VISIONX
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AI CONTACT CENTRE PLATFORM FOR BANKS

ConnectX

The complete contact center.
With an AI agent already inside it.

Telephony, routing, agent desktop, supervisor tooling, recording, omnichannel, workforce management and outbound dialing. One platform, built for banks, with an AI agent ready for your first call.

01	AI Virtual Agent	02	IVR & Self-Service	03	ACD & Routing
04	Agent Desktop & CTI	05	Supervisor & Quality	06	Omnichannel & Knowledge
07	Reporting & Wallboards	08	Workforce & Dialer	09	Platform & Security

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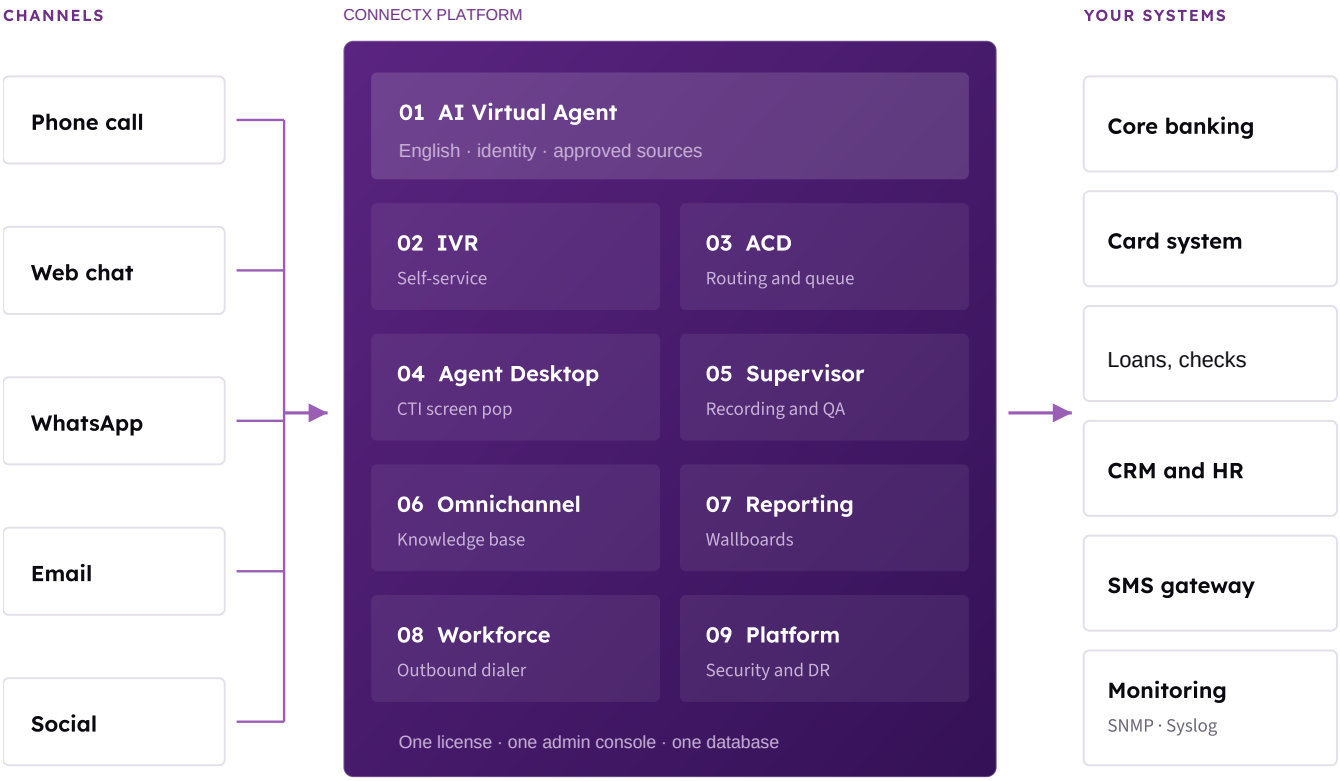
THE PLATFORM

Nine modules. One platform. Nothing bolted on afterwards.

A contact center is usually assembled from separate products: telephony from one vendor, recording from another, workforce management from a third. ConnectX ships as one system, with the AI agent built into the core rather than parked in front of it.



239	500	1,000	9	100%
RFP REQUIREMENTS ANSWERED	CONCURRENT AGENTS	IVR PORTS	MODULES ONE LICENCE	ON YOUR OWN INFRASTRUCTURE

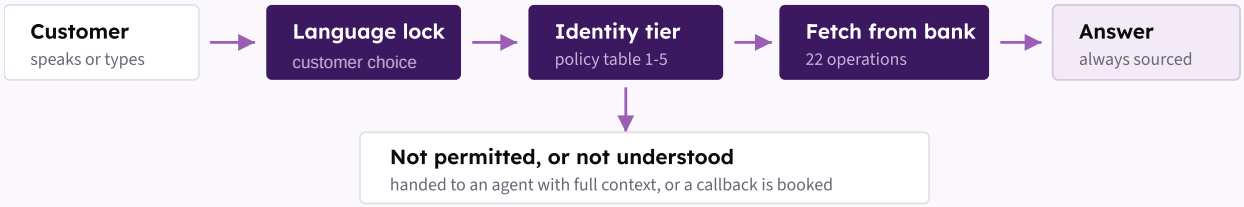
The difference

01

The AI agent at the core

What every other vendor sells as a chatbot bolted to the front. Here it is the core of the platform, and it answers in the language your customer actually speaks.

HOW A QUESTION BECOMES AN ANSWER



- **Customer-selected language**
  Supported languages follow the customer's own choice, never guessed.
- **Five-tier identity verification**
  Written in a table your risk team reads and edits, not buried in code.
- **Clean human handover**
  Card block, stop payment and PIN reset go to an agent, never falsely marked done.
- **Degrades honestly**
  If core banking slows or stops, it says what it can and names the fault.
- **Conversation memory**
  Recognizes a returning customer days later and remembers what it was about.
- **Zero fabrication guard**
  Every figure comes from your systems or approved copy, approved numeric values included.
- **22 core banking operations**
  Balance, cards, checks, loans, deposits, rates, branch and ATM locator.
- **Business-editable copy**
  Marketing changes a greeting in the console and the next caller hears it.
- **Masking at the moment of entry**
  PIN, account and card numbers hidden as they are spoken, not cleaned up afterwards.
- **Append-only audit trail**
  Every turn records its decision, database-enforced, unalterable afterwards.

345

Automated checks stand behind this module

Language handling, identity policy, the no-fabrication guard and every banking operation are covered by a suite that runs live, in front of you, at any demonstration.

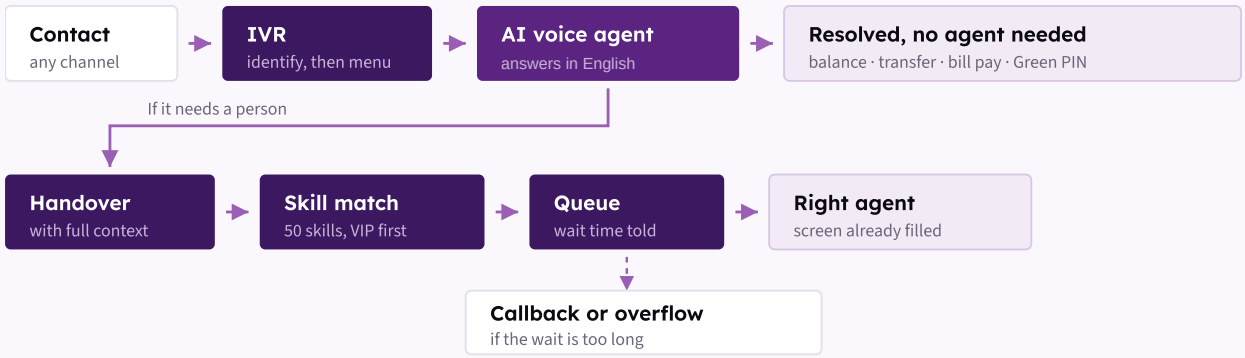
For your customers

02

Self-service, routing and queue

The AI agent answers first and finishes most calls on its own. When one does need a person, it hands over by skill, with everything the customer already said attached.

WHAT THE AI HANDLES, AND WHAT REACHES A PERSON



SELF-SERVICE

- **Drag-and-drop flow designer**
  Your team builds and rearranges menus visually, with no code and no downtime.
- **Full transactions through core banking**
  OTP, balance, cards, fund transfer, bill payment, Green PIN, card activation.
- **PCI-DSS masked entry**
  Card number and PIN masked while entered and absent from the recording.
- **Drop-off analytics**
  See the exact menu where customers abandon, fix it, and raise self-service.

ROUTING AND QUEUE

- **Skill-based routing**
  Up to 50 skills per agent, with separate priorities for voice, chat and email.
- **VIP lane and return to previous agent**
  Designated customers jump the queue, and ANI reconnects them to who they spoke to last.
- **Wait time and queue position**
  Announced before the customer joins, with a callback offered instead.
- **Overflow and self-recovery**
  Busy queues spill to idle groups, and a failed node loses nothing the customer sees.

0 — **Developer tickets to change a prompt or a routing rule**

A common requirement in bank tenders, and the thing that quietly costs the most across a multi-year contract. Every prompt, menu and rule belongs to your team.

For your team

03

Agent desktop and supervisor

Your agents look at this screen for eight hours a day. Everything the customer already said is waiting on it before the phone finishes ringing.

THE SCREEN, ONE SECOND BEFORE THE AGENT SAYS HELLO · ILLUSTRATIVE

Incoming call · (202) 555-0142		RINGING
CUSTOMER Emily Carter Priority segment, 9 years	IDENTITY Verified To tier 3, on this call	HOLDINGS 2 accounts, 1 card One click to switch
WHAT SHE ASKED Returned check High confidence	WHAT WE TOLD HER Reason and next step Transcript attached	LAST CONTACT 11:04pm last night Ten most recent shown

AGENT DESKTOP

- **Every channel in one browser**
  Call, chat, email and social from a single screen with one universal queue.
- **WebRTC softphone or your Cisco handsets**
  Speak from the browser, or keep the IP phones you already bought.
- **Cross-product view, one-click switching**
  Account and card details together, and no fresh search to move between them.
- **Wrap-up and reason codes**
  Set from the IVR selection, maintained by your business team, straight into reporting.

SUPERVISOR, RECORDING AND QUALITY

- **Listen, whisper, barge in**
  Monitor unheard, coach the agent privately, then join the live call when needed.
- **Voice and screen recording together**
  Replayed in step, so you see what the agent did while the customer was speaking.
- **AES-256, three-year retention, legal hold**
  Encrypted at rest, role-based playback, and calls under dispute are never deleted.
- **AI quality scoring and transcription**
  Sentiment and keywords score every call, and every transcript is searchable.

100%

Of calls scored, not the fraction a human can listen to

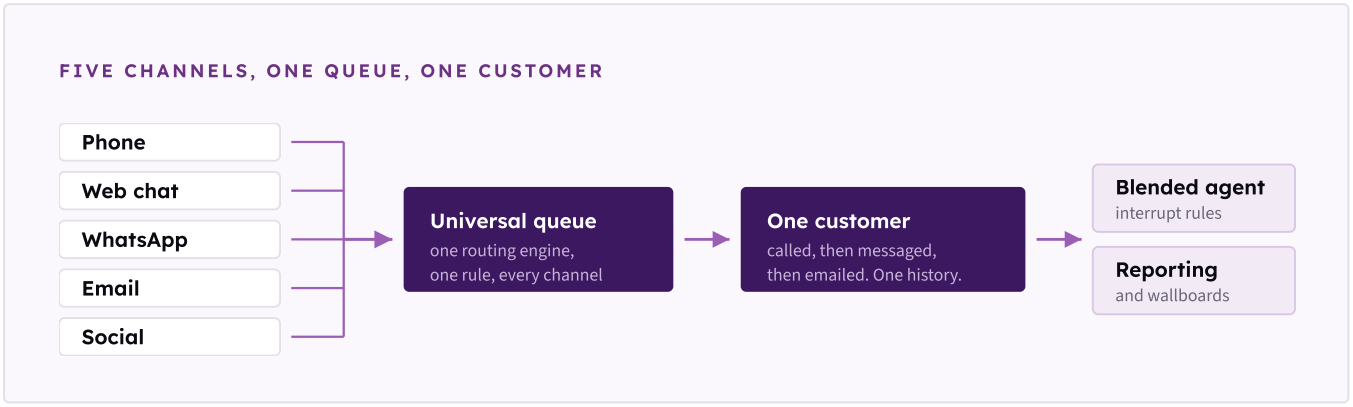
Manual review can only ever sample. AI scoring reads every conversation, so coaching aims at what is actually happening on your floor rather than at the few calls someone had time for.

Running the operation

04

Omnichannel, reporting and workforce

Every channel in one queue, every number in one report, and a roster the system builds from what it forecasts rather than from last month's spreadsheet.



OMNICHANNEL AND KNOWLEDGE

- **Voice, chat, email, WhatsApp and social**
  One interface, one universal queue, one history per customer across all of it.
- **Knowledge base with live suggestion**
  The right article surfaces during the call instead of the agent searching for it.
- **Home and branch agents**
  A browser is all they need. No session border controller, no local telephony kit.
- **Two-way CRM integration**
  Customer data flows in, activity logs and follow-up tasks flow back out.

REPORTING AND WALLBOARDS

- **Drill down to the exact call**
  From a breached service level to the conversation that caused it, and play it back.
- **Wallboards, Power BI and scheduled reports**
  Browser wallboards with no install, threshold alerts, and reports emailed on a schedule.

WORKFORCE AND OUTBOUND

- **AI forecasting, rosters and adherence**
  Volume predicted by channel and season, schedules built for you, adherence watched live.
- Predictive, progressive and preview dialing
  Up to 100 campaigns at once, blended with inbound always taking priority.

1 Queue, one license, one database behind all of it

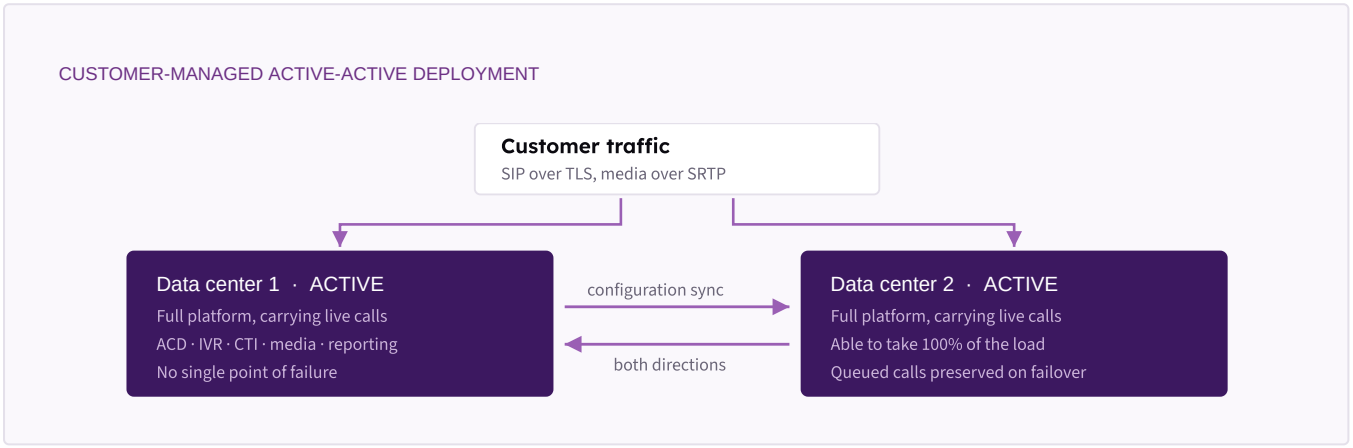
Not a voice queue plus a chat queue plus an inbox somebody checks twice a day, and not a separate product to integrate for every channel you decide to offer.

The foundation

05

Telephony, resilience and what you are buying

The pages your IT, risk and procurement teams will read. Encrypted telephony, two live data centers, and the licenses, training and support that come with it.



TELEPHONY

- **SIP over TLS, media over SRTP**
  Signaling and audio both encrypted, connected to your approved trunk provider.
- **Multiple telecom operators**
  If one operator's line fails, calls move to another automatically.
- **Codecs, DTMF and admission control**
  G.711, G.729 and Opus, keypad detection, and a cap that stops overload breaking the system.
- **Your existing handsets**
  Cisco IP Phone 8800 series and Jabra Biz 2400 headsets. No new agent hardware.

RESILIENCE AND SECURITY

- **Active-active across two data centers**
  Both sites live, each able to carry the full load, with queued calls preserved on failover.
- **Customer-managed infrastructure**
  Deployment and data handling are agreed for your environment.
- **TLS 1.2 and 1.3, AES-256, MFA**
  Encrypted in transit and at rest, with multi-factor on administrative access.
- **Monitoring into your own tools**
  SNMP, Syslog and telemetry, so your IT team learns no new dashboard.

LICENSING, TRAINING AND SUPPORT

- **Concurrent licensing**
  Counted by people working at once, so three shifts do not treble your license cost.
- **On-site training for four groups**
  Agents, supervisors, administrators and management each trained separately.
- **Three-year warranty under SLA**
  Post-go-live support with agreed resolution times, and an optional seven-year maintenance term.
- **Support portal with escalation**
  Ticketing and chat for your IT team, with a defined path when something becomes serious.

SEE IT FOR YOURSELF

Ask it for an account balance. **Then try to make it lie.**

Forty minutes on a live system, never a recorded video. Place a real call and ask anything you like. Then we disconnect the bank in front of you and you watch it refuse to invent a number. Bring your hardest questions and your most skeptical colleague.

A live demonstration

At your office or ours, driven by your questions rather than our script.

Your requirements, answered

Send your compliance matrix and we respond line by line, with the gaps named.

A pilot on your own data

Your services, your policy table and your content, on your infrastructure.

ConnectX by VisionX

Request a demo or discuss your deployment.

CONTACT VISIONX

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