go back to Exchange admin center, and click **recipients**.

Admin

Exchange admin center

dashboard recipients permissions compliance management organization protection mail flow mobile public folders unified messaging hybrid

mailboxes groups resources contacts shared migration

Manage your Exchange Online mailboxes and messaging configurations in the New Exchange admin center. Try it now

DISPLAY NAME	MAILBOX TYPE	EMAIL ADDRESS
Arko Email Activity	User	arko-email-activity@evlc2017.onmicrosoft.com

New Exchange admin center

10. Under **mailboxes** tab, select your newly created shared mailbox.

The General Setting page for the shared mailbox appears.

11. From the left menu bar of your shared mailbox, select **mailbox features**.

12. Under the **role assignment policy** section, choose **Delete older emails of shared mailbox**.

13. Click **Save**.

Provide the credentials to Aviso implementation team

Provide the following

- Application (client) ID and the Directory (tenant) ID that you created in the [Register your application with Microsoft Outlook](#) topic.
- Client value and the client secret ID that you created in the [Generate certificate and secret](#) topic.
- Unique ID that you copied in the [Copy unique ID of your Sales group from Microsoft 365 admin center](#) topic.

After you provide the Aviso implementation team with the above-mentioned credentials and keys, the team integrates Microsoft Outlook with your Aviso instance.

Integrating webex

Aviso AI seamlessly integrates with webex to let users have virtual meetings with their buyers. Aviso AI is then able to analyze the meeting recording, transcribe it, and provide rich insights to both reps and managers that ultimately help move the conversation forward and provide managers with improvement or coaching areas for reps. This document explains how to integrate webex with Aviso AI.

Important:

The procedures mentioned in this document are performed by the IT admins to facilitate webex calls from Aviso AI, and these are one-time activities. After webex is integrated with Aviso AI, every user needs to validate their webex account from Aviso AI.

Important:

After you perform the procedures mentioned in this document, collect the authorization codes from webex and share them with the Aviso executive to integrate webex with Aviso AI.

Integrating webex with Aviso requires the following procedures:

- Prerequisites
- Create an Integration with Webex
- Provide the credentials to Aviso Executives
- Validate your Webex account in Aviso

Prerequisites

Ensure that you have a webex admin license.

Register your integration with webex

To integrate webex with Aviso AI, register with webex and collect Client ID, Client Secret, OAuth Authorization Url, and Redirect URI that will be required in the later steps.

1. Go to <https://developer.webex.com/my-apps/new/integration> and log in with your webex administrative credentials.
New Integration form appears.
2. In the **Will this integration use a mobile SDK?** dropdown list, select *No*.
3. In the **Integration Name** field, enter a name.
For example, you may enter "Aviso webex".
4. In the **Icon** field, choose or upload an icon of your choice for the Aviso Integration with webex.
5. In the **Description** field, enter a short description.
For example, you may enter "This Integration is used to request permissions to invoke webex REST API on behalf of another webex user".
6. In the **Redirect URI(s)** field, enter the following redirect URI:
`https://<tenant_domain>.app.aviso.com/collaboration/register/webex.`

Note

If the tenant name in the Aviso app is "abc_customer.com", then the tenant domain will be "abc-customer" and the URI will be "https://abc-customer.app.aviso.com/collaboration/register/ms-team".

The underscore (_) in the tenant name is replaced by a hyphen (-) in the **tenant domain**.

7. Scopes - Select the following scopes from the list.

Scope	Description
meeting:schedules_read	Retrieve your Webex meeting lists and details
meeting:schedules_write	Create, manage, or cancel your scheduled Webex meetings
meeting:recordings_read	Retrieve your Webex meeting recordings for playback
meeting:recordings_write	Manage or delete your meeting recordings for playback
meeting:preferences_read	Retrieve your Webex meeting preferences
meeting:preferences_write	Edit your Webex meeting preferences
meeting:controls_read	Read meeting control information for in-progress meetings
meeting:controls_write	Update meeting controls for in-progress meetings
meeting:participants_read	Read participant information from meetings
meeting:participants_write	Manage participants within meetings
meeting:admin_schedule_read	Retrieve meetings of all WebEx users of your organization
meeting:admin_schedule_write	Create, manage, or cancel meetings of all WebEx users of your organization
meeting:admin_recordings_read	Retrieve recordings of all WebEx users of your organization
meeting:admin_recordings_write	Manage or delete recordings of all WebEx users of your organization
meeting:transcripts_read	Retrieve your Webex meetings transcripts
spark:people_read	Read your users' company directory
spark-admin:people_read	Access to read your user's company directory
identity:placeonetimepassword_create	Access to a one time password to a place to create an activation code
Identity:one_time_password	Request a one time password for people, devices, and things
identity:groups_rw	Read Write groups
identity:groups_read	Read group
identity:tokens_read	Admin can list token ids for a user
identity:tokens_write	Admin can delete token for a user

8. Click **Add Integration**.

The newly created Integration details page appears.

9. From this screen, note down the following information and keep it safe for use in the [upcoming step](#).

- Client ID
- Client Secret (The Client Secret will only be shown once so copy and keep it safe)
- OAuth Authorization URL
- Redirect URI

Provide the credentials to Aviso implementation team

Provide the Aviso implementation team with the following credentials that you collected from the last step:

- Application (client) ID
- Client secret ID
- OAuth Authorization URL
- Redirect URI

After you provide the Aviso implementation team with the above-mentioned credentials, the team integrates webex with your Aviso instance.

Validate your webex account in Aviso

After webex is integrated with Aviso AI, every user must validate their webex account to use webex from Aviso AI. Perform the following steps to validate your webex account from Aviso AI.

Prerequisites

- Ensure that webex is integrated with your Aviso instance.
- Ensure that you have logged in to webex with the correct credentials.

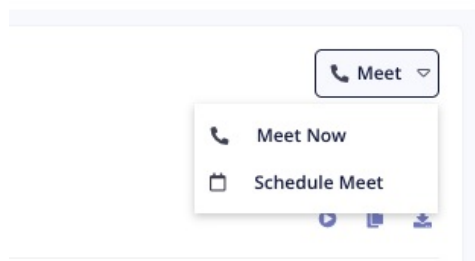
Important

If you use incorrect credentials to log in to Webex and validate your Webex Account, you can't revert it later.

Steps

Perform the following steps to validate webex from Aviso AI.

1. From any digital war room in the Aviso AI, click **Meet Now**.



Meet Now dialog box appears.

2. From the available call types, select **webex**.

Meet Now

Meeting Name: *

New Webex_Jul152022-06:32PM

Participants:*

Search for user, or type email address

Call Type*

☐  Aviso Call

☐  Zoom Call

☒  WebEx

Validate WebEx Account

Cancel

Start Meeting

3. Click **Validate Webex Account**.

Webex account page appears. If you have not logged in to webex, you are asked to log in to your webex account.

4. Log in to your webex account.

After you successfully log in to Webex account, the following message appears:

```
{"success": true, "msg": "Your account is linked successfully to Aviso, Please go back to Aviso to continue."}
```

Integrating Microsoft Dynamics

Introduction

Aviso AI seamlessly integrates with Microsoft Dynamics to extract data such as opportunities, accounts, and system users. Aviso AI is then able to process this data through AI and provide you with actionable insights, notifications, and alerts. This document explains how to integrate Microsoft Dynamics with Aviso AI.

Important

The procedures mentioned in this document are performed by the IT admins to facilitate Microsoft Dynamics integration with Aviso platform, and these are one-time activities.

Important

After you perform the procedures mentioned in this document, collect the authorization codes from **Microsoft Dynamics** and share them with the Aviso implementation team to integrate **Microsoft Dynamics** with Aviso AI.

Integrating Microsoft Dynamics with Aviso requires the following procedures:

- [Prerequisites](#)
- [Register your application on Microsoft Azure portal](#)
- [Add application user to Dynamics 365](#)
- [Configure Aviso platform to integrate Microsoft Dynamics](#)

Prerequisites

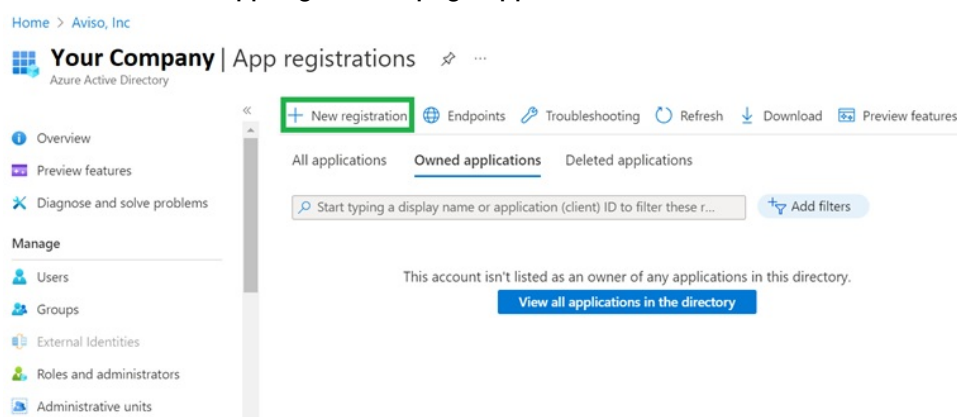
Ensure you have admin access to Microsoft Dynamics.

Register your application on Microsoft Azure portal

Perform the following steps to register your application on Microsoft Azure portal:

1. Log in to [Microsoft Azure](#) with your admin credentials.

Microsoft Azure > App registration page appears.



2. Click **+New Registration**.

Register an application screen appears.

Register an application ...

* Name

The user-facing display name for this application (this can be changed later).

Aviso Integration ✓

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (Default Directory only - Single tenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- ☐ Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Select a platform ▼ e.g. https://example.com/auth

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from [Enterprise applications](#).

By proceeding, you agree to the [Microsoft Platform Policies](#) ☑

[Register](#)

- In the **Name** field, enter a name of your choice.

Under **Supported account types**, *Accounts in this organizational directory only (Default Directory only - Single tenant)* checkbox is selected by default.

- Click **Register**.

A new screen appears and shows the following IDs.

Essentials

Display name
[Company name](#)

Application (client) ID
337da524-9015-48ca-8482-722eed99bd68

Object ID
1d4f73c7-bd10-4e3d-9c96-4b5f50182351

Directory (tenant) ID
5f5158ec-d8a1-40a3-8833-aaa5b79163e1

Supported account types
[My organization only](#)

Client credentials

[Add a certificate or secret](#)

Redirect URIs
[Add a Redirect URI](#)

Application ID URI
[Add an Application ID URI](#)

Managed application in local directory
[Company name](#)

- Note down the **Application (client) ID** and **Directory (tenant) ID**.

- Click the **Add a certificate or secret** link to generate client secret.

Certificate & secrets screen appears.

Certificates & secrets ✕ ...

[Got feedback?](#)

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Certificates (0) **Client secrets (0)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

[+ New client secret](#)

Description	Expires	Value	Secret ID
-------------	---------	-------	-----------

No client secrets have been created for this application.

- Click **+ New client secret**.

Add a client secret dialog box appears.

Add a client secret ×

Description

Expires

8. In the **Description** field, enter a short description of why you need the client secret.
9. From the **Expiry** list, select the maximum value available.
10. Click **Add**.

The client secret value and secret ID appear on the screen.

Certificates (0) Client secrets (1) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

[+ New client secret](#)

Description	Expires	Value ⓘ	Secret ID
Test test	11/9/2024	KG_*****	00000000-0000-0000-0000-0000000000001aa0...

11. Note down the secret value and secret ID immediately after the values appear on the screen.
The secret value is masked after that.
12. From the left menu, click **API permissions**.
Configured permissions screen appears.

Search << Refresh Got feedback?

Manage

- Overview
- Quickstart
- Integration assistant
- Branding & properties
- Authentication
- Certificates & secrets
- Token configuration
- API permissions**
- Expose an API
- App roles

tps://portal.azure.com/#home

Configured permissions

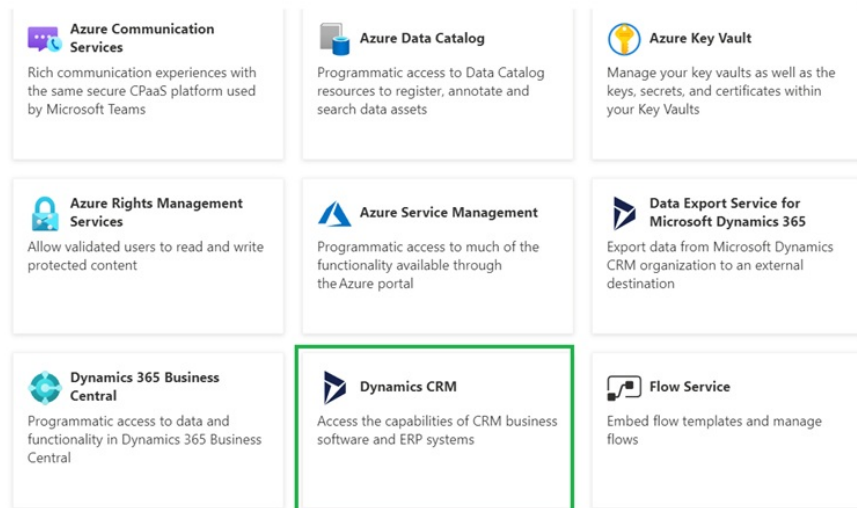
Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. They include all the permissions the application needs. [Learn more about permissions and consent](#)

[+ Add a permission](#) ✓ Grant admin consent for Aviso, Inc

API / Permissions name	Type	Description	Admin consent req...	Status
Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	

13. Click **+ Add a permission**.
Request API permissions dialog box appears.

Request API permissions



14. Under **Microsoft APIs** tab, select **Dynamics CRM**.

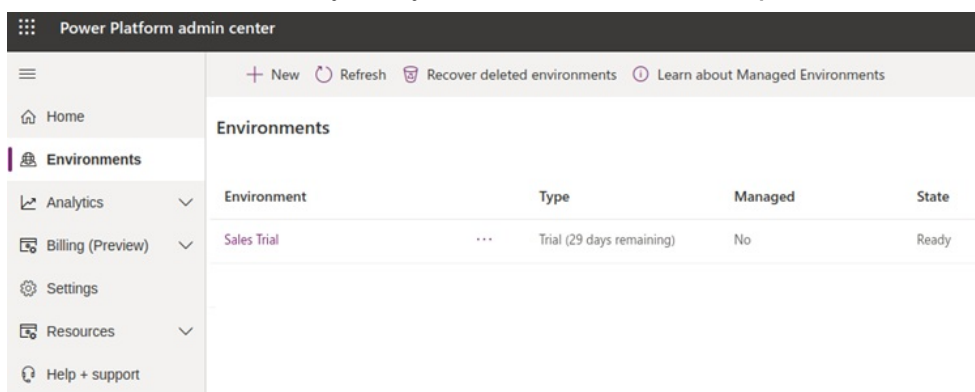
The Dynamics CRM dialog box appears.

15. Click **user_impersonation** checkbox and click **Add permissions**.

Add application user to Dynamics 365

Perform the following steps to add an application user to Dynamics 365.

1. Log in to [Power Platform admin center](#) using your admin credentials.
Environment screen appears and lists all the environments.
2. Under **Environments**, click your Dynamic 360 environment to open it.



The Details section of the environment appears.

Details [See all](#) [Edit](#)

Environment URL org7e63011b.crm.dynamics.com	State Ready	Region United States
Refresh cadence Frequent	Type Trial (29 days remaining)	Security group Not assigned
Organization ID 2de54899-da13-45f2-a0cd-bf2d8843fe9	Environment ID 9629def8-fa00-e781-a47d-29fb437c8108	

Version

Database version
9.2.22101.00174

Updates

2022 release wave 2
On
[See what's new in the release](#)

Recent operations [Full history](#)

Type	Start time	End time
Create	11/9/2022, 6:23:41 AM	11/9/2022, 6:23:50 AM

Access

Security roles
[See all](#)

Teams
[See all](#)

Users
[See all](#)

S2S apps
[See all](#)

Resources

- Dynamics 365 apps
- Power Pages sites
- Power Apps
- Flows

3. Click Users.

Users screen appears.

Power Platform admin center

[+ Add user](#) [Refresh](#) [Manage users in Dynamics 365](#)

Environments > Sales Trial > Settings > Users

Manage users so they can access data within their environment. This list includes users with disabled and enabled statuses. [Learn more](#)

Looking for application users? Click here to go to the [app users list](#)

To validate user permissions for specific app(s), go to [app access checker](#).

4. Click the app users list link.

Application users screen appears.

Power Platform admin center

[+ New app user](#)

Environments > Sales Trial > Settings > Application users

Manage the non-interactive users in this environment so your apps can access Dataverse data. [Learn more](#)

You don't have any app users yet

[+ Setup app user](#)

Create a new app user [×](#)

App *

[+ Add an app](#)

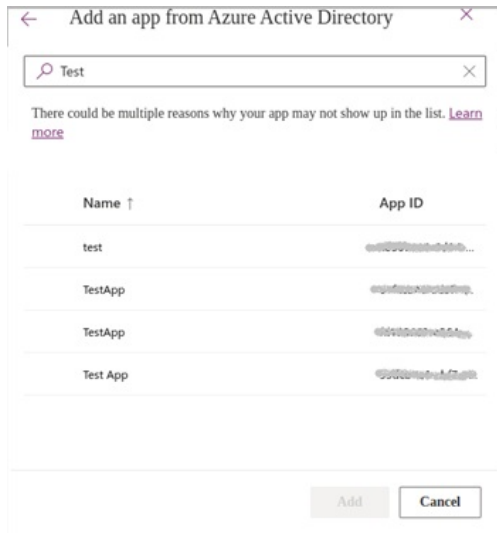
Business unit *
Select

Security roles(0)

5. Click + Setup user.

Create a new app user dialog box appears as shown in the image attached in the last step.

6. Click Add an app and from the list of apps, select the app that you created while performing the previous task - [Register your application on Microsoft Azure portal](#).



7. From the **Business unit** list, select the correct business unit.
 8. (Optional) Edit **Security roles** field to add the required security roles.
 9. Click **Create**.
- The newly created app user appears on the Application users screen.

Configuring Aviso platform to integrate Microsoft Dynamics

Provide the following information that you collected from Microsoft Azure portal to the Aviso implementation team to integrate Microsoft Dynamics with your Aviso AI instance:

- username (integration user username)- Create a CRM user for this integration. Share the username of the CRM user.
- password (integration user password)- Create a CRM user for this integration. Share the password of the CRM user.
- client_id (Application (client ID))- generated while [you registered the application, step number 5](#).
- tenant_id (Directory (tenant ID))- generated while [you registered the application, step number 5](#).
- customer secret (Customer secret value we generated above)- generated while [you registered the application, step number 11](#).
- crm url (MS dynamics url)- When you log in to the CRM, you get a unique URL, for example, *https://org2222a2h6.crm2.dynamics.com*.

For security purpose, you can use a password-protected excel sheet to share the information with the Aviso implementation team and share the password in a separate email or chat.