Verizon Business Assistant user guide

March 2025

This guide will walk you through onboarding your Verizon Business Assistant and using the Business Assistant Management portal.

Preparing for Verizon Business Assistant onboarding

- The initial onboarding process can take up to 20 minutes to complete
- Only the Verizon My Business registered user can complete the Verizon Business Assistant Onboarding
- Use this checklist to identify the information that you need to onboard your Business Assistant

Check list part 1

Required for My Business – Business Assistant portal

- Verizon mobile numbers for the live Team Member Agents (up to 10 agents)
- Business phone number for Call Forwarding

Check list part 2

Required for Business Assistant Management portal

- Full name
- Contact mobile number
- Business name
- Business address – Address, City, State, Zip
- Business hours
- Business description (Limit to 200 characters)
  - Suggested items to add include: What is your business, what do you offer, what sets you apart, brief history, etc. (anything that is helpful for customers to know)
  - Avoid URLs and promos, pricing and sales
  - Note: Business Assistant can generate a description for you based on inputs you provide
- Type of business – Which industry best describes what your business does?
- Name for your Business Assistant
- Start gathering knowledge about your business
  - Business Website pages
  - Frequently asked questions (PDF or Webpage)
  - Marketing/Sales collateral in PDF form

Part 1: Managing Business Assistant

Navigate to the Business Assistant dashboard in My Business to access the Business Assistant Management Portal and add your call forwarding and Team Member Agent numbers.

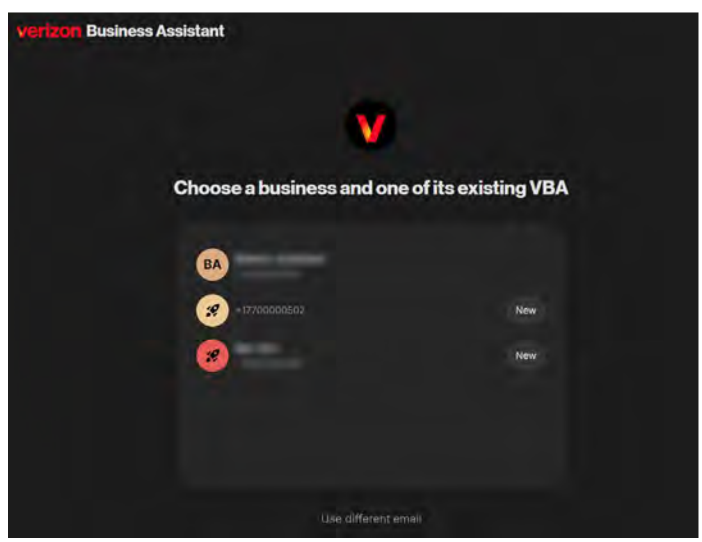
1. Sign into your Verizon My Business account.
2. Navigate to Business Assistant by selecting Manage > Product Portals > Business Assistant.
3. Under the **I Want to tile**, select **Manage Business Assistant lines**.
   - **Manage your call forward number** – Your Business Assistant line is designed for messaging, some customers may still call it. Easily forward these number to any US domestic phone number.
   - **Manage your live agent numbers** – You will need to add at least one Team Member's telephone number (aka Live Agent). Up to 10 live agents can be assigned and all must be Verizon mobile phone numbers.
4. Return to the Business Assistant dashboard
5. Under the I want to tile, select **Manage Business Assistant services** to continue with onboarding setup.

Part 2: Onboarding Verizon Business Assistant

6. Select **Business Assistant Number** listed as new

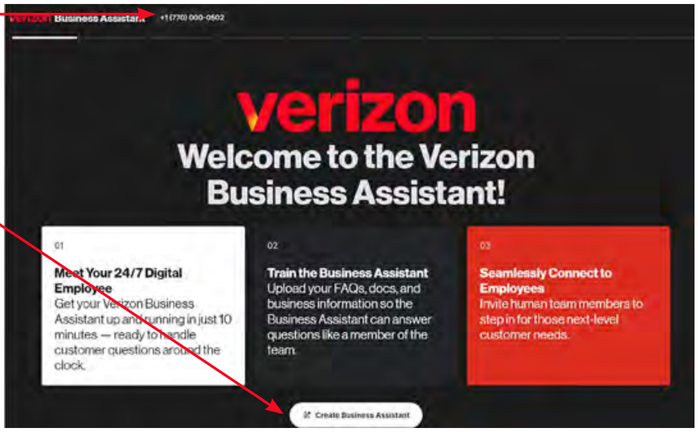
- This Number is what customers will use to text the Business Assistant.
- If you have more than one Business Assistant, select the one you want to use for this session.

You can use a different email if you have Business Assistant number associated with a different email address.

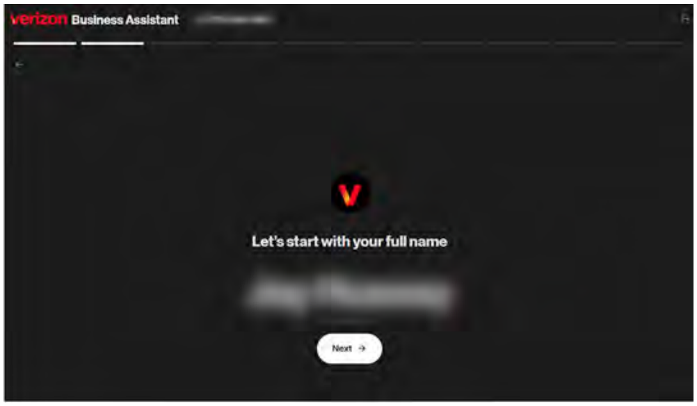


Your **Business Assistant Number** will always appear in the top left corner

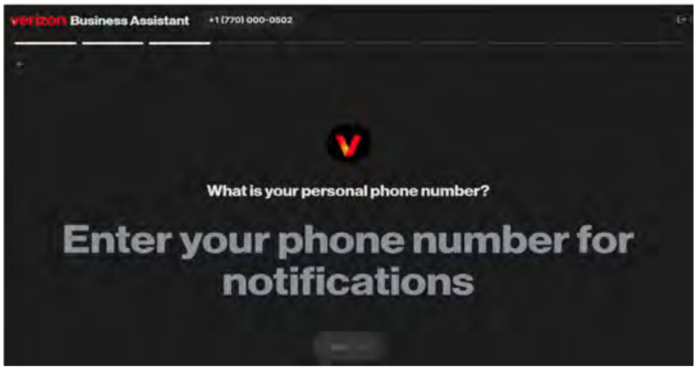
Step 1 – Select **Setup Business Assistant** to start onboarding set up.



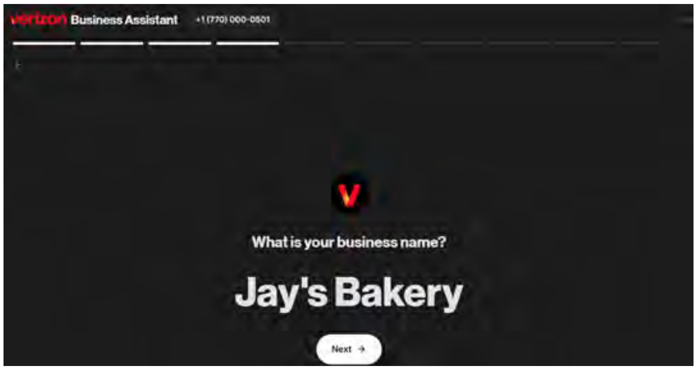
Step 2 – Enter in your **Full Name** and select **Next**.



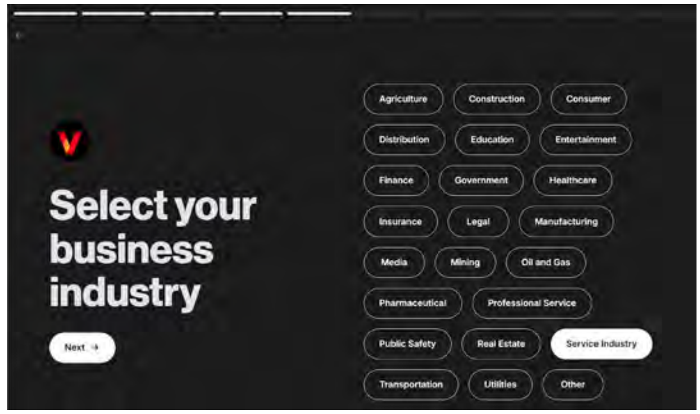
Step 3 – Enter in your **Mobile Number** you want to use to receive notifications and select **Next**.



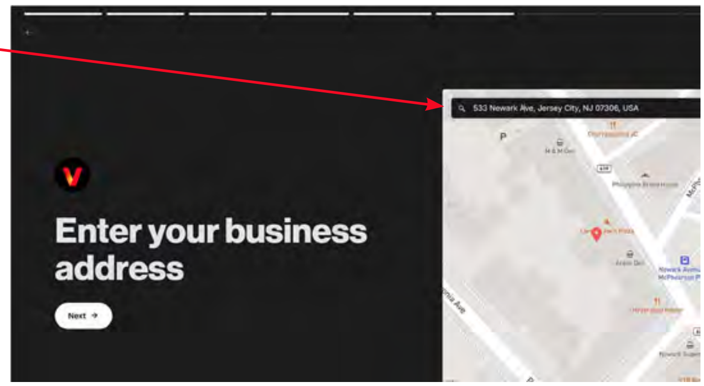
Step 4 – Enter the **name of your business** and select **Next**.



Step 5 – Select the **industry** that best aligns with your business and select **Next**.

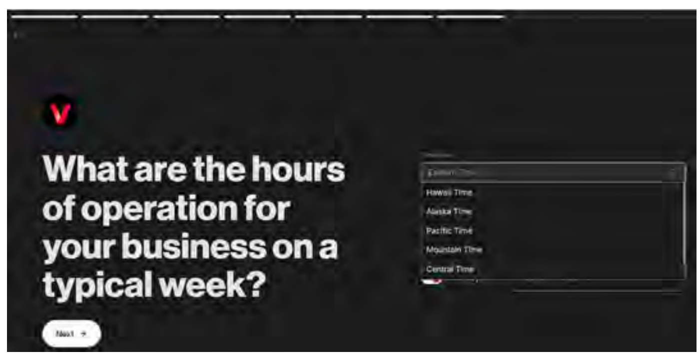


Step 6 – Enter your **Business Address** using the navigation location field and select **Next**.



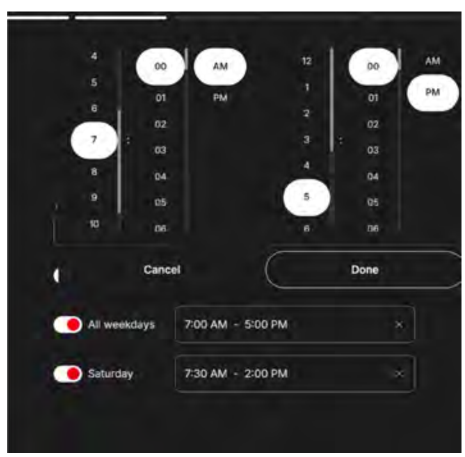
Step 7 – Enter the **hours of operation**

- Select the Timezone your business is in. You can choose from Eastern, Central, Mountain, Pacific, Alaska and Hawaii.



- Select the **time of day** when your business is open. Use the toggle system to select the hours and turn off days you are closed. Select **Done**.

Once completed select **Next**.



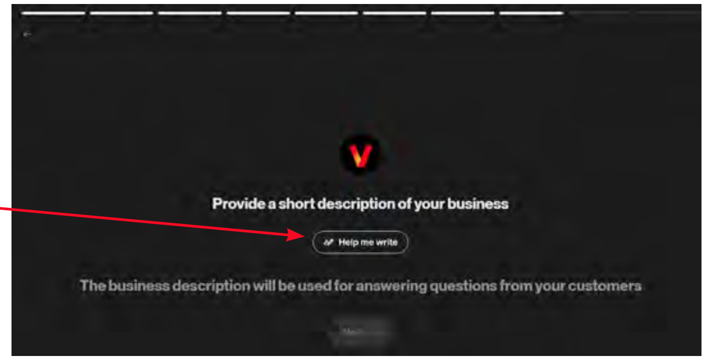
Step 8 – Provide a short description of your business that will be used to answer questions from your customers.

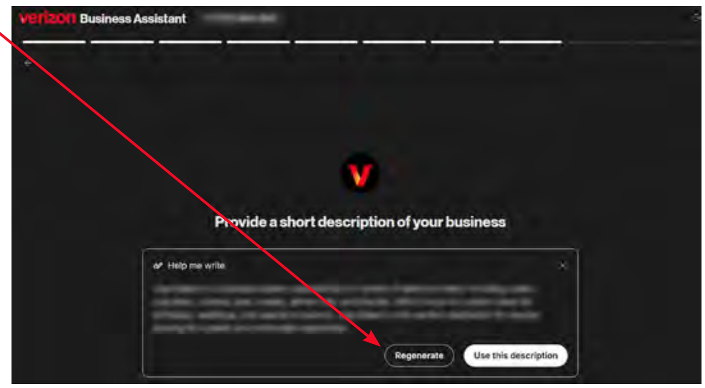
You can write or paste in a description or leverage Business Assistant to help you write one.

- Select **Help me write.**
- Enter key bullets to describe your business – note you're limited to 200 characters.
- Select **Generate.**

You can use the description the Business Assistant wrote or select **Regenerate** to have it write a different description.

Select **Next**.



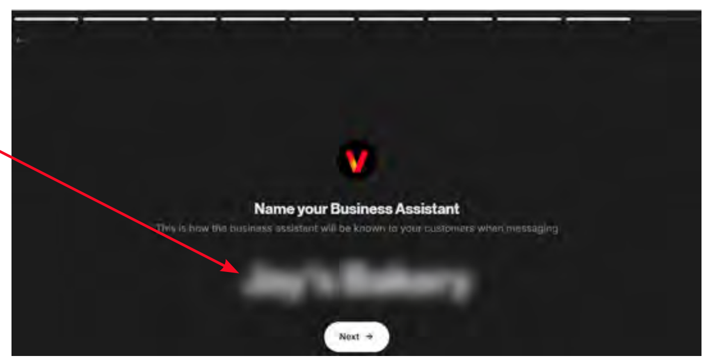


Step 9 – **Name your Business Assistant**

Enter what you want to call your Business Assistant. This is the name that your customers will see when they text your Business Assistant.

Choose a name that reflects your brand and helps your customers recognize the assistant's purpose. For best results, avoid using personal names and opt for something tied to your business or service.

Select **Next**.

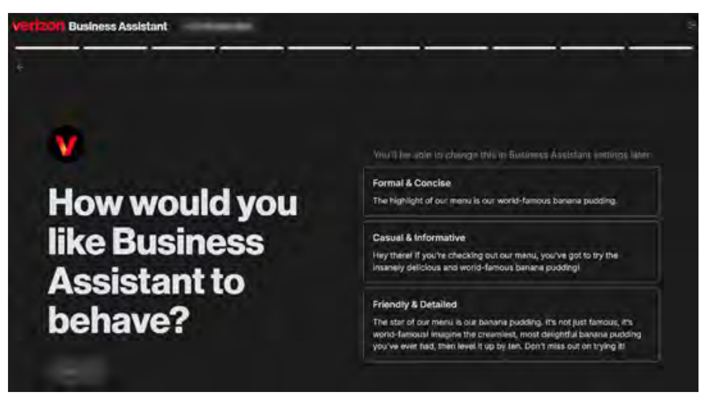


Step 10 – How do you want your Business Assistant to interact with customers?

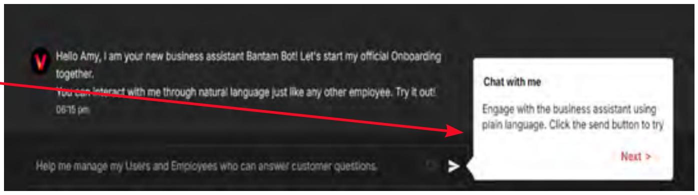
- **Formal & Concise** – Exhibit professionalism and respect in communication. Use precise and straightforward language, providing only essential information to facilitate quick understanding without unnecessary elaboration.
- **Casual & Informative** – Adopt a relaxed and easy-going demeanor. Use conversational language that is clear and direct while focusing on delivering key information without unnecessary formality.
- **Friendly & Detailed** – Maintain a warm and inviting tone. Use friendly and engaging language to provide thorough information. Focus on understanding and meeting the user's needs.

You will be able to change this in the **Customize Business Assistant skill** later.

Select **Next**.



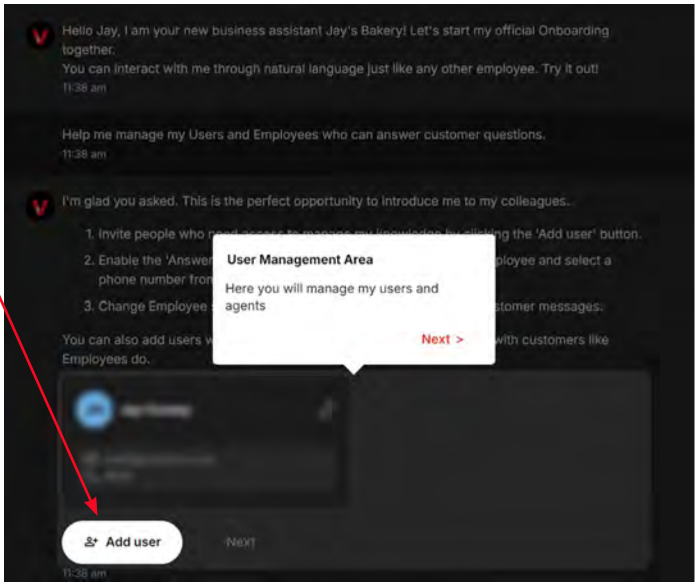
Step 11 – Continue onboarding with Verizon Business Assistant. Engage with the Business Assistant using plain language – "**Help me add and manage Team Members who create, edit and test the Business Assistant's knowledge**". Select the **send** button to try.

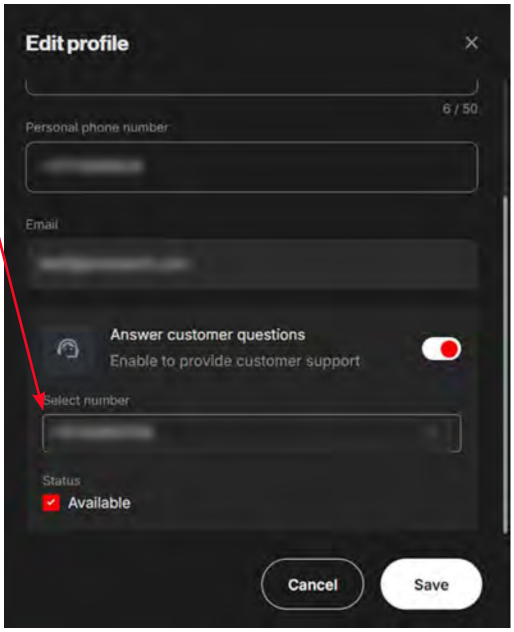


Step 12 – You can invite **Team Members** by selecting the **Add user** button.

- Enter in their First Name, Last Name and Email address.
- You can also elevate some Team Members to Agents so they can respond to questions the Business Assistant cannot answer by turning on the **Answer customer questions** toggle and selecting their mobile number from the drop down list.
- Change Team Member Agents status to "**Available**" then select **Save**, and they will begin to receive customers questions that the Business Assistant cannot answer.

This can be changed at any time. Team Members can set their own availability either in the Portal, or by texting "**On**" or "**Off**" to the Business Assistant number.

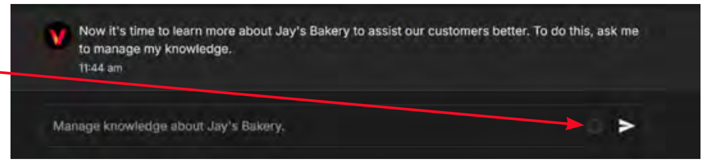




Step 13 – Manage your Business Assistant's knowledge

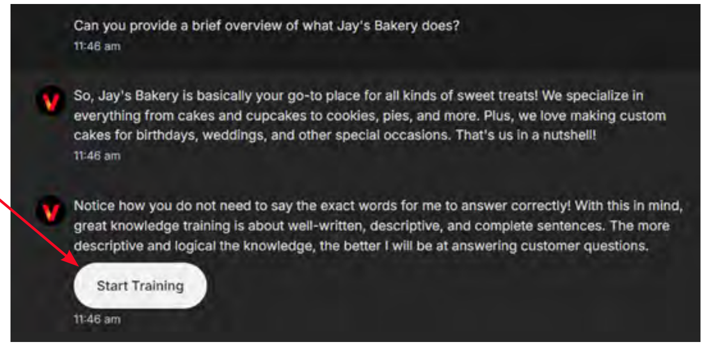
Question and Answer pairs are how the Business Assistant is trained to support customers. To see an example, select the send button, to see how to manage knowledge about business assistant.

Notice how you do not need to use exact words to answer correctly. Business Assistant understands context even without complete sentences.



Step 14 – Manage my Knowledge

Now let's continue training [Business Assistant Name] by adding additional knowledge. Select **Start Training** to begin.



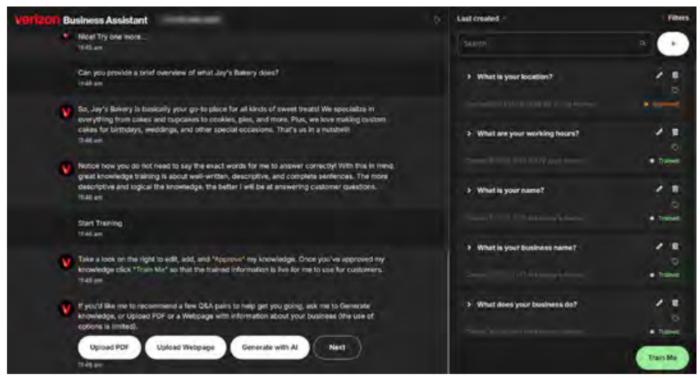
Step 15 – Let's review how to edit, add and approve Question & Answer pairs (Q&A) in the knowledge base on the right.

Let's modify a Q&A pair.

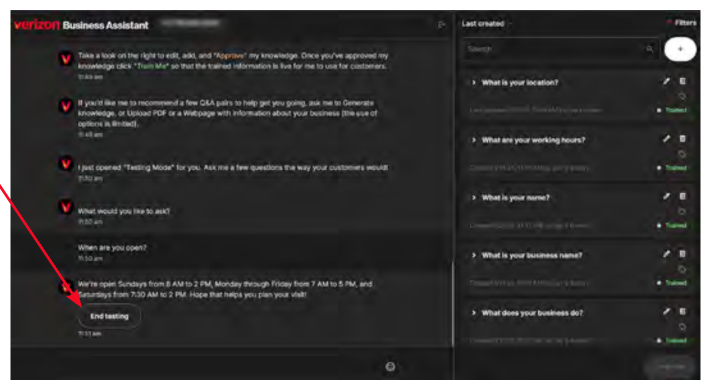
- Select the **pencil button** next to the Q&A pair you want to edit.
- Edit the question and answer and select **Save Changes.**
- Then approve the change by selecting **Approve.**
- Once you've approved the new knowledge, select **Train Me** so the trained information is available for customers.

If you'd like me to recommend a few Q&A pairs to get started, select **Generate with AI**, **Upload PDF** or **Webpage** with information about your business.

Now, select **Next** to enter Testing Mode.



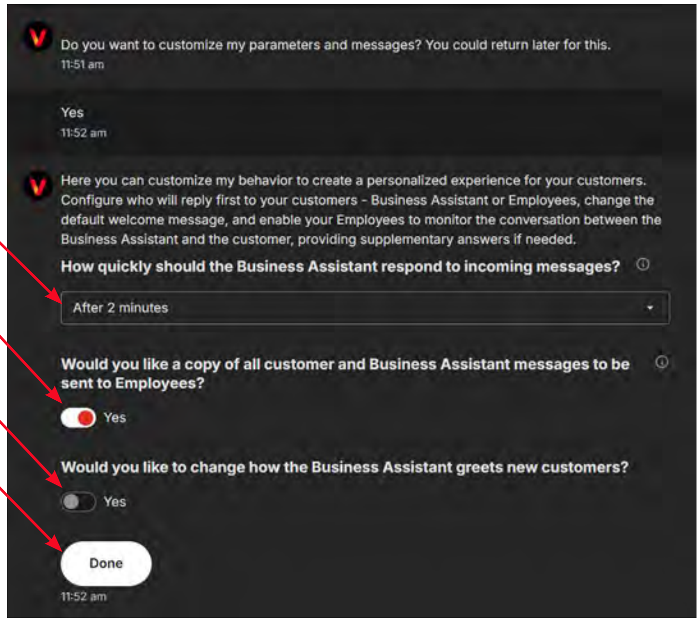
Step 16 – Access **Testing Mode**. Ask questions the way a customer would. Select **End testing** to exit the Test Mode.



Step 17 – Customize the Business Assistant's settings, messages and behavior.

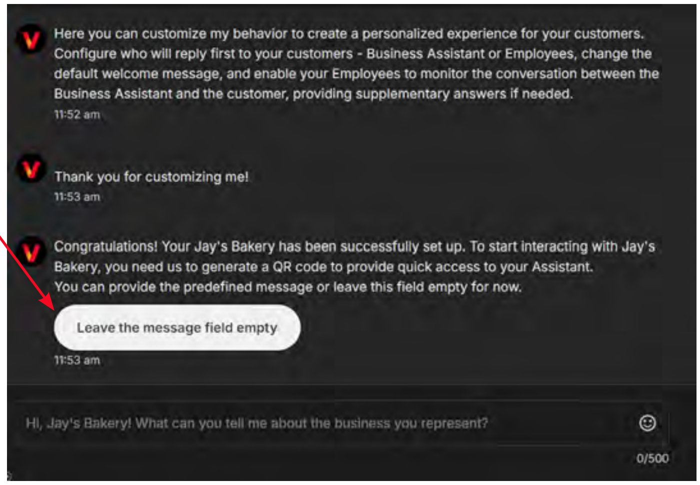
- Select how quickly you want the Business Assistant to respond to incoming customer questions.
- Toggle to **Yes** if you want to send a copy of all my message interactions with customers to Team Member Agents.
- Toggle to **Yes** if you want to change the Business Assistant's customer greeting.

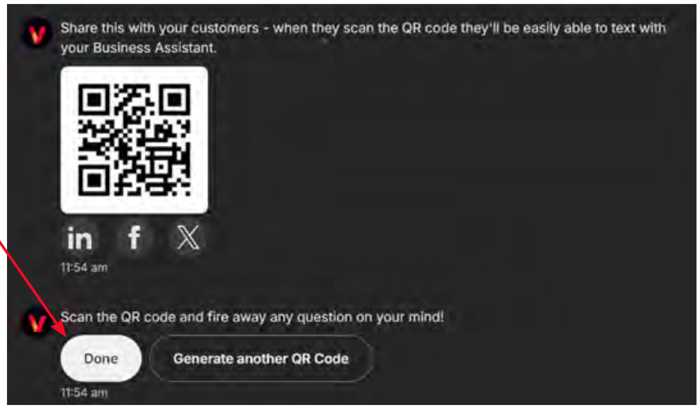
Select **Done** when you are finished with customizing the Business Assistant.



Step 18 – Congratulations! You have successfully set up Business Assistant. Select **Leave the message field empty** if you do not want to change the greeting.

Verizon Business Assistant will now generate a **QR code**. Select **Done** once complete.





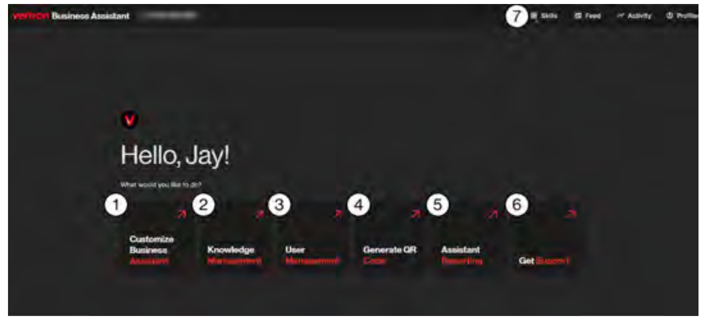
Business Assistant home screen

1. **Customize Business Assistant**
2. **Knowledge Management** – Manage and organize information accessible to Business Assistant, including creating, modifying and deleting Q&A pairs, and testing Business Assistant as a customer.
3. **User Management** – Business Owner (Admin) to manage user access and information (Only the Business Owner has access to this skill)
4. **Generate QR Code** – Generate a QR Code and share it on Social Media.
5. **Assistant Reporting** – Allows business to track customer interactions, Team Member agent performance and Business Assistant answer success rate, and provides a weekly digest with analytics.
6. **Get Support** – Ask your Business Assistant any question on using the portal.
7. **Skills** – Access the available Skills

   Feed – View an Updates on Business Assistant

   Activity – View all Activity by Time Stamp with Business Assistant

   Profile – Edit and Manage Profile



Business Assistant reporting

Business Assistant Reporting skill consists of four main views.

- **Customer Interactions** – Displays Total Uniques Customers, Daily Trends, Customer Interactions, Response Rate, Response distributions
- **Team Performance** – Team Escalations, Distribution between Team Members, Avg Time of Response, Team Availability
- **Business Assistant Performance** – Performance Trends, Answer Success Rate, Known vs Unknown answers, Answers Daily Trend
- **Weekly Insights** – Weekly Customer, Customer Interactions, Response Rate, Weekly Top 10 asked Questions, New Questions

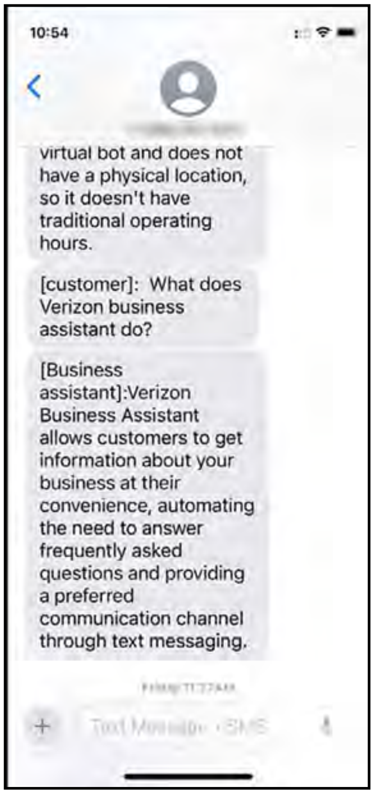
Team Member Agent text interaction

Team Member agents can update their availability status in two ways:

By sending the keywords “**On**” or “**Off**” to the Business Assistant phone number. You will get a “**you are available**” response back.

By using the option **Set yourself as Available/Unavailable** on the Profile Page. From the Business Assistant home screen, select Profile in the top right hand corner, select status as **Available**.

Team Members can end the conversation with a customer by texting “**Finish**”.



Learn more

For more information about Verizon Business Assistant, ask your Verizon Business Account Manager or visit verizon.com/businessassistant.