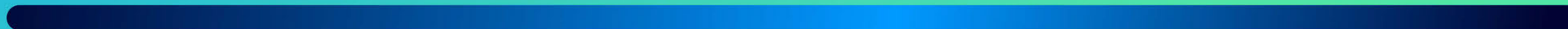




CUSTOMER ENGAGEMENT

Conversations That Remember.
Customer Relationships That Grow.



Overview

Your Upgrade Awaits: Discover What's Possible with ChatBeacon AIX

03 New Operator Workspace

05 Theme Studio

06 Refined Visitor Chat Experience

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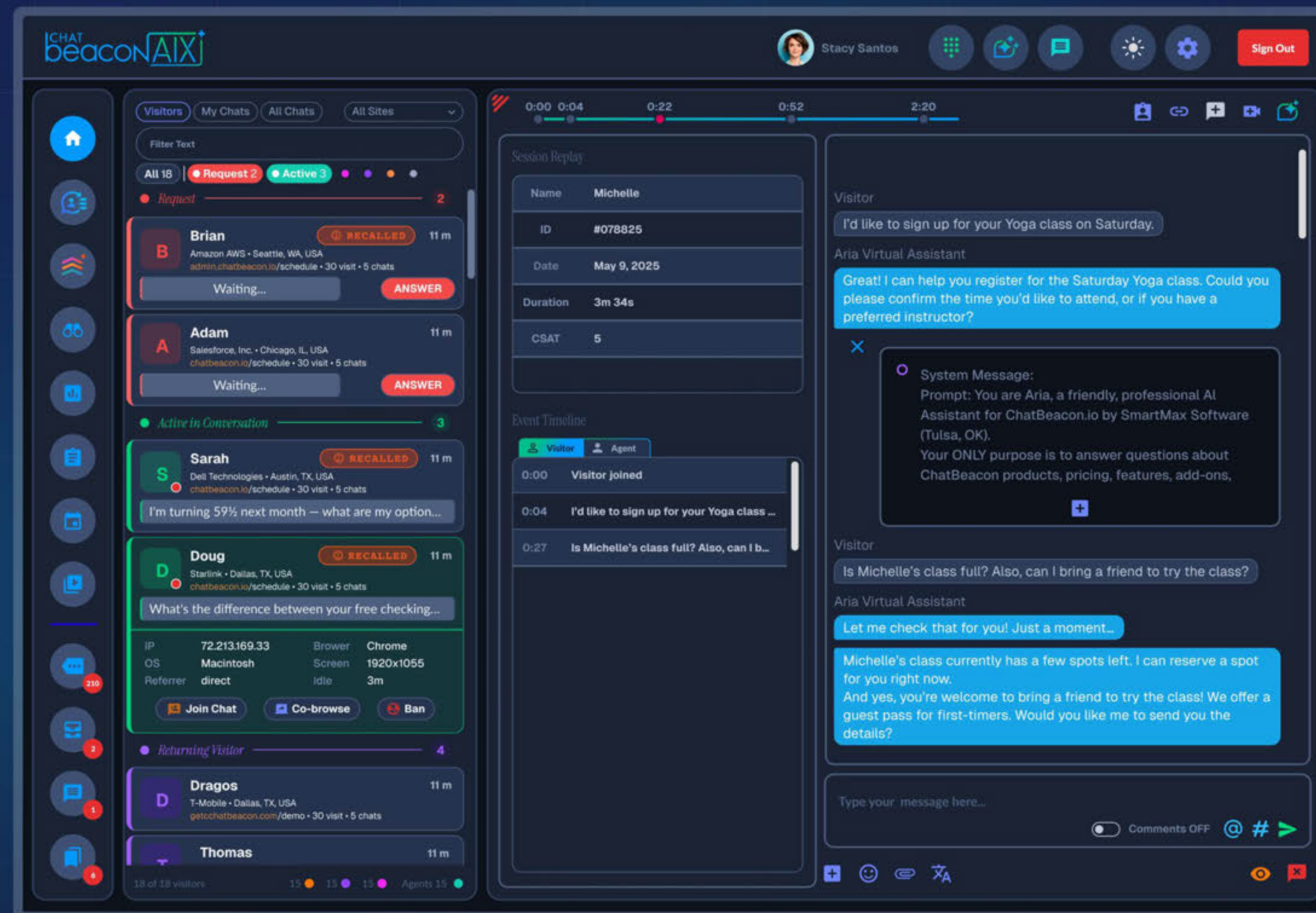
*ARIA WORKFLOW ASSISTANT | CO-BROWSE & SCREEN SHARE |
CUE INSTANT RECALL | SMS CHAT | CHATBEACON RECALL CRM |
VIDEO CHAT | AI ESCALATION | PICTUREDATA | ENTRA ID |
PRIVATE DEDICATED CLOUD*

21 Next Steps

ALL-NEW OPERATOR WORKSPACE

Built for Speed. Designed for Humans.

Welcome to a better way to work. The redesigned Operator Workspace is faster, cleaner, and more intuitive than ever, built for real-world performance and daily comfort.



WHAT'S NEW:

-  Lightning-fast Operator Workspace, responsive with every action
-  Effortless navigation with virtually no learning curve
-  Dynamic dark and light modes that reduce eye strain across long shifts

WHY IT MATTERS:

A faster, more intuitive workspace helps operators stay focused, respond with confidence, and deliver exceptional service throughout the day.

A workspace built for the way you work.

The entire operator workspace brings live conversations, visitor activity, customer context, and frontline actions into one unified view.

The screenshot displays the CHAT beacon AIIXI operator workspace. The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons for home, chat, and other functions. Callouts include "Recall CRM" pointing to the home icon and "AI Escalation" pointing to the chat icon.
- Top Bar:** Shows the user's name "Stacy Santos" and a "Sign Out" button. A callout "AI Operator Assistant" points to the top right area.
- Visitors List:** A list of visitors with their names, locations, and chat status. Callouts include "Easy Navigation" pointing to the "Visitors" tab, "Simple Filtering" pointing to the filter text input, and "Co-Browse" pointing to the "Co-browse" button for Patricia.
- Session Replay:** A section showing the session history for a selected visitor, including Name, ID, Date, Duration, and CSAT.
- Event Timeline:** A timeline of events for the selected visitor, such as "Visitor joined", "I'd like to open a business checking...", and "Do you have accounts with no mont...".
- Chat Window:** A large area for live chat. It shows a conversation with a visitor and an AI Virtual Assistant. Callouts include "Video Chat" pointing to the video chat icon and "Summarize" pointing to the summarize button.
- Bottom Bar:** A message input area with a "Type your message here..." prompt and a "Live Translation" callout pointing to the translation icon.

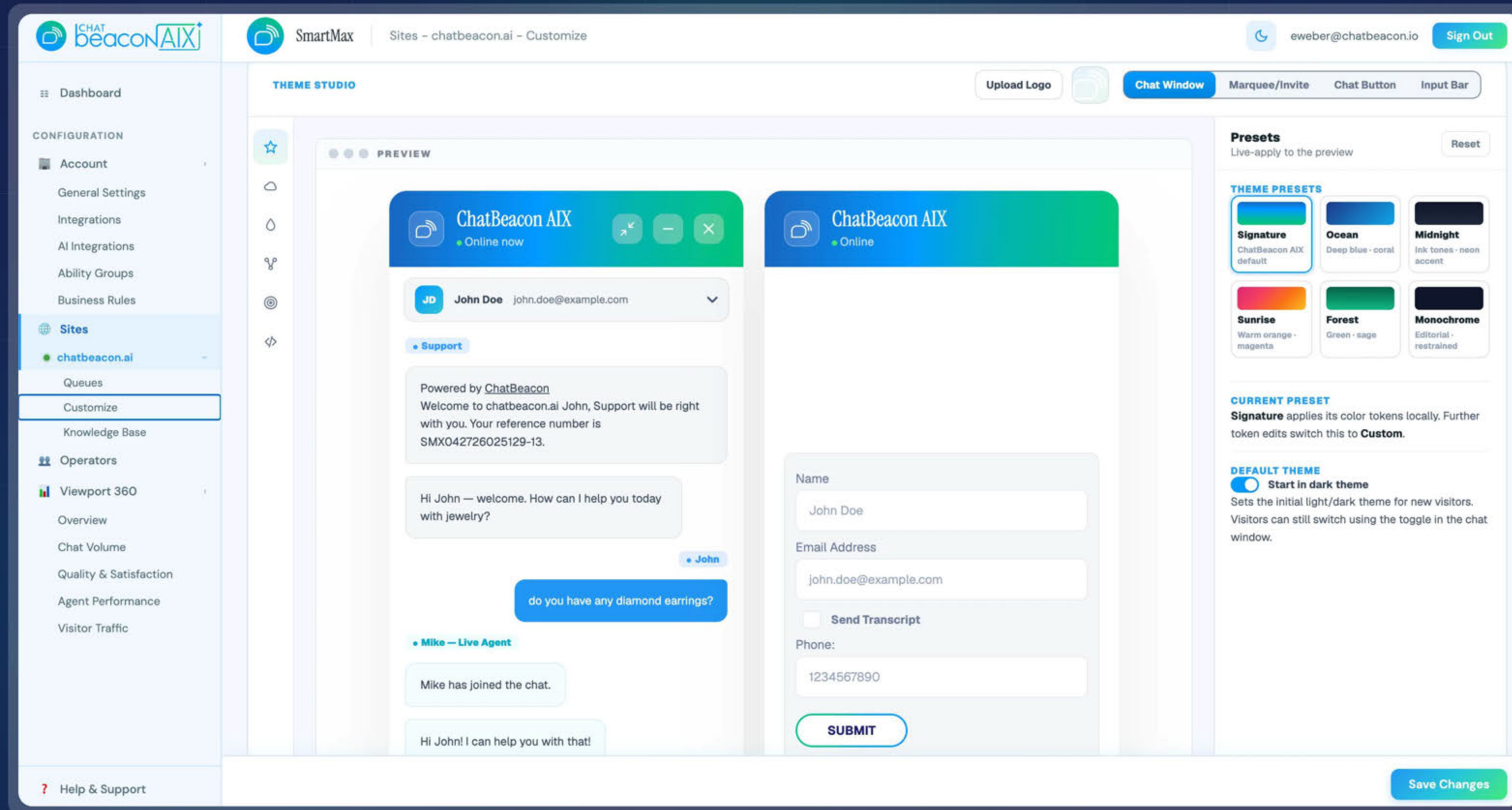
Search and filter visitor history instantly, without digging for details.

A more powerful visitor grid organizes visitors in real time by status and surfaces rich context at a glance

Qualify leads, recognize intent, and enter the conversation at the right moment with real-time visitor intelligence at your fingertips.

ChatBeacon Theme Studio – *Make every chat unmistakably yours.*

Theme Studio is a visual editor that turns your brand guidelines into a polished visitor experience, no CSS, no developers. Tune colors, type, shape, and motion in real time, then ship a chat window that looks like it was always part of your site.



Brand-aware palette. Drop in primary, accent, and surface colors – every bubble, button, and badge updates instantly.

Type pairing. Pick a header serif and a body sans from a curated library, or load your own webfont.

Shape & motion. Choose corner radius, bubble tail style, and animation feel from polished presets.

Side-by-side preview. Light and dark mode update together, push to staging or live with one click.

THE EXPERIENCE BEHIND EVERY HELLO

A Better Chat Experience, Built Around the Visitor

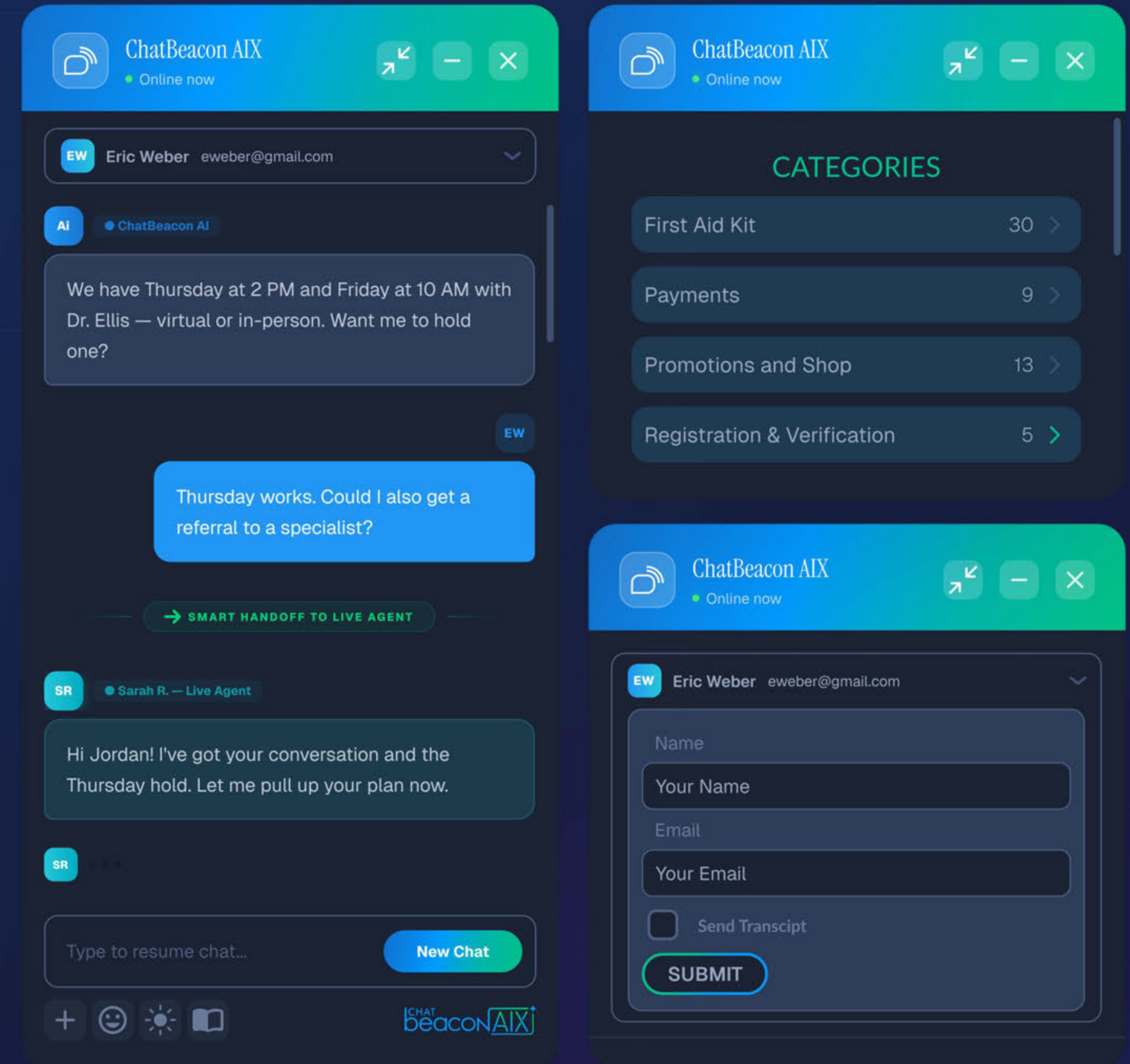
The updated Visitor Interface makes every interaction easier, with a cleaner design, touch-friendly controls, and a responsive experience built for sales, service, and support.

Large, clear controls for effortless interaction on any device

Instant light and dark mode switching for a more comfortable viewing experience

Turn every completed chat into feedback and a lasting record

Automatically adapts across desktop, tablet, and mobile for a consistent experience on every screen.



The Payoff:

A faster, easier chat experience that encourages engagement, builds confidence, and keeps visitors connected to your team.

INTELLIGENCE BESIDE EVERY OPERATOR

ChatBeacon AI Operator Assistant

Ask questions, uncover insights, and get immediate answers from the conversations and activity already inside ChatBeacon. From team performance to visitor intent, the AI Operator Assistant helps managers and operators understand what is happening without searching reports or leaving the workspace.

Examples of What You Can Ask:

- “What’s our average response time today?”
- “Which operator accepted the most chats this month?”
- “What's the wait time in the Support queue right now?”

BUILT FOR YOUR TEAM

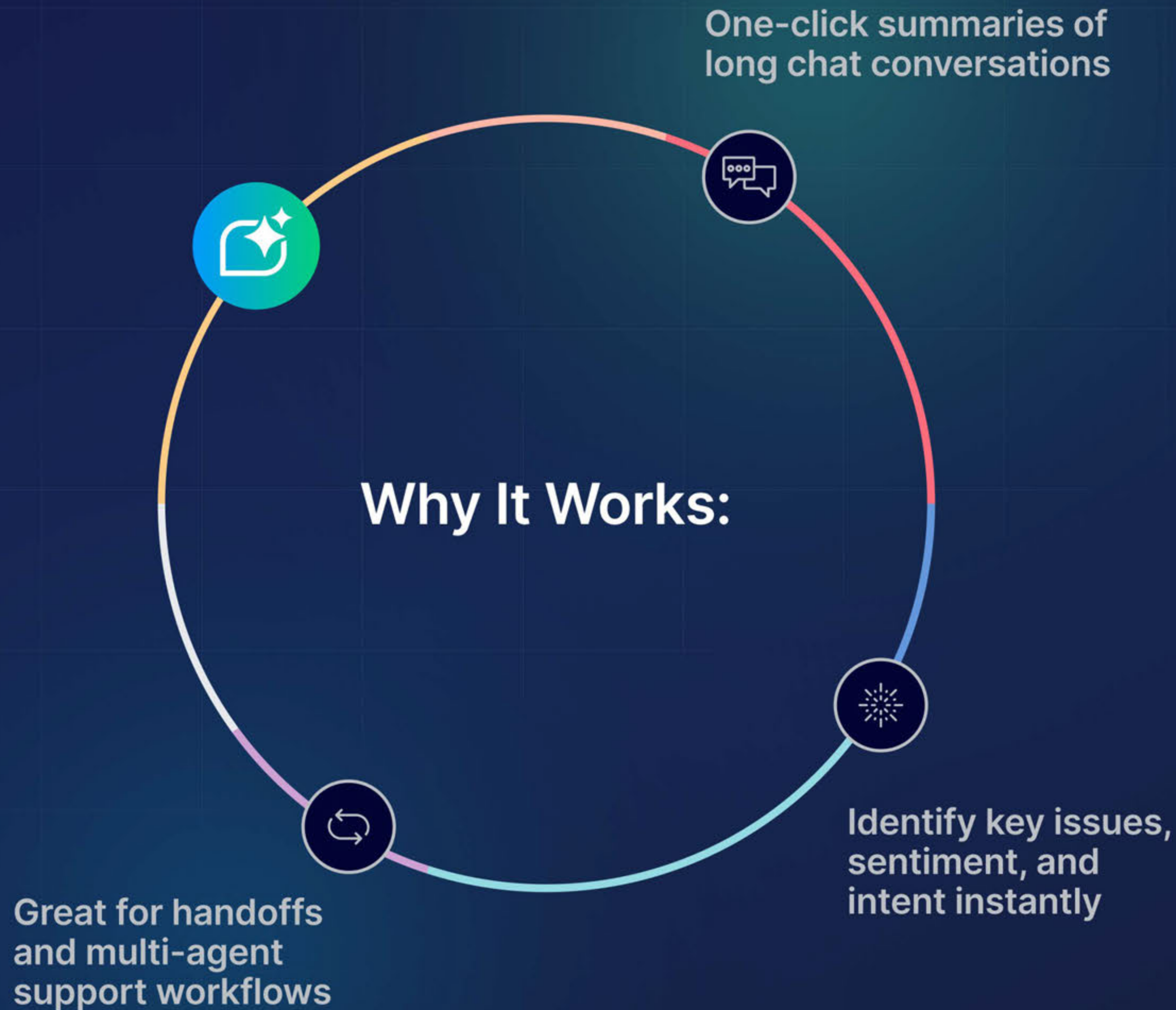
ChatBeacon AI Operator Assistant uses authorized ChatBeacon data to deliver fast, context-aware answers directly inside the Operator Workspace.

The screenshot displays the ChatBeacon AI Operator Assistant interface. At the top, it says "Ask ChatBeacon" with a subtitle "OPERATOR COPILOT · CHATS · METRICS · VISITORS". A user input box contains the question: "Hi, I need help with pricing, can you show me the current pricing plans?". Below this, a section titled "FOUND FOR YOU" provides the answer: "Here are the current ChatBeacon cloud plans:". A table lists three plans: Launch (\$39/month), Grow (\$69/month), and Scale (Custom). Each plan includes details on operator capacity, analytics, and history. Below the table, it indicates the source of the data: "CLOUD-PRICING-2026.PDF · P.3" and "PLAN-MATRIX.XLSX". At the bottom, there are several suggested questions in a scrollable list: "How much is ChatBeacon AIX?", "ID verification failed twice — what now?", "How many chats today?", and "Ask about chats, metrics, visitors...". A green arrow icon is next to the last question. At the very bottom, a footer note states: "Answers blended from your live data · Cue for operators".

PLAN	MONTHLY	BEST FOR · HIGHLIGHTS
Launch	\$39	Startups and small teams — up to 4 concurrent operators, Recall CRM, 150 tracked visitors, 6-month history
Grow	\$69	Teams ready for AI — up to 10 operators, Viewport 360 analytics, 1,000 visitors, 12-month history, SMS
Scale	Custom	Regulated enterprise — dedicated server, unlimited agents, SOC 2 / HIPAA, SSO, priority SLA

THE RESULT

Less searching. Faster decisions.
Better-informed conversations.



Result: Faster service, better accuracy, and a dramatically improved agent experience.

CONVERSATIONS. CONDENSED.

AI Chat Summaries at a Click

No more digging! Just click and get the full story. Our AI instantly transforms even the longest chat into a sharp, actionable summary that keeps your team moving fast.

AI HANDOFF SUMMARY

Samuel asked about the new ChatBeacon AIX 2026 release, then requested more detail on the PictureData feature. The AI explained PictureData as a visual conversational commerce add-on for e-commerce that supports natural-language product discovery, live inventory matching, in-chat product cards, shopping actions, AI recommendations, compare, and describe features, with current support noted for Shopify and WooCommerce. Samuel then asked for pricing, and the AI provided monthly platform pricing plus the PictureData add-on cost of \$139/month and a \$295 one-time setup/onboarding fee. After receiving pricing, Samuel requested a live agent and was transferred to Sales. Best next action: greet Samuel, confirm his use case and platform, and continue the sales conversation around PictureData fit, pricing, and next steps.

AIX 2026 info

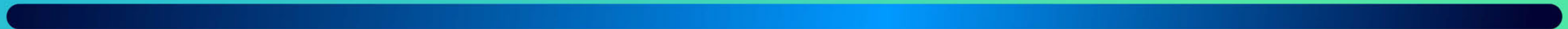
PictureData pricing

Sales handoff

E-commerce interest

Recommended: Open by acknowledging the transfer, confirm whether Samuel is evaluating PictureData for a specific store, identify his e-commerce platform and expected usage, then guide him on fit, pricing, and a demo or next sales step.

Optional Add-Ons to Supercharge Your Experience



Add-on

AN AI AGENT THAT SPEAKS YOUR BRAND'S LANGUAGE

Aria AI Workflow Assistant

Step into the future of support with an AI chatbot that doesn't just answer questions, it represents your brand. With our fully managed service, your chatbot is trained on your specific FAQs, help docs, and internal resources, securely stored in a private vector database.

That means every response is context-aware, on-brand, and delivered in your company's unique voice. It understands your products, your tone, and your policies, providing answers that feel personalized, accurate, and human. Whether you're onboarding customers, solving issues, or handling pre-sales questions, your AI is ready to engage like a seasoned team member.

Outcome: 24/7 support that sounds human, stays accurate, and frees up your team to handle the moments that matter most.

Train It Once. Let It Work Forever and for YOU.

WHAT YOU GET:

A generative AI chatbot trained on your business's exact content, from product manuals, financial forms and documents to internal policies

Fully integrated vector store that indexes your documents for precise, contextual responses

No scripted flows, just smart, human-like conversations that evolve with your content

Brand, consistent responses that sound like you wrote them yourself

Our intelligent website crawler instantly scans your entire live site and transforms every page into AI-ready knowledge. Within minutes, your chatbot can speak fluently about your products, services, and policies, using your exact words, voice, and tone. No setup. No hassle. Just smart automation that brings your site to life in the chat window.

BUILD AND ORCHESTRATE AI AGENTS VISUALLY

Agent Workflow Builder

Build your own AI, no code required

The all-new Agent Builder gives you a visual canvas for designing exactly how your Aria AI Workflow Assistant thinks, routes, and responds. Drag in agents, classifiers, guardrails, logic, and tools, then connect them into a workflow tailored to your business.

FEATURES:

No Code

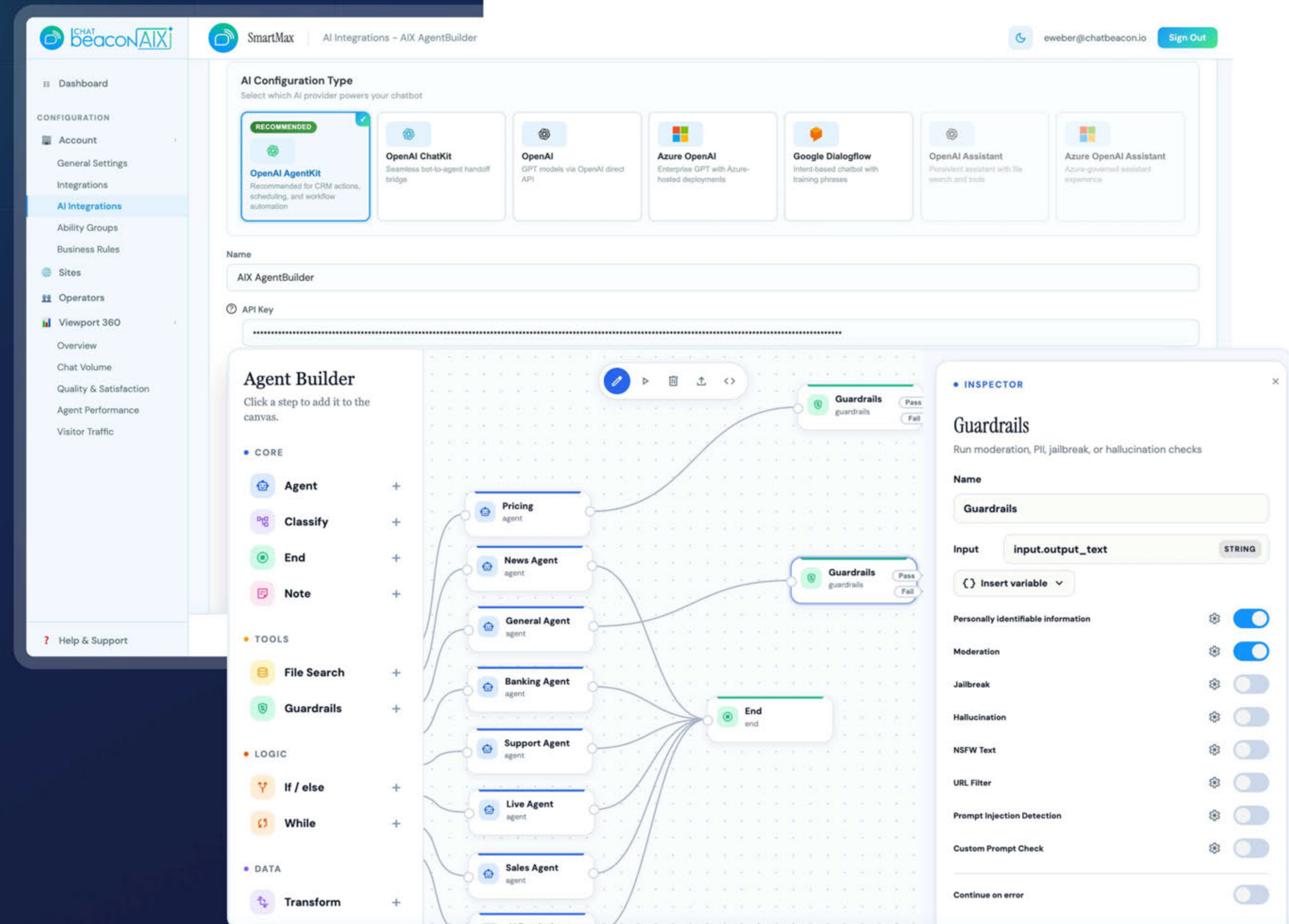
Let customers start a conversation from anywhere, on their schedule, on their phone

No apps to install or accounts to create

Fast, easy setup

Result: Open a direct line to your customers that feels natural, fast, and personal, driving stronger engagement, more conversations, and repeat business.

NEW AGENT BUILDER



Add-on

LIVE GUIDANCE. ZERO DOWNLOADS.

Co-Browse & Screen Share

Guide customers through complex tasks in real time with secure, visual assistance directly in the browser.

Features:



Real-time co-browsing lets operators guide customers through forms, applications, checkout flows, and multi-step processes.



Visual guidance and screen sharing help operators identify where customers need assistance without relying on lengthy explanations.



Browser-based sessions keep the experience simple, with no plugins, software downloads, or app switching required.

WHY IT MATTERS:

Faster resolution by giving operators the visual context to guide customers through complex issues in real time.

Less customer effort by reducing back-and-forth explanations and keeping assistance directly in the browser.

Higher completion rates for forms, applications, checkout flows, and other multi-step processes.

The screenshot displays the CHAT beacon AIX interface, which is split into two panels: AGENT VIEW (left) and CUSTOMER VIEW (right). Both panels show a mortgage application form for 'First Federal Credit Union' at 'Step 2: Employment Info'. The form includes fields for 'EMPLOYER NAME' (Acme Corporation), 'ANNUAL INCOME' (\$85,000), and 'YEARS EMPLOYED'. A 'Live Chat' window is open on the agent's side, showing a conversation about the annual income field. The agent's view also features a 'Continue to Step 3' button. The customer's view shows the same form with the 'Continue to Step 3' button. The interface is clean and modern, with a top navigation bar and a bottom status bar.

Add-on

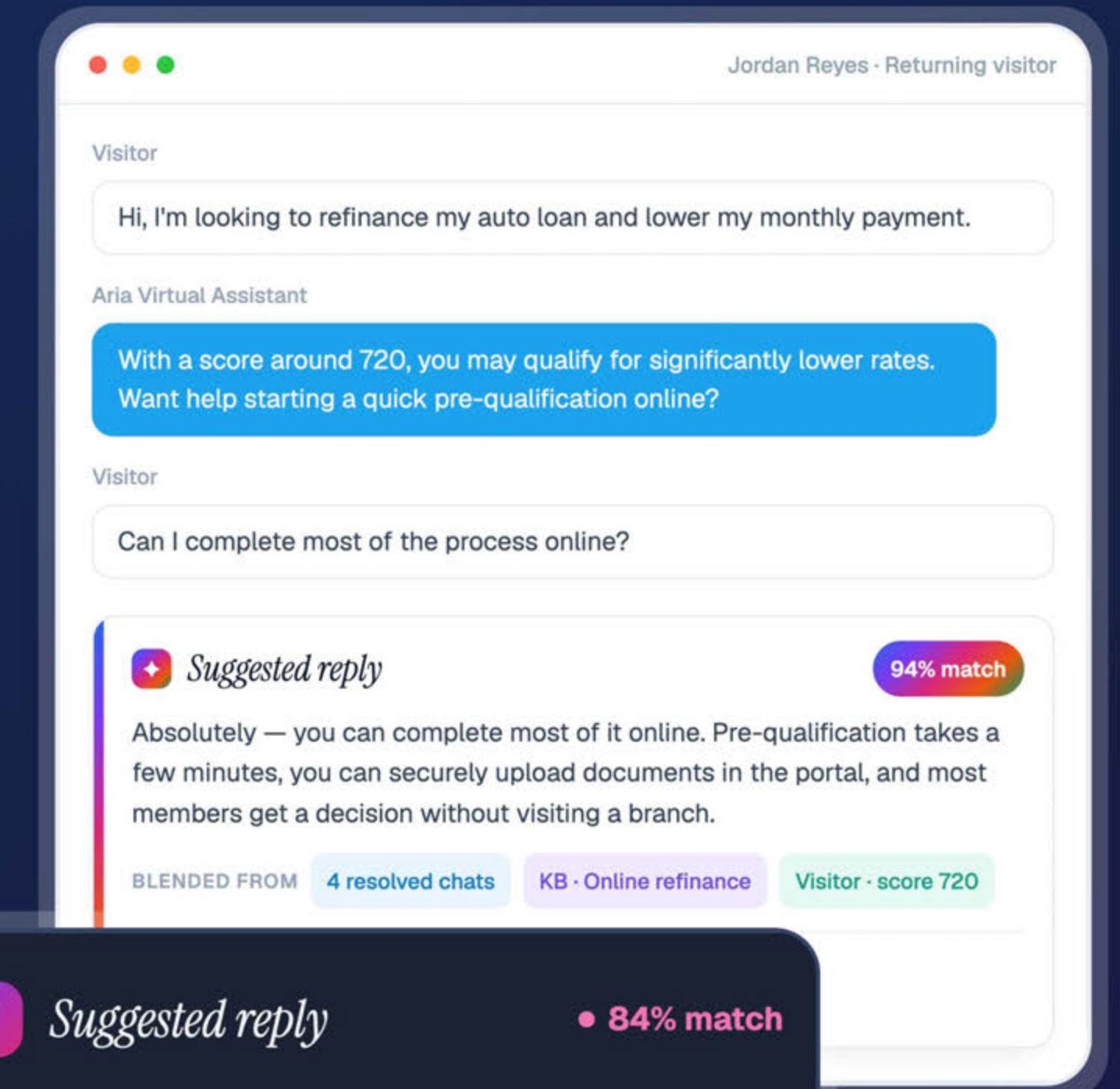
THE RIGHT REPLY, ON CUE.

Cue Instant Recall

Deliver immediate, sourced answers to visitors and operators using your organization's approved knowledge and resolved conversations.

FEATURES:

- Sourced answers** grounded in approved knowledge, resolved conversations, and relevant customer context.
- Confidence-based suggestions** surface when Cue has enough support to recommend a response.
- Visible attribution** shows operators where each suggested answer came from.
- Human-controlled responses** let operators review, edit, or send Cue's suggested reply.



✦

Suggested reply

● 84% match

Happy to help with your auto loan! You'll need a driver's license, proof of income, and the vehicle's VIN, year, make, and price. Rates currently start at 5.49% APR — want me to send the secure application link?

RECALLED FROM

● 3 resolved chats

→ Use reply

Edit first

Add-on

ON-THE-GO CONVERSATIONS, MADE EFFORTLESS

SMS Chat on Your Existing Number

Give customers a simple way to start and continue conversations by text using your existing business number. SMS Chat extends customer service beyond the website while keeping conversations connected to your ChatBeacon environment.

FEATURES:

- Use your existing business number** to support SMS conversations without requiring customers to learn a new contact method.
- Let customers start conversations from anywhere** using the messaging experience already built into their phone.
- Native text messaging** keeps the experience familiar and easy for customers.
- Centralized operator handling** keeps SMS conversations within the same customer-service environment as your other ChatBeacon interactions.

Result: Make SMS an easy, familiar way for customers to reach your team.

TEXT US. ANYWHERE. ANYTIME.



Add-on

MOST CRMS START WITH AN IMPORT. RECALL STARTS WITH A HELLO.

ChatBeacon Recall CRM

Every customer record begins with a real conversation and grows with each interaction, page view, escalation, co-browse session, and operator note. Recall keeps that history connected in one continuously developing customer record.

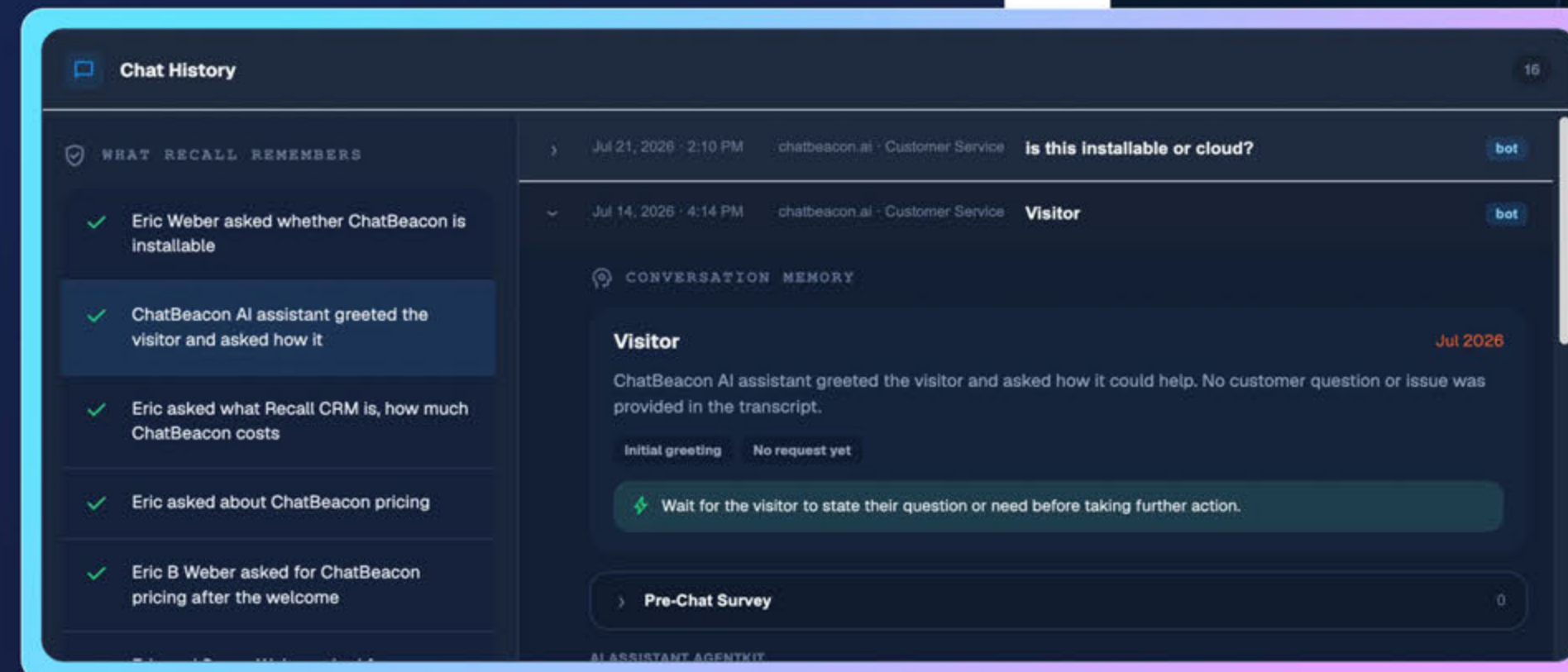
FEATURES:

Conversation-built customer records. Profiles develop naturally from real customer interactions, without relying on imported lead lists.

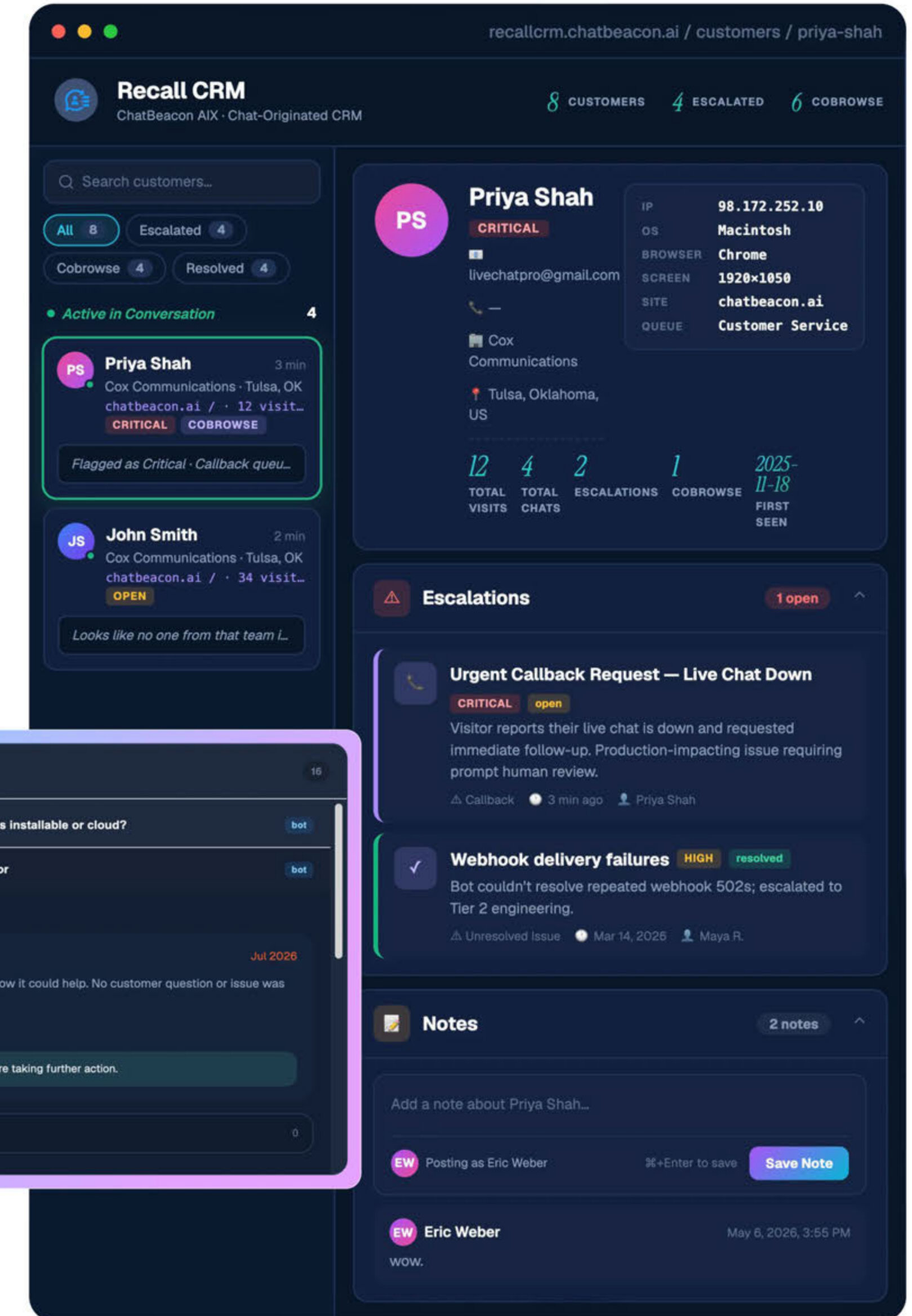
Complete chat history. Bot, operator, and escalated conversations stay connected to the customer record.

Full visitor journey. See relevant page activity, conversation history, and engagement context in one place.

Escalations and co-browse activity. Important events are captured alongside the customer record for easier follow-through.



CHATBEACON RECALL CRM STARTS WITH A HELLO.



TURN CONVERSATIONS INTO CONNECTIONS

Face-to-Face Video Chat

When text isn't enough, connect with customers face-to-face in real time. Video Chat gives operators a direct way to handle high-touch conversations, complex questions, and situations where visual communication matters.

Features:

-  Browser-based video lets customers connect without installing an app or downloading software.
-  1:1 HD video supports clear, real-time conversations between customers and operators.
-  Virtual backgrounds help operators maintain a professional presentation from any workspace.
-  Private video sessions keep conversations within the ChatBeacon experience.

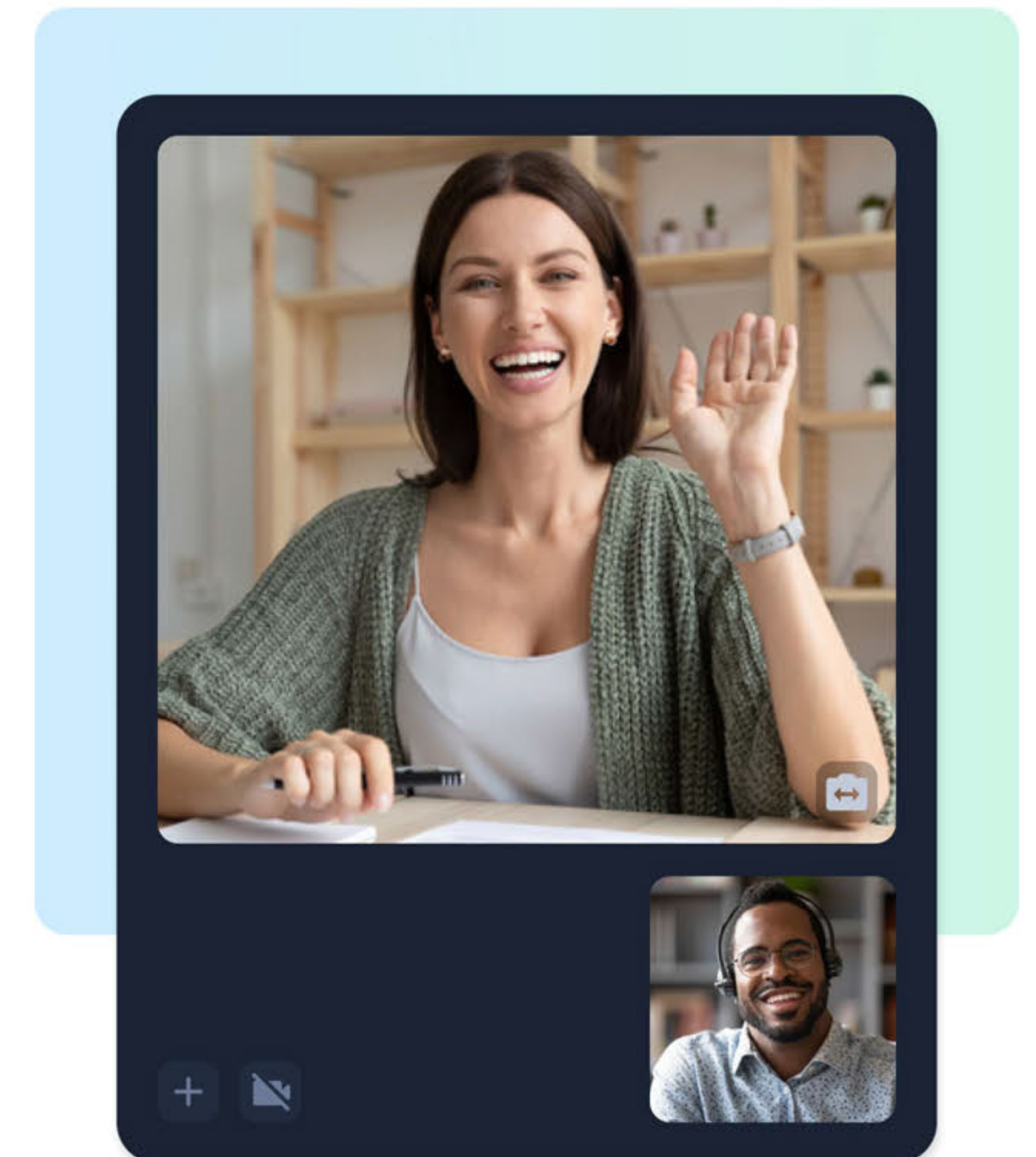
Result: Bring a more personal, face-to-face experience to digital customer service.

WHY IT WORKS:

Adds a human connection when text alone isn't enough.

Makes complex conversations easier when customers benefit from visual explanation.

Supports high-touch service for consultations, sensitive issues, and important customer interactions.



Add-on

CATCH WHAT THE BOT CAN'T.

AI Escalation Dashboard

Automatically surface conversations that need human attention, including callback requests, unresolved issues, and low-confidence AI responses. The AI Escalation Dashboard gives your team one place to review, prioritize, and act without searching through transcripts.

Features:



Automatic escalation flags identify callback requests, unresolved issues, and low-confidence AI responses.



Prioritized review queues help teams quickly see which conversations need attention first.



Conversation context keeps the relevant transcript and escalation details attached to each flagged interaction.



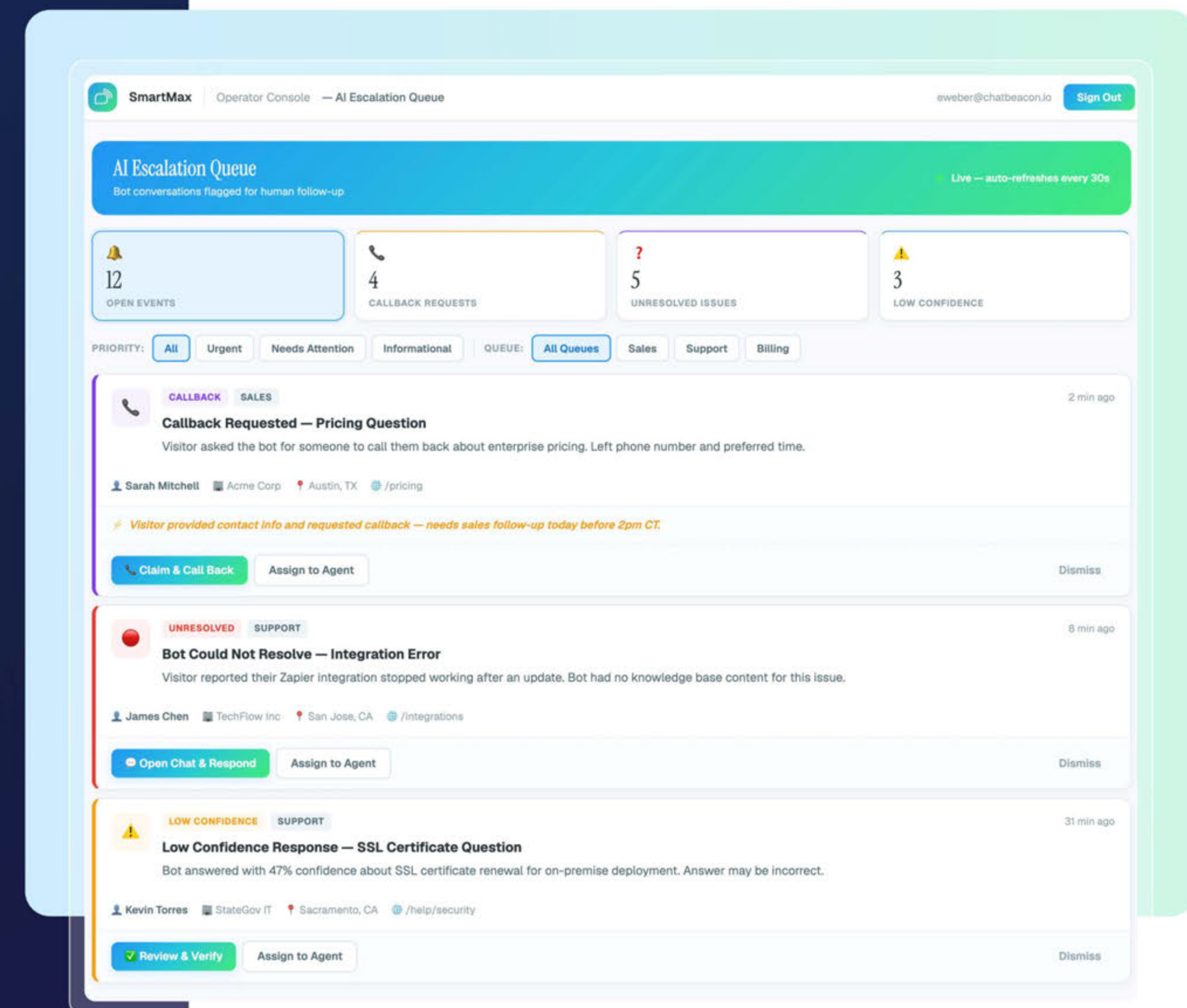
Built-in actions let operators claim, assign, review, or escalate conversations without losing context.

THREE FLAG TYPES:

Callback Requests **CALLBACK**

Unresolved Issues **UNRESOLVED**

Low Confidence Responses **LOW CONFIDENCE**





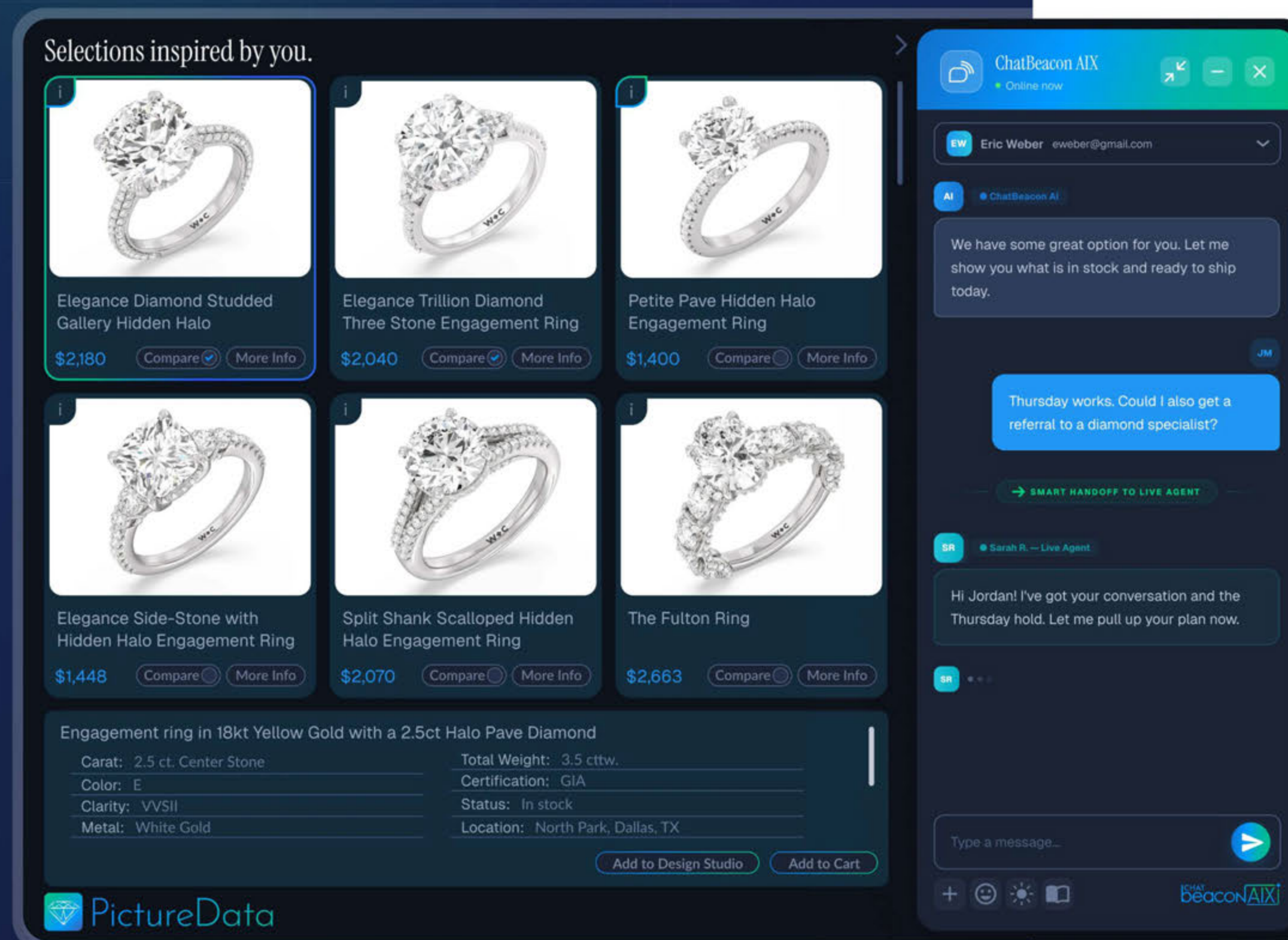
PictureData turns product discovery into a visual, conversational experience, helping customers find relevant products using natural language and your Shopify catalog data.

Conversational product discovery lets shoppers describe what they want in natural language instead of relying only on filters or search.

Visual product recommendations surface matching products, images, pricing, and details directly from your Shopify catalog.

Catalog-grounded suggestions use your approved product data to keep recommendations relevant and consistent.

Connected shopping experience brings product discovery and customer conversation together in one interface.



VISUAL, CONVERSATIONAL PRODUCT DISCOVERY

 **Natural-language shopping.** Customers can ask for products the way they would ask a person.

 **Visual-first results.** Show matching products with images, pricing, and key details.

 **Grounded in your catalog.** Recommendations use your Shopify product information rather than generic responses.

 **No-code deployment.** Add conversational product discovery without building a custom shopping interface from scratch.

Add-on

SECURE ACCESS THROUGH MICROSOFT ENTRA ID

Microsoft Entra ID Integration

Connect ChatBeacon with Microsoft Entra ID to give your team secure, streamlined access using the identity system your organization already manages. Users can sign in with existing Microsoft credentials while IT maintains centralized control over authentication and user access.



What's Included

- ✓ Single sign-on using existing Microsoft Entra ID credentials.
- ✓ Centralized identity management aligned with your organization's existing Microsoft environment.
- ✓ Role-based permissions to help control user access within ChatBeacon.

Result: Secure, streamlined access with centralized identity control.

For Your Team: Use the credentials they already know, with fewer passwords and a more consistent sign-in experience.

Why It Matters

- + Less login friction for users accessing ChatBeacon.
- + Simpler administration by keeping identity management within your existing Microsoft environment.
- + More consistent access control across users, teams, and systems.

**Available with qualifying Dedicated Private Cloud deployments.*

Add-on

YOUR CLOUD. YOUR CONTROL.

Microsoft Azure Dedicated Private Cloud

For organizations that require greater isolation, control, and deployment flexibility, ChatBeacon can be deployed in a dedicated Microsoft Azure environment. This option provides a private cloud architecture designed around your organization's security, infrastructure, access, and data-handling requirements.

What's Included

- ✔ **Dedicated Azure environment** designed for your organization's ChatBeacon deployment.
- ✔ **Isolated application and data resources** separated from standard shared-cloud deployments.
- ✔ **Configurable access controls** aligned with your organization's security and identity requirements.

WHY IT MATTERS

- + Meets strict regulatory and compliance requirements
- + Enables deeper integrations with your internal Azure-based tools and networks
- + Optimized for financial services, healthcare, government, and other sensitive sectors

Result: Dedicated cloud infrastructure with greater isolation, control, and flexibility for your organization.

What Customers Are Saying

“A large share of our conversations are sales-related, and ChatBeacon helps us turn those questions into confident buying decisions. Customers can get quick answers in the moment instead of leaving the site or putting off the purchase.”

Megan Carter, Digital Project Specialist

“For us, great customer service means making it easy for people to get help when they need it. ChatBeacon gives customers a direct way to ask questions, get answers quickly, and move forward without unnecessary delays.”

Jennifer Hale, Director of Member Experience

“Co-Browse gives our team a much better way to help members through online forms and other multi-step processes. Instead of trying to explain where to click or what they’re seeing, we can guide them through it in real time and make the experience much easier.”

Daniel Brooks, Owner & Managing Broker

“Recall CRM gives our team the conversation history and customer context they need without having to piece everything together manually. When a customer returns, we can quickly see what happened before and continue the conversation with much better continuity.”

Laura Mitchell, Vice President, Digital Banking

 **READY TO SEE IT IN ACTION?**

-  Schedule a Live Demo or Upgrade Today
-  Talk to a product specialist about pricing
-  Start your free trial and experience the upgrade firsthand

MAKE YOUR TEAM FASTER, YOUR CUSTOMERS HAPPIER, AND YOUR BUSINESS STRONGER, WITH CHATBEACON AI.

CHECK US OUT ON OUR SOCIALS



**START A CHAT ON CHATBEACON.AI
OR CALL US AT 918-388-5900**