Release Notes

LiveVox Platform v. 5

LVP 5.0, ACD 5.0, Reporting 5.0

Support Contacts:

24 Hour Support Line: 888.477.3448

Support Email: support@livevox.com

This document last revised September 22, 2017

For Internal and Client Use Only

Contents

1. Overview

1.1 Document Purpose

This document provides an overview of the features and functionality included in LiveVox Platform 5. Components/Versions included in this release are ACD 5.0, LVP 5.0, Reporting 5.0, API 5.0.

For API, related information please reference the Developer Portal.

Notes :

- *With the introduction of the new version of the platform, LiveVox would like to announce the end of support date for some older versions of the platform and agent desktop. Customers are encouraged to migrate to the latest release of the platform if they have not yet. New releases information is available for review in the User Hub. To request an upgrade, please contact Client Services team at client-services@livevox.com.*
    - *After March 15, 2017, LiveVox no longer supports the following versions: LVP v. 3.2, Reporting v. 2.9 and ACD 2.9.*
    - *After July 15, 2017, LiveVox will no longer support the following versions: LVP v. 3.3, Reporting v. 3.0, ACD 3.0 and API 3.3.*

1.2 Requirements

Clients being upgraded from Platform 3 to Platform 5 are highly encouraged to review the release notes for both, Platform 4 and Platform 5 to anticipate and be prepared for the functional and interface changes after the upgrade. Appendix section of this document includes the list of changes in Platform 4. Details are available in the Platform 4 Release Notes that can be found in the User Hub or provided by Client Services.

For this version of platform to function properly, traffic to and from the following web addresses must be permitted:

- *.livevox.com
- google-analytics.com
- ajax.googleapis.com

Unless stated otherwise, supported browser versions

- For the LiveVox Voice Portal:
    - Internet Explorer 11
    - Latest version of Firefox

  - Latest version of Chrome
  - Latest version of Edge
- For the Agent:
  - Internet Explorer 11
  - Latest version of Firefox
  - Latest version of Chrome

To log into the LiveVox Voice Portal:

1. Navigate to the LiveVox login site using one of the links below (provided by LiveVox):
   a. *https://login.livevox.com.*
   b. *https://login.na5.livevox.com*
   c. *https://login.na4.livevox.com*
2. Enter Client Name (provided by LiveVox).
3. Enter User Name (Login ID).
4. Enter password.
5. Click **Login**.

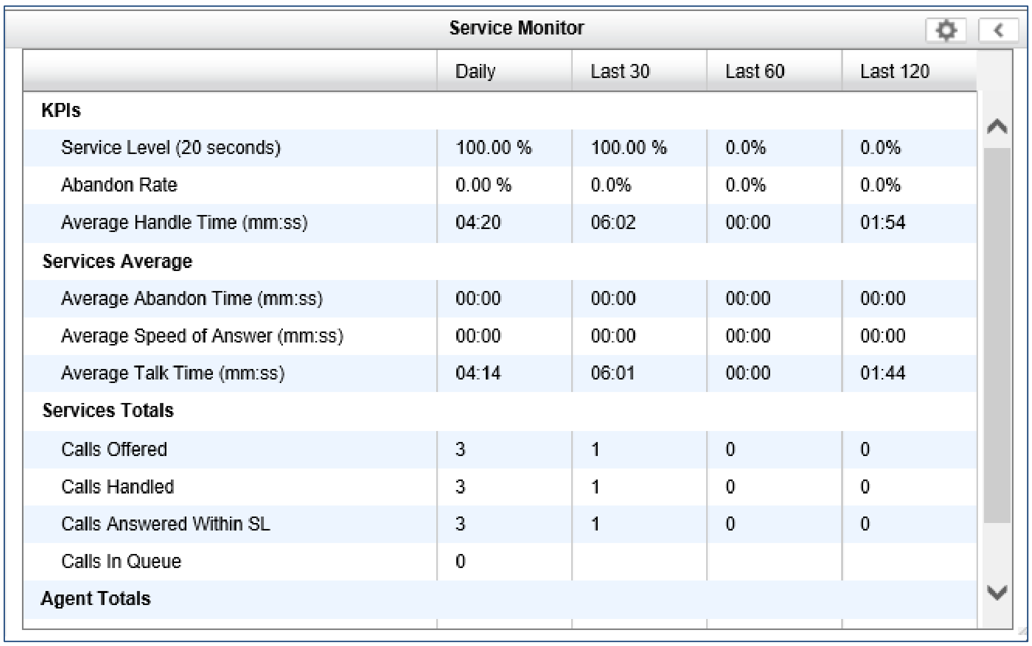
2. What Is New in Platform 5?

2.1 Manager Enhancements

2.1.1 Sliding Intervals for Inbound Service Monitor Widget

Inbound Service Monitor widget now displays data that is updated every minute based on rolling intervals. Previously, the data displayed was updated based on fixed intervals. For example, Last 15 reported the last fixed 15-minute interval, rather than the last 15 minutes.

The default and additional configurable values for the Service Monitor widget have not changed:



Service Monitor

	Daily	Last 30	Last 60	Last 120
KPIs				
Service Level (20 seconds)	100.00 %	100.00 %	0.0%	0.0%
Abandon Rate	0.00 %	0.0%	0.0%	0.0%
Average Handle Time (mm:ss)	04:20	06:02	00:00	01:54
Services Average				
Average Abandon Time (mm:ss)	00:00	00:00	00:00	00:00
Average Speed of Answer (mm:ss)	00:00	00:00	00:00	00:00
Average Talk Time (mm:ss)	04:14	06:01	00:00	01:44
Services Totals				
Calls Offered	3	1	0	0
Calls Handled	3	1	0	0
Calls Answered Within SL	3	1	0	0
Calls In Queue	0			
Agent Totals				

Figure 1: Inbound Service Monitor widget

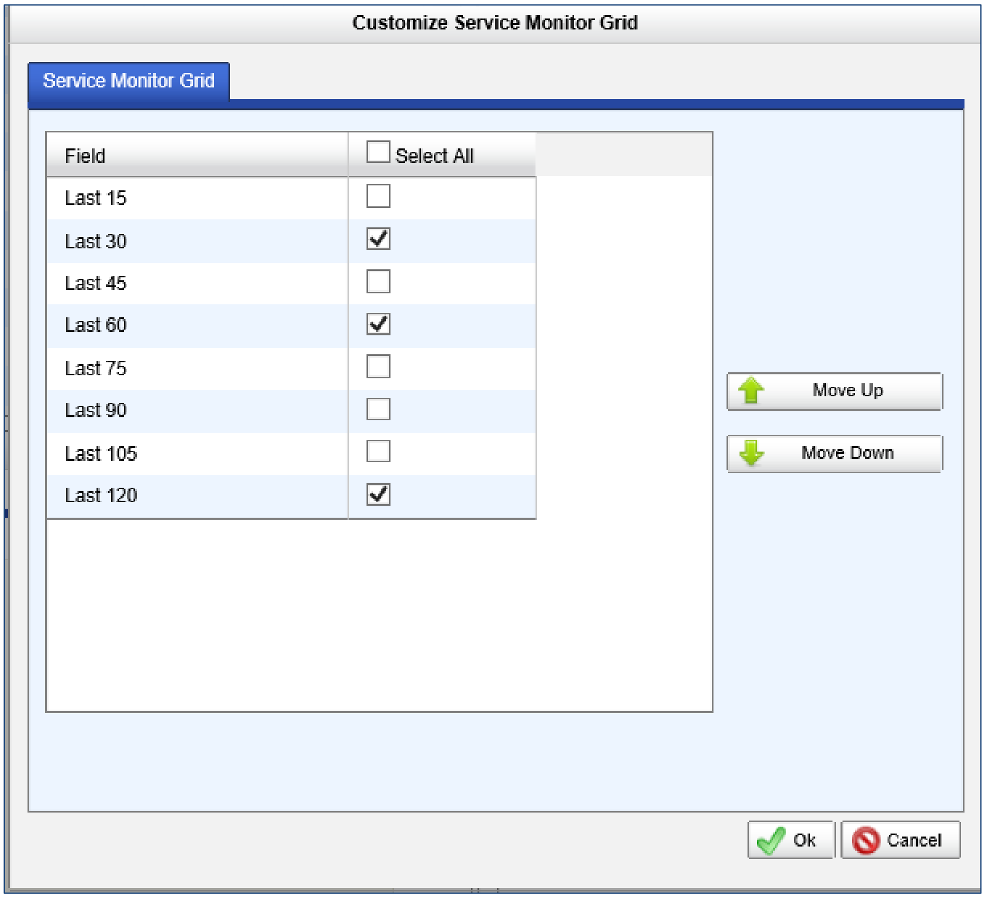


Figure 2: Configurable values for inbound Service Monitor widget

2.1.2 Display of Cloud Profiles in the UI

This version offers users visual association of services and cloud profiles. Users will notice the cloud profile name next to the service type when using the following editors:

- *Services Editor > General Tab > Service Type* selection
- *Client Editor > Services Tab, Service Type* column
- *Call Center Editor > Services* tab
- *LVP > Monitor Tab > Monitor* widget

The following is an example of the updated Service Type column under Client editor **Services** tab:

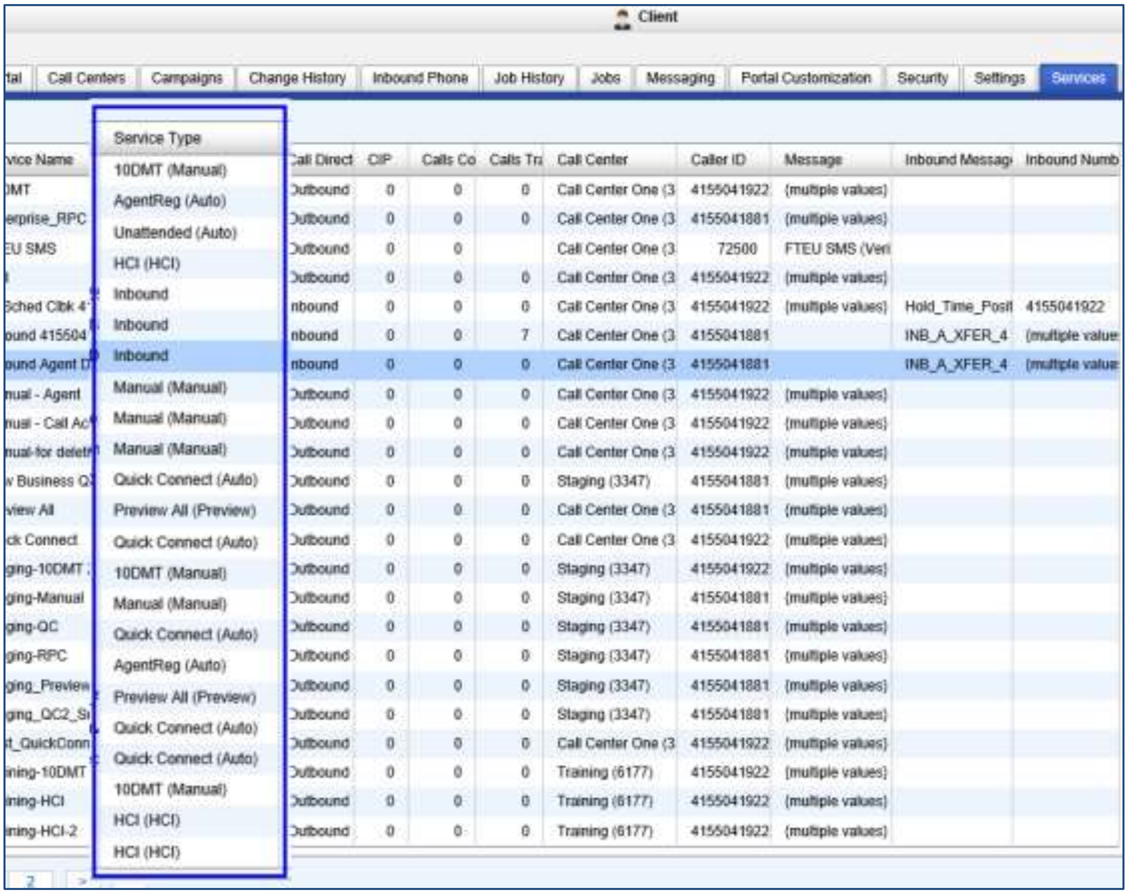


Figure 3: Service Type column – Client editor

2.1.3 Service Editor Enhancements

The **General** tab in Services editor has been rearranged. Selected settings have been moved to other tabs for better logical grouping.

Previously,

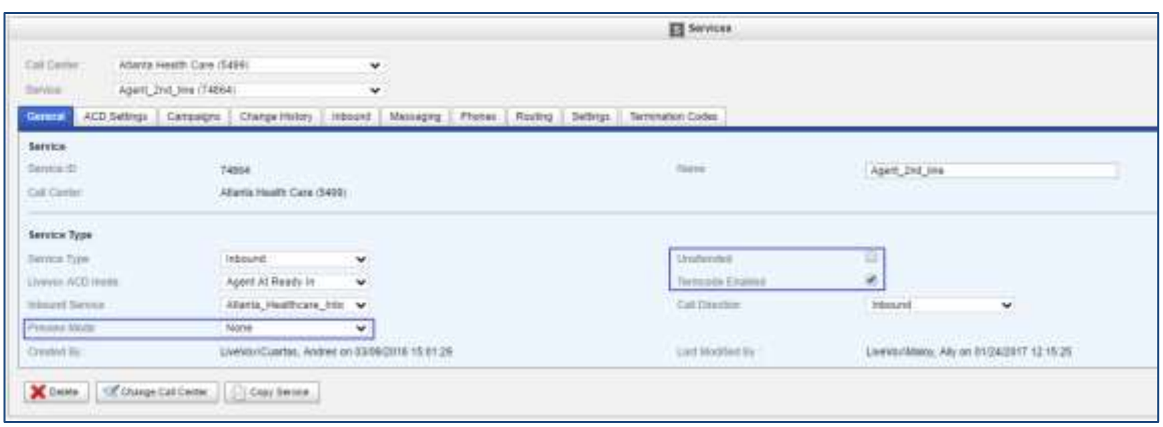


Figure 4: General tab - Services editor - Platform 4

Now,

- **Unattended** option has been removed. This option is now automatically enabled whenever the service type is unattended.
- **Termcode Enabled** setting moved to the **Termination Codes** tab.
- Preview setting moved to **Preview Settings** tab.

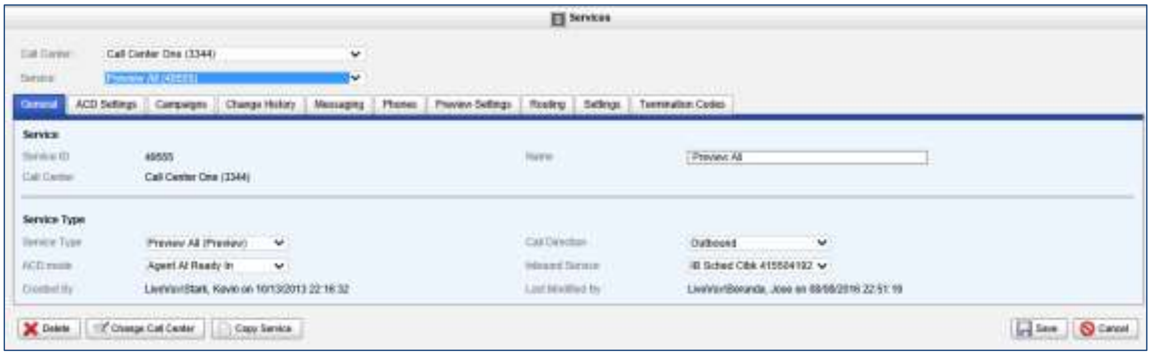


Figure 5: General tab – Services editor – Platform 5

- Two new service types have been added to the Service Type drop down:
    - API Enabled (API Enabled) – used for client custom applications
    - SMS (Auto) – designed for SMS campaigns

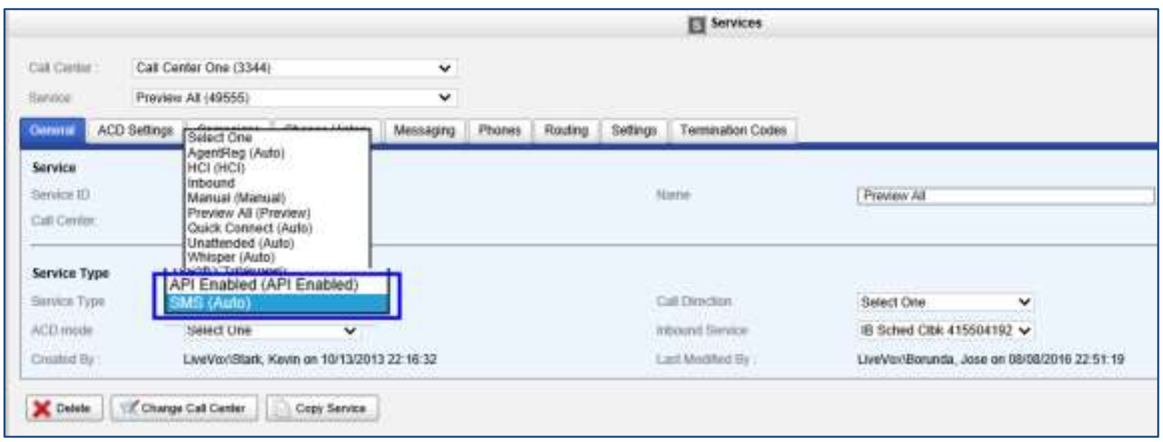


Figure 6: General tab – Services editor – new services types - Platform 5

Termination Codes tab:

- Termcode Enabled setting is now available in this tab.

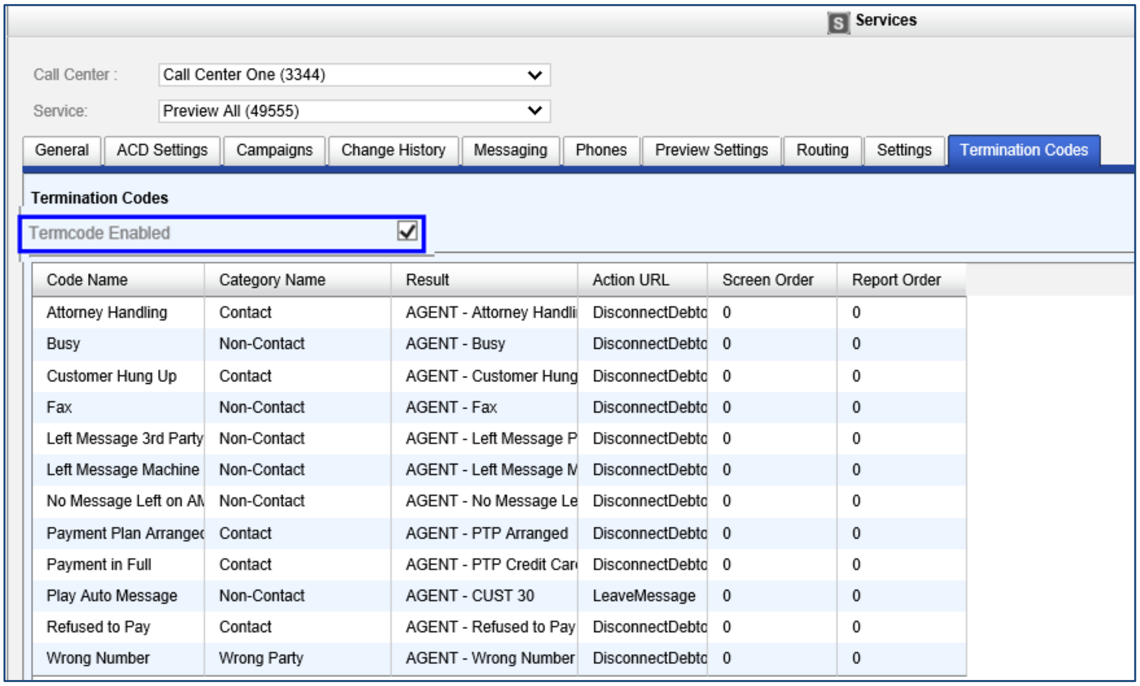


Figure 7: Termination Codes tab - Service editor – Platform 5

Preview Settings tab:

- This tab will only be visible if service type is either Preview All (Preview) or API Enabled (API Enabled).
- This tab now groups all available preview settings:
    - Preview Mode - Allows to enable preview all option and force agent's acknowledgement before launching a call.
    - Preview Manual Allowed - If checked, an agent can enter and dial a 10-digit number manually on a Preview call.
    - Preview Timeout - The number of seconds set for an agent to confirm, manually enter (if enabled) or skip an account, while in preview before the Preview Default Action occurs.
    - Preview Skip Allowed - When checked, allows agent to skip an account in preview and move to the next account. The preview default action of Skip can still occur when agent skip ability is disabled.
    - Preview Confirm Dial - When checked, forces an agent to provide a secondary confirmation of a Preview dial via a dialogue box.

Figure 8: Preview Settings tab – Services editor – Platform 5

2.1.4 Account/Phone Do Not Dial (DND) Support at Dial Time

Dial Time DND support is now extended to a more granular level of account + phone allowing users to select specific account + phone combinations not be called at dial time. These restrictions can be set at the Client, Service or Contact level for daily or permanent exclusions.

The following fields are now available as part of Contact Rules section of **Client** and **Services** editors **Settings** tabs:

- **Contact Max Attempts Per Day**: How many times a unique account can be attempted per day (existing option).
- **Contact Max Phone Attempts Per Day**: How many times a unique account + phone combo can be attempted per day.
- **Contact Max Attempts Lifetime**: Total amount of times a unique account can be attempted.
- **Contact Max Phone Attempts Lifetime**: Total amount of times a unique account + phone combo can be attempted.

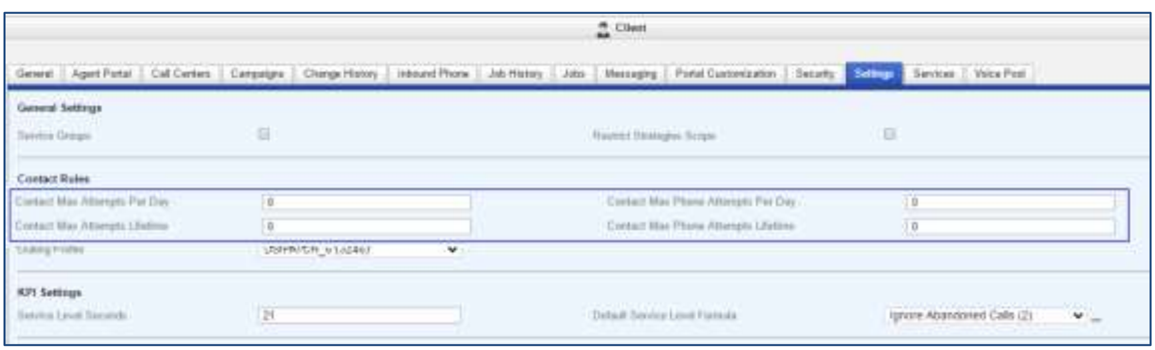


Figure 9: Settings tab - Client editor – Contact Rules section

Notes :

- *Lifetime is defined by how long LiveVox stores an inactive account within Contacts manager. The default is currently set at 30 days. To change this value, contact Client Services.*
    - *Inactivity is based on the last day an account was built within a campaign.*
- *Zero value settings allow unlimited attempts. Null value settings at the service level will inherit the client level settings. The default values set by upgrade to Platform 5 are as follows:*
    - *Contact Max Attempts Per Day: retains previously configured value for both Service and Client levels*
    - *Contact Max Attempts Lifetime: NULL (blank) for the Service level and zero (0) for the Client level*
    - *Contact Max Phone Attempts Per Day: NULL (blank) for the Service level and zero (0) for the Client level*

      Contact Max Phone Attempts Lifetime: NULL (blank) for the Service level and zero (0) for the Client level
- *This feature requires Contact Management enabled. Contact Management is typically enabled by default but please check with Client Services team to confirm your settings.*

At the contact level, a new **Phones** tab in the selected contact screen has been added to the Contacts manager which allows users to setup account + phone DND and DNC rules.

- Users can enable Do Not Contact and Do Not Contact Today options if they want restrict dialing on a selected account permanently or for this day.
- Double-clicking on the phone number row opens the Edit Phone screen which allows users to select Do Not Contact and/or Do Not Contact Today options for specific phone numbers of the account.

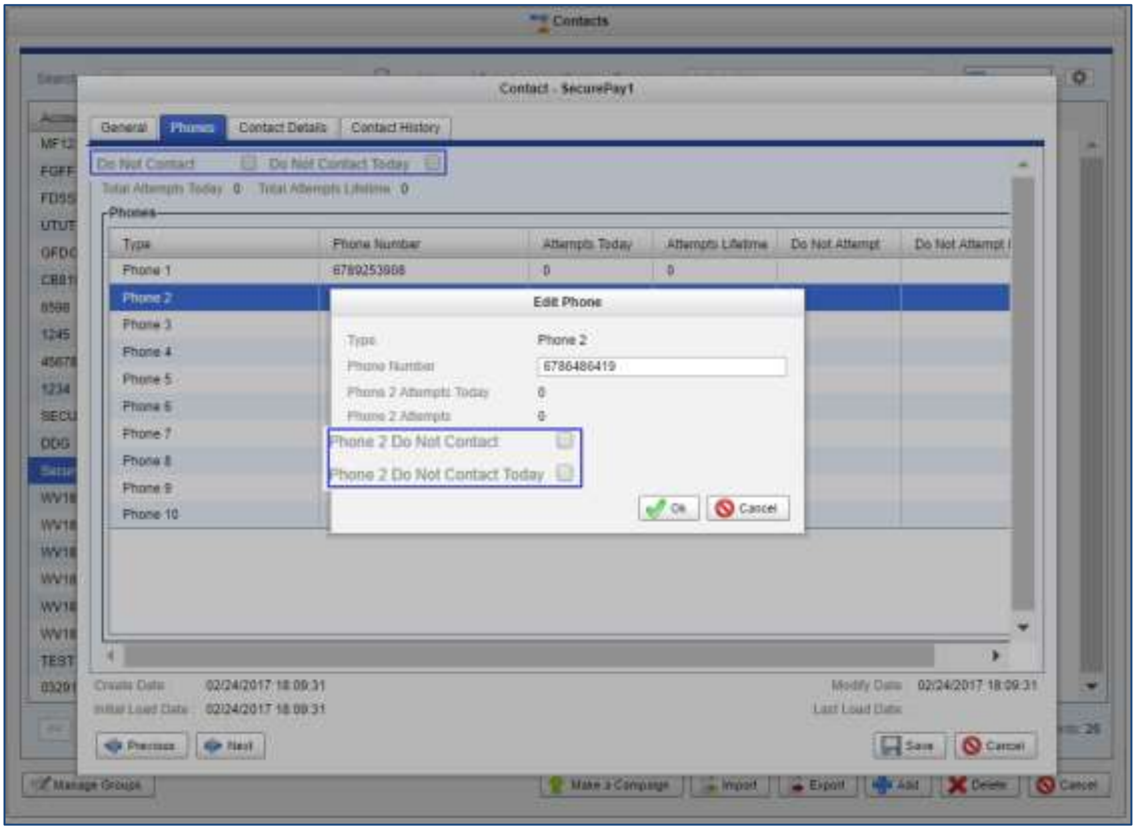


Figure 10: Edit Phone screen - Phones tab – Contact screen

2.1.5 Re-Labeled 'On Hold' to 'Calls in Queue' in Activity Widget

The On Hold metric has been relabeled to Calls In Queue on the Activity widget at the service level view to more accurately reflect values displayed.

Previously,

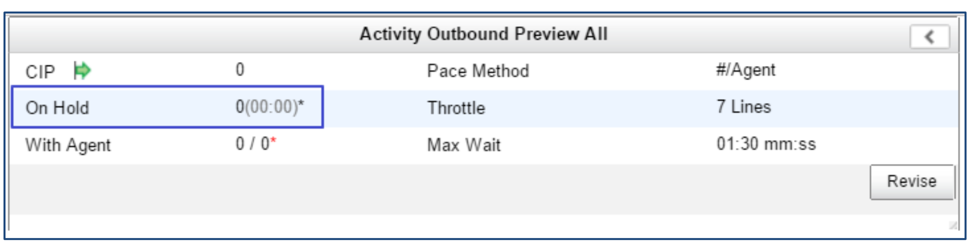


Figure 11: Activity Widget – Services Dashboard – Platform 4

Now,

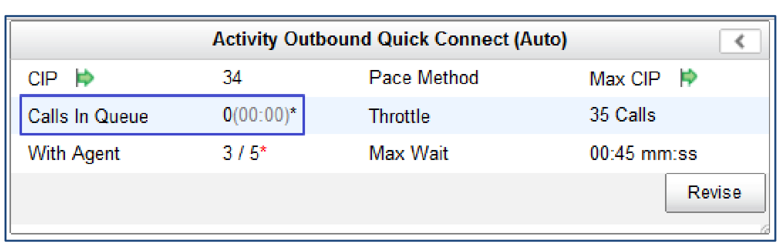


Figure 12: Activity widget – Services Dashboard – Platform 5

2.1.6 New Look for Notification Messages

Notification messages for confirmation, warnings, and errors have been redesigned and now have a new look.

Figure 13: Floating messages – Platform 5

Previously,

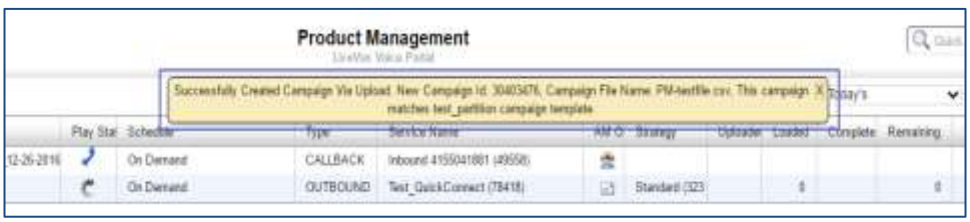


Figure 14: Message example – Platform 4

Now,

Figure 15: Message example – Platform 5

2.1.7 Support Adding/Appending Records to Active Campaigns

This new feature allows users to add/append records to active campaigns using Campaign APIs. New transactions can only be appended to active "today's "campaigns in Built, Pause or Play status.

Notes :

- *Users must be on this version of the platform and utilize this platform's campaign APIs to use this functionality.*

- *There is a maximum of 10,000 records allowed per API call.*
- *New transactions appended to campaigns in the Stop status are not supported.*
- *Campaign build functionality does not apply to the appended records, only to the initial build. With this, no cell phone scrub or duplicate number checking, for example, are performed on the appended records.*
- *API method requires only one phone number at a minimum to append the records.*
- *Campaign ID is required to use this functionality. The Campaign ID can be retrieved from campaign upload process, but the campaign must be built for the API to append records.*
- *Appendable campaigns will follow the normal dialing sort rules set at the service level and will be resorted after each successful append request.*
- *The following Campaign Types do not apply to campaign appends:*
    - *CALLBACK*
    - *INBOUND*
    - *SCHEDULED_CALLBACK*
    - *MANUAL*
- *For more information on requirements/setup of the feature, please contact Client Services and/or review Quick Reference Documents section in the User Hub.*

The API calls will only work on campaigns that have the Allow Append option enabled. To use the Allow Append, the client must first have the **Campaign Appends Allowed** enabled by going to *Client editor > Settings tab > Advanced Features* section.

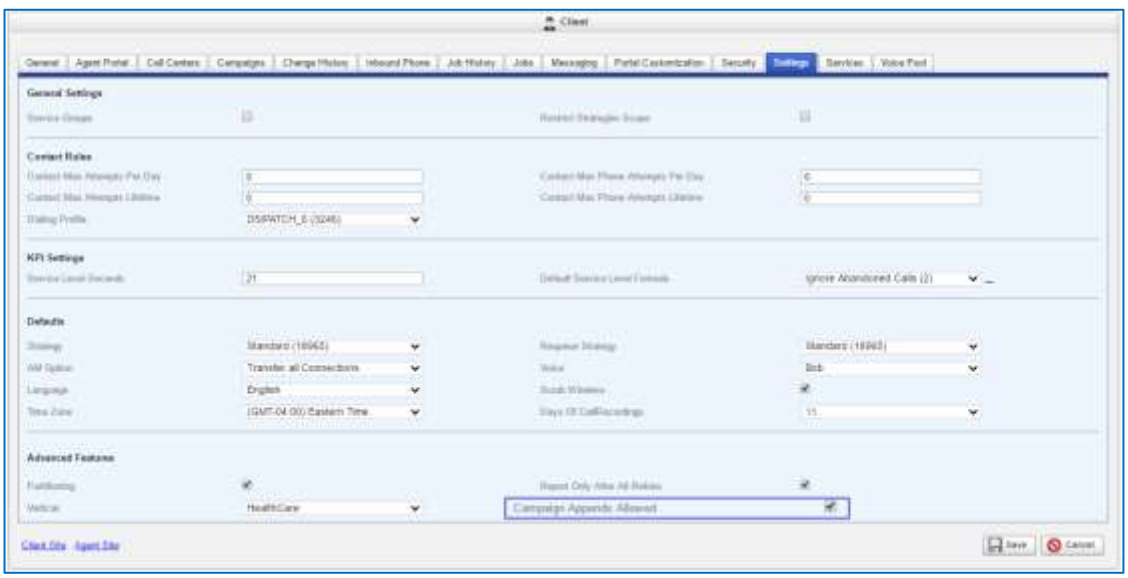


Figure 16: Settings tab – Client editor - Campaign Appends Allowed field

Campaign Appends only works for campaigns that have not reported, essentially any campaigns that have not been stopped manually or automatically when the records are exhausted. To keep an append campaign active while there are no records available, there is an optional setting at the Service level to force the campaign to report at the end of the day. This can be configured via *Service editor > Settings tab > Advanced Features* enabling **Append Campaign Reports at End of Day**.

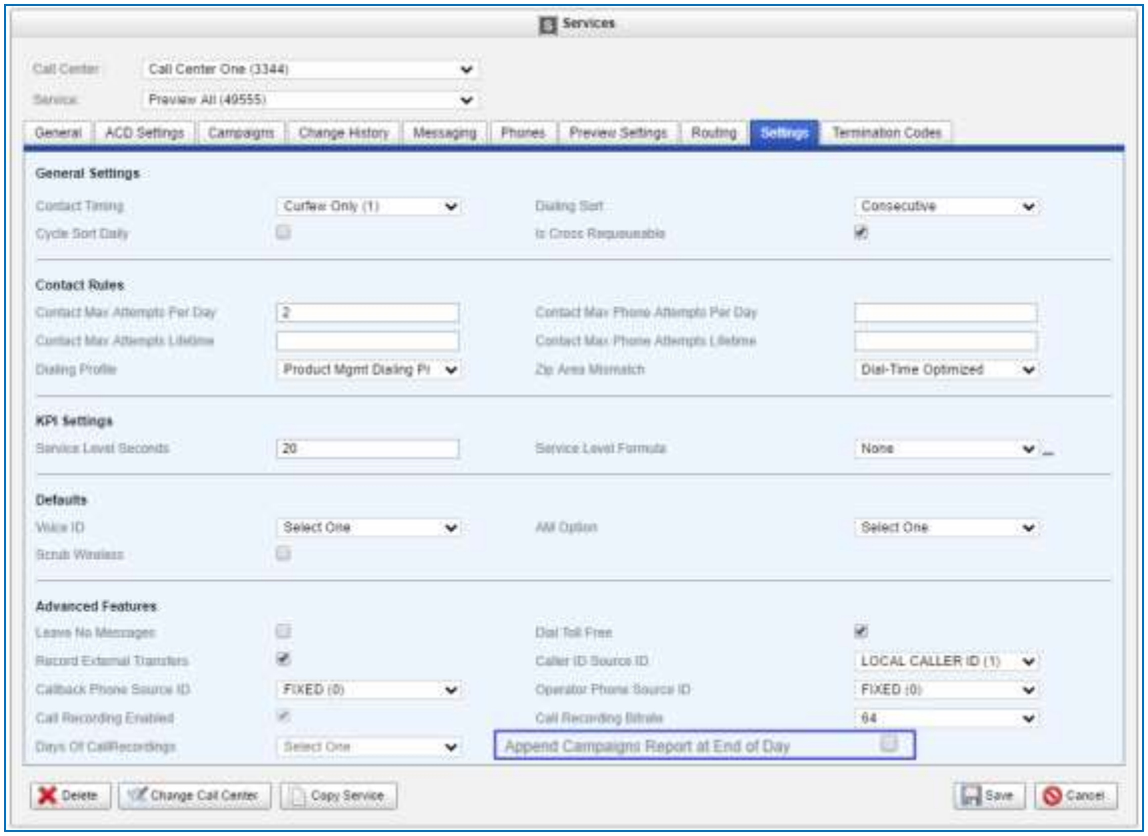


Figure 17: Settings tab – Services editor - Append Campaigns Report at End of Day

Campaign files with campaign append allowed now display a green checkmark in the Allows Append column in the Campaigns manager.

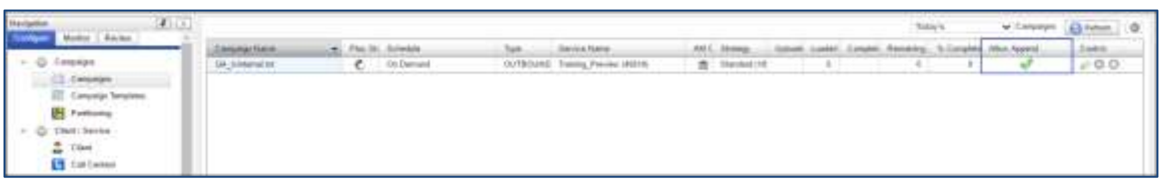


Figure 18: Campaigns manager – Allow Append column

Note :

An active campaign with at least one record must be available to utilize campaign append feature.

When uploading campaigns, users can enable the new **Appending Campaign** option in the upload UI to allow appends to the campaign.

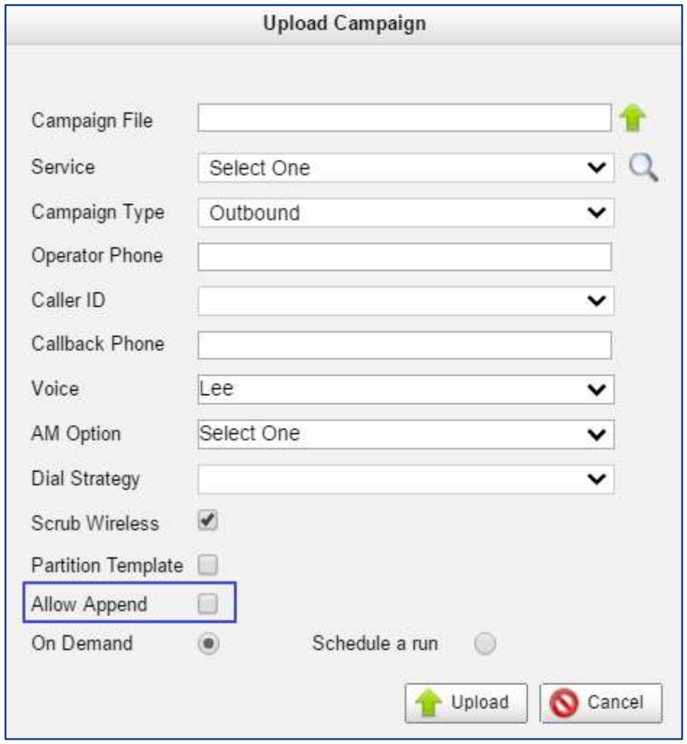


Figure 19: Upload Campaign screen – Allow Append option

Locating the Campaign ID to be used for the Append Campaign API is an important step. Once the file is loaded, the Campaign ID is generated as shown below.

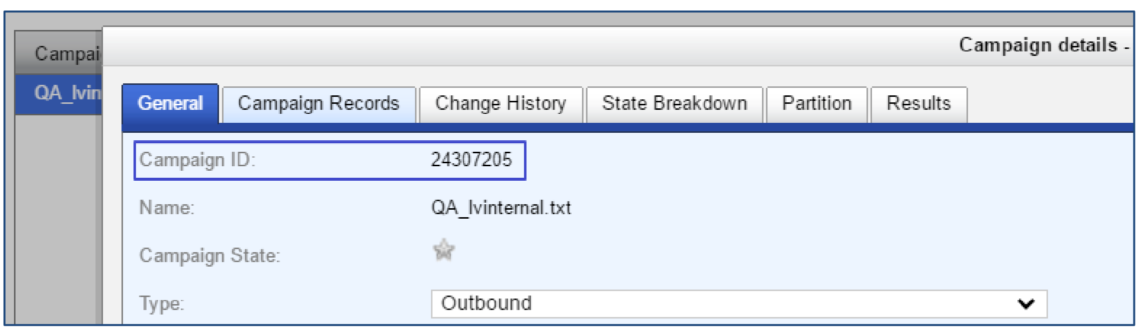


Figure 20: Campaign details screen – General tab - Campaign ID

2.1.8 Agent Messagebook in Configuration Manager

The ability for agents to leave pre-recorded messages was introduced in the previous versions of the platform. This version of the platform exposes the configuration options that allow users to manage agent messagebooks and messages available for agents to play.

Notes : *This feature is not available for Manual, Preview All, HCI & 10DMT service types.*

New entries are created by using **Add Messagebook Entry** button available in the Messages editor.

- The name and description assigned to a Messagebook is also displayed on the Agent Desktop.
- Existing phrases from the LiveVox or client pool will be available for instant use as well as any voice talent.

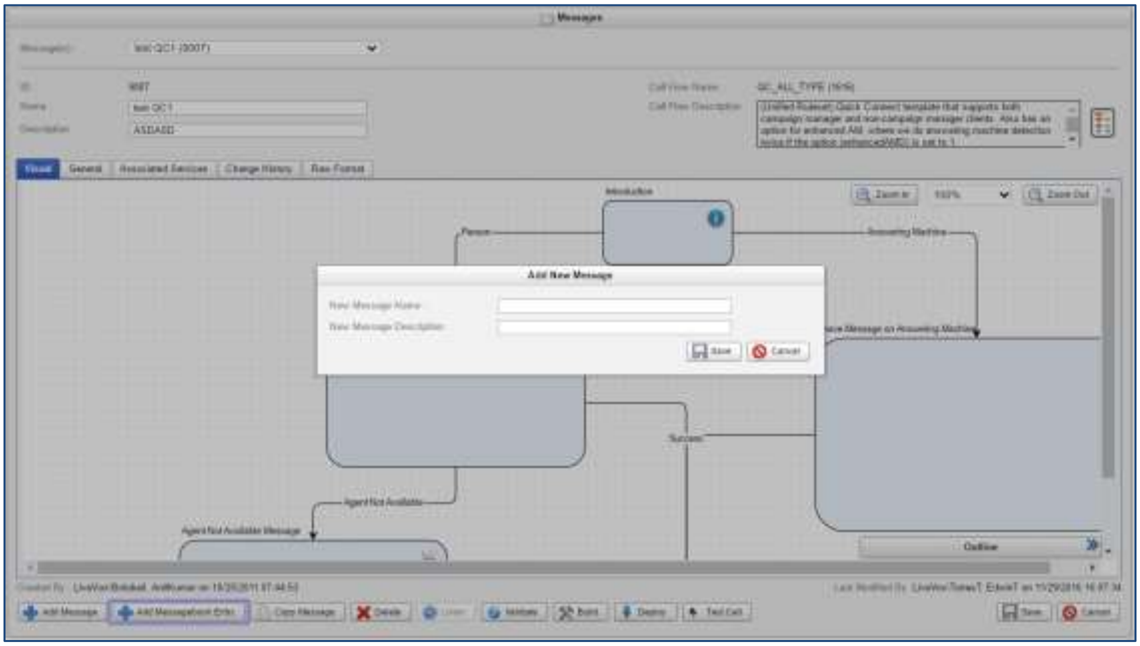


Figure 21: Add New Message screen – Messages editor

After saving,

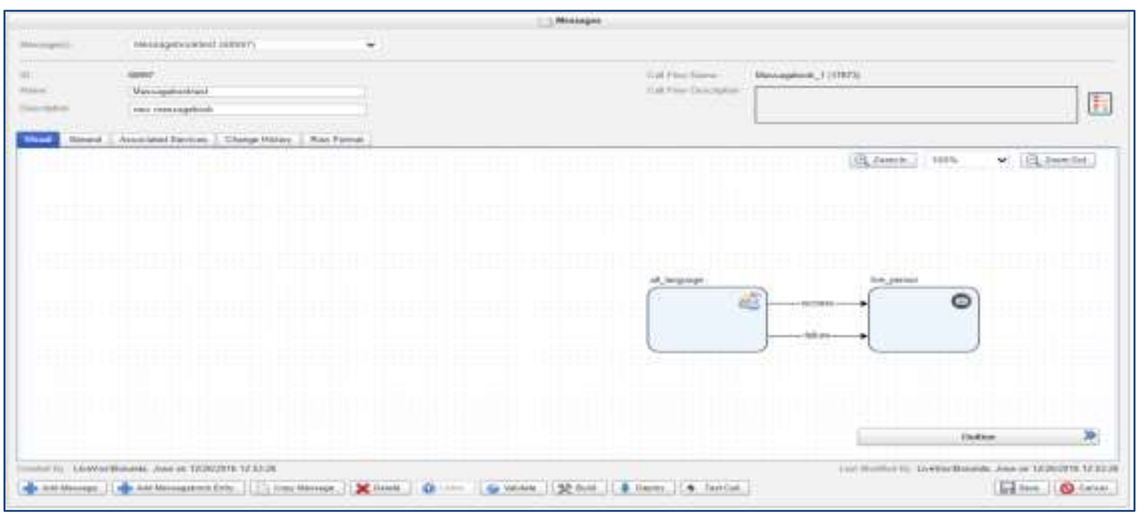


Figure 22: New message – Messages editor

Users can associate existing phrases in the Phrases library to be assigned on a Messagebook available to the agent. Messagebook associations are done in the Agent Desktop editor.

When the **Messagebook Enabled** field is checked, the **Messagebook** tab will display in the Agent Desktop – agents will see the **Messagebook** button (see Agents Enhancements section of these notes for more information).

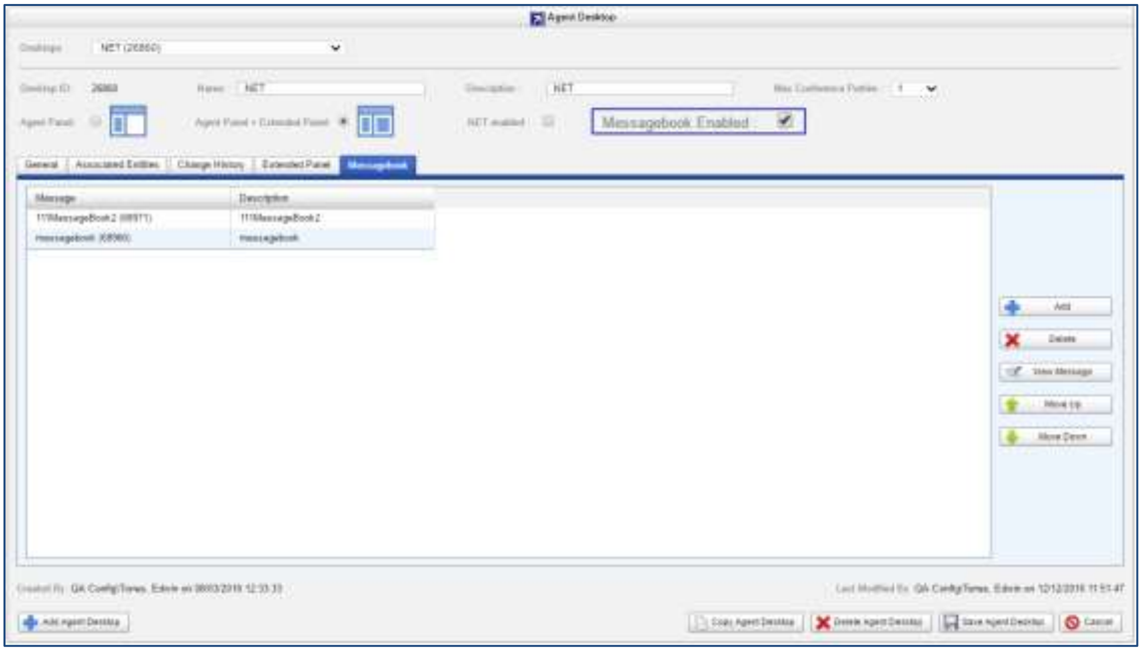


Figure 23: Agent Desktop - Messagebook enabled option

- Select the **Add** button to add a new entry to the Messagebook.
- From the **Message** drop down select the new message to add.

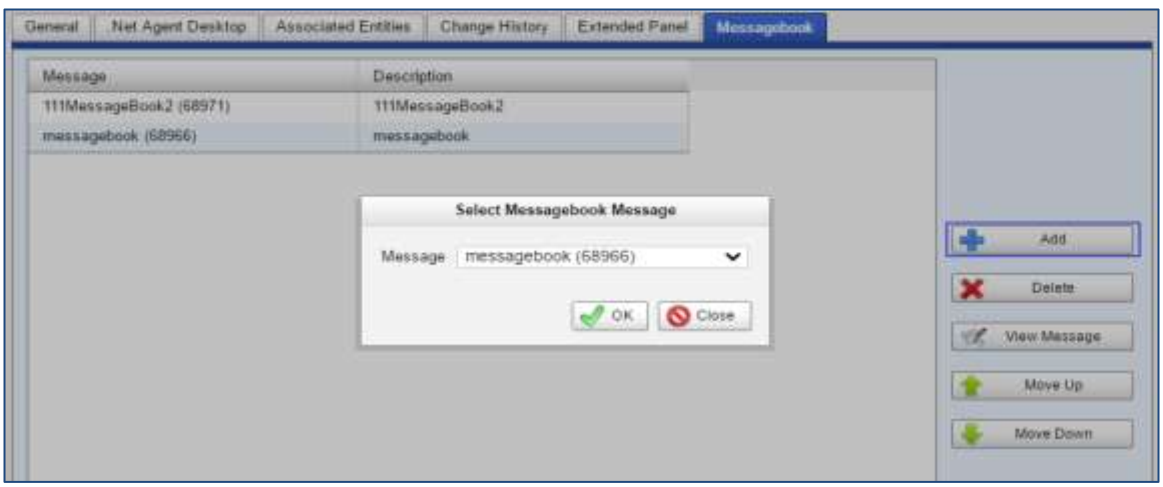


Figure 24: Messagebook tab – Agent Desktop editor - New Messagebook entry addition

2.1.9 Access to Partitioning Editor from Contacts Manager

This feature allows users to access and configure partitioning templates within the Contacts manager. Previously, when a user had identified a filter they wanted to use and create a campaign within Contacts manager; they had to go to Partitioning editor to create the filters for future use. Now, users can access and modify partitioning templates from Contacts manager.

To access Partitioning from the Contacts manager, users should select the link next to the **Partition templates** field. This link will take users to the Partitioning editor screen from which they can create and manage partitioning templates and then apply them on any filtered contacts or for the entire pool of accounts.

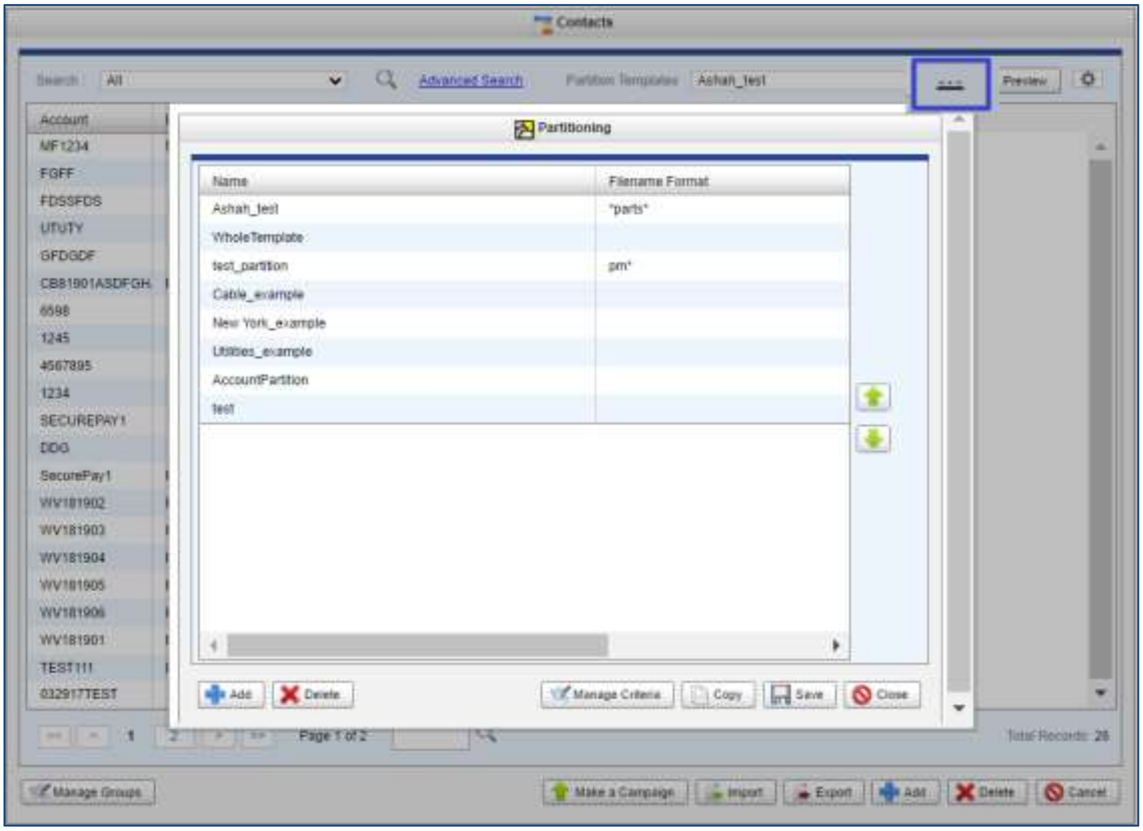


Figure 25: Access to Partitioning editor – Contacts manager

2.1.10 Stored Call Flows Editor Variables

The Call Flows editor (CFE) variables used during the Interactive Voice Responses (IVRs) process to collect data from callers can now be stored within Contacts manager. This allows users to easily report on responses via a CDR or view responses within the voice portal on features such as a customer survey or speech recognition responses.

All Contacts manager fields can be mapped to new or existing CFE variables.

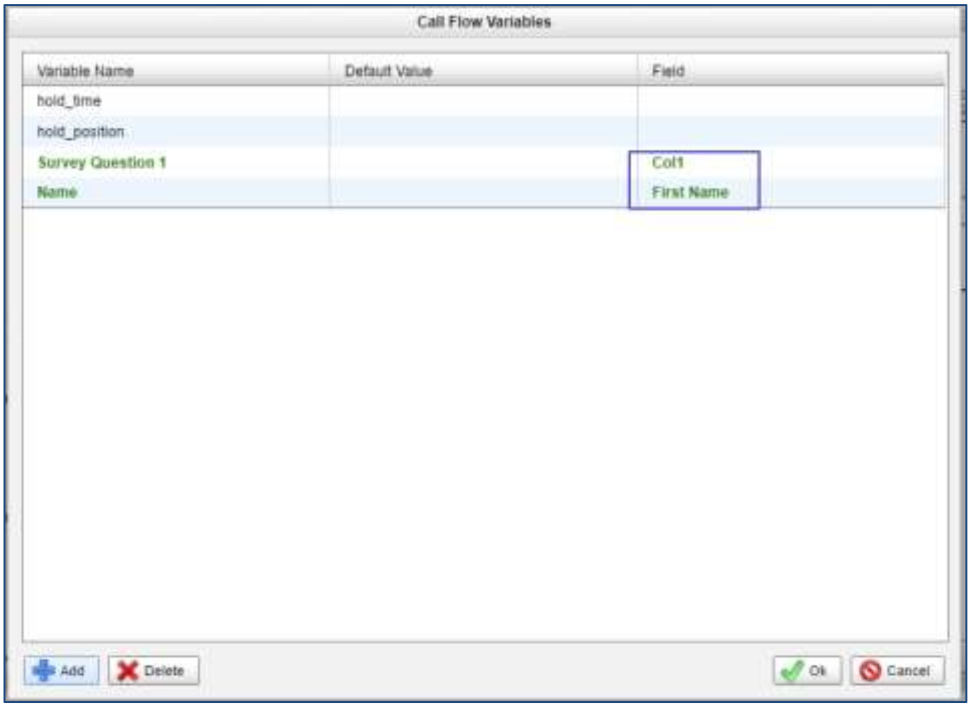


Figure 26: Call Flow Variables screen – Call Flows editor

2.1.11 Call Flows Editor Enhancements

2.1.11.1 Speech Recognition Module Enhancements

- In this version of platform, all the properties with the label *Advanced* have been moved into the new **Advanced properties** tab in Speech Recognition module.

Previously,

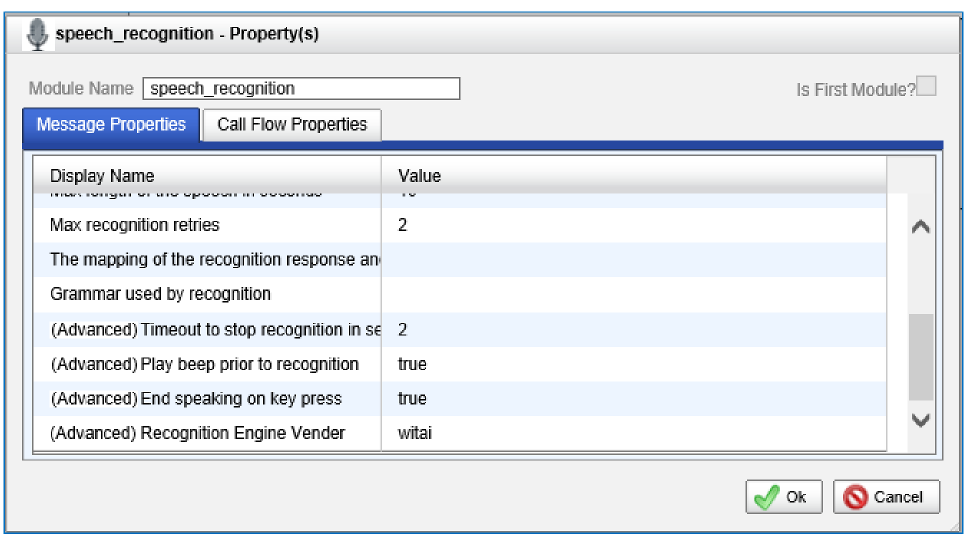


Figure 27: Speech recognition module – Message Properties tab – Platform 4

Now,

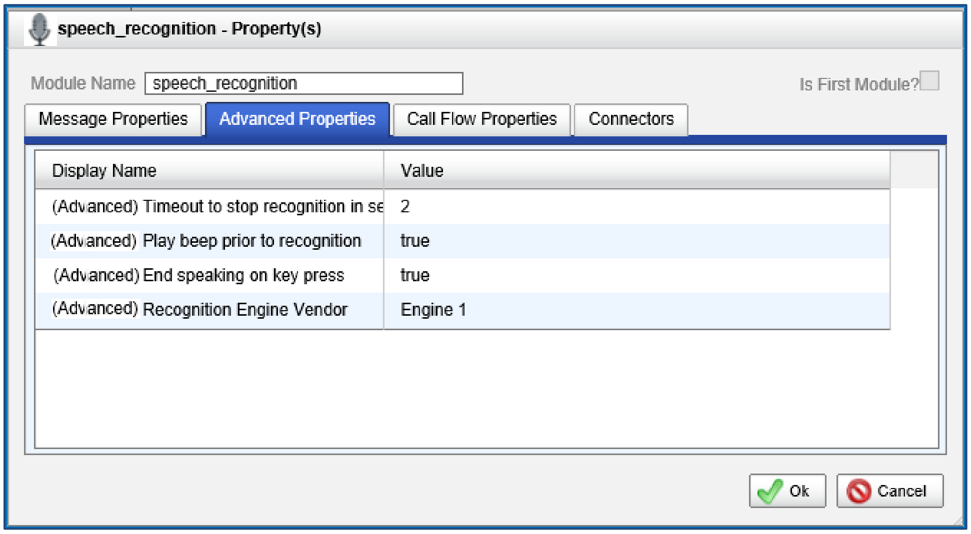


Figure 28: Speech recognition module – Advanced Properties tab – Platform 5

2.1.11.2 Connectors tab

Each module within CFE now has a **Connector** tab:

- The **Connectors** tab shows a list of all connectors going in and out of a module.
- Users can update existing connectors within a module without having to find or recreate the connection on the CFE main/visual screen.

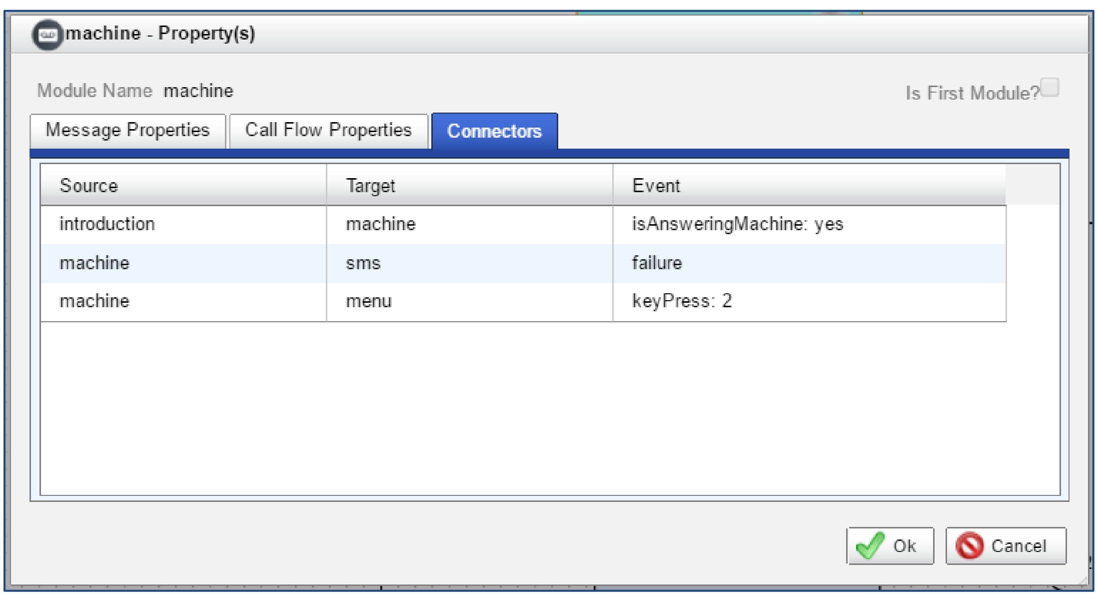


Figure 29: Example of connectors tab within a module

2.1.11.3 Billing Tree Specific Payment Modules

This version of platform introduces Billing Tree specific payment modules located under Advanced modules of Call Flows editor:

- *billingtree_check:* Allows configuration for real time payment integrations with the payment processor Billing Tree for checks.
- *billingtree_creditcard:* Allows configuration for real time payment integrations with the payment processor Billing Tree for credit cards.

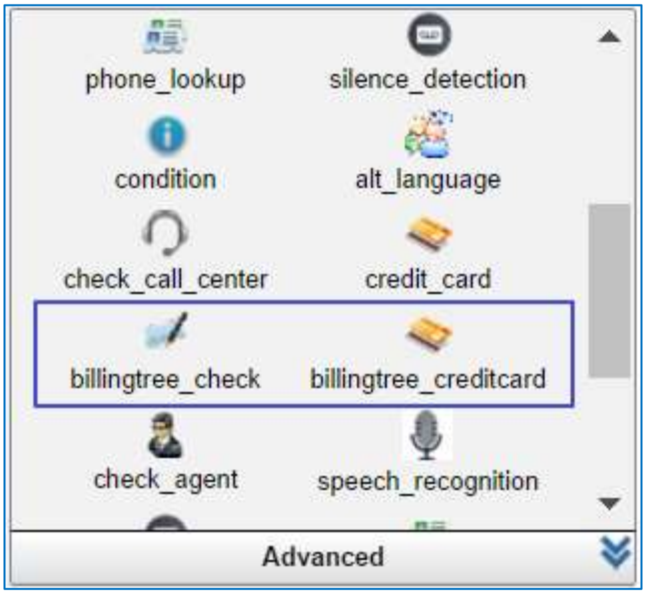


Figure 30: Billing Tree check and credit card modules in Call Flows editor

Note :
Users must have an existing relationship with Billing Tree to utilize these modules.

2.1.11.4 Expression Builder Enhancements

Expression Builder has been updated in this version of platform to insert Boolean and Logical Operators format directly from within CFE as opposed to via custom work orders.

Users can expand on the list of available operations and function in the Expression Builder to view the list of operators:

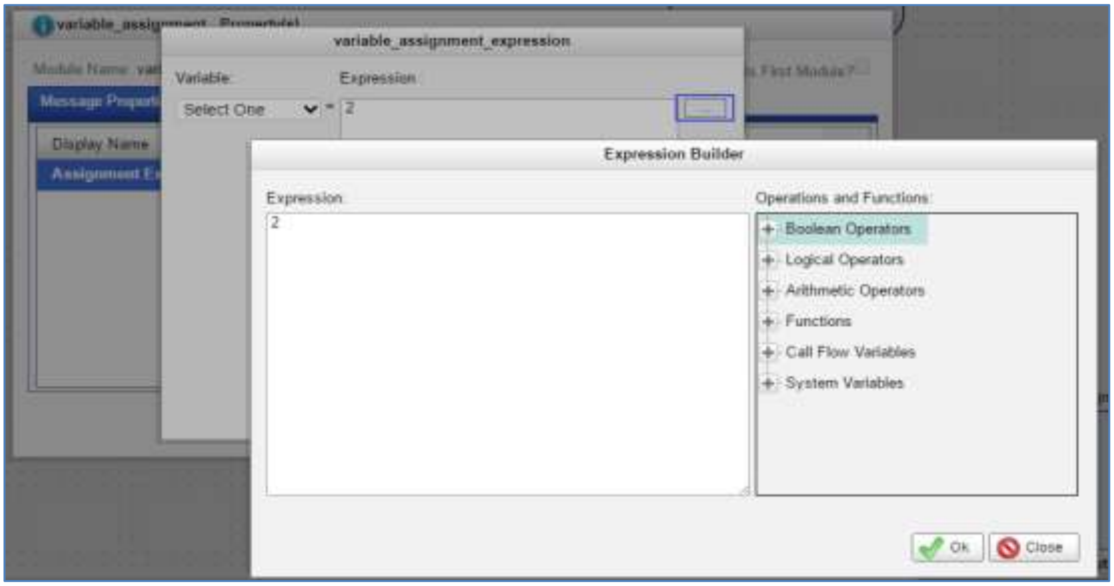


Figure 31: Expression Builder access – Call Flows editor - Operations and Functions

2.1.11.5 New QC_AMD_Transfer Module

The AMD functionality, used by legacy QC ALL TYPE template, is now available and can be used for QC, Preview All and Manual services via CFE editor. New QC_AMD_ Transfer module is available under Advanced modules.

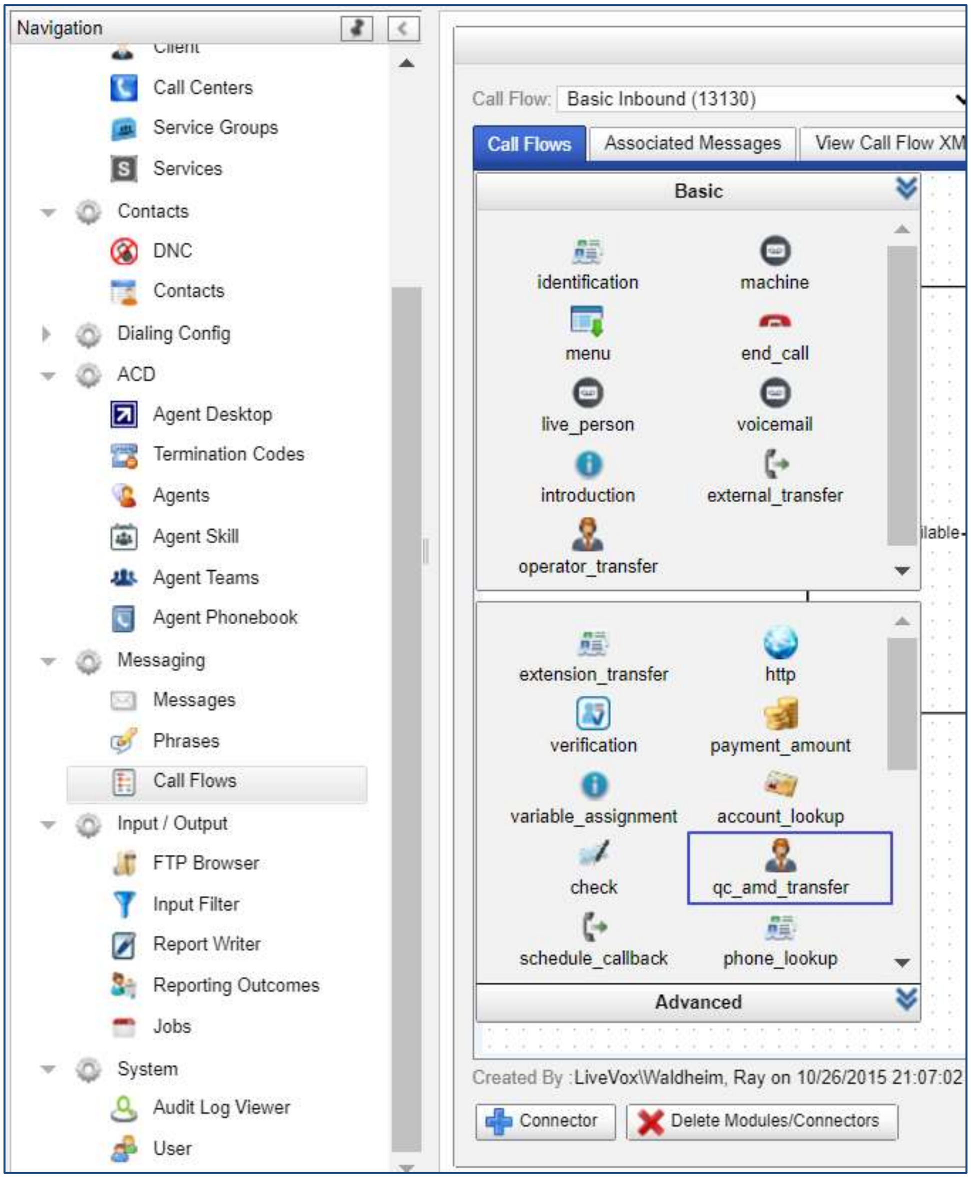


Figure 32: QC_AMD_Transfer module

2.1.12 Agent Editor Enhancements

2.1.12.1 Exposed "Caller ID Name" in Services Editor

Users can now customize CNAM (Caller NAMe) configurations on any outbound service dialing **Canadian numbers.** This field supports 15 printable ASCII characters (A-Z, 0-9).

Notes :

- *For U.S. dialing, LiveVox continues to offer CNAM change requests through a third-party vendor. These requests should be communicated to Client Services.*

- *CNAM may not always display on all outbound calls made to the US. This is due to the local phone company of the person being called doing a CNAM dip to an LIDB provider which may not always have the most updated information.*

To configure CNAM, users can navigate to *Services Editor > Phones* tab and update CNAM field under the Caller ID List in the **Phones** tab.

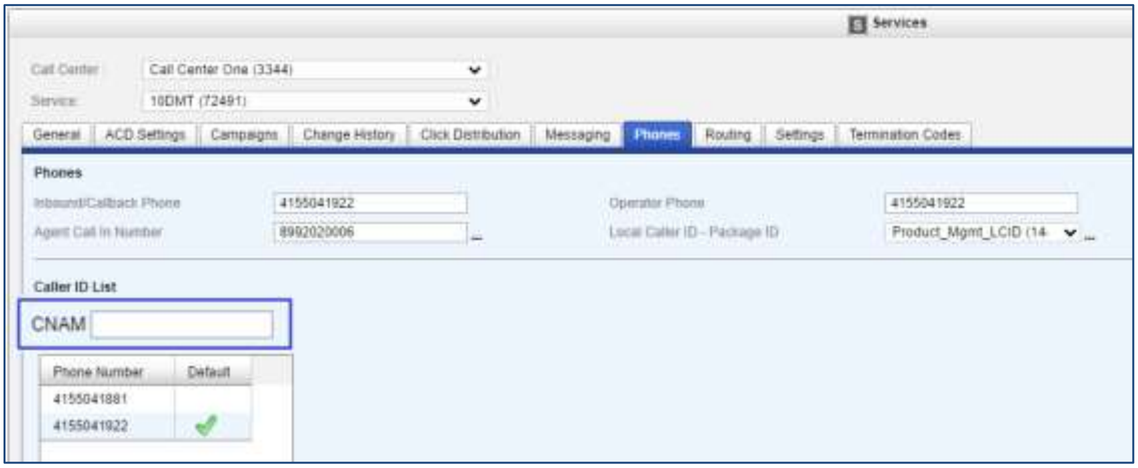


Figure 33: CNAM field (Outbound Canadian dialing only) - Phones tab – Services editor

2.1.13 Multi-Conference Support

With this version of platform, agents can conference multiple parties (as opposed to a single party in the past) using different sources, e.g. Phonebook, Agent Book, Manual Transfer. To configure the number of parties an agent can add to the conference, users should use Max Conference Parties drop down in the Agent Desktop editor. By default, the Max Conference Parties field is set to 1. Maximum value is 10.

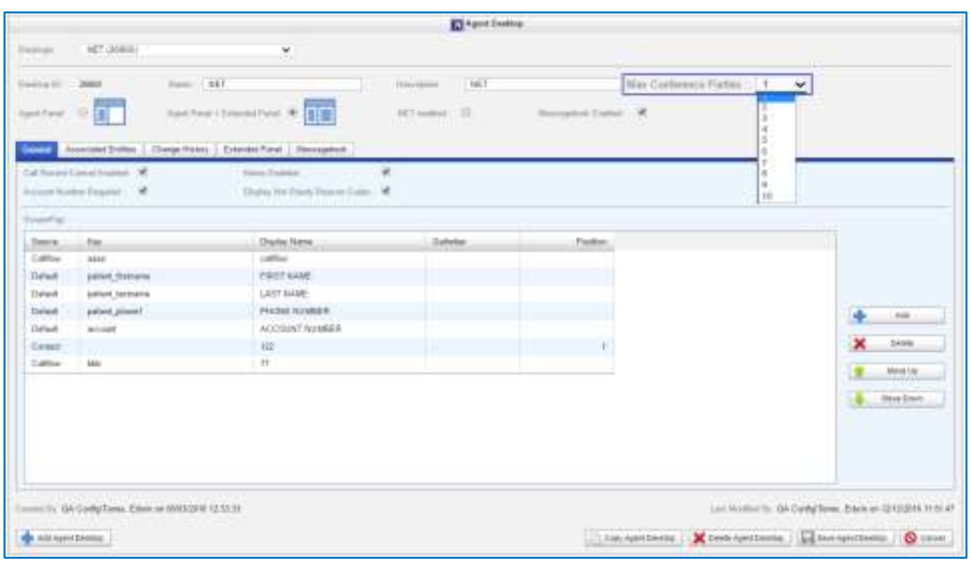


Figure 34: Max Conference Parties field – Agent Desktop editor

Note :

Call recording is defaulted to record based on the "caller's audio leg", hence call recording is supported for the entire life of a conference if the caller remains in the conference. ***Record External Transfers*** *must be enabled at the service level to continue recording if the agent leaves the conference.*

2.1.14 Agent Desktop Audio Connection (WebRTC)

With this release of the platform, agents can connect their audio to LiveVox using agent desktop. This is done using Web Real-Time Communication (WebRTC), supported in this release, which is a method for delivering voice and other forms of communication that are embedded directly in a web page. The new Opus codec supported by WebRTC provides enhanced voice quality at low bandwidth.

For agent desktop audio connection to work, the functionality should be enabled at the client level (*Client editor > Agent Portal tab > Use Agent Desktop Audio* field). Currently, this field is view-only for the users. To enable, please contact Client Services team at client-services@livevox.com.

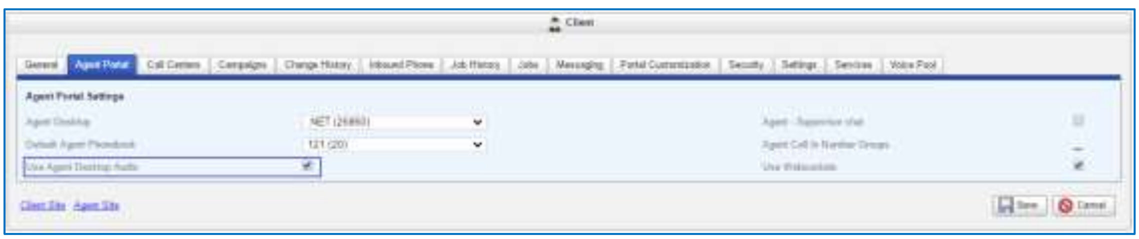


Figure 35: Agent Portal tab – Client editor - Use Agent Desktop Audio field

Notes :

- *This feature is currently only supported on* ***Firefox*** *and* ***Chrome.***
- *This features is only supported for* ***Agent at Ready In*** *services (agent logs in and then calls in to Agent Call In Number).*

2.1.15 Phone Details Screen Update

With this version of platform, when navigating to *Client->Inbound Phone* tab and double-clicking on the phone, the fields in the Edit Phone screen will now match the grid header displayed on the main screen for the **Inbound Phone** tab.

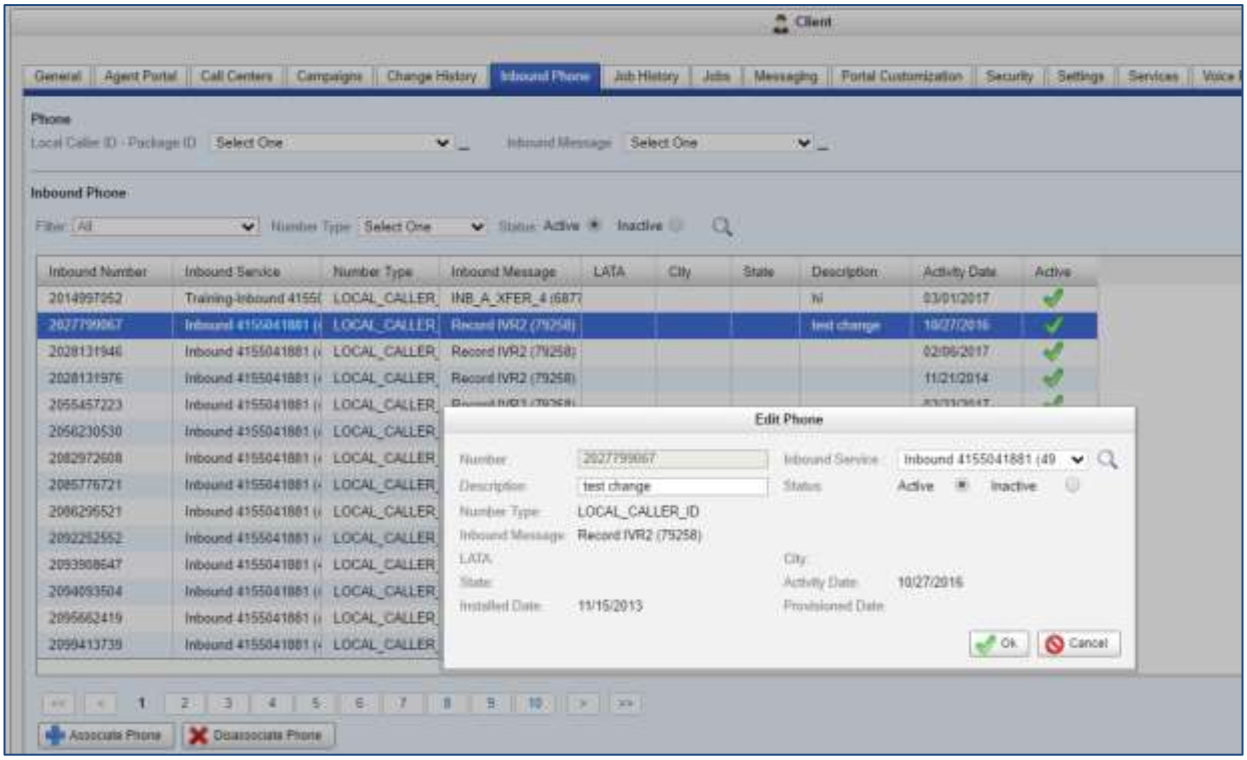


Figure 36: Inbound Phone tab - Edit Phone screen – Client editor - Platform 5

2.1.16 Call Recording Enhancements

2.1.16.1 Increased Call Recording Max Length

Max Call Recording duration has been extended from 2 hours to 4 hours per call.

2.1.16.2 Retention Period of Existing Recordings Update

Retention period for stored Call Recordings are now updated whenever Call Recording retention period is changed. Previously, changing the retention period only applied to the future calls and any previously stored Call Recordings were only retained for the duration configured at the time they were recorded.

2.1.17 New Widgets on Unified Agent Desktop

There are three new widgets available on Unified Agent Desktop with the release of this platform:

- Contact Notes - allows an agent to determine what action or notes have been written by previous agents who worked the account.
- APIv2 - allows users to configure API responses and display them on the agent desktop.
- Contact History - displays all contact history on agent desktop for the account.

These new widgets are designed to give agents additional tools to increase agent productivity as well as provide more contact level information for a smoother customer interaction. Like the existing widgets, the new widgets can be configured on the voice portal via *Agent Desktop editor > Extended Panel*.

Figure 37: Extended Panel tab - Agent Desktop editor - new widgets

The Agent Desktop editor allows users to add widgets to an existing agent desktop or configure a new one. Users may also easily enable and disable additional widgets.

2.1.18 Pagination in Agents Panel

The Agents panel/widget in the service dashboard and agent queue pages has been updated with a "pagination" style of navigation. Previously, the Agents panel default view at the client, call center and service levels displayed all agents logged in on one page. To view them, the user would be required to scroll up and down the list. With this version, instead of one long list of agents, the Agents panel distributes the agents to display via multiple pages.

In addition, a search filter has been implemented for easier searching of an individual agent; when logged in.

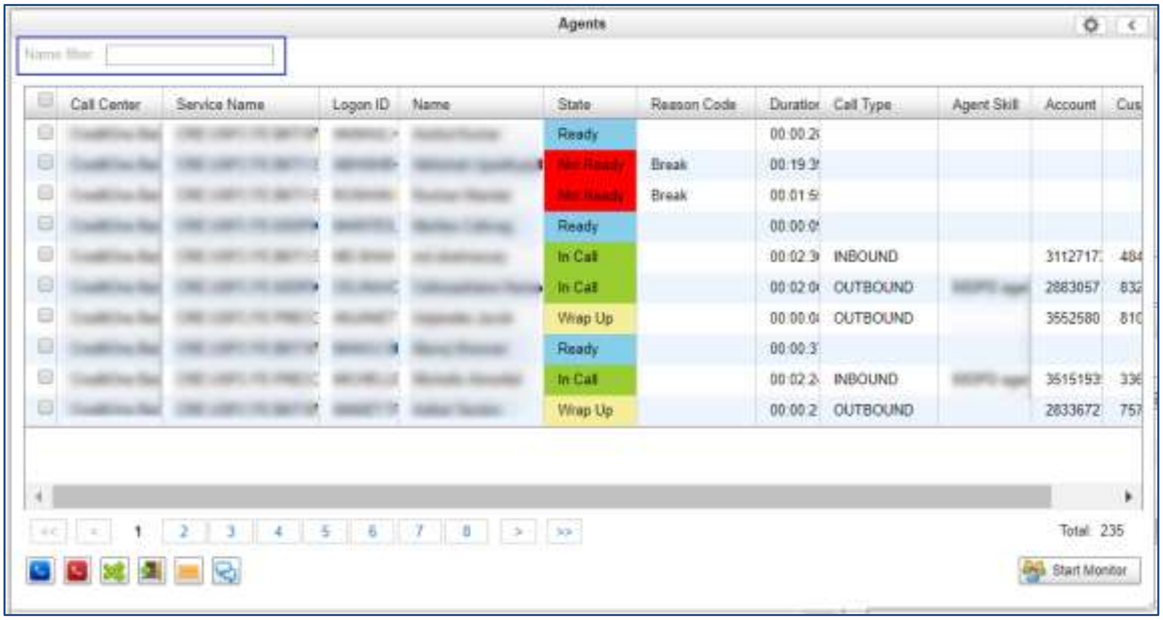


Figure 38: Agents panel navigation

Notes :

In this release, previously configured customized columns for the panels on the Agent Queue page (Monitor > Agents) will be reset to default. If this is not the desired view, users will need to customize using the cog icon in the upper right-hand corner of the selected panel.

2.1.19 Dialing Sort Support for HCI and 10 DMT Services

Previously, dialing sort options were not available for HCI and 10DMT services. These services used a Default dialing sort only.

Now, the following Dialing Sort options are supported for HCI and 10DMT:

- Consecutive
- Default
- Inverted consecutive
- Mid point consecutive
- Contact name – no area code
- Campaign round robin

Notes :
Please note that Contact Name dialing sort option is not available for HCI or 10DMT services.

To select, please go to *Configure>Services>Settings*

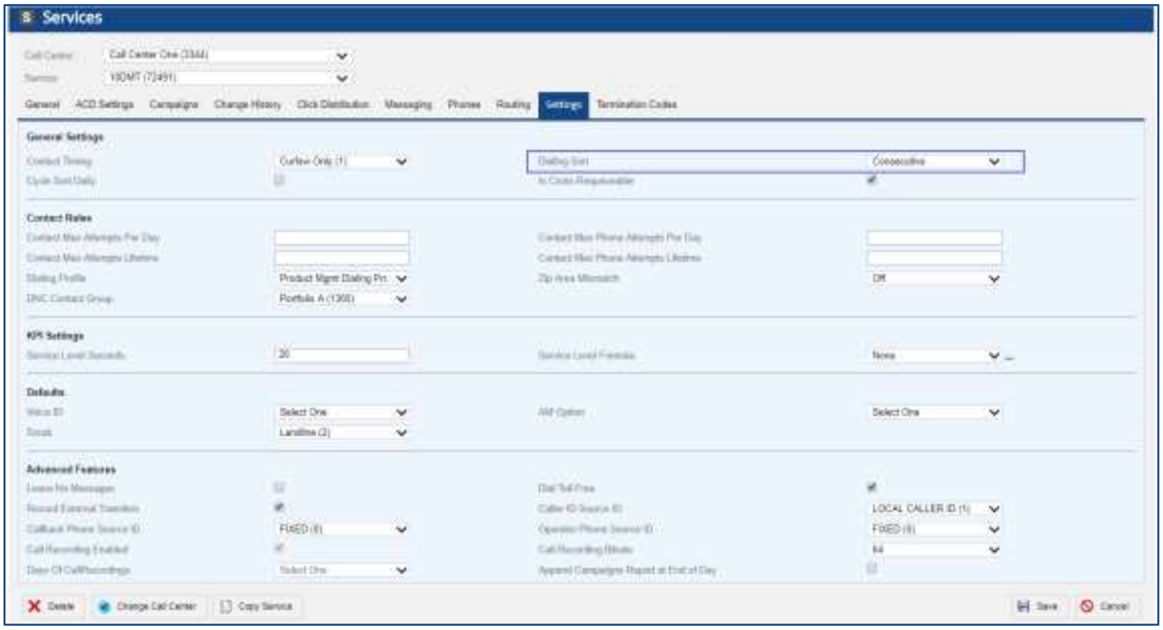


Figure 39:Dialing sort option for 10DMT service

2.2 *Agent Enhancements*

2.2.1 Call Using Computer (WebRTC)

With this release of the platform, agents using **Firefox** and **Chrome** browsers can connect their audio to LiveVox using their desktop. This enables a seamless agent experience avoiding the need to navigate to two applications to connect to LiveVox.

When this feature is enabled, during the login process, agents will have *Call using computer* option on their sign in screen.

Figure 40: Agent Sign In screen - Call using computer option

Once signed in, the browser will open standard agent desktop screen that will now have a new button. This button opens PC Audio screen with the dial pad that allows agents to generate DTMF tones for IVR inputs.

Figure 41: Agent Desktop – PC Audio dial pad

If *Call using computer* option is unchecked, the agent will be presented with the dial in instructions screen for the sign in (existing behavior).

2.2.2 Conferencing Additional Parties

Previously, agents were only able to add one additional party to a call and have three-way conference. Now, if enabled, the agent can conference in up to 10 parties. The agent has controls over the conference and these controls become available whenever an agent initiates a transfer:

- **Phone:** Allows the agent to call a number.
- **Drop:** Allows the agent (initiator of the conference) to drop any added party.
- **Silence:** Allows an agent to mute the conference or any party within the conference.
- **Reconnect:** Reconnects the agent back to the caller and drops all conferenced parties.
- **Add Party:** Calls any additional party via the transfer option – will put the caller or the conference on hold.
- **Swap:** Swaps between a conference and an additional line and puts them on hold.
- **Merge:** Adds any additional party to the conference.
- **Leave Conference:** Allows an agent to exit a conference – keeping the conference active.

Note :

These conference controls along with the call controls will be transferred to the first agent (if the agent is using Agent Desktop) added to the conference once the agent that originated the transfer left the conference.

Once the transfer is initiated, the caller will be put on hold while the agent gets connected to the transfer recipient.

To bridge new party into the call, the agent should select **Merge. Leave Conference** option will allow to complete the transfer while **Reconnect** will drop all parties and allow the agent to continue the call with the original caller.

Figure 42: Multi-conferencing in agent desktop

2.2.3 Agent Messagebooks

When messagebooks are configured for the agent, the new **Messagebook** button becomes available on the agent desktop for the agent to play individual pre-recorded messages.

To view and play a pre-recorded message in the agent desktop, agents can:

- Select the **messagebook** button.
- Select a message from the list of pre-recorded messages.
- Confirm playing the messages by selecting **Yes**.

Figure 43: Agent desktop messagebook functionality

The agent will be muted while the message is played to the customer. Agents can stop the playback at any time. Agents call select **Cancel** to return to the previous screen.

Figure 44: Agent Desktop while message is played back to customer

2.2.4 Unified Agent Desktop Enhancements

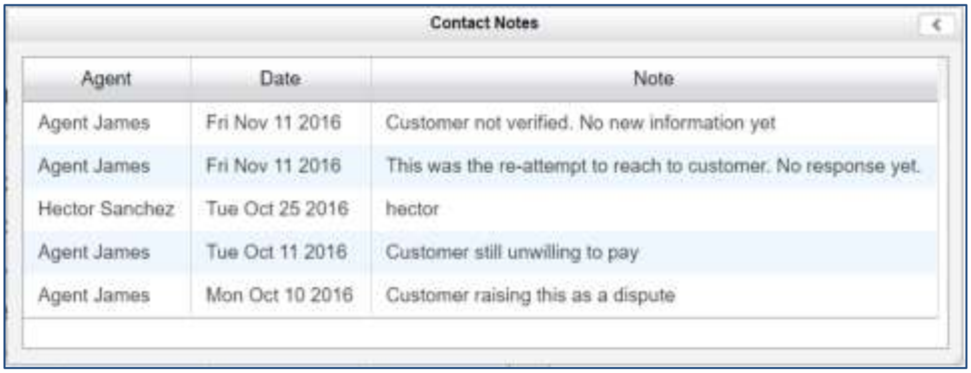
The unified agent desktop has three new widgets:

- Contact Notes
- Contact History
- APIv2

2.2.4.1 Contact Notes Widget

- Displays all agent entered notes on the given account on the Unified Agent Desktop.
- Allows an agent to determine what action or notes have been written by previous agents who have worked the account.

Contact Notes Widget gets displayed when call is connected.



Contact Notes

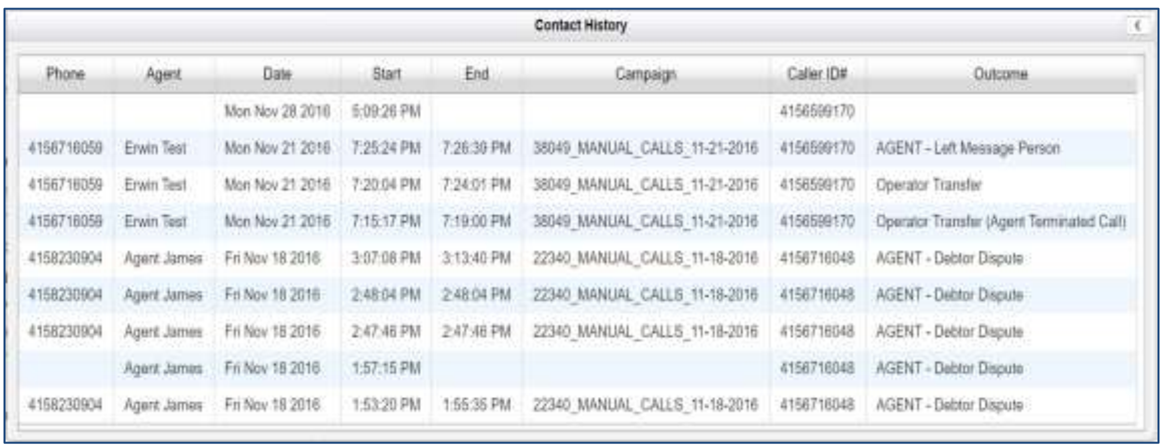
Agent	Date	Note
Agent James	Fri Nov 11 2016	Customer not verified. No new information yet
Agent James	Fri Nov 11 2016	This was the re-attempt to reach to customer. No response yet.
Hector Sanchez	Tue Oct 25 2016	hector
Agent James	Tue Oct 11 2016	Customer still unwilling to pay
Agent James	Mon Oct 10 2016	Customer raising this as a dispute

Figure 45: Contact Notes widget

2.2.4.2 Contact History

- Displays all Contact history on Agent Desktop for the Account.

Widget displays when call is connected. Only the last 30 days of history displays.



Contact History

Phone	Agent	Date	Start	End	Campaign	Caller ID#	Outcome
		Mon Nov 28 2016	5:09:26 PM			4156599170	
4156716059	Erwin Test	Mon Nov 21 2016	7:25:24 PM	7:26:30 PM	38049_MANUAL_CALLS_11-21-2016	4156599170	AGENT - Left Message Person
4156716059	Erwin Test	Mon Nov 21 2016	7:20:04 PM	7:24:01 PM	38049_MANUAL_CALLS_11-21-2016	4156599170	Operator Transfer
4156716059	Erwin Test	Mon Nov 21 2016	7:15:17 PM	7:19:00 PM	38049_MANUAL_CALLS_11-21-2016	4156599170	Operator Transfer (Agent Terminated Call)
4158230904	Agent James	Fri Nov 18 2016	3:07:08 PM	3:13:40 PM	22340_MANUAL_CALLS_11-18-2016	4156716048	AGENT - Debtor Dispute
4158230904	Agent James	Fri Nov 18 2016	2:48:04 PM	2:48:04 PM	22340_MANUAL_CALLS_11-18-2016	4156716048	AGENT - Debtor Dispute
4158230904	Agent James	Fri Nov 18 2016	2:47:46 PM	2:47:46 PM	22340_MANUAL_CALLS_11-18-2016	4156716048	AGENT - Debtor Dispute
	Agent James	Fri Nov 18 2016	1:57:15 PM			4156716048	AGENT - Debtor Dispute
4158230904	Agent James	Fri Nov 18 2016	1:53:20 PM	1:55:35 PM	22340_MANUAL_CALLS_11-18-2016	4156716048	AGENT - Debtor Dispute

Figure 46: Contact History widget

2.2.4.3 API V2

- Allows users to configure API responses and display on the Unified Agent Desktop.
- Supports JSON type content and responses can be displayed in columns or in rows. Widget displays when call is connected.

Yahoo Weather API

Location	San Francisco
Pressure	1015.0
Temperature	58
Wind Speed	25
Wind Direction	285
Empty	

Figure 47: Display of API responses - API V2 widget

2.2.5 Customer Satisfaction Survey (CSAT)

When configured, agents can send the caller to a post call customer satisfaction survey (CSAT) at the end of the call by selecting the End Call button.

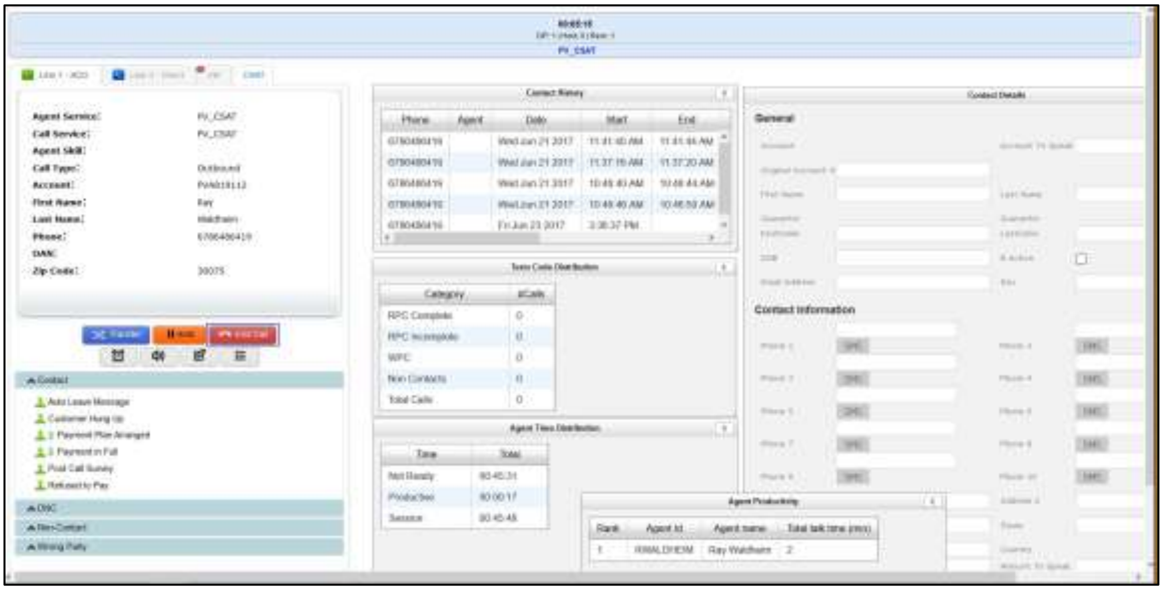


Figure 48: End Call button as a trigger for CSAT

2.3 Reporting Enhancements

2.3.1 Call Monitoring Report

New Call Monitoring report available as part of the platform ACD reports offers visibility into user initiated agent monitoring events like monitoring, coaching and barging. This report ensures that quality control users are monitoring the right agents and run daily reports on them. Data for the report is only logged whenever a monitoring event is triggered.

The report comes with advanced search parameters and supports account and phone multi-search. Users can search based on any of the criteria listed below. If no conditions are applied, the search is done for all values on a given date or date range.

- **Dates**: The date range.
- **VP User ID**: User performing the monitoring action.
- **Call Center**: The call center(s) within which the agent monitoring events occurred.
- **Service**: The service(s) within which the monitoring events occurred.
- **Agent**: The agent being monitored.
- **Agent Team**: The agent team(s) for which the monitoring event occurred.
- **Campaign**: The campaign within which the monitoring event occurred.
- **Campaign Pattern**: The campaign file name pattern.
- **Phone**: The phone number of the caller being monitored.
- **Account**: The account number of the caller being monitored.
- **Result**: The termination result(s) selected.
- **Monitoring Duration**: The duration of the event.
- **Monitoring Event**: The type of monitoring event captured (Monitor/Coach/Barge).
- **Original Account Number**: The original account number selected for the transaction monitored.

Note **:**
This report may only be generated with a start and end time frame no greater than 3 days. Data can be generated from up to 180 days back. The report can be exported via PDF, CSV and Excel.

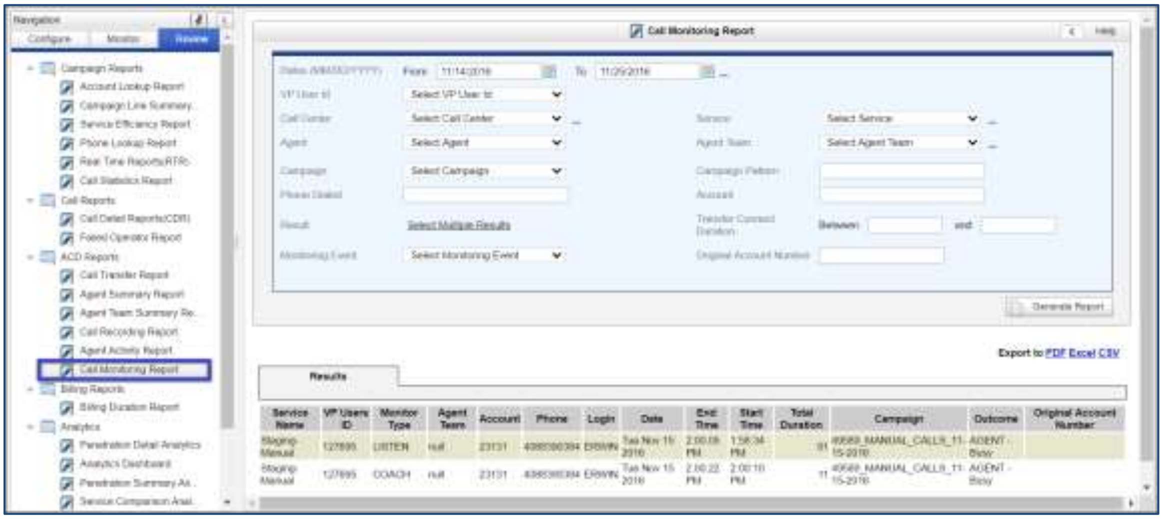


Figure 49: New Call Monitoring Report

2.3.2 Call Transfer Report

New Call Transfer report available as part of the platform ACD reports provides details on all agent initiated transfers for the selected period.

The report comes with the advanced search parameters and supports account and phone multi-search. Users can search based on any of the criteria listed below. If no conditions are applied, the search is done for all values on a given date or date range.

- **Dates:** Date range.
- **Transfer Outcome:** A transfer outcome can be selected using the drop down menu (TRANSFER, CANCELED, FAILURE, JOINING, CONFERENCE).
- **Call Center:** The desired call center(s).
- **Service:** The service(s) on which the calls were transferred.
- **Agent:** Source agent - agent that generated call transfer.
- **Agent Team:** The agent team associated to the source agent.
- **Campaign:** Name of the campaign the call transfer is associated to.
- **Campaign Pattern:** The campaign file name pattern.
- **Phone Dialed:** The phone number used to transfer the call.
- **Account:** The account number associated to the transfer.
- **Result:** The termination result(s) selected.
- **Transfer Connection Duration:** The duration of the transfer connection.

- **Transfer Type:** The type of transfer (eg. Phonebook Transfer, Agent to Agent, Manual Transfer).
- **Original Account Number:** The original account number.

Note :
This report may only be generated with a start and end time frame no greater than 3 days. Data can be generated from up to 180 days back. The report can be exported via PDF, CSV and Excel.

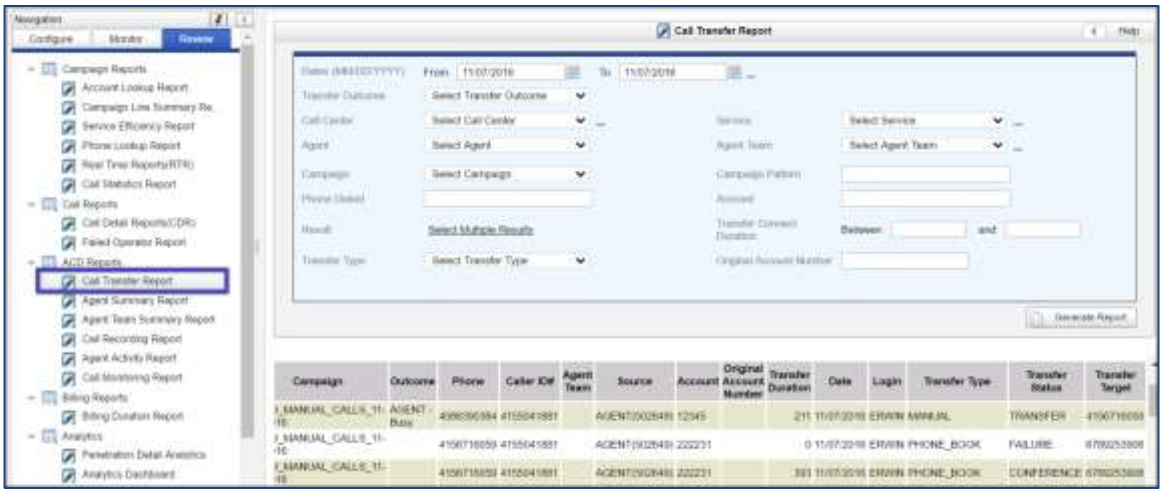


Figure 50: New Call Transfer Report

2.3.3 New Call Detail Report (CDR) Plugins

New fields are now available within Report Writer to include in a CDR:

- Client Name
- Termination Code Category
- Time Zone of Call
- Agent Team Name

2.3.4 Clicker Agent Information in Report Writer

Clicker Agent ID field is now available within Report Writer to include in a Call Detail Report.

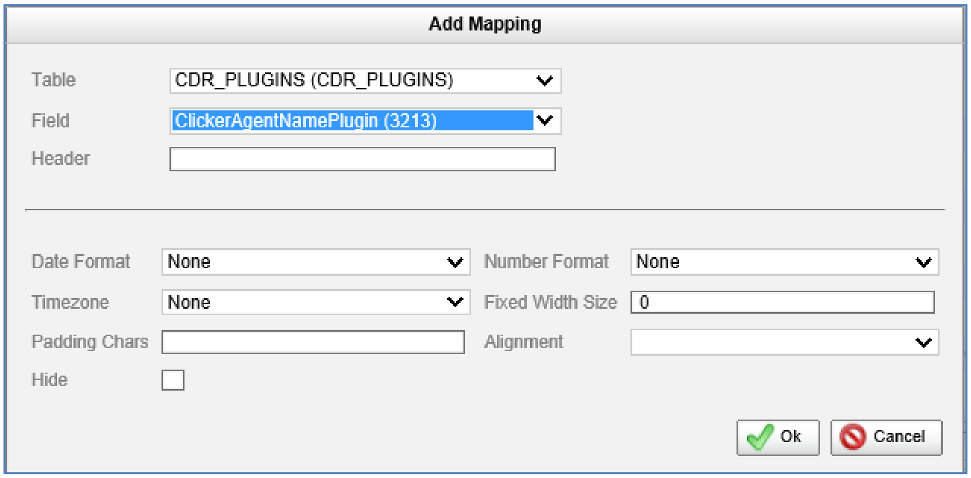


Figure 51: Report Writer – Add Mapping screen

3. User Roles Permissions

3.1 Power Users

User Roles and Permissions - Power Users (LVP 5.0)

Permissions/Powers			SYSADMIN	SUPERUSER	MANAGER	IT USER
		Description	User with full access and ability to administer other users	Powerful user with full access except for some Configure tools and inability to administer Sysadmins	User that supervises campaigns and agents	User with access to Configure tools and user monitoring
	Configurable Powers		Access Call Recording Report Download Call Recording Stream (Playback) Call Recording	Access Call Recording Report Download Call Recording Stream (Playback) Call Recording	Access/Edit DNC List Specify Cellphone Dialing Administer Agents Create/edit Dialing Strategies Create/edit Campaign Templates Upload Campaigns Includes: Make Test Call Upload Campaigns Requeue Campaigns Ability to Modify Services Access to Contact Editor Access Call Recording Report Download Call Recording Stream (Playback) Call Recording	None
	Campaign Monitor	Client	Full	Full	Full	Full
		Call Center	Full	Full	Full	Full
		Service	Full	Full	Full	Full
		Campaign Control	Full	Full	Full	View Only
	Agent Monitor	Monitor	Full	Full	Full	Full
		Switch Active/Inactive Status	Full	Full	Full	Full
		Switch Service	Full	Full	Full	Full
		Logoff	Full	Full	Full	Full
		Send Message	Full - Excluding 10DMT and HCI	Full - Excluding 10DMT and HCI	Full - Excluding 10DMT and HCI	Full - Excluding 10DMT and HCI
		Chat	Full - Excluding 10DMT and HCI	Full - Excluding 10DMT and HCI	Full - Excluding 10DMT and HCI	Full - Excluding 10DMT and HCI
	Configure	Campaigns	Full	Full	Optional	None
		Campaign Templates	Full	Full	Optional	None
		Partitioning	Full	Full	Optional	None
		Client	Full	None	None	Full - Excluding Security tab
		Call Centers	Full	None	None	Full
		Service Groups	Full	Full	Full	Full
		Services	Full	Full	Optional	Full
		DNC	Full	Full	Optional	Full
		Contacts	Full	Full	Optional (View Only)	None
		Profiles	Full	Full	None	Full
		Contact Timing	Full	Full	Full	None
		Strategy	Full	Full	Optional	None
		LCID	View Only	View Only	View Only	None
		Agent Desktop	Full	None	None	Full
		Termination Codes	Full	None	None	Full
		Agents	Full	Full	Optional	Full
		Agent Skill	Full	Full	Optional	Full
		Agent Teams	Full	Full	View Only	Full
		Agent Phonebook	Full	None	None	Full
		Messages	Full	None	None	Full
		Phrases	Full	None	None	Full
		Call Flows	Full	None	None	Full
		FTP Browser	Full	None	None	Full
		Input Filter	Full	None	None	Full
		Report Writer	Full	None	None	Full
		Reporting Outcomes	Full	None	None	Full
		Jobs	View Only	None	None	View Only
		Audit Log Viewer	Full	None	None	Full
		User	Full	Full except Sysadmin	None	None
	Review	Reports	Optional - Depending on configurable powers	Optional - Depending on configurable powers	Optional - Depending on configurable powers	None

Refer to the Administrative User Guide for additional information.

3.2 Lite Users

User Roles and Permissions - Lite Users (LVP 5.0)

Permissions/Powers		AUDITOR	REPORT ADMIN	CLIENT AUDITOR	ALERTS ONLY
	Description	User that oversees campaigns and agents through view-only access	User with access to the reporting suite	User with listen-only access to live and pre-recorded calls	User with no LVP access who just receives alerts via e-mail
Configurable Powers		Access Call Recording Report Download Call Recording Stream (Playback) Call Recording	Access Call Recording Report Download Call Recording Stream (Playback) Call Recording	View Costs Access To Reports Access To Real Time Reports Access To Service Efficiency Report Access To Campaign Summary Report Access To Billing Duration Report Access Call Recording Report Download Call Recording Stream (Playback) Call Recording	None
Campaign Monitor	Client	View Only	None	None	None
Campaign Monitor	Call Center	View Only	None	None	None
Campaign Monitor	Service	View Only	None	None	None
Campaign Monitor	Campaign Control	View Only	None	View Only	None
Agent Monitor	Monitor	Listen Only	None	Listen Only	None
Agent Monitor	Switch Active/Inactive Status	None	None	None	None
Agent Monitor	Switch Service	None	None	None	None
Agent Monitor	Logoff	None	None	None	None
Agent Monitor	Send Message	None	None	None	None
Agent Monitor	Chat	None	None	None	None
Configure	Campaigns	None	None	None	None
Configure	Campaign Templates	None	None	None	None
Configure	Partitioning	None	None	None	None
Configure	Client	None	None	None	None
Configure	Call Centers	None	None	None	None
Configure	Service Groups	None	None	None	None
Configure	Services	None	None	None	None
Configure	DNC	View Only	None	None	None
Configure	Contacts	None	None	None	None
Configure	Profiles	None	None	None	None
Configure	Contact Timing	None	None	None	None
Configure	Strategy	None	None	None	None
Configure	LCID	None	None	None	None
Configure	Agent Desktop	None	None	None	None
Configure	Termination Codes	None	None	None	None
Configure	Agents	None	None	None	None
Configure	Agent Skill	None	None	None	None
Configure	Agent Teams	None	None	None	None
Configure	Agent Phonebook	None	None	None	None
Configure	Messages	None	None	None	None
Configure	Phrases	None	None	None	None
Configure	Call Flows	None	None	None	None
Configure	FTP Browser	None	None	None	None
Configure	Input Filter	None	None	None	None
Configure	Report Writer	None	None	None	None
Configure	Reporting Outcomes	None	None	None	None
Configure	Jobs	None	None	None	None
Configure	Audit Log Viewer	None	None	None	None
Configure	User	None	None	None	None
Review	Reports	Optional - Depending on configurable powers	Optional - Depending on configurable powers	Optional - Depending on configurable powers	None

Refer to the Administrative User Guide for additional information.

4. Appendix

Below is the list of changes implemented in Platform 4 release. Details can be found in the Platform 4 Release Notes available in the User Hub.

Manager Enhancements

1. New Advanced Contact Search
2. Updates to Agents View and Agent Panel Functionality at Enterprise, Call Center and Service Levels.
3. Inbound CIP
4. Voicemail Configuration
5. Mobile Enhancements
6. Filter by Campaign Name
7. Support for New Agent Desktop Widgets
8. Zip Call Recording enhancement
9. Exposed Contacts Manager fields/Call Flows Variables in Agent Desktop
10. SMS configuration enhancements in Call Flow Editor
11. Call Recording Storage Enhancements
12. Secure Payment Capture enhancements
13. Preferred Click Distribution
14. Time Zone Abstraction
15. Account Look-Up API Method Changes
16. Call Recording Report Enhancements
17. Phone Lookup Report Enhancements
18. Account Lookup Report Enhancements
19. Contact Attributes Export through Report Writer / CDR

Agent Enhancements

1. Agent Login Updates
2. Zip/Area Mismatch on Manual Services
3. Agents' Ability to Log into Inbound Services
4. Force Specific Case on Agent-Entered Account Numbers