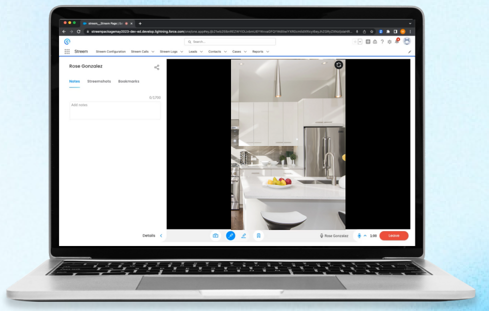
streem

DATA SHEET

StreemCore® for salesforce

Remote visual assistance



StreemCore is an **interactive video tool** that allows companies to quickly see and solve support inquiries remotely - accelerating diagnosis and resolution times, including:

No App Download

Send an SMS with the invite link to start the Streem call. No app download is required, so your customers can quickly get started.

AR-Enabled Annotation tools

Identify, document, and visually guide your customer's needs quickly and clearly using our laser pointer and mark-up tools powered by augmented reality.

OCR Model & Serial Number Capture

Record any model or serial number with a StreemShot® photo and built-in StreemVision® AI.

Cloud-hosted archive

High-resolution photos, videos, and all customer data are captured directly within Salesforce. Secure and efficient cloud storage gives your team easy access to call recordings, captured data, and more.

Integrate into existing workflows

Streem's Salesforce app quickly allows you to add interactive video to your existing workflows. Maximize your integration with Streem® through the various customization options.

Meet

Communicate with your customers on their terms. Start a video call on any channel or device by simply sending a link - no account creation or app download required.

See

Accelerate diagnosis to save time and eliminate jargon or language barriers. See what your customer sees - eliminate lengthy explanations and misunderstandings.

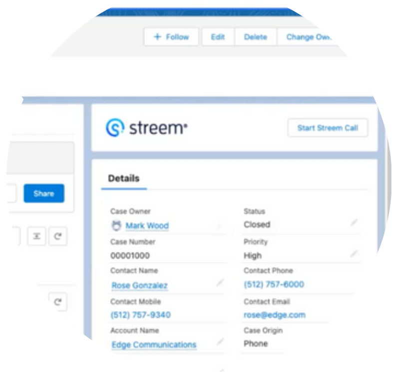
Connect

Unleash the power of your team with secure data sharing – capture key details (part and model numbers) for easy sharing with other team members or for further follow-up.

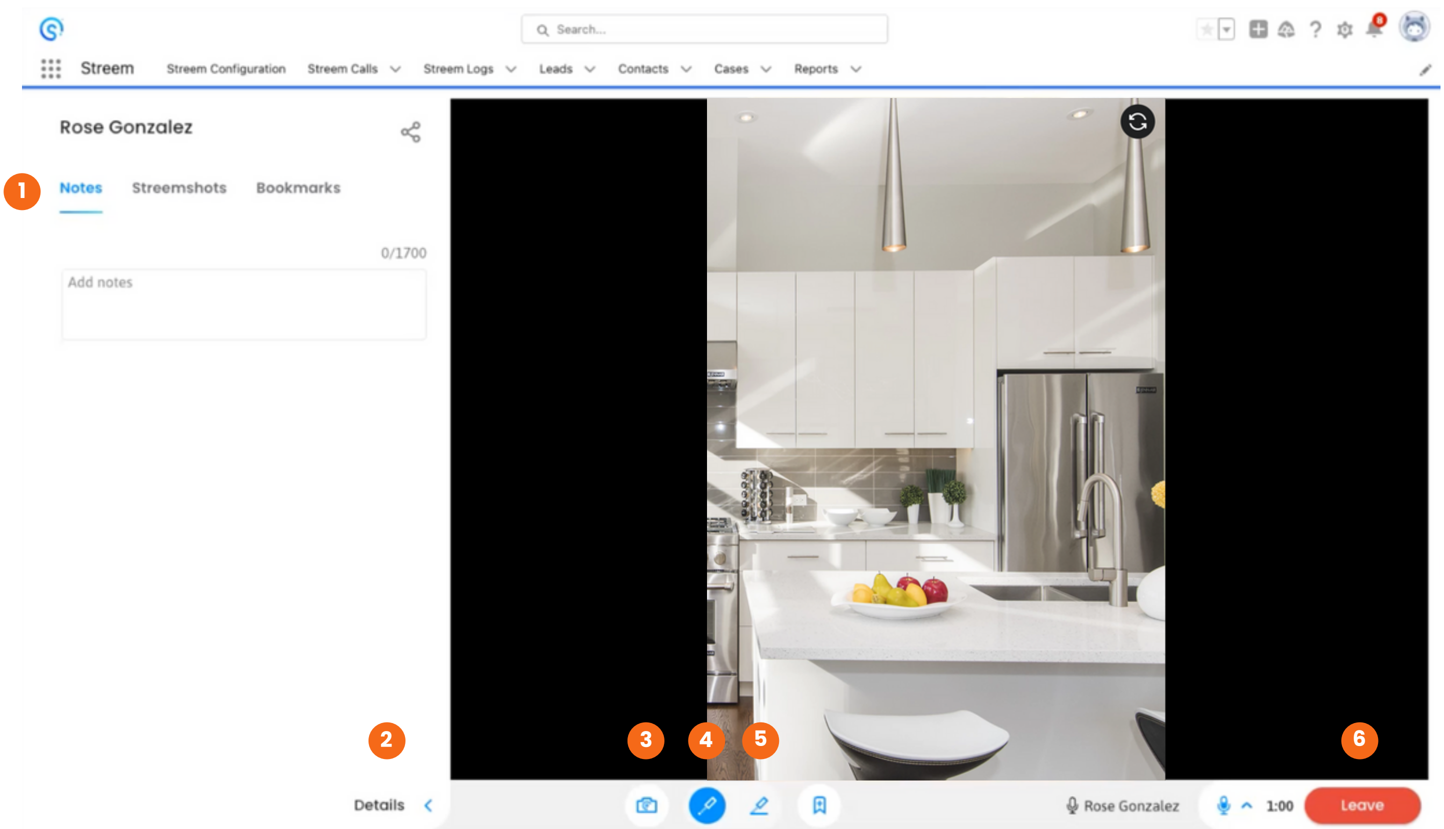
HOW IT WORKS

1. Locate the Streem button
Start from an open case, contact, or lead within the Sales, Service or Streem App/Tab inside Salesforce.

2. Jump to Streem
The invite will be pre-filled with your customer's contact information.



3. Connect with your customer
The customer will receive a text message containing a personalized link. They won't need an app or account; after following the link they can connect to you right from their mobile browser.



1 Notes
Capture any critical information or follow-up needs during the call. Text data will be available and editable within Salesforce post-call.

2 Call Details
Browse through data collected during Streem calls, including StreemShots and video recordings. Enter call notes for easy follow-up with your customers.

3 StreemShot® Photos
Take a full-res photo embedded with depth and scale information. Streem automatically detects and transcribes model and serial numbers in the shot.

4 Laser Pointer
Your default tool — lets you point and gesture by moving a pointer around the customer's screen.

5 Marker
Draw on the screen to outline areas or indicate movements. Lines fade away shortly to minimize clutter.

6 End Streem
Your original voice call will keep going.

QUICK START GUIDE

Available on [AppExchange]

Required Production Deployment Steps *

- [x] **Required: Installation**
We recommend selecting "Install for All Users". (You can limit access/grant access to Streem based on User Profile in a subsequent step). You can also choose to only install the app for specific profiles.

- [x] **Required: App Authorization Setup**
Set the Permitted Users field to "admin-approved users are pre-authorized" under the setup menu for Manage Connected Apps

- [x] **Required: User Access**
The Streem App grants access based on User Profiles.

- [x] **Required: Configuration Page**
The Authentication & Logs Tab allows you to connect to the integration server. A connection must be established to send and receive data from Streem.

- [x] **Required: Adding Record Pages, "Start Streem Call" Embedded Tab & "Start Streem Call" Button**
Place either the Start Streem Call tab and/or button on Case, Lead, and/or Contact record pages. This is how you start a Streem call.

**See Streem Salesforce Package - Installation and Configuration Guide for complete details*

Optional & Recommended Configuration Steps

- [ ] **Adding the "Streem Call" Dynamic Related List**
  - You can give your users easy access to all Streem Calls created from a specific record

- [ ] **Change the Height of the Embedded Streem**
  - In most cases, you'll want to increase the height of Streem to see more of the UI when conducting Streem calls, depending on your browser/computer resolution.

- [ ] **Enable Chatter Feed Tracking**
  - In some cases, you may want to enable the Chatter Feed Tracking feature to see a record of when a Streem Call was created on an object (Case, Lead, and/or Contact) in the Chatter Feed.

- [ ] **Enable Reporting**
  - If you'd like to enable reporting on Streem Calls and Streemshots to run internal reports, you'll need to configure each object to "Allow Reporting"

- [ ] **Add "Contact Mobile" to Case Details**
  - For Starting Streem Calls on Cases: The Streem integration will use the Contact Associated with your Case's Mobile Number to pre-fill in the Streem Invite.

- [ ] **Restricting Access to Streem**
  - There are various levels of access you can give User Profiles to the Streem App and Experience.

- [ ] **Streem Call Sharing Settings**
  - You can change the Organization-Wide Default (OWD) for Streem calls to private.