



# INNOVATE

Digital Transformation Made **SMARTer**

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## Recent Enhancements to Scale the Conversation

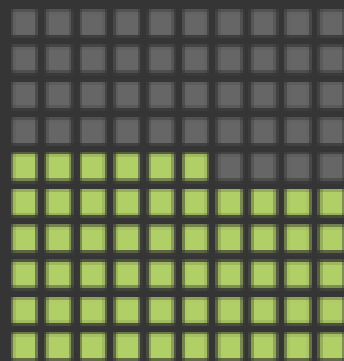
Geoffrey Niven, VP of Product Management for Smart Communications

Chris Murphy, Senior Director of Product Marketing for Smart Communications

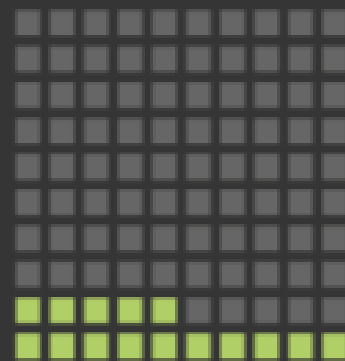
- **Digital Transformation & Customer Experience**
- **Conversation Cloud**
- **Release Highlights SC20/SC21**

# Digital Transformation is the New Normal

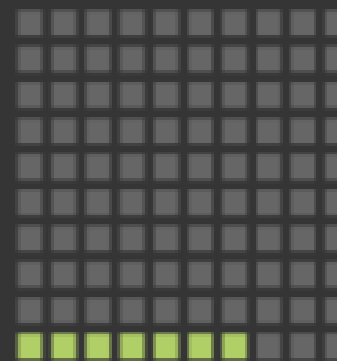
“Which of the following best describes your firm’s digital transformation?”



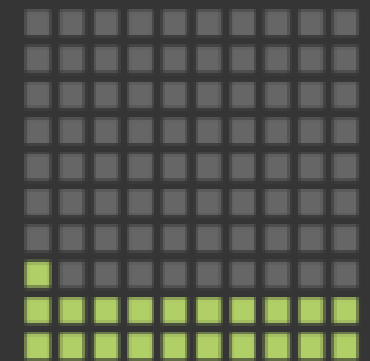
**56%**  
Currently  
underway



**15%**  
Investigating



**7%**  
Improving but  
not transforming



**21%**  
Completed

Source: *Forrester - The Sorry State Of Digital Transformation In 2018*

# Digital Transformation vs. Digital Optimization

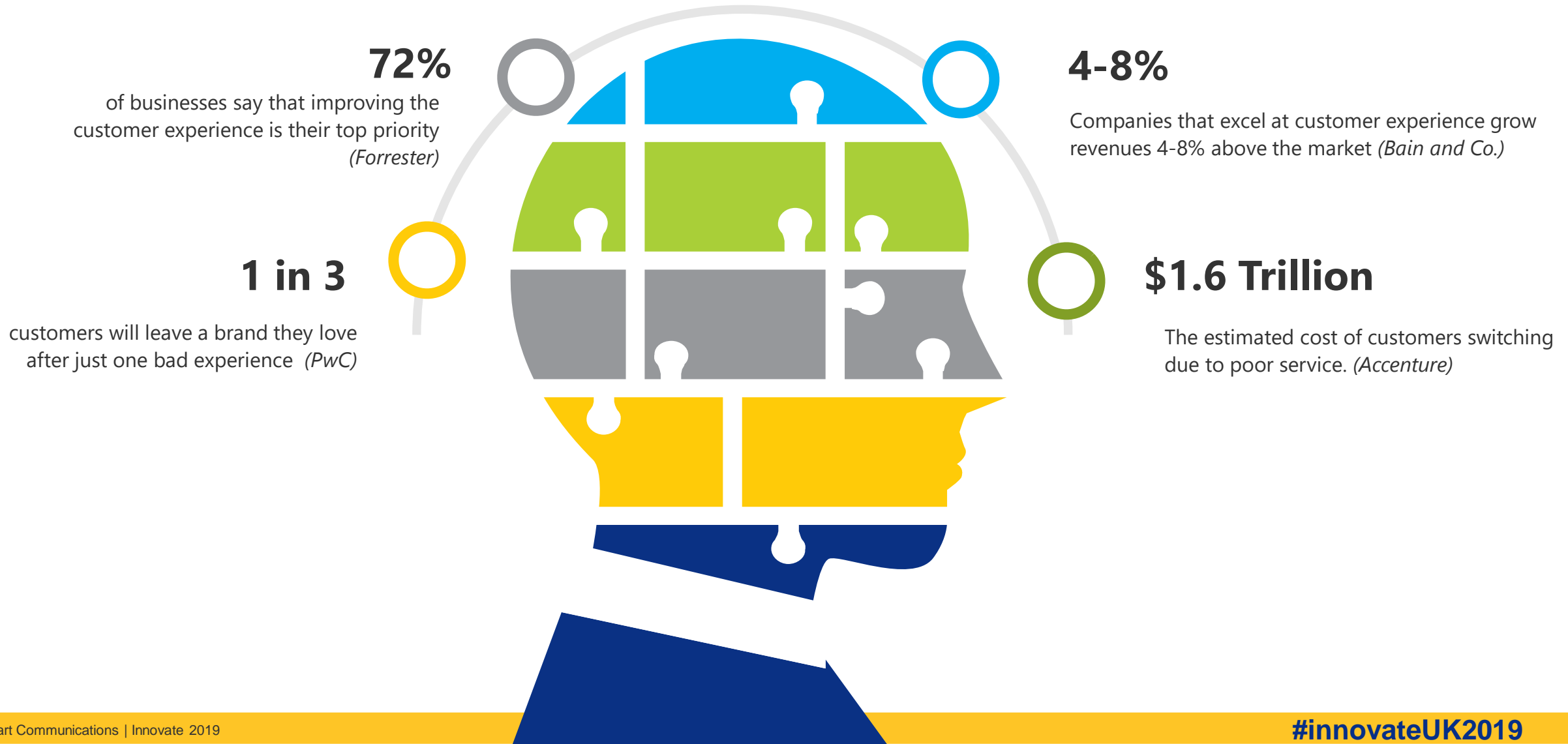
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*“75 percent of CIOs and their enterprises will fail to meet all their digital objectives in 2019”.*

*IDC*

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# The Importance of Customer Experience





“ 64% chose “easy to integrate” as the most important characteristic when selecting a solution, compared with 39% who chose “best-of-breed.”

Forrester, *The State Of Digital Experience Delivery, 2017*

#innovateUK2019

# Mobile



# Voice Assistants



## “Alexa...”

... tell insurance advisor I'd like to find an agent in my area.”

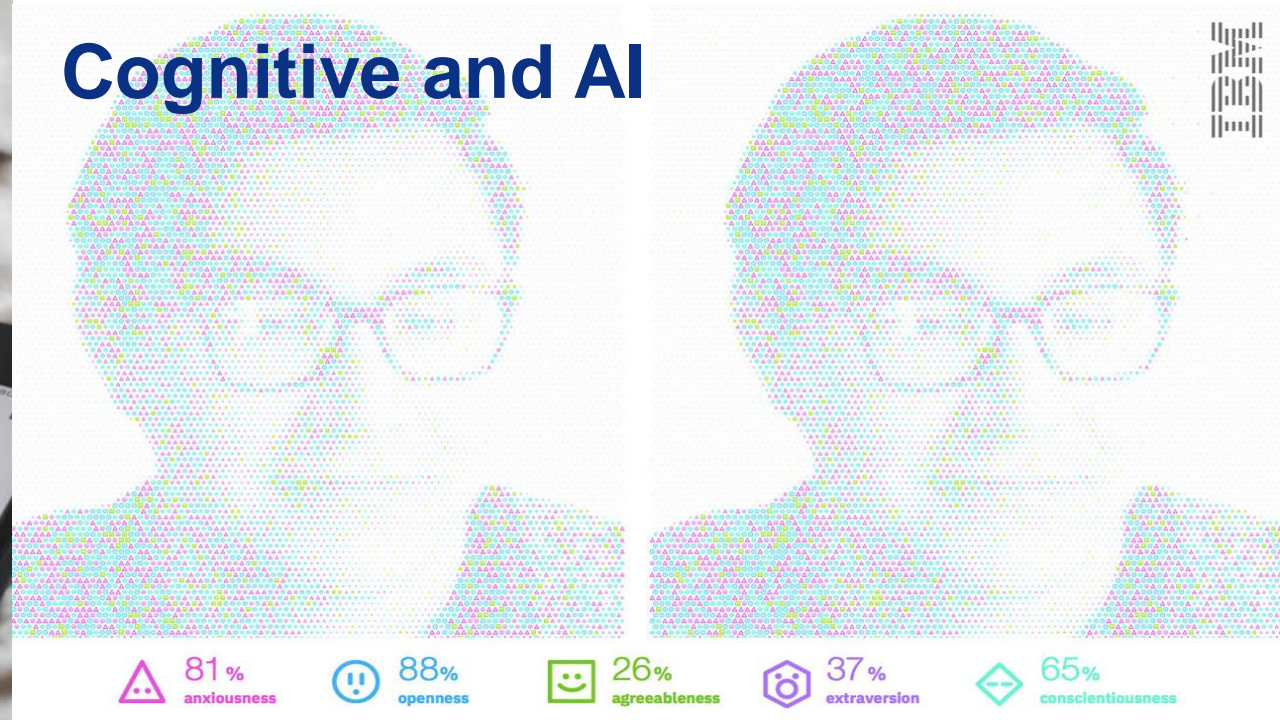
... ask insurance advisor what total vehicle loss is.”

... ask insurance advisor what types of insurance Accordant offers.”

# Connected Devices / IoT



# Cognitive and AI



81% **anxiousness**

88% **openness**

26% **agreeableness**

37% **extraversion**

65% **conscientiousness**

# The Conversation Cloud Framework



Connect to 3<sup>rd</sup> Party Systems



Validated Plug-Ins



Open and Flexible



Marketplace



APIs



360° View of Customer





# Conversation Cloud Marketplace

2019

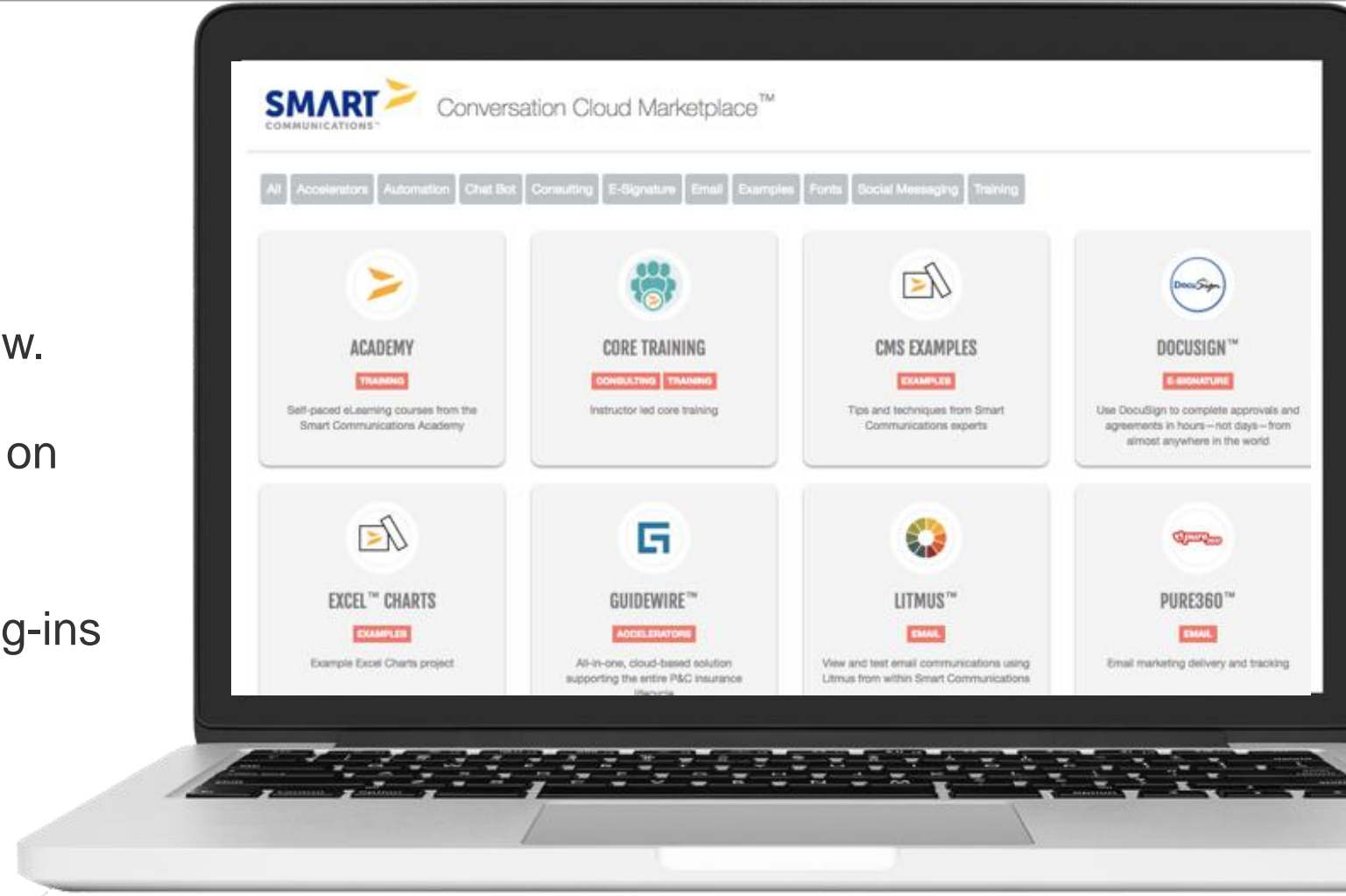
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Explore validated plug-ins and verified accelerators.

Detailed listings highlighting minimum requirements and a functionality overview.

Each listing offers a demo project guide on how to implement the offering.

Showcasing internal and partner-led plug-ins to extend the value of Smart Communications.



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# Our Innovation Themes

# Smart Communications Delivering Innovation

2019  
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**Customer  
Experience**



**Channels**



**User  
Experience**



**Content  
Assembly**



**Negotiation**



**Deployment  
Flexibility**



**Intelligence &  
Information**



**Enterprise  
Integration**



**Partner  
Strategy**

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# SC20 Release Highlights

# Draft Editor: Right-Click Menu

Draft Editor users may now interact with their Drafts by using the context sensitive right-click menu which presents relevant actions at the mouse pointer position.

This feature is very useful for working with tables, where context sensitive actions can reduce time spent editing.

The screenshot displays the Draft Editor interface for a document titled "Communications Health Check". The document content includes a title, a paragraph, a bullet list, a table, and a section on "Repeating Rows". A right-click context menu is open over the table, showing options relevant to the current selection. A red callout box states: "The contextual right-click provides appropriate options depending on the section or area it is used".

This is a title row	
This is row 1	This is row 1 again
This is row 2	
This is row 3	This is row 3

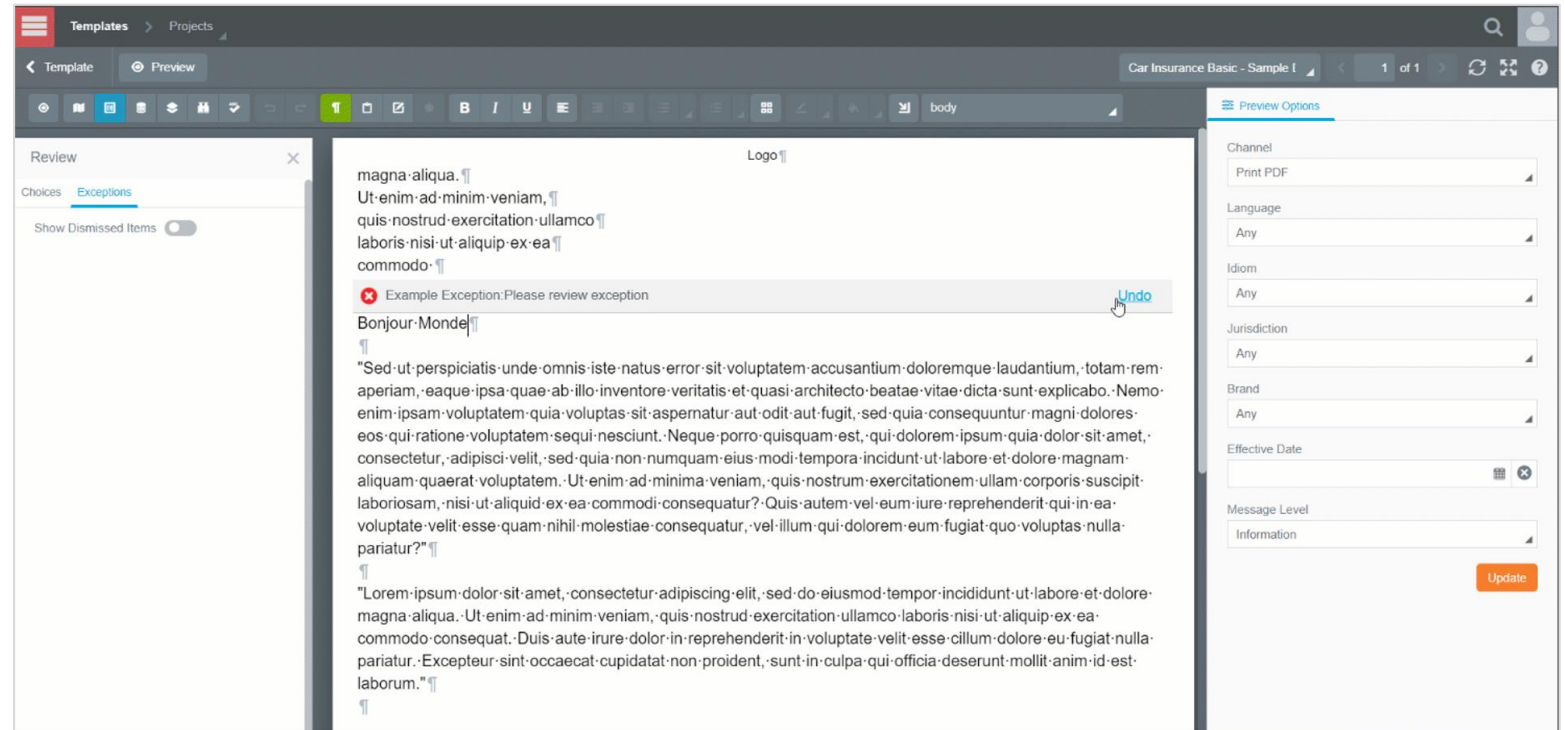
# Draft Editor: Dismiss Exceptions



Users of Exceptions in the Draft Editor can now dismiss individual Exceptions.

This allows for users to keep track of their progress through the Exceptions within their Draft.

The underlying TML can be post-processed as part of the external user workflow ensuring that critical parts of the document are actioned by the user.



# Data Item Change History

Improved representation of document edit history—previously updates were recorded as deletions and insertions.

All changes to a data item are now wrapped inside the same change element.

This improves the Draft as a tool for data capture and also facilitates much more robust data extraction.

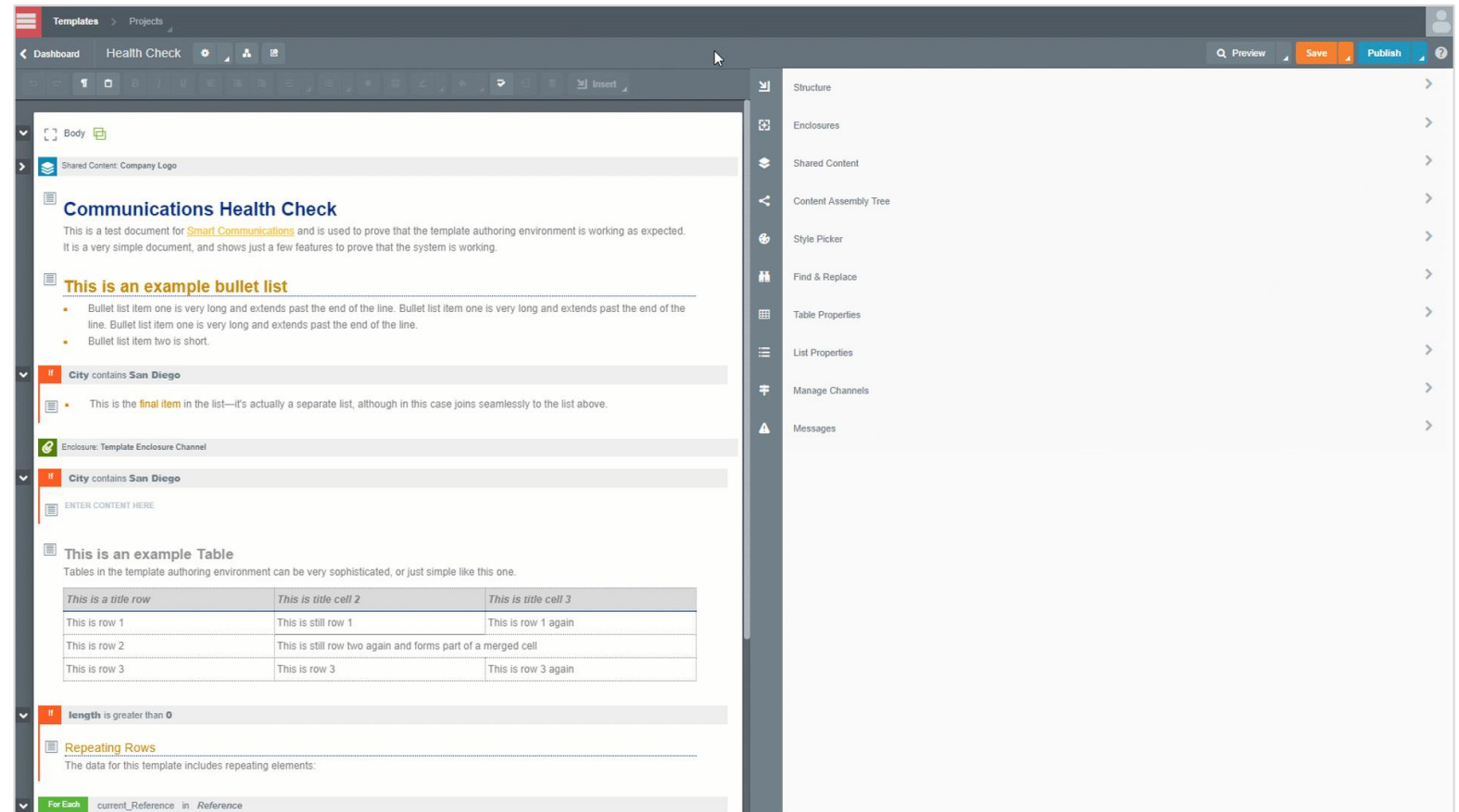
The screenshot shows a document editor interface. On the left, a 'Review' window is open, displaying a table of changes. The table has columns for 'Changes', 'Tasks', 'Choices', and 'Exceptions'. A single change is listed for '[LondonParis]' with a green checkmark and a blue arrow icon. The main document view on the right shows a 'Table of Contents' for an 'Insurance Document'. A red callout box highlights the text: 'All change history is tracked within the same change element'. The document content includes a table with columns 'Name', 'Insurance Type', and 'Licence', and a list of items.

Name	Insurance Type	Licence
Peter Jones	Full	Full
John Smith		
Simon Peters	Full	

NOTE: This change has resulted in updates to the Draft TML. Please refer to the product documentation for more information.

# Template Editor: Side Panel

The side panel in Template Editor has been redesigned using our *SmartUI* user interface design language. Users can work more efficiently with the new, cleaner Side Panel interface.





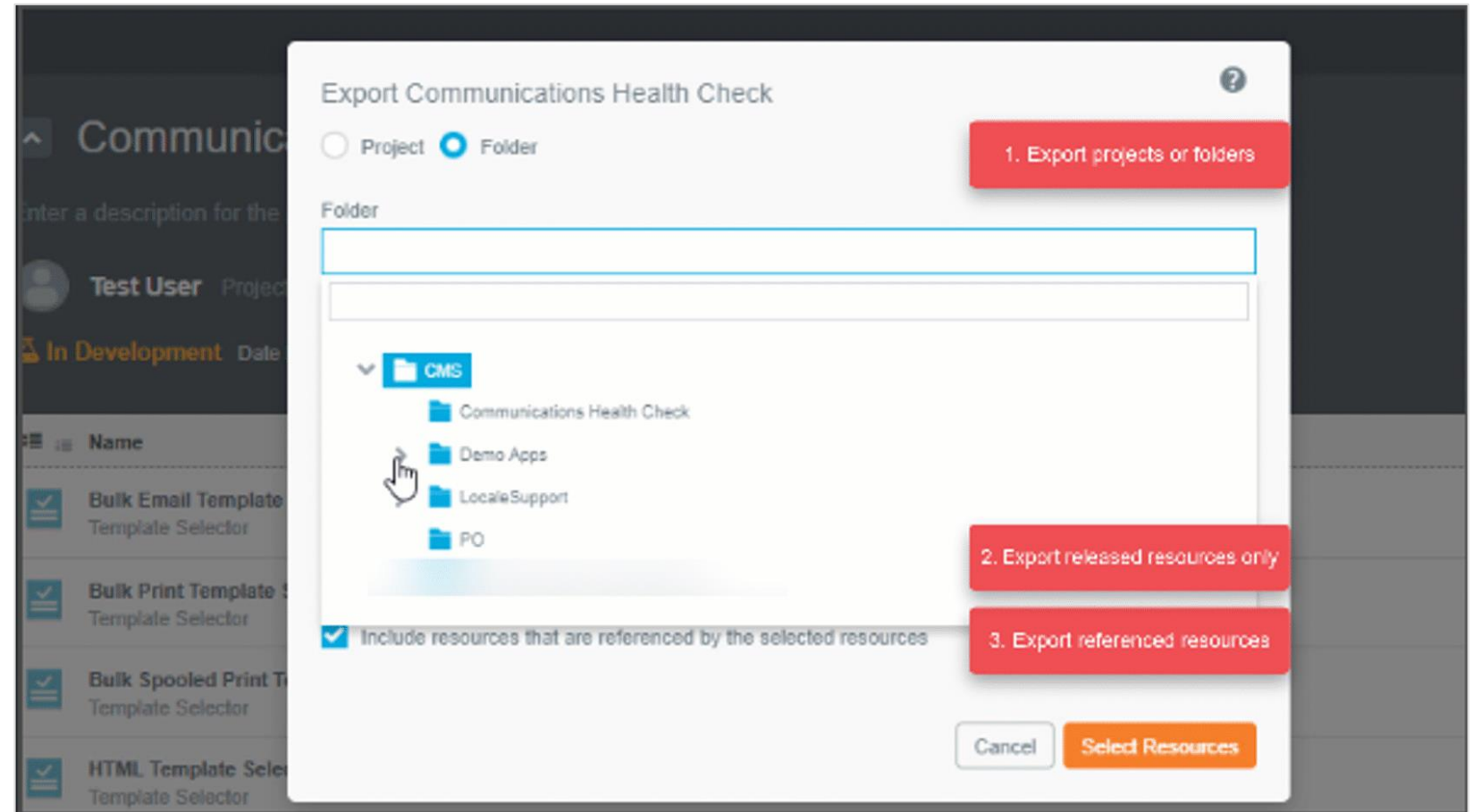
# Improved Export and Import

Project Dashboard Export now supports folder export.

All Exports now have two new options:

- To select only released resource versions
- To select related resources

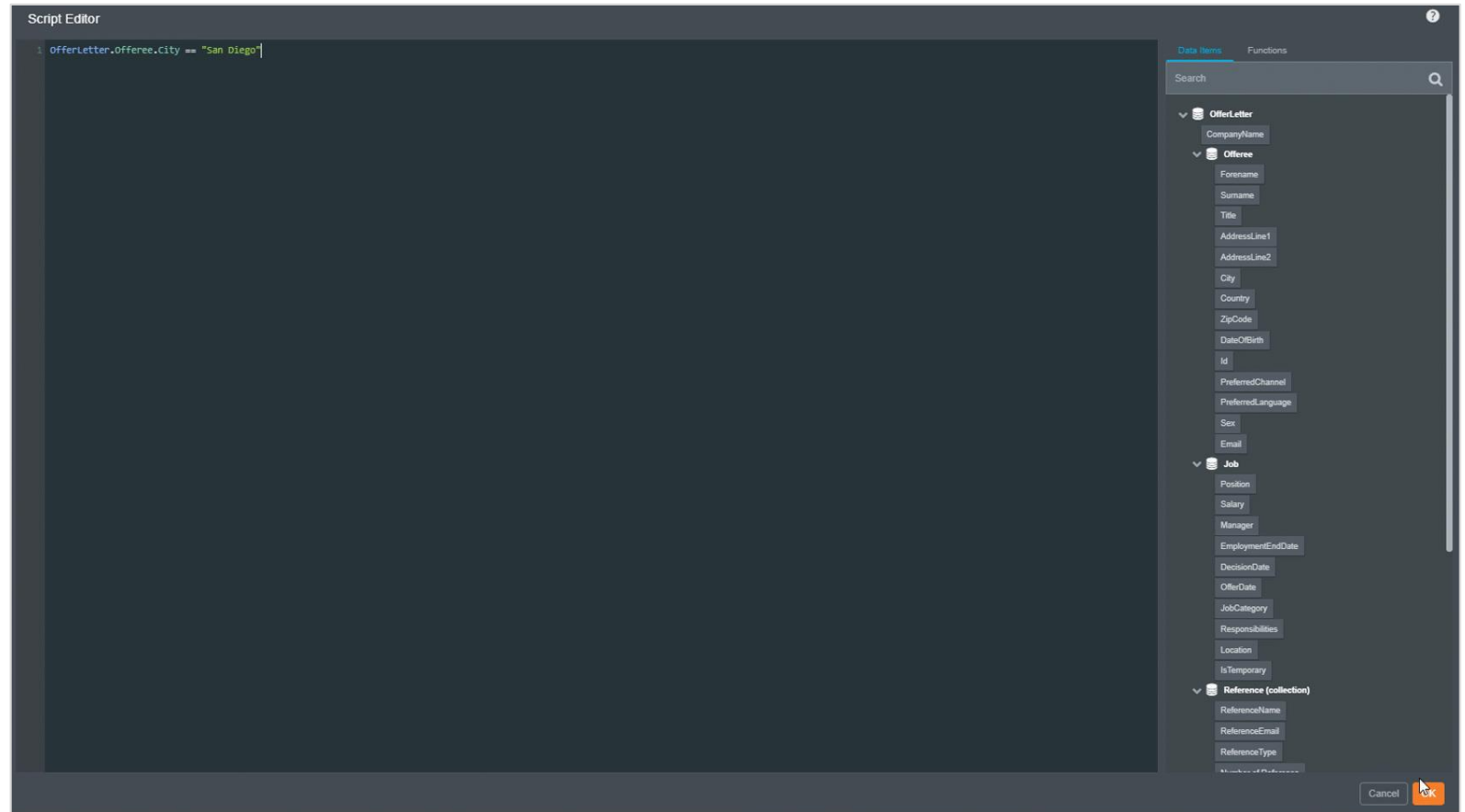
Export and Import dialogs have had their interfaces improved.



# Template Editor: Advanced If Rules

Users can now create Advanced If Rules within the Template Editor using JavaScript.

This allows users to utilize the SmartCOMM function library as well as any custom functions defined in their Document Script or Script Library.

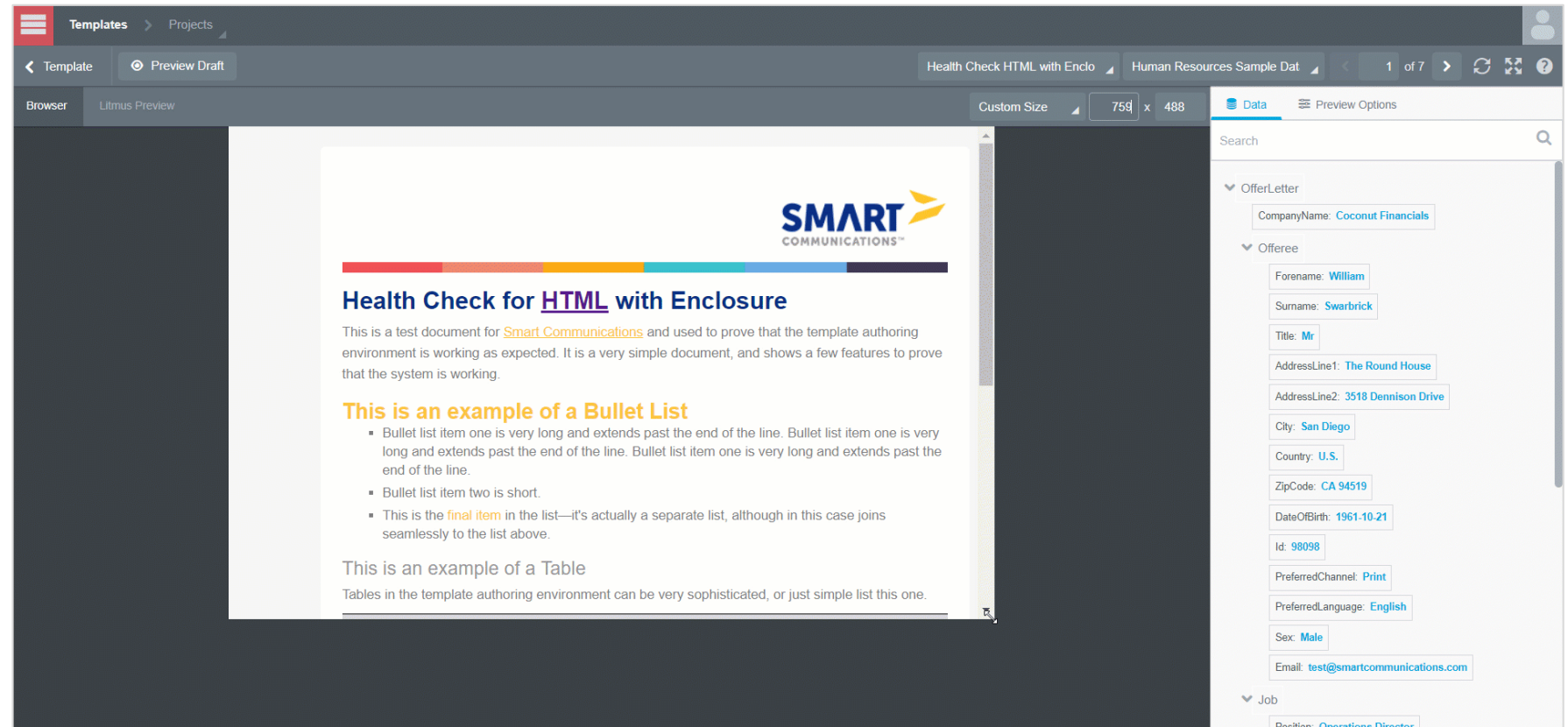


# HTML Preview Area Mouse Resize

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When previewing HTML templates, users are now able to use the mouse to resize the preview, allowing them to quickly mimic the screen resolution of any device.



# Template Editor: Automated PDF Bookmarking

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Template Editor users can configure their Templates to now automatically create Bookmarks in their PDF Output.

Bookmarks can be configured to be generated on individual Sections and Enclosures, or they can be applied to all Sections and Enclosures through the use of a Channel Job Property.

The screenshot displays the Template Editor interface. The main preview area shows a document with a table and a 'Communications Health Check' section. The table has three columns and three rows. The 'Communications Health Check' section includes a test document for Smart Communications. On the right, a 'Bookmarks' panel is open, showing a list of sections: 'Communications Health Check', 'Example Table', 'For Each Section', and 'Footer'. The 'Example Table' bookmark is selected. The background shows a form with various fields like 'Company Name', 'Address', 'City', 'Country', 'Zip Code', 'Date of Birth', 'Job', 'Position', 'Salary', 'Manager', 'Employment End Date', 'Decision Date', 'Offer Date', 'Job Category', 'Responsibilities', 'Location', 'is Temporary', and 'Reference[1]'. The bottom left corner of the preview area shows 'CHANNEL: Print EFFECTIVE DATE: 03/25/2019'.

For Advanced Template Designer (ATD) users, this new functionality requires the latest SC21 ATD to be installed to preserve customized Section names.

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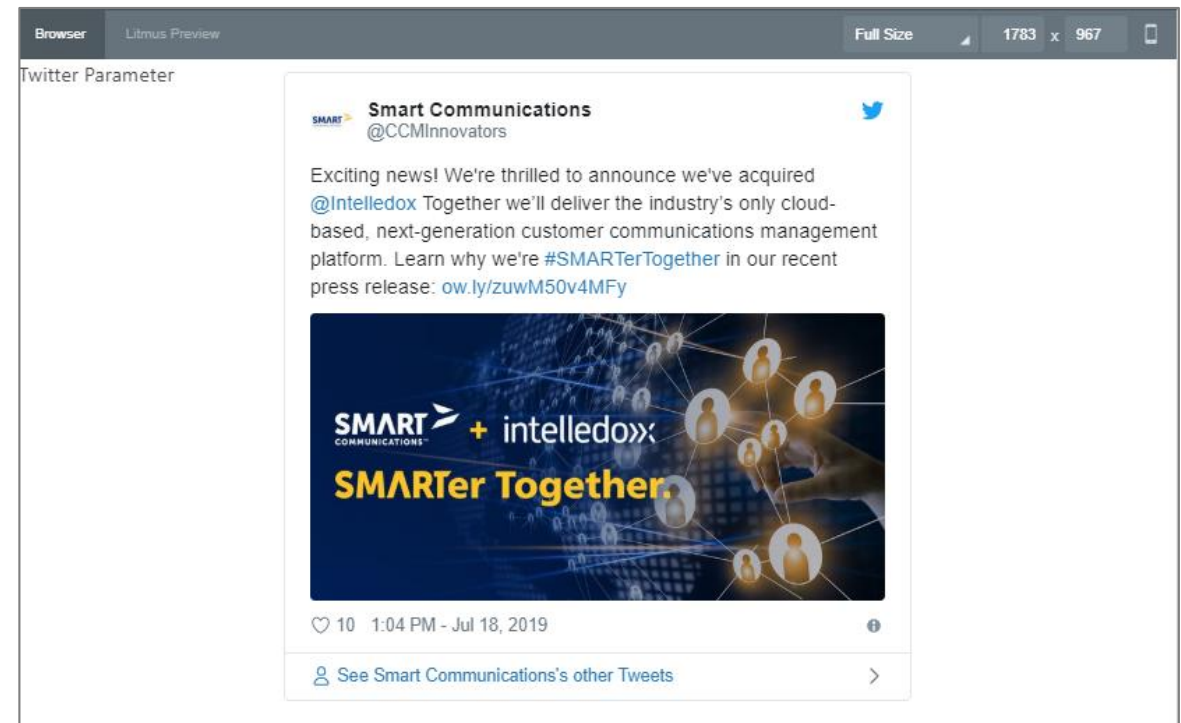
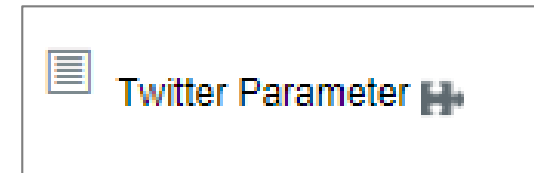
# SC21 Release Highlights

# Inline Smart Components

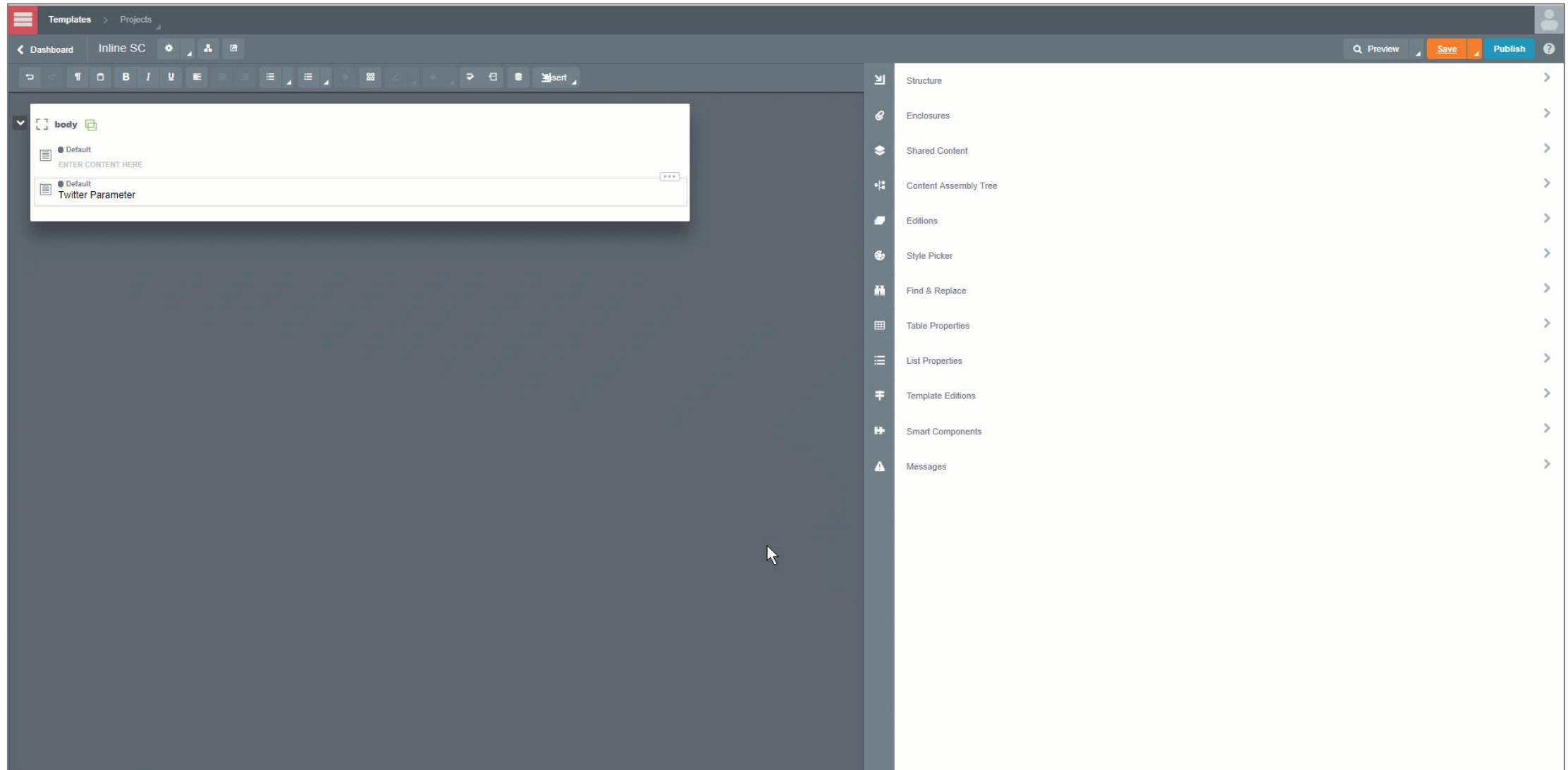
The Smart Components feature has been enhanced to provide Inline capability which enables users to insert buttons or social media components in line with existing content.

Previously Smart Components only operated at a block level but now they can be used for innovative applications like cross-referencing within a document.

This feature is licensable



# Inline Smart Components—Demo



The screenshot displays the InnoVate Smart Components editor interface. At the top, there is a navigation bar with 'Templates' and 'Projects' tabs. Below this is a breadcrumb trail showing 'Dashboard' and 'Inline SC'. A toolbar with various editing tools is visible. The main workspace is divided into two sections: a left sidebar showing a component tree with 'body' expanded to show 'Default' and 'Twitter Parameter' components, and a right sidebar with a list of tool panels including Structure, Enclosures, Shared Content, Content Assembly Tree, Editions, Style Picker, Find & Replace, Table Properties, List Properties, Template Editions, Smart Components, and Messages. At the top right of the editor, there are 'Preview', 'Save', and 'Publish' buttons.

# PowerPoint Output ((•))

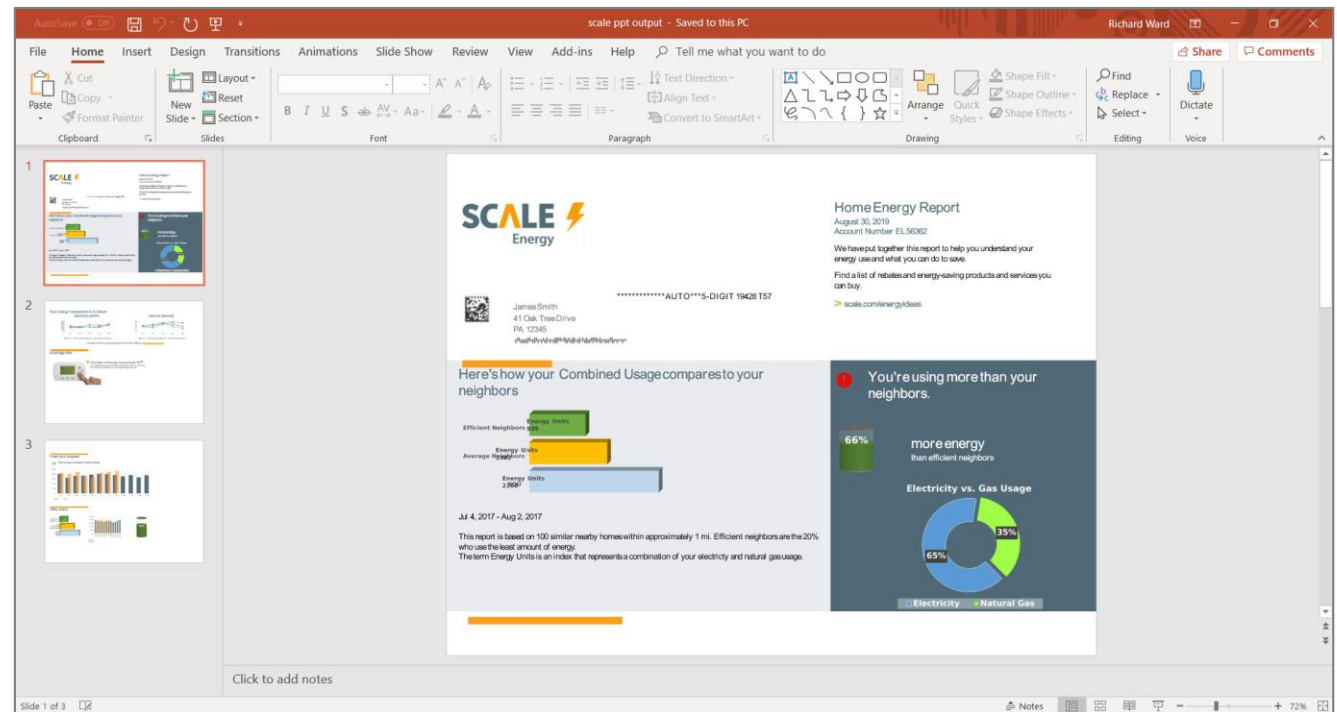
2019

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Users can output as PowerPoint using a Channel Job Property on the Print channel.

Now Presentations can be produced directly from Salesforce or other core systems.

Name	Value
channel.output.format	ABC pptx



This feature is licensable



# Draft Editor Save as Shared Content



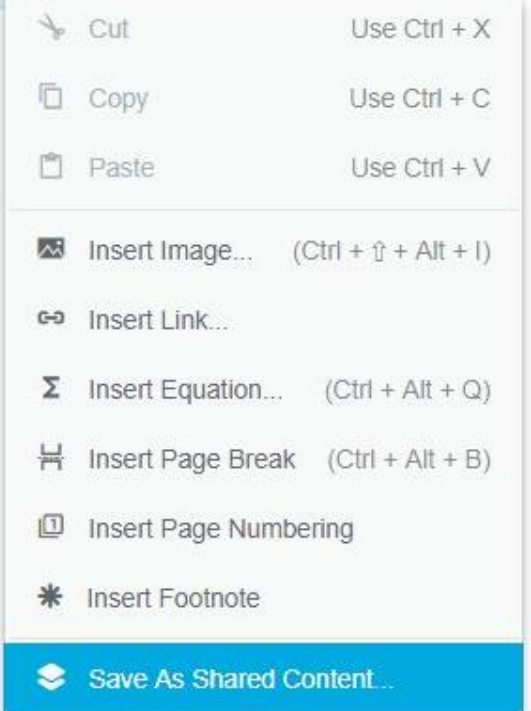
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Draft Editor users can now save wording from Drafts to be repurposed in other communications via Shared Content. This enables sharing of good wording between teams, as well as quick reaction to regulatory change.

Shared Content once saved is Released within the CMS.

The ability to save as Shared Content is off by default and enabled by the Draft Editor API.

Thank you very much for taking the time to call us regarding your insurance needs. which you provided in order to give you the best quote possible. I will call you before as any other questions you may have.



# Draft and Template Editor Drag and Drop Content

Inline elements can be dragged and dropped within a fragment in both Template Editor and Draft Editor, to speed up both template design time and the time spent personalizing documents when in draft.

These components include:

- Images
- Links
- Equations
- Shared Content
- Data Items



# Template Editor Drag and Drop Content—Demo



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The screenshot displays the Smart Communications Template Editor interface. The main area shows a preview of a document with the following content:

Dear [William] [Swarbrick],

## Communications Health Check

This is a test document for [Smart Communications](#) and is used to prove that the template authoring environment is working as expected. It is a very simple document, and shows just a few features to prove that the system is working.

This is shared content



**This is an example bullet list**

- Bullet list item one is very long and extends past the end of the line. Bullet list item one is very long and extends past the end of the line.
- Bullet list one is very long and extends past the end of the line.

**This is an example Table**  
Tables in the template authoring environment can be veryTest Style sophisticated, or just simple like this one.

This is a title row	This is title cell 2	This is title cell 3
This is row 1	This is still row 1	This is row 1 again
This is row 2	This is still row two again and forms part of a merged cell	
This is row 3	This is row 3	This is row 3 again

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The right sidebar contains 'Preview Options' with the following settings:

- Channel: Print
- Language: English (United States)
- Idiom: Any
- Jurisdiction: Any
- Brand: Smart Communications
- Effective Date: [Calendar icon]
- Message Level: Information

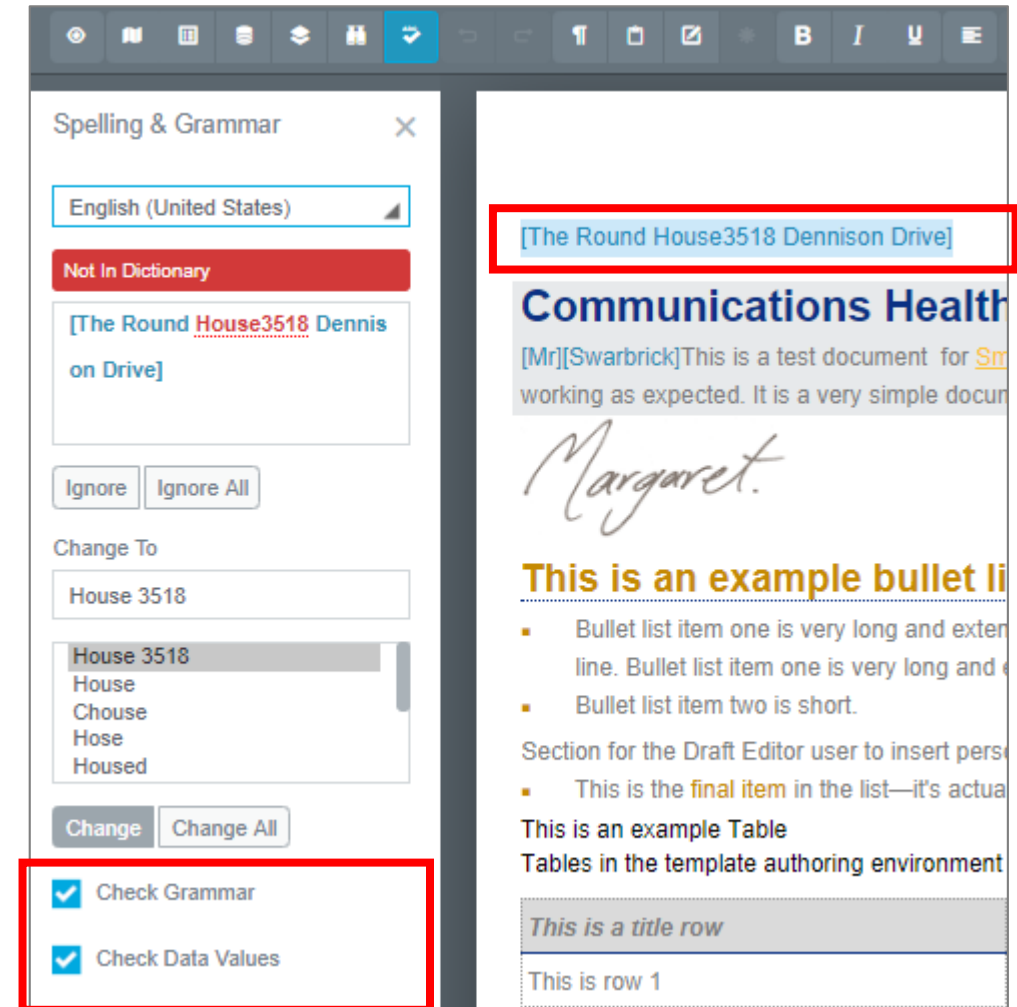
An 'Update' button is located at the bottom of the sidebar.

At the bottom of the preview area, the following metadata is displayed: 'English (United States)' (5) CHANNEL: Print BRAND: 'Smart Communications' (1011000000001) EFFECTIVE DATE: 09/02/2019

# Draft Editor Spell Check Script Variables

Document Script Variables are now included within the Spelling & Grammar check.

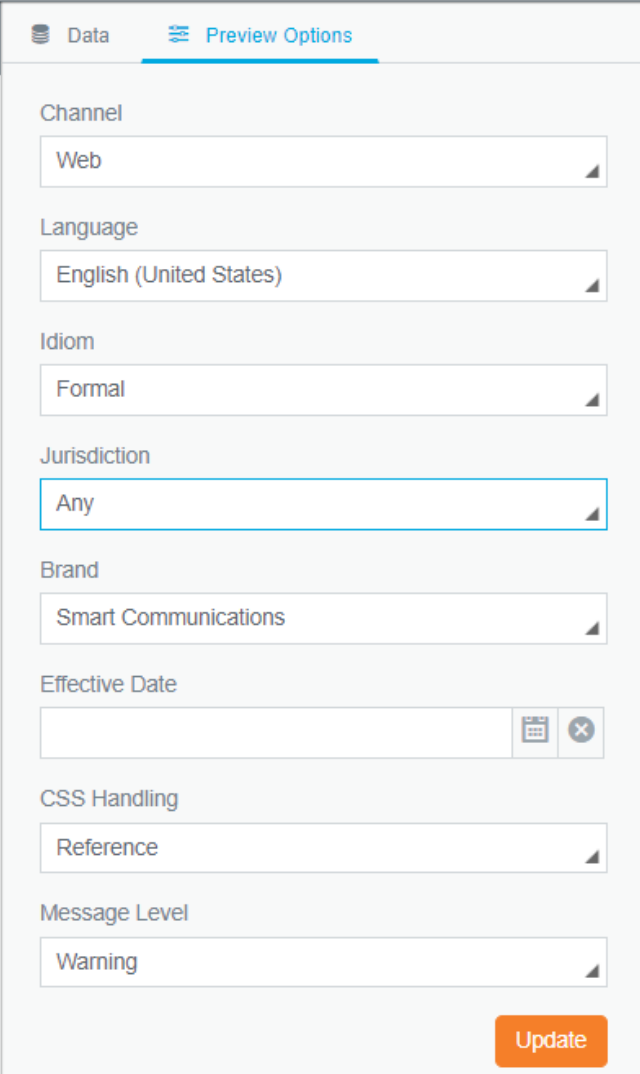
The spellcheck preferences are remembered for Check Grammar and Check Data Values.



The screenshot displays the 'Spelling & Grammar' panel in the Draft Editor. The language is set to 'English (United States)'. A red box highlights the text '[The Round House3518 Dennison Drive]' in the document. The panel shows a list of suggestions for this text, with 'House 3518' selected. The 'Check Grammar' and 'Check Data Values' checkboxes are checked. The main document content includes a red box around '[The Round House3518 Dennison Drive]', a heading 'Communications Health', a signature 'Margaret.', a bullet list, and a table with a title row and one data row.

# Remember Preview Options

Template Editor users save time when navigating between design and preview as template preview options are now remembered for the user.



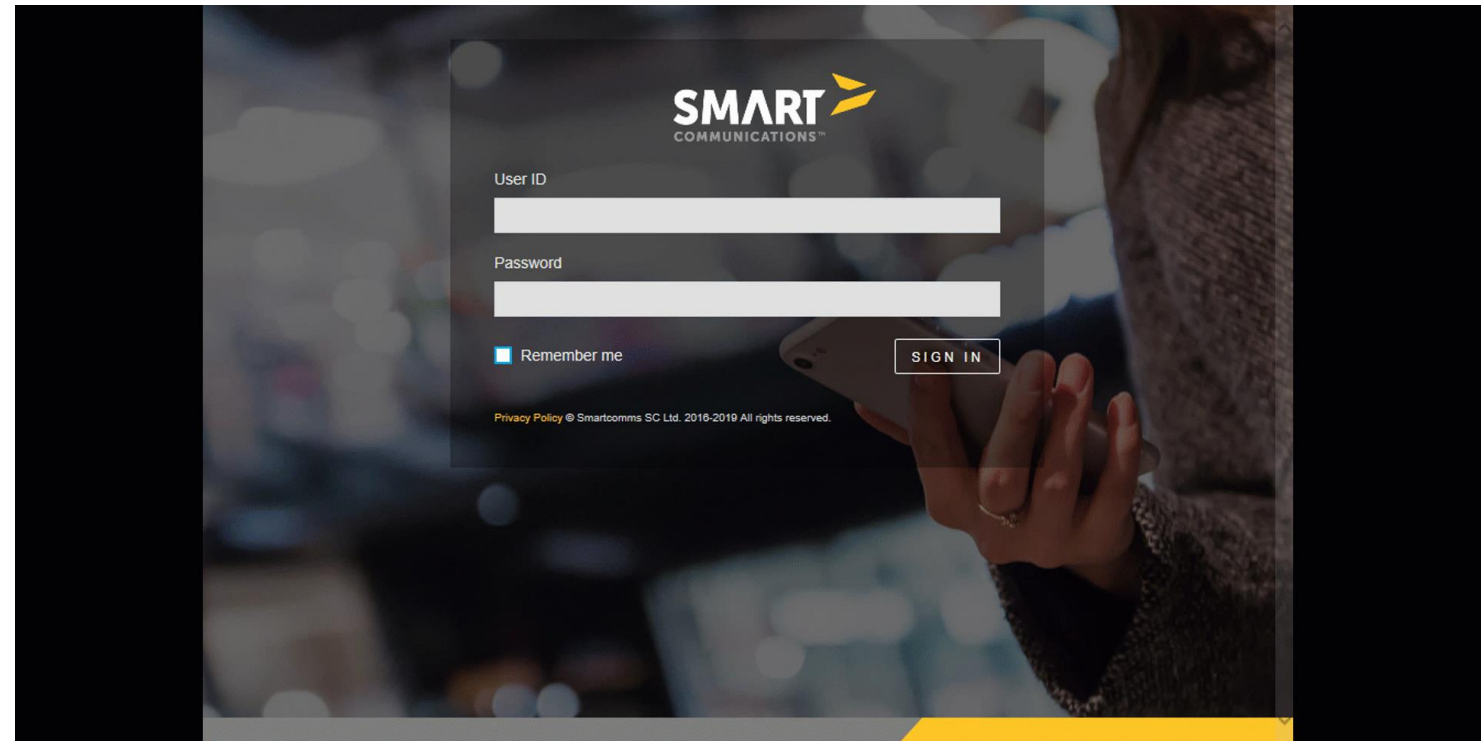
The screenshot shows the 'Preview Options' panel in the Template Editor. The panel is titled 'Preview Options' and contains the following fields:

- Channel: Web
- Language: English (United States)
- Idiom: Formal
- Jurisdiction: Any
- Brand: Smart Communications
- Effective Date: (Empty field with a calendar icon and a close icon)
- CSS Handling: Reference
- Message Level: Warning

An orange 'Update' button is located at the bottom right of the panel.

# ATD User Name Memory—Demo

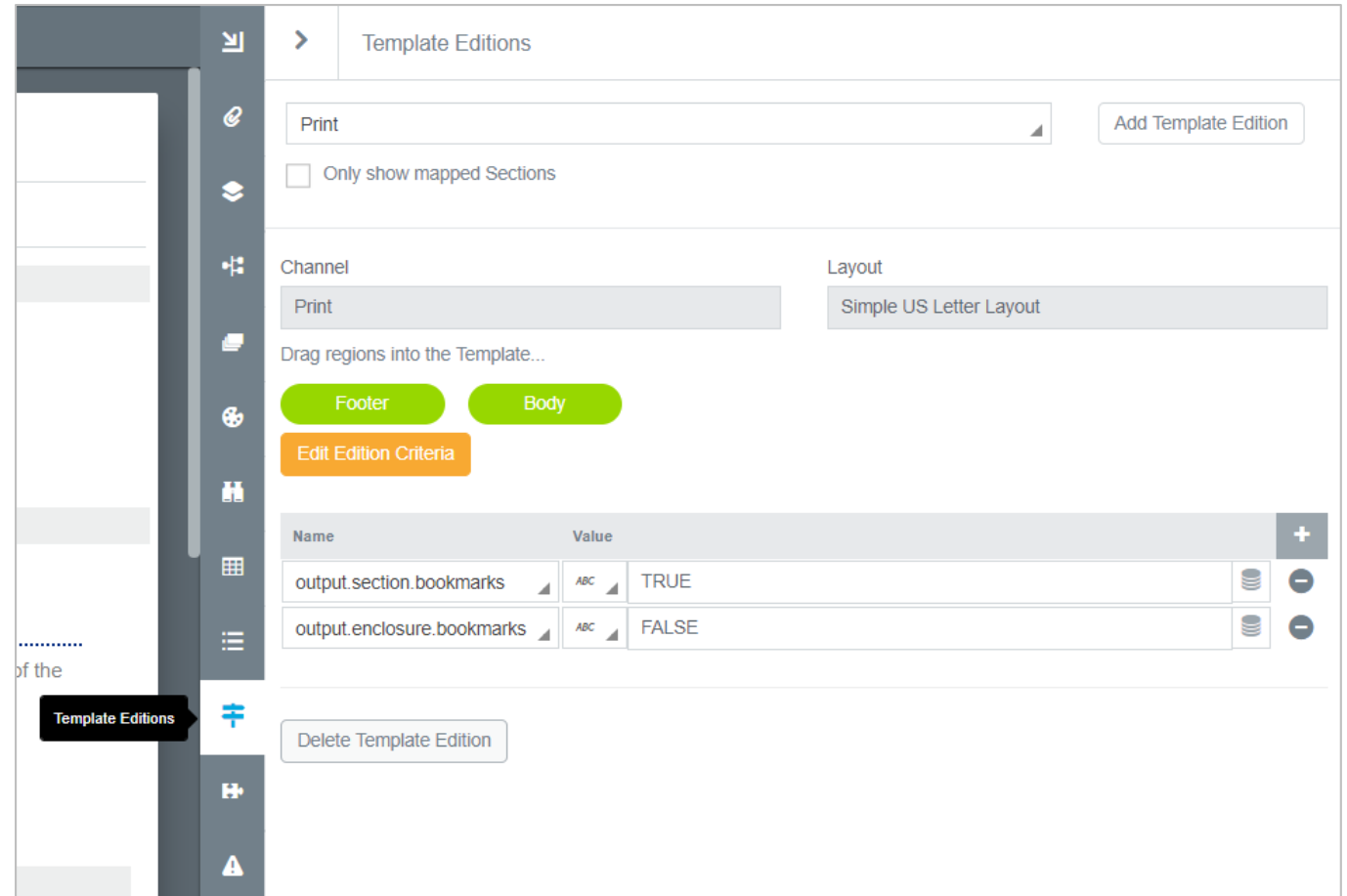
Users of Advanced Template Designer can select “Remember me”, to store their User ID on the computer they’re using, so that they don’t have to type in this information every time they login.



# Manage Channels → Template Editions

The side panel section to *Manage Channels* has been renamed to *Template Editions*, and redesigned using our *SmartUI* user interface design language.

By displaying each Edition individually there is a clearer interface providing easier access to region mapping as well as the configuration of additional channel job properties. Multiple Editions of the same channel can also be configured more easily.



Template Editions

Print

Add Template Edition

Only show mapped Sections

Channel: Print

Layout: Simple US Letter Layout

Drag regions into the Template...

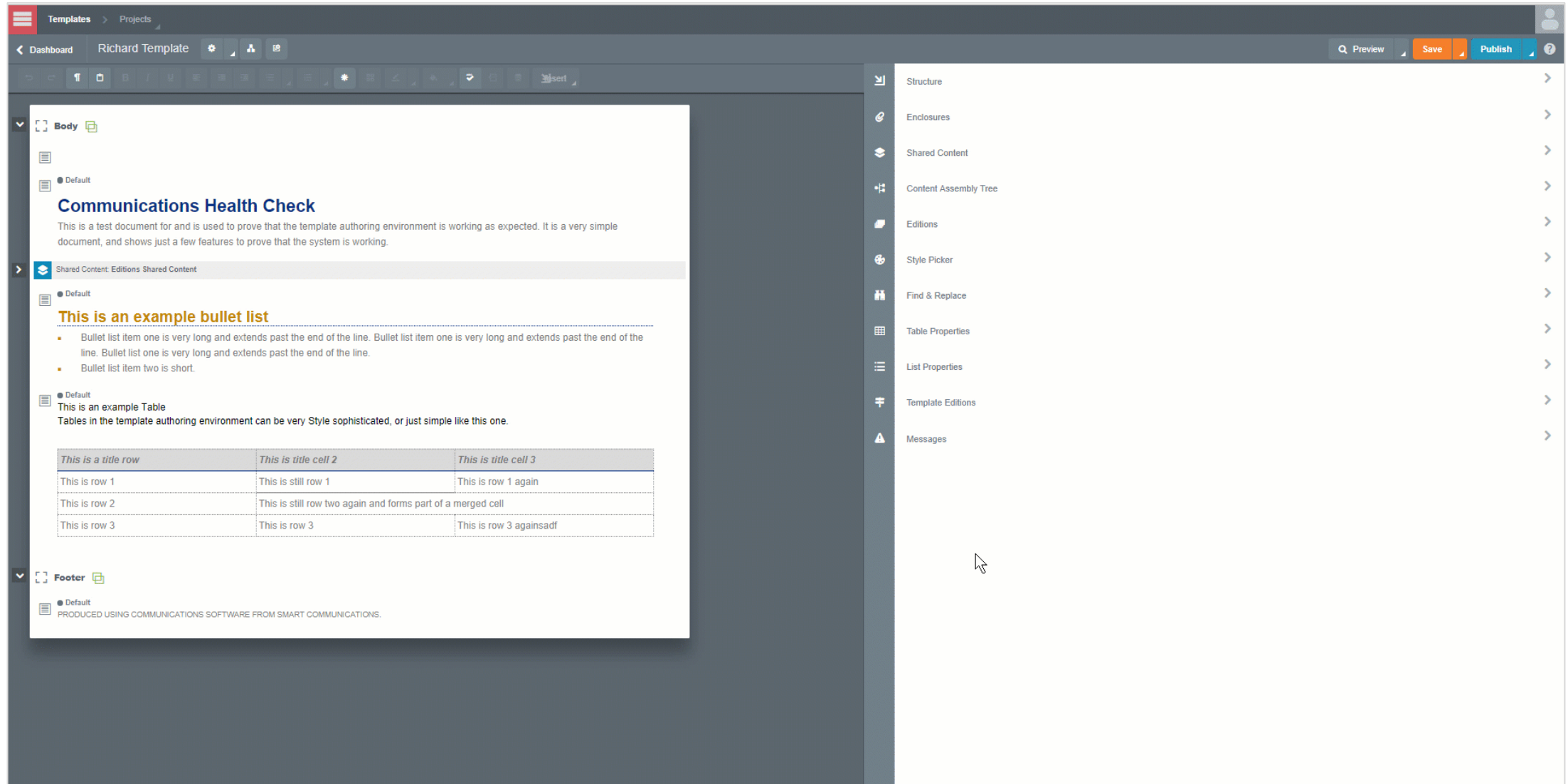
Footer Body

Edit Edition Criteria

Name	Value		
output.section.bookmarks	ABC	TRUE	
output.enclosure.bookmarks	ABC	FALSE	

Delete Template Edition

# Template Editions—Demo



The screenshot displays the Smart Communications template authoring environment. The main workspace shows a document titled "Communications Health Check" with the following content:

**Communications Health Check**  
This is a test document for and is used to prove that the template authoring environment is working as expected. It is a very simple document, and shows just a few features to prove that the system is working.

**Shared Content: Editions Shared Content**

**This is an example bullet list**

- Bullet list item one is very long and extends past the end of the line. Bullet list item one is very long and extends past the end of the line. Bullet list one is very long and extends past the end of the line.
- Bullet list item two is short.

**This is an example Table**  
Tables in the template authoring environment can be very Style sophisticated, or just simple like this one.

<i>This is a title row</i>	<i>This is title cell 2</i>	<i>This is title cell 3</i>
This is row 1	This is still row 1	This is row 1 again
This is row 2	This is still row two again and forms part of a merged cell	
This is row 3	This is row 3	This is row 3 againsadf

**Footer**  
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The right sidebar contains the following editing tools:

- Structure
- Enclosures
- Shared Content
- Content Assembly Tree
- Editions
- Style Picker
- Find & Replace
- Table Properties
- List Properties
- Template Editions
- Messages



# Choice Lists Navigation Improvements



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New highlighting of mandatory Choices Lists in red with a warning triangle.

New “To Do” filter to show mandatory Choice Lists.

Enhancement to easily find the content bound to a Choice by clicking on the Choice name

Enhancement to collapse Choice Lists

The screenshot shows a document review interface for an "Insurance Document for Demo" in "IN DRAFTING (Internal)" status. A "Review" panel is open, displaying a list of choices. The "Choices" tab is active, and a "To Do" filter is selected, indicated by a red notification badge with the number "2". The choices are:

- Is the customer in the UK?** (Mandatory, highlighted in red with a warning triangle)
- Yes
- No
- Does the customer have a full driving licence?** (Mandatory, highlighted in red with a warning triangle)
- Yes
- No
- Do you have a no claims bonus?
- Yes
- No
- Do you keep your car in the garage?

The main document content is visible on the right, showing a "Health Check for PDF with" section with a bullet list and a "Table" section with a table of rows.

# Pagination of Users and Groups

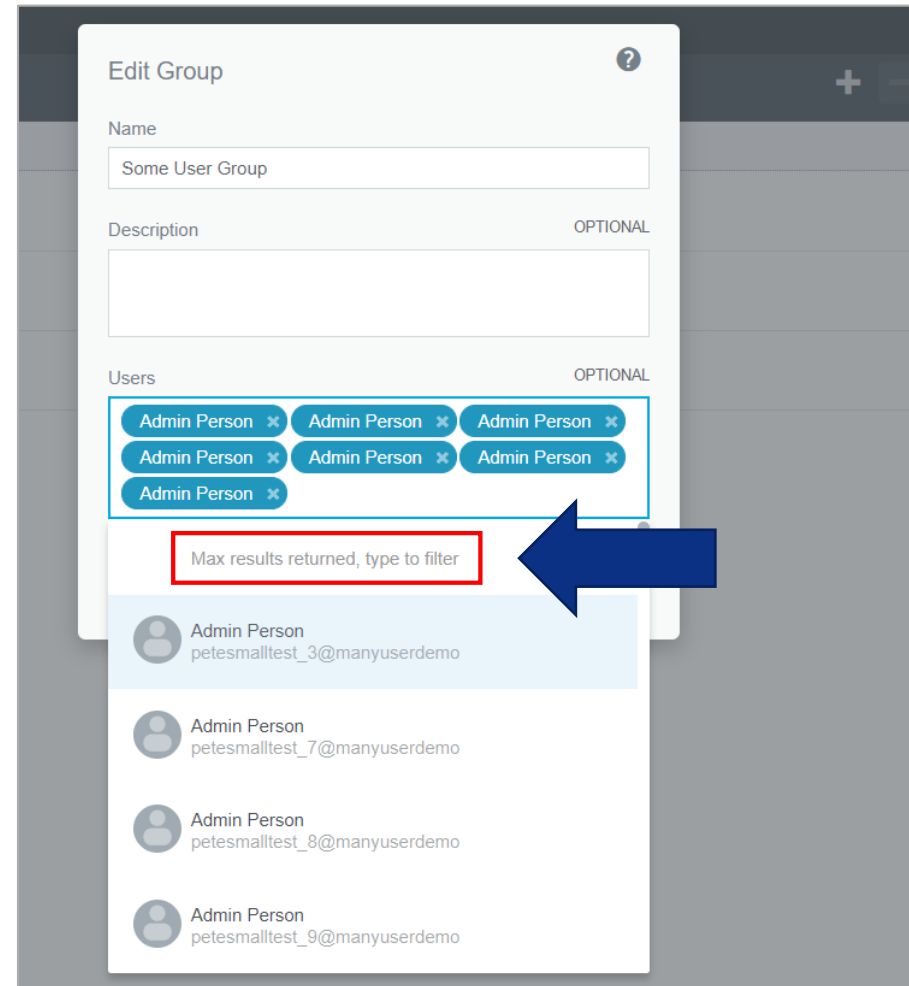
New support for Tenancies that have a large numbers of users or groups.

Latest versions of List Users and List Groups APIs returns a maximum of 500 records in each response.

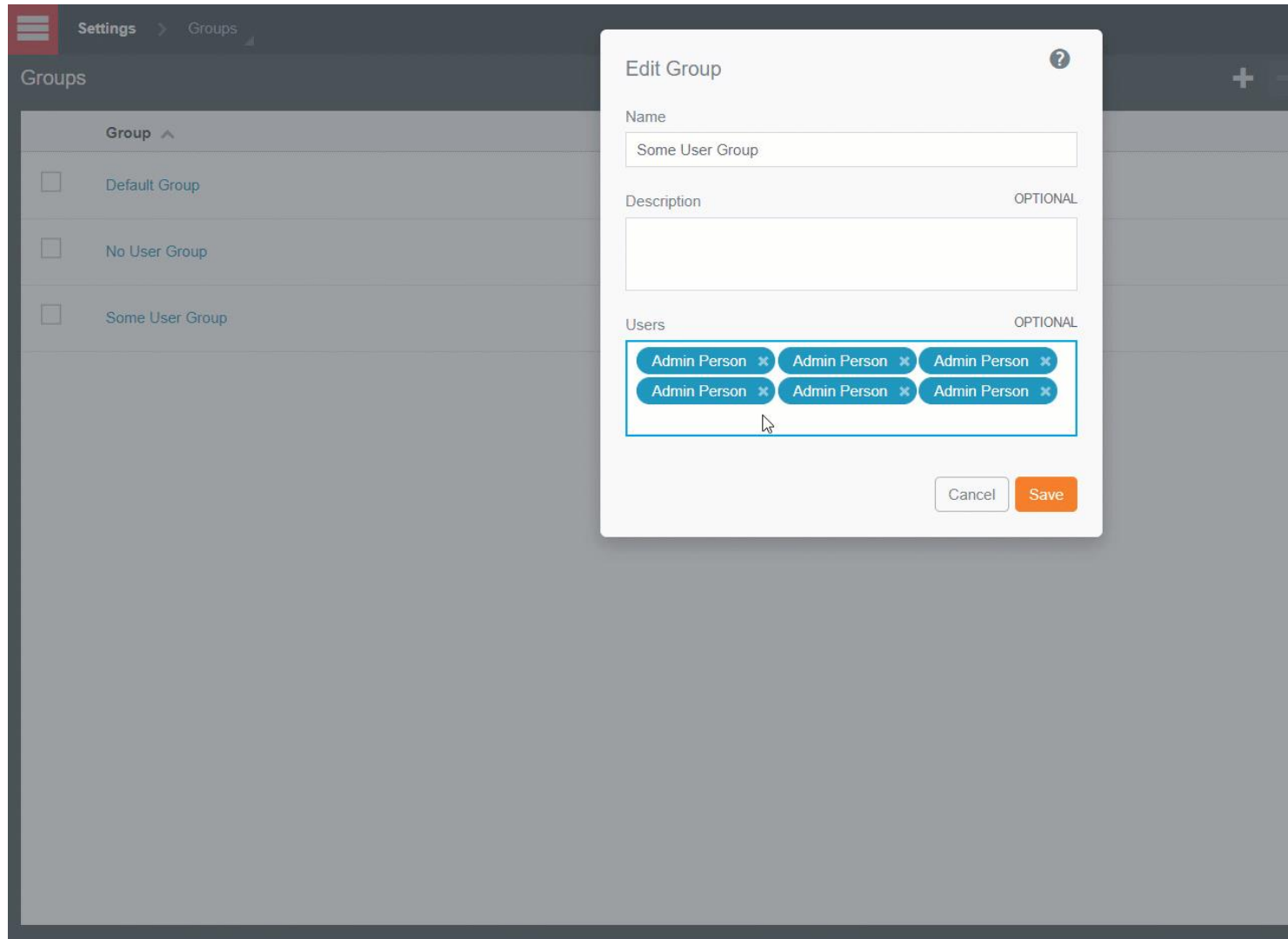
Pages for listing users and groups have been updated to use the new APIs. Paging is available, so that the user can page through all the results.

Dialogues for adding users to a Group or Project have been updated to support paging.

API calls without the version number in the path will use the latest APIs.



# Pagination of Users and Groups—Demo



The screenshot displays a web application interface. On the left, a sidebar menu shows 'Settings' and 'Groups'. The main content area is titled 'Groups' and contains a list of three groups: 'Default Group', 'No User Group', and 'Some User Group'. Each group has a checkbox to its left. A modal dialog titled 'Edit Group' is open in the foreground. The dialog has a title bar with a question mark icon. It contains the following fields and elements:

- Name:** A text input field containing 'Some User Group'.
- Description:** A text area labeled 'OPTIONAL'.
- Users:** A section labeled 'OPTIONAL' containing six blue pill-shaped buttons, each labeled 'Admin Person' with a close icon (x) on the right. The buttons are arranged in two rows of three.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

# Template Editions

Editions deliver the capability to manage multiple Languages, Channels, Jurisdictions, Idioms and Brands within one template. Therefore, saving time and money on template management, and complicated configuration.

Customers using Editions can now move to Template Editor, empowering business users to edit Templates.

The workflow for adding and managing Editions has been improved to allow users to work with them more effectively when adding new ones.

### Create Edition Set ?

Create Edition From...

Default

Jurisdiction

Any

Brand

Any

Language

Any

Channel

Any

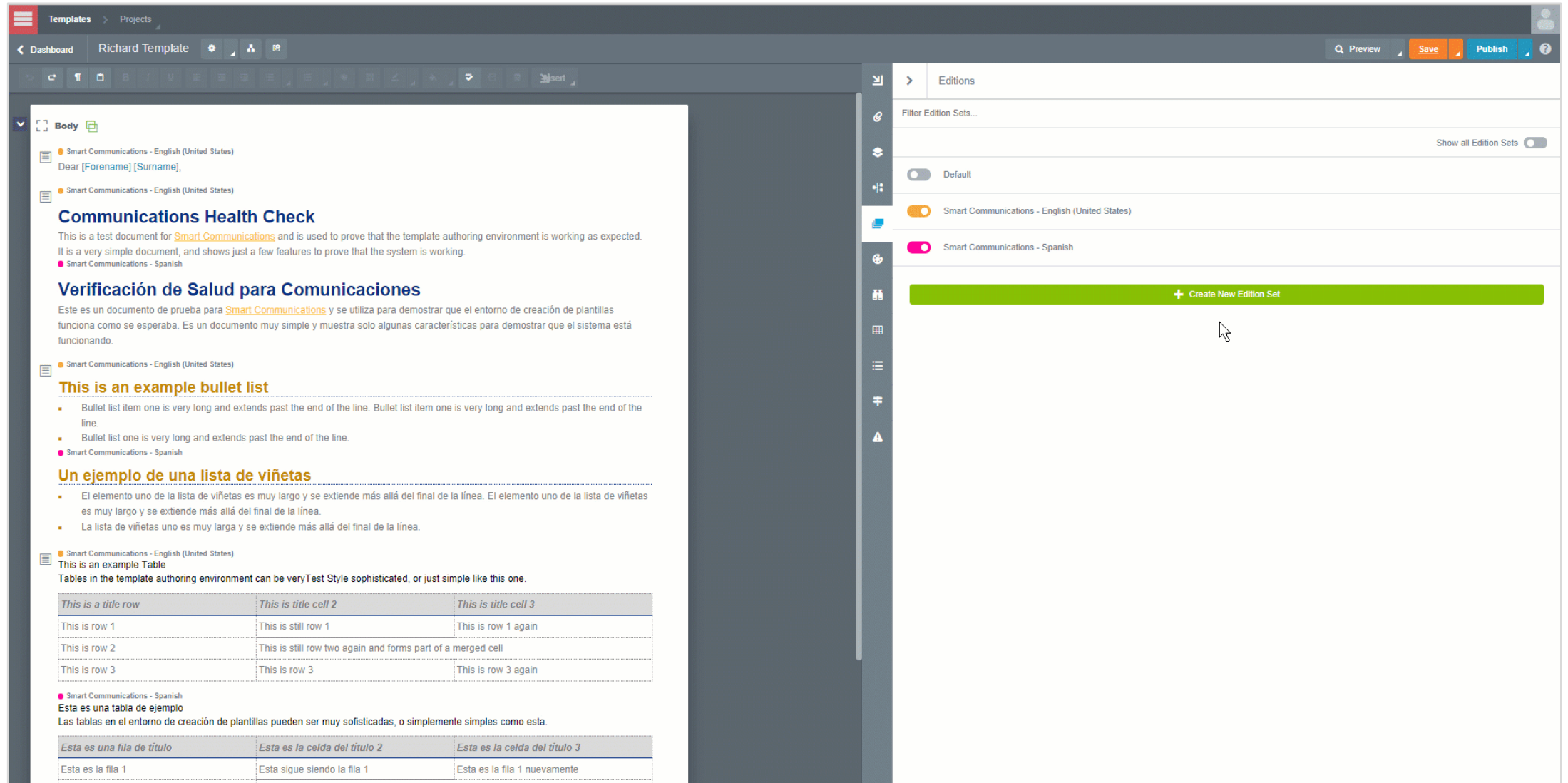
Idiom

Any

Configure Edition Display Color

Cancel Next

# Template Editions—Demo



The screenshot displays the Smart Communications template editor interface. The main workspace shows a document titled "Richard Template" with a breadcrumb "Templates > Projects". The document content includes:

- A salutation: "Dear [Forename] [Surname]."
- A section titled "Communications Health Check" with a paragraph: "This is a test document for [Smart Communications](#) and is used to prove that the template authoring environment is working as expected. It is a very simple document, and shows just a few features to prove that the system is working."
- A section titled "Verificación de Salud para Comunicaciones" with a paragraph: "Este es un documento de prueba para [Smart Communications](#) y se utiliza para demostrar que el entorno de creación de plantillas funciona como se esperaba. Es un documento muy simple y muestra solo algunas características para demostrar que el sistema está funcionando."
- A section titled "This is an example bullet list" with a bulleted list:
  - Bullet list item one is very long and extends past the end of the line. Bullet list item one is very long and extends past the end of the line.
  - Bullet list one is very long and extends past the end of the line.
- A section titled "Un ejemplo de una lista de viñetas" with a bulleted list:
  - El elemento uno de la lista de viñetas es muy largo y se extiende más allá del final de la línea. El elemento uno de la lista de viñetas es muy largo y se extiende más allá del final de la línea.
  - La lista de viñetas uno es muy larga y se extiende más allá del final de la línea.
- A section titled "This is an example Table" with a paragraph: "Tables in the template authoring environment can be veryTest Style sophisticated, or just simple like this one."
- A table with 3 columns and 4 rows:

This is a title row	This is title cell 2	This is title cell 3
This is row 1	This is still row 1	This is row 1 again
This is row 2	This is still row two again and forms part of a merged cell	
This is row 3	This is row 3	This is row 3 again
- A section titled "Esta es una tabla de ejemplo" with a paragraph: "Las tablas en el entorno de creación de plantillas pueden ser muy sofisticadas, o simplemente simples como esta."
- A table with 3 columns and 2 rows:

Esta es una fila de título	Esta es la celda del título 2	Esta es la celda del título 3
Esta es la fila 1	Esta sigue siendo la fila 1	Esta es la fila 1 nuevamente

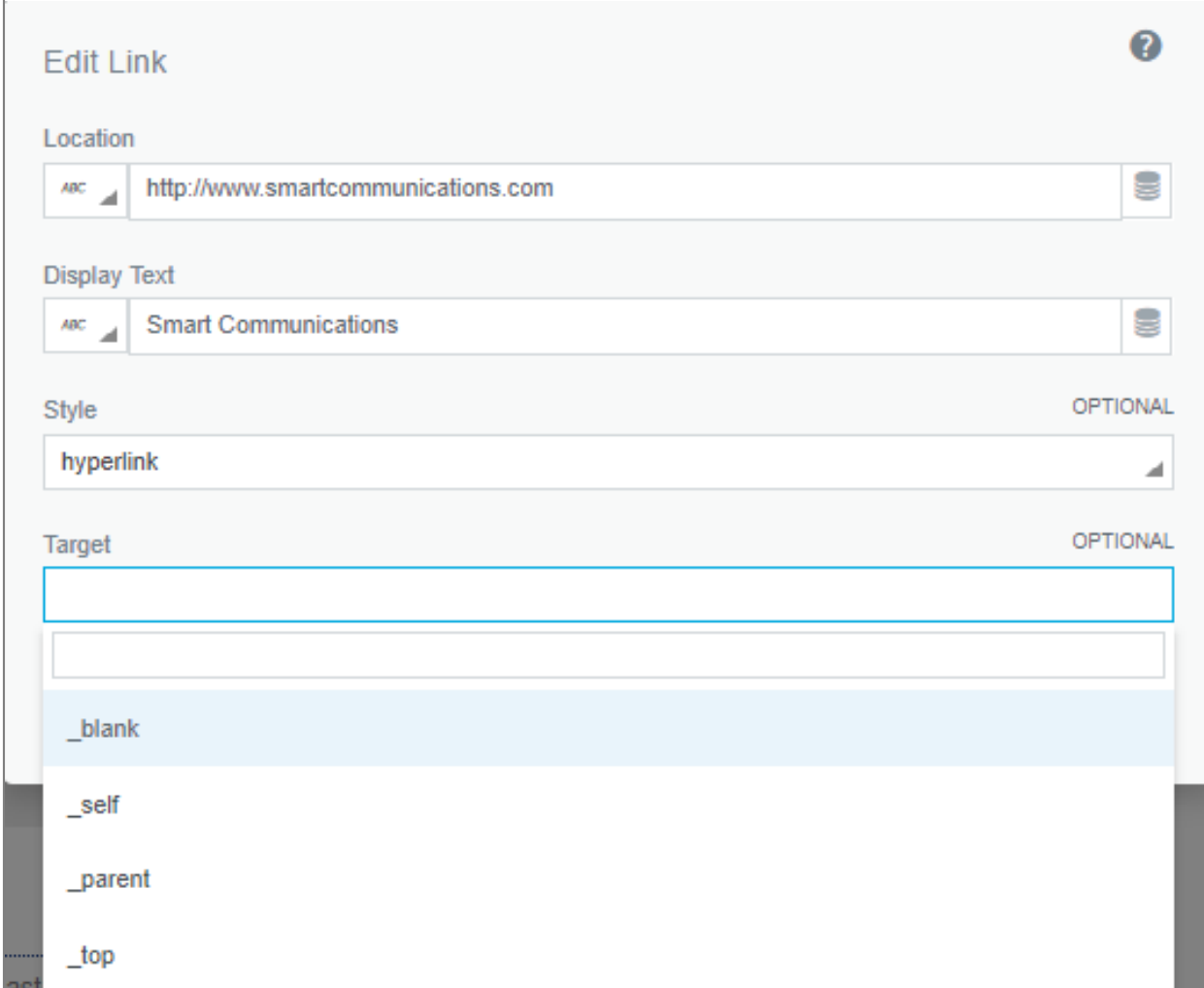
The right sidebar, titled "Editions", shows a list of edition sets:

- Filter Edition Sets...
- Show all Edition Sets
- Default
- Smart Communications - English (United States)
- Smart Communications - Spanish
- [+ Create New Edition Set](#)

# Support Target Link Attribute

Target Link Attribute specifies a window or target frame where a linked document is opened, and they can now be defined on Links and Images.

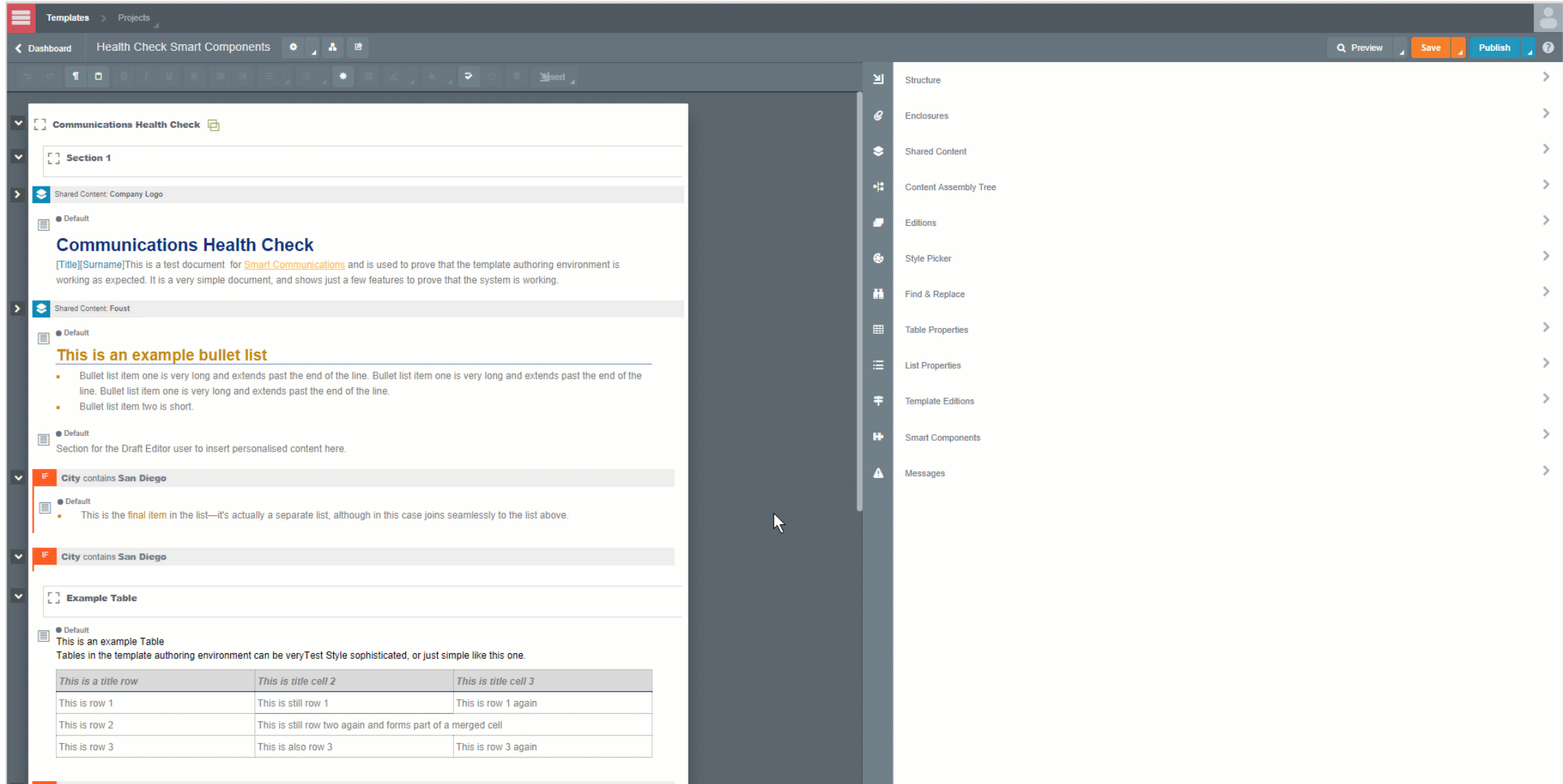
A customer can now jump to another website without closing the current window, for example with a new product application.



The screenshot shows the 'Edit Link' configuration interface. It includes the following fields and options:

- Location:** A text input field containing 'http://www.smartcommunications.com' with a database icon on the right.
- Display Text:** A text input field containing 'Smart Communications' with a database icon on the right.
- Style:** A dropdown menu with 'hyperlink' selected and 'OPTIONAL' text to the right.
- Target:** A dropdown menu with 'OPTIONAL' text to the right. The menu is open, showing options: '\_blank' (highlighted), '\_self', '\_parent', and '\_top'.

# Support Target Link Attribute—Demo



The screenshot displays a template authoring tool interface. The main workspace shows a document titled "Communications Health Check" with several sections:

- Section 1**: Contains a shared content block for the "Company Logo" and a default paragraph: "[Title][Surname] This is a test document for Smart Communications and is used to prove that the template authoring environment is working as expected. It is a very simple document, and shows just a few features to prove that the system is working."
- Shared Content: Foust**: Contains a default section titled "This is an example bullet list" with three items:
  - Bullet list item one is very long and extends past the end of the line. Bullet list item one is very long and extends past the end of the line. Bullet list item one is very long and extends past the end of the line.
  - Bullet list item two is short.
- IF City contains San Diego**: Contains a default section with one item: "This is the final item in the list—it's actually a separate list, although in this case joins seamlessly to the list above."
- IF City contains San Diego**: Another conditional section.
- Example Table**: Contains a default section with a table:

This is an example Table  
Tables in the template authoring environment can be veryTest Style sophisticated, or just simple like this one.

This is a title row	This is title cell 2	This is title cell 3
This is row 1	This is still row 1	This is row 1 again
This is row 2	This is still row two again and forms part of a merged cell	
This is row 3	This is also row 3	This is row 3 again

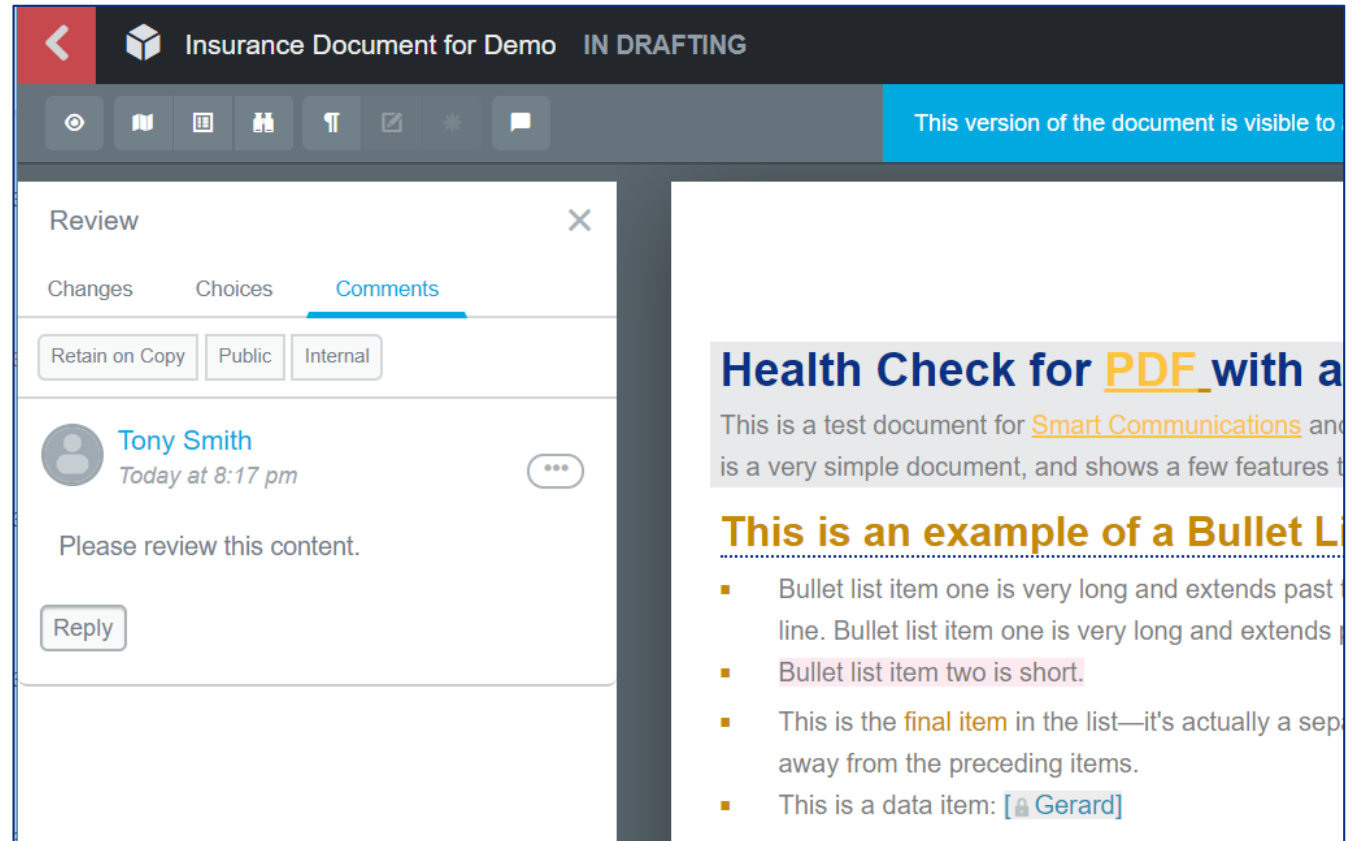
The right-hand sidebar contains a list of tool options: Structure, Enclosures, Shared Content, Content Assembly Tree, Editions, Style Picker, Find & Replace, Table Properties, List Properties, Template Editions, Smart Components, and Messages.

# Improved Docbox Navigation



The Comments tab has been moved to the Review panel, so that all tabs useful for reviewing changes to the document are in the same panel.

Tasks and Enhancements tabs now only show if there is content. This reduces unnecessary clutter and so improves the readability of the left hand menu.





# Improved Docbox Navigation—Demo



Health Check with an Interview Insurance IN DRAFTING (Internal)

Review

Changes Choices **Comments**

Retain on Copy Public Internal

Admin User  
Today at 4:29 pm

Please review this content.

Reply

**Comments moved to the Review panel**

**Tasks and Exceptions tabs are now only visible if there is something to show**

**Health Check for PDF with an Interview**

This is a test document for [Smart Communications](#) and used to prove that the template authoring environment is working as expected. It is a very simple document, and shows a few features to prove that the system is working.

**This is an example of a Bullet List**

- Bullet list item one is very long and extends past the end of the line. Bullet list item one is very long and extends past the end of the line. Bullet list item one is very long and extends past the end of the line.
- Bullet list item two is short.
- This is the final item in the list—it's actually a separate list, and depending on how the Styles are set up may be slightly spaced away from the preceding items.
- This is a data item: [John]

[This is text for a customer who does not live in the UK.](#)

[This is text for a customer who has a full driving licence.](#)

**This is an example of a Table**

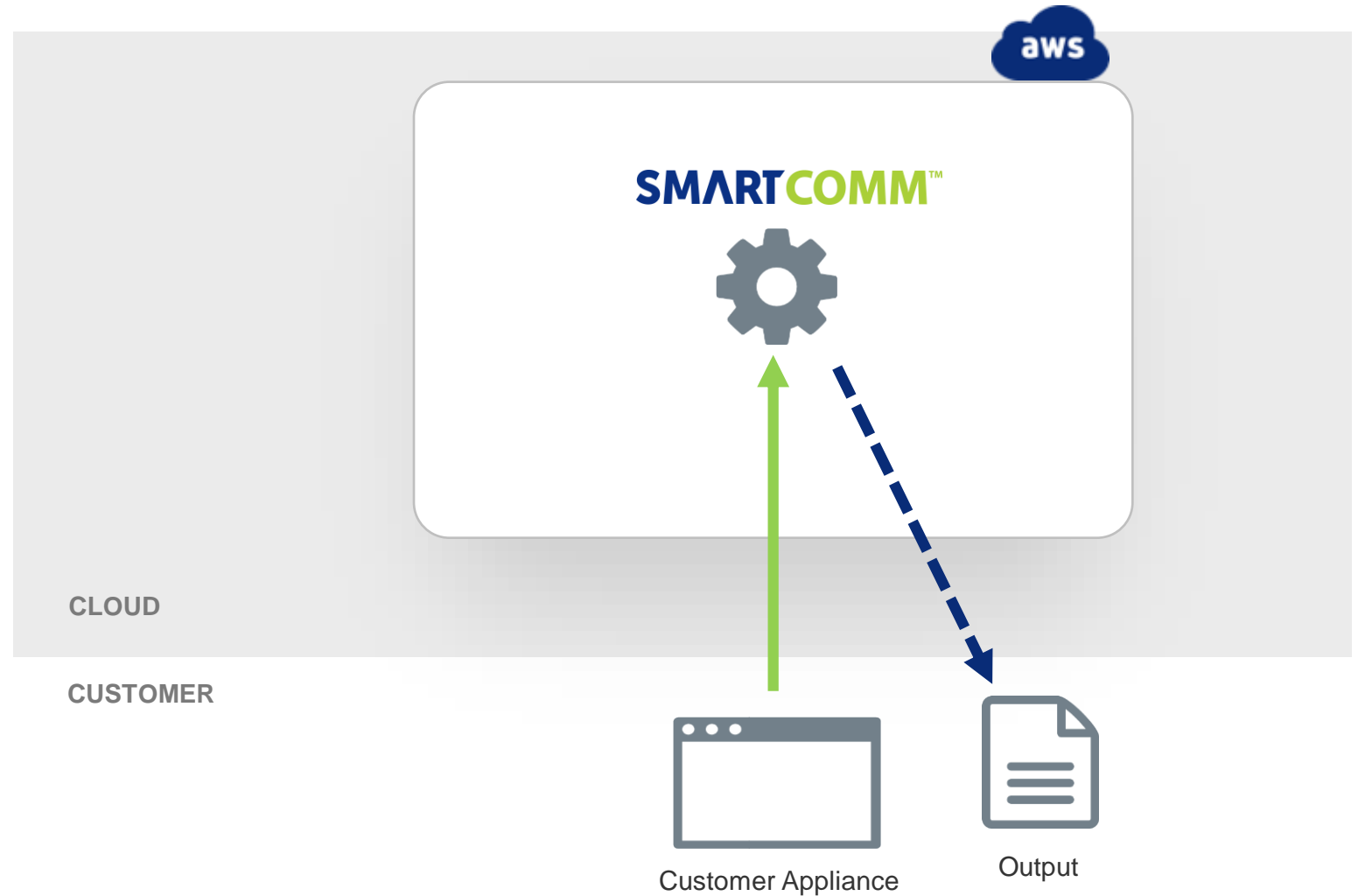
Tables in the template authoring environment can be very sophisticated, or just simple list this one.

This is cell 1	This is cell 2	This is cell 3
This is row 2	This is still row 2	This is row 2 again
This is row 3	This is still row 3	This is the last cell in row 3
This is row 4	This is row 4	This is row 4 again
This is row 5	This is row 5	This is row 5 again

PRODUCED USING COMMUNICATIONS SOFTWARE FROM SMART COMMUNICATIONS.

# Appliance Support for Pure Cloud AWS

To support greater deployment flexibility, the Appliance is now offered with our Pure Cloud AWS solution.



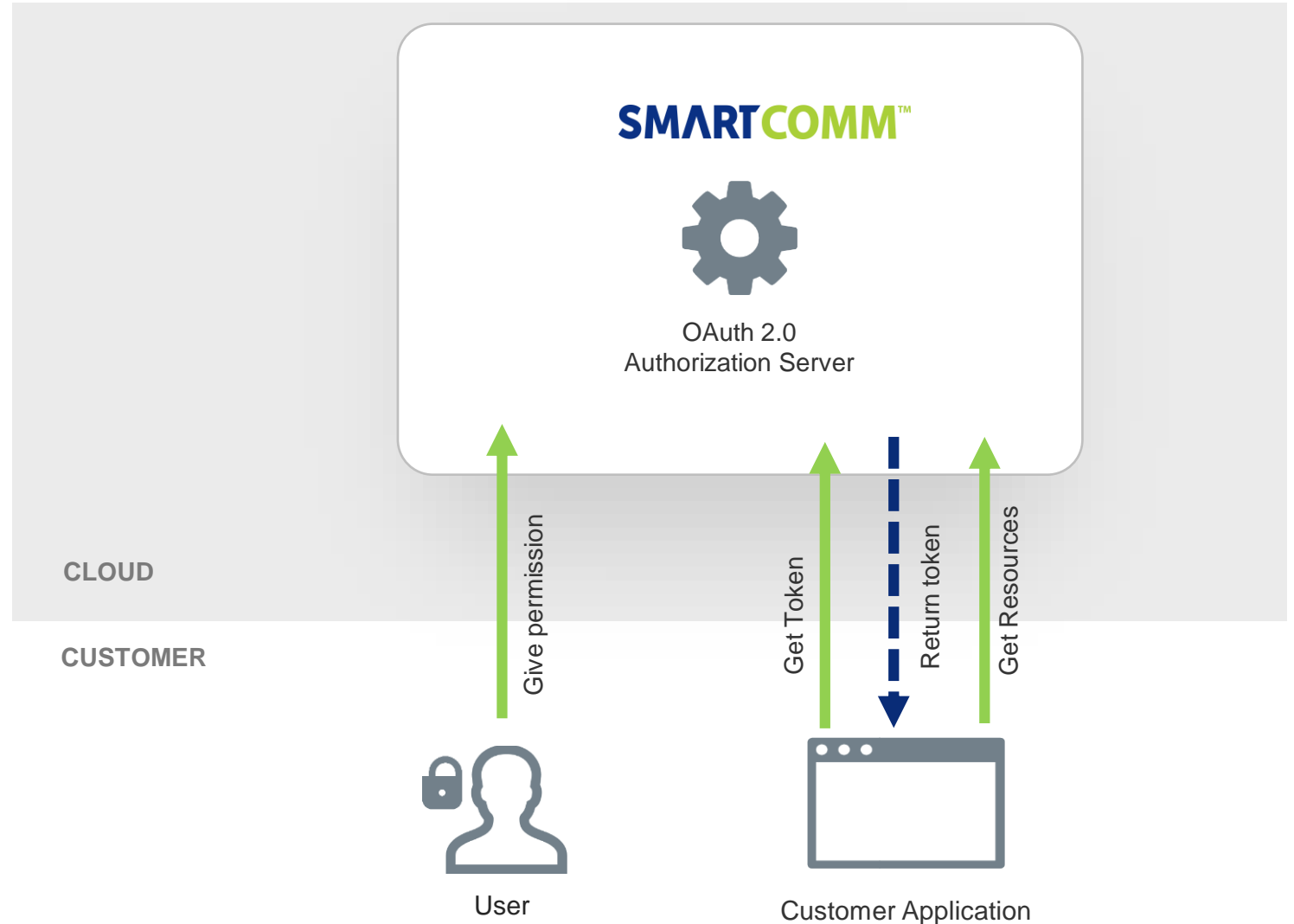
# OAuth 2.0 Support for Co-lo Customers

OAuth 2.0 is now supported for all Co-lo customers.

With OAuth 2.0, access is scoped to the user rights, unlike OAuth1.0a where an API Key and Secret gives a user access to all resources.

More Proxy Servers support OAuth 2.0 because after a token is generated, the Client ID and Secret do not have to be resent with every request.

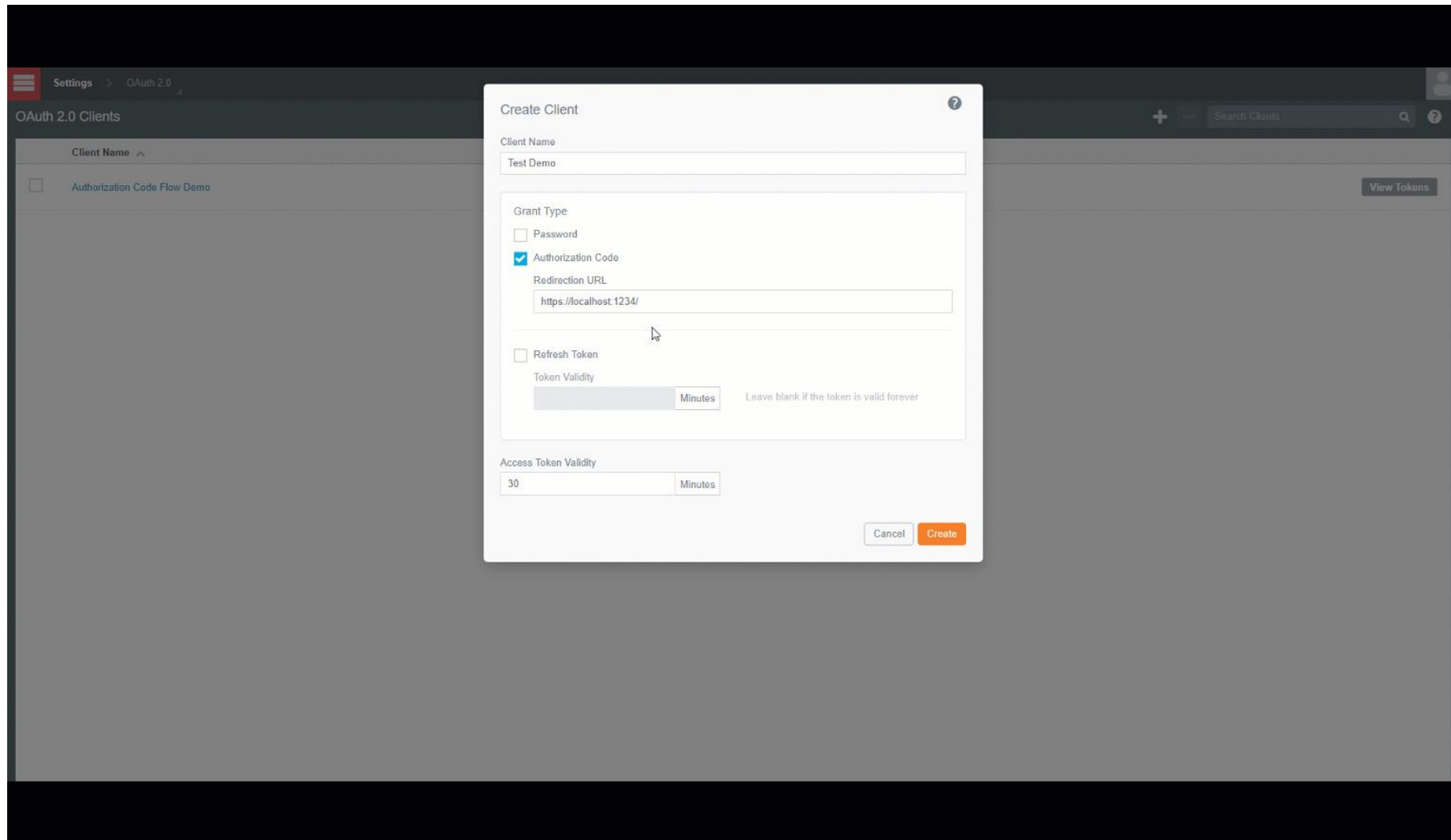
NOTE: OAuth 2.0 is not currently supported for the Appliance.



# OAuth 2.0—Demo



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The screenshot shows a web application interface for managing OAuth 2.0 clients. A modal window titled "Create Client" is open in the center. The modal contains the following fields and options:

- Client Name:** A text input field containing "Test Demo".
- Grant Type:** A section with two radio buttons: "Password" (unchecked) and "Authorization Code" (checked).
- Redirection URL:** A text input field containing "https://localhost:1234/".
- Refresh Token:** A checkbox that is unchecked.
- Token Validity:** A numeric input field (empty) followed by a "Minutes" dropdown menu. A note below reads "Leave blank if the token is valid forever".
- Access Token Validity:** A numeric input field containing "30" followed by a "Minutes" dropdown menu.

At the bottom right of the modal are "Cancel" and "Create" buttons. The background interface shows a list of clients with one entry: "Authorization Code Flow Demo".

# Support for Health and Financial Services Clouds

SmartCOMM for Salesforce implementation has been validated for both Health Cloud and Financial Services Cloud.



Healthcare &  
Life Sciences



Financial  
Services



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