Release Notes

LiveVox Platform v. 6

LVP 6.0, ACD 6.0, Reporting 6.0

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This document last revised September 24, 2018

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 6. Components/Versions included in this release are ACD 6.0, LVP 6.0, Reporting 6.0, API 6.0.

For API, related information please reference the Developer Portal.

Note :

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 done 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 November 15, 2017, LiveVox will no longer support the following versions: LVP v. 3.3, Reporting v. 3.0 and ACD 3.0.*

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 are:

- Internet Explorer 11
- Latest version of Firefox
- Latest version of Chrome
- Latest version of Edge

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://na3.livevox.com/<Client Code>*
    b. *https://portal.na4.livevox.com/<Client Code>*
    c. *https://portal.na5.livevox.com/<Client Code>*

2. Enter Client Name (provided by LiveVox).
3. Enter User Name (Login ID).
4. Enter password.
5. Click **Login**.

Note:

Once upgraded to the new version, please do not forget to clear existing cache and cookies and delete old login links before logging into LiveVox.

2 What Is New in Platform 6?

2.1 Manager Enhancements

2.1.1 Voice Portal Visual Style

This version offers an updated, more sophisticated visual experience to the users. This new visual style is available for the desktop and tablets.

Following is an example of the LiveVox Portal's updated look:

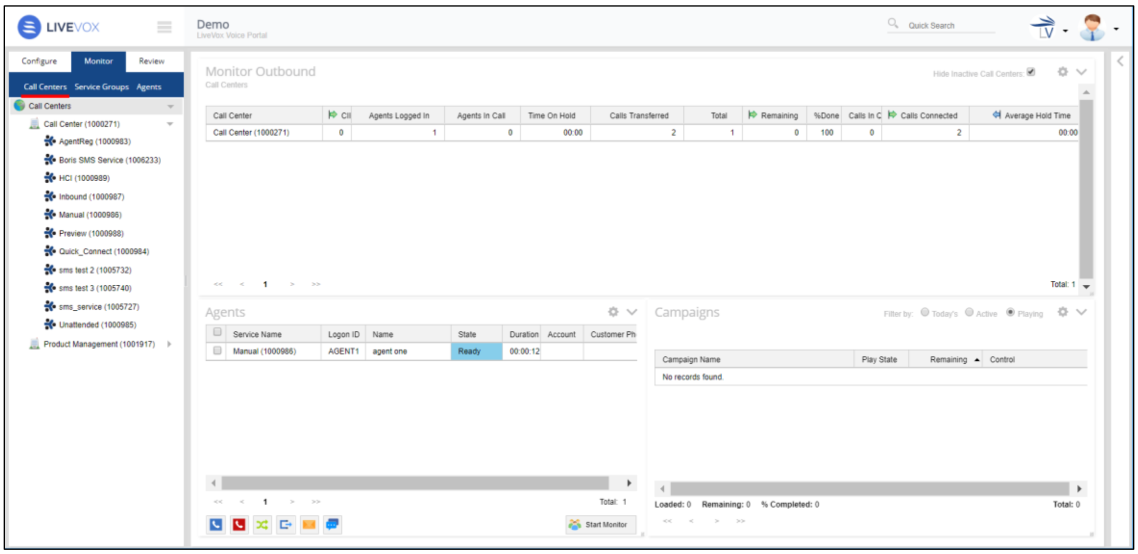


Figure 1: Updated look for the LiveVox Portal

Following are the changes with regards to the look and feel of the icons used on the platform:

UI Section > Icon Name	Old Icon	New Icon
Configure > Reporting Outcomes		
Configure > Report Writer		
Configure > Profile		
Configure > FTP Browser		
Configure (internal) > Rule Set Mapper		
Configure (internal) > Rule Set		

UI Section > Icon Name	Old Icon	New Icon
Configure (internal) > Fields		
Configure (internal) > Components		
Configure (internal) > Billing Report Browser		

The functionality and location of the icons remains the same. All editors have been updated to include a title banner.

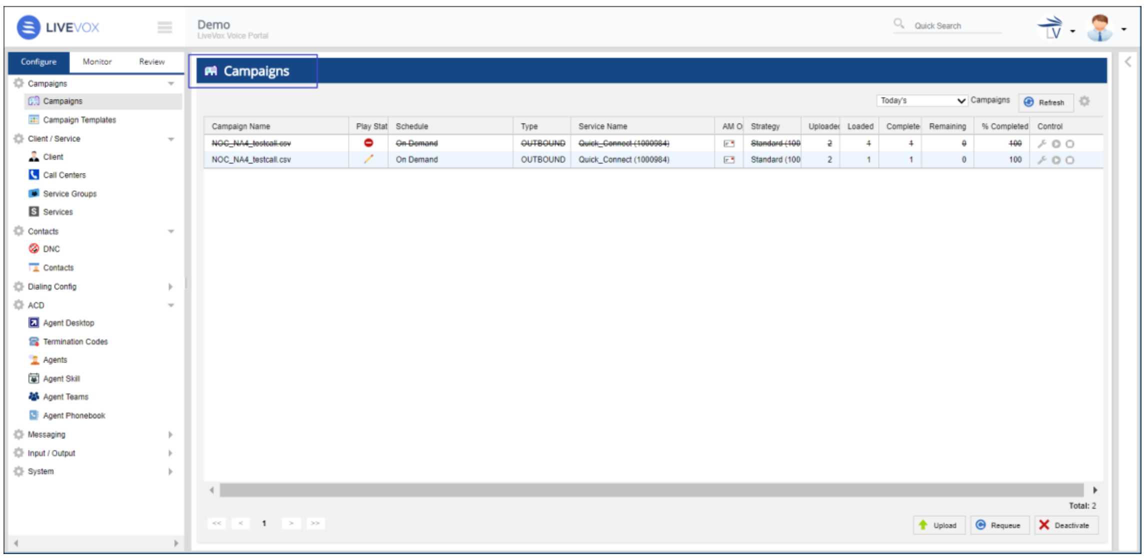


Figure 2: Example of Campaigns editor title banner

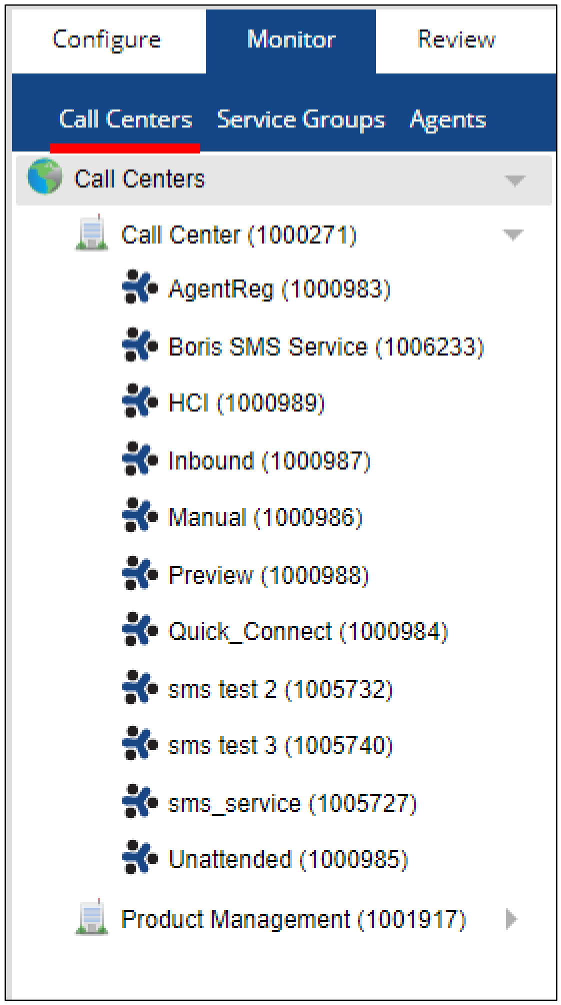


Figure 3: Updated look for the navigation panel

2.1.2 Inbound Routing Enhancements

This version contains the following changes as part of the Inbound Routing configuration:

1. The **Inbound Phone** tab under the Client editor is renamed to **Phones** tab. This tab now offers batch number assignment. The following new buttons are available replacing Associate and Disassociate Phone buttons:

   - **Associate Service** button - Allows the user to assign a phone number or a batch of numbers to a service that has been assigned to the client.

   - **Disassociate Service** button - Allows the user to un-assign a number or a batch of numbers from a service.

Previously,

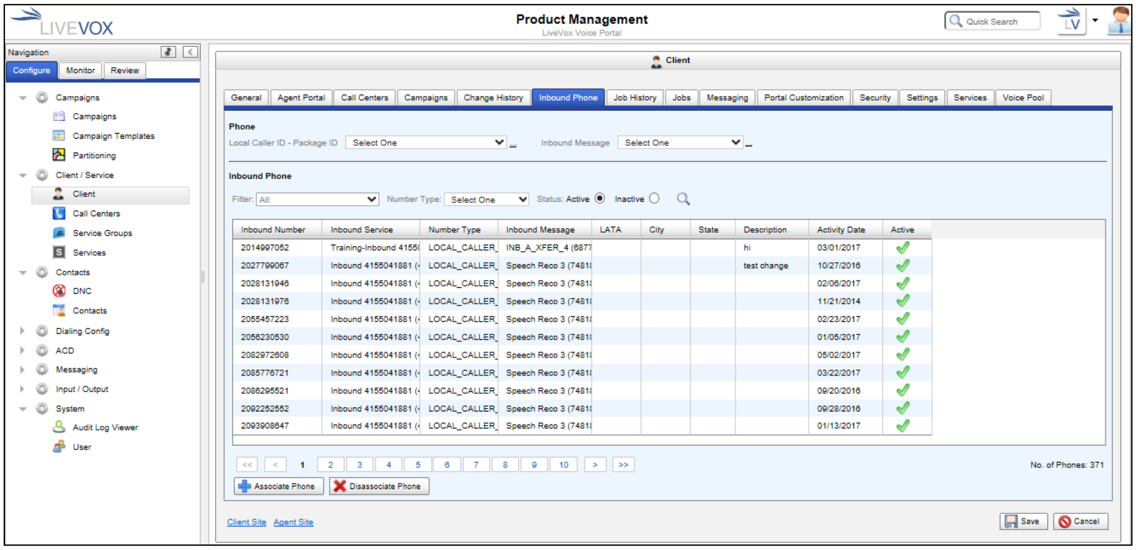


Figure 4: Inbound Phones tab – Platform 5

Now,

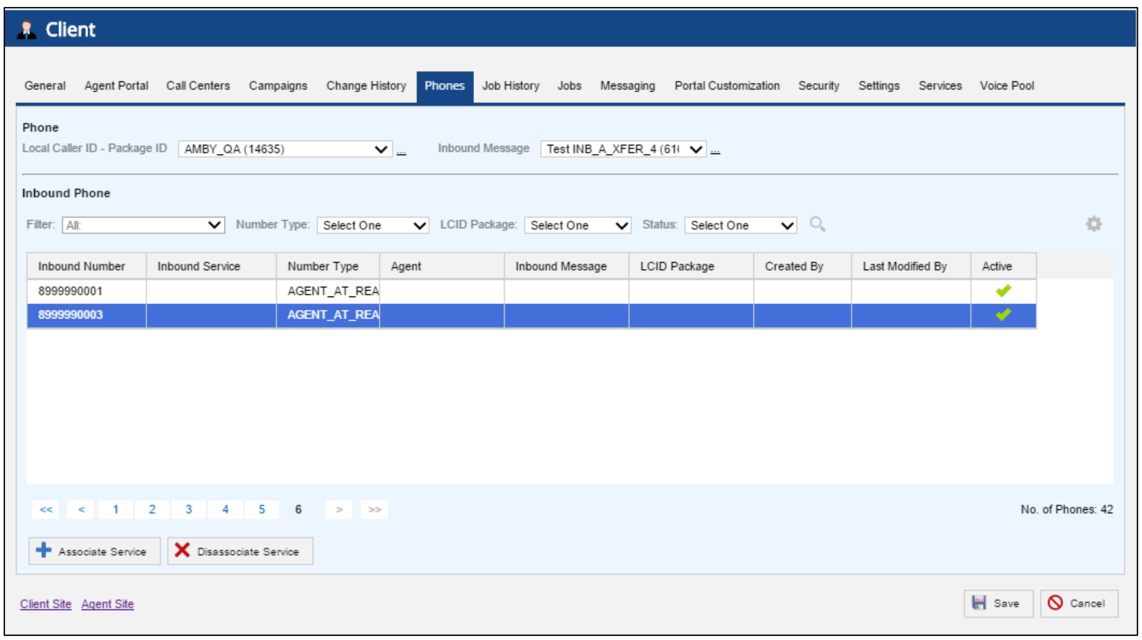


Figure 5: Phones tab – Platform 6

Selection of **Associate Service** button brings up Associate Service screen:

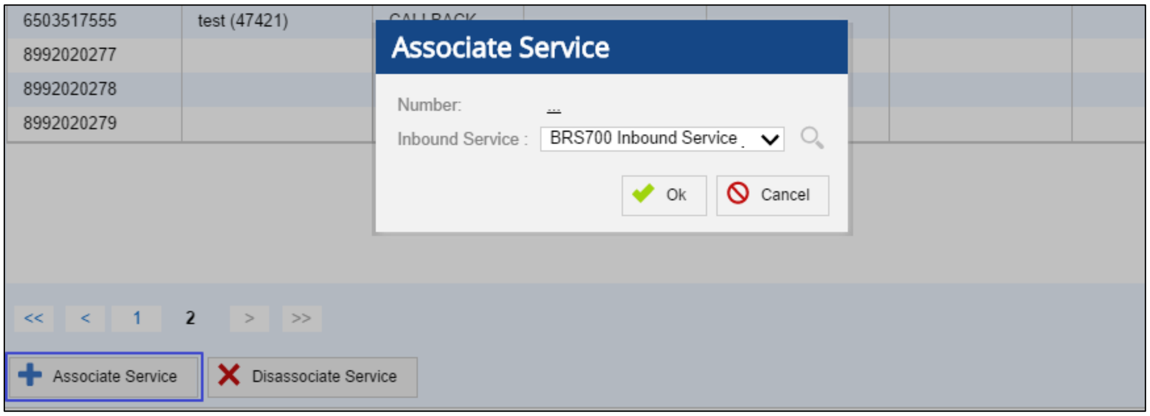


Figure 6: Associate Service screen

User can select the link next to the number option to view a list of inbound phones which can be associated to the selected (Inbound Service drop down) inbound service.

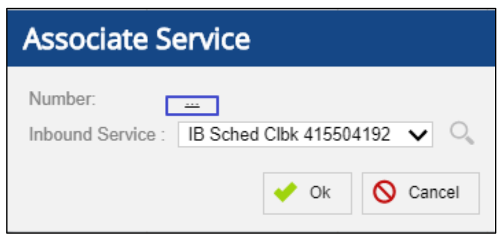


Figure 7: Number option to view a list of inbound phones

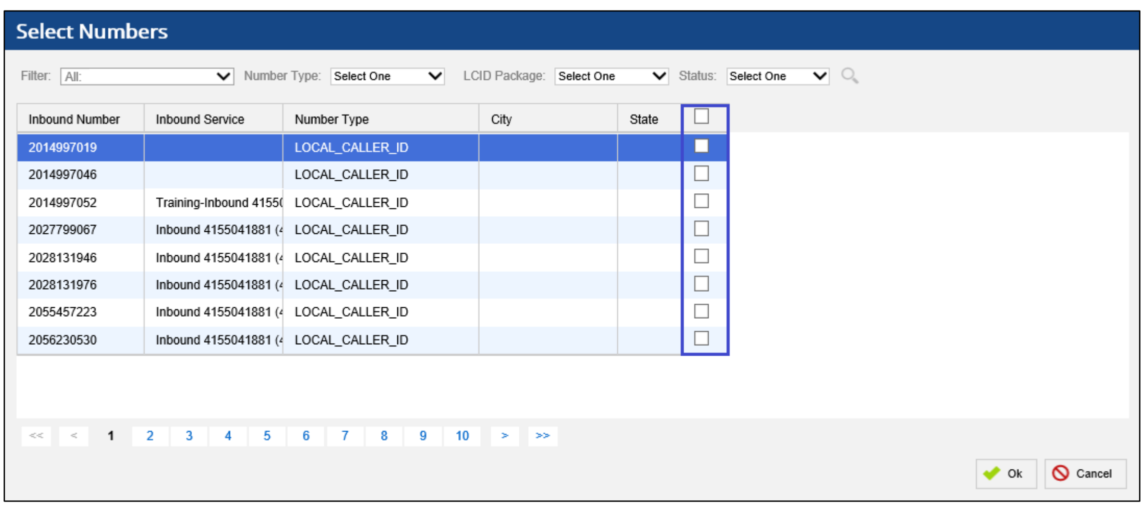


Figure 8: List of inbound phones associated to the selected inbound service

To re-assign the service:

- User can select a number or a batch of numbers by checking the checkbox (highlighted in the screen shot above)
- Select **Ok**
- Select an inbound service to associate from the **Inbound Service** drop down
- Select **Ok** again.

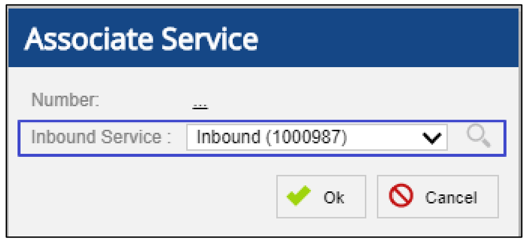


Figure 9: Inbound Service drop down

2. A new Phones editor is now available under Dialing Config section of the navigation panel. The Phones editor allows users to view all phone numbers within the client portal and identify, assign, modify and disassociate phone numbers from one service to another. This feature compiles all assigned phone numbers (Agent Dial-In numbers, Extensions, Agent Direct Lines, LCID, Inbound numbers & Caller ID numbers) in a single view for easier management.

   Phones editor comes with a **Change History** tab which displays logged changes for easier tracking.

   The Phones editor can be accessed from the voice portal through the *Configure tab > Dialing Config > Phones*.

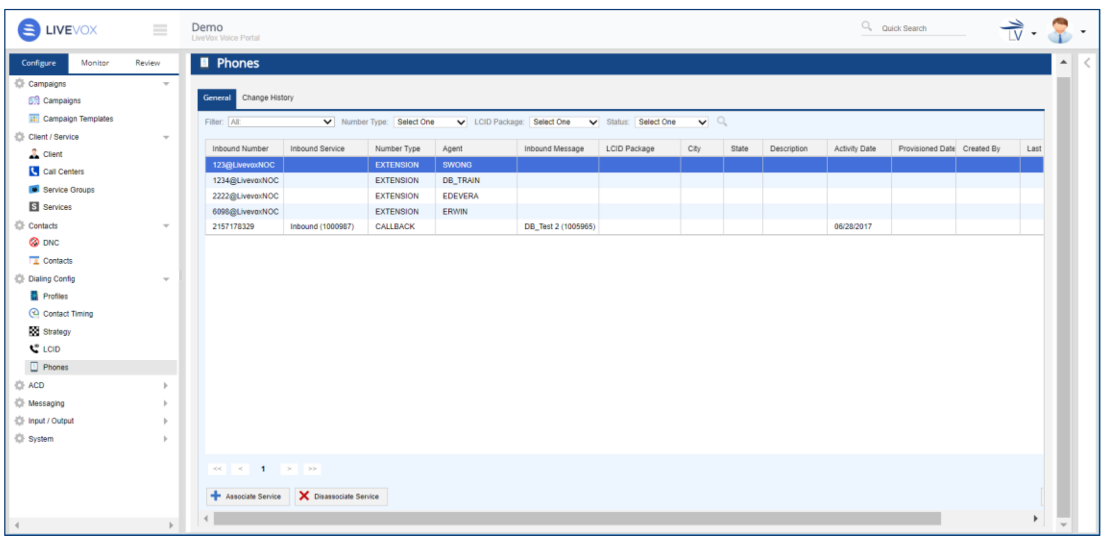


Figure 10: Phones editor

The Edit Phone screen allows the user to update the following information:

- Description
- Status
- Inbound Service
- State
- City

Note :

- *Phones editor does not allow users to add or edit an extension type phone number.*
- *Agent at Ready In numbers (agent dial in numbers used for the agent persistent audio connection) cannot be assigned to a service.*

The **Associated Entities** section shows if an inbound number is part of an LCID package, Call-In Group, Agent Audio Path, Service Caller ID, Message template, or Agent Phonebook. The entities cannot be edited.

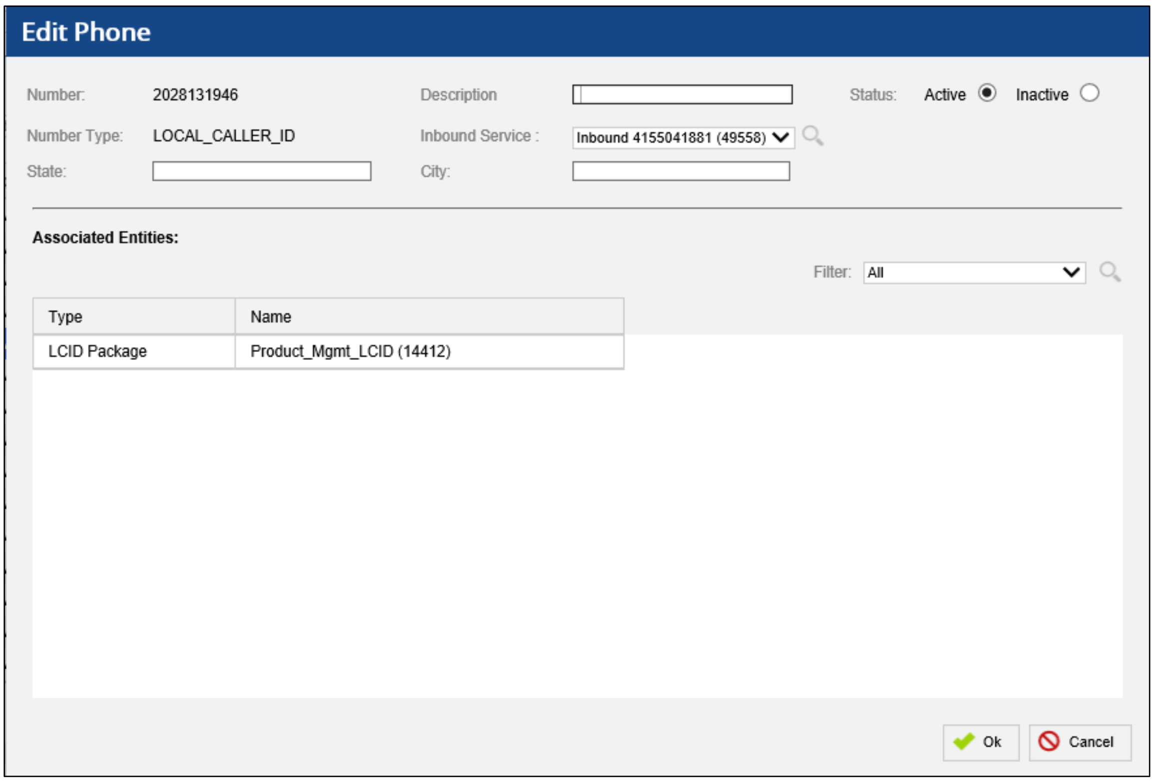


Figure 11: Edit Phone screen

Similar to the client level **Phones** tab functionality to re-assign a number or a batch of numbers, the new Phones editor allows users to re-assign Local Caller ID packages to a different Inbound Service. The user can select the package through the **Associate Service** button and LCID Package filter search option.

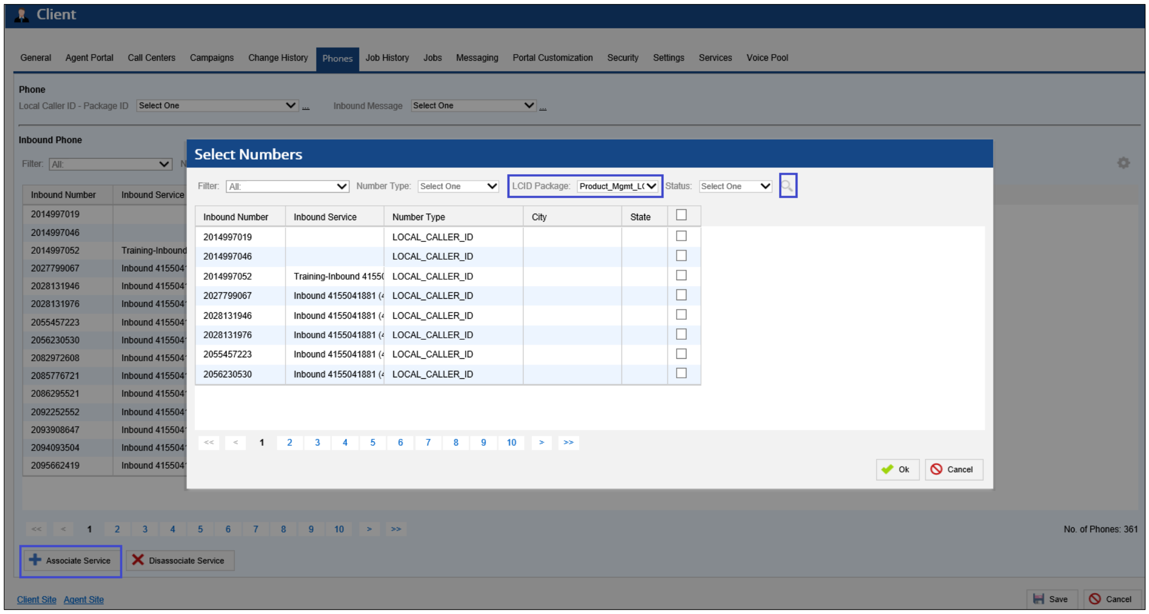


Figure 12: Selecting an LCID package for inbound association

Then choose the desired inbound service from the drop down.

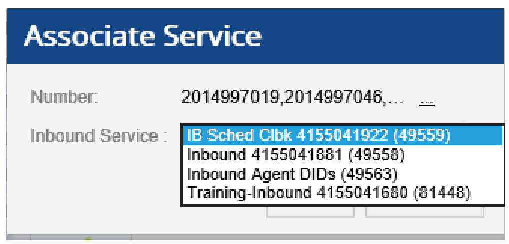


Figure 13: Selecting new inbound service association

2.1.3 DNC Upload Restriction

This feature enforces a restriction to the number of records that can be uploaded at any given time through the DNC editor. To access DNC editor, navigate to *Configure > Contacts > DNC.*

This restriction is set at 100,000 records. If a file exceeds this limit, the upload will be rejected displaying an error.

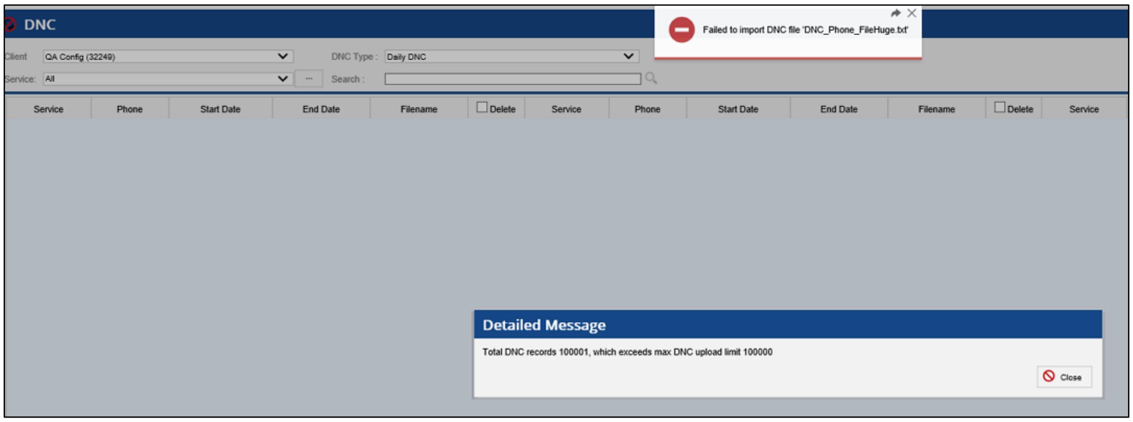


Figure 14: DNC file upload exceeds max DNC upload error message

2.1.4 New Configuration Options

This version introduces new settings, configurable and view only.

- **Days of Contact Retention,** view only setting, displays the duration an account is retained within Contacts manager from the last load date. To view, navigate to *Client Editor > Settings tab > Advanced Features* section. The default is set at 30 days.
  - Contact Client Services for more information regarding this setting.

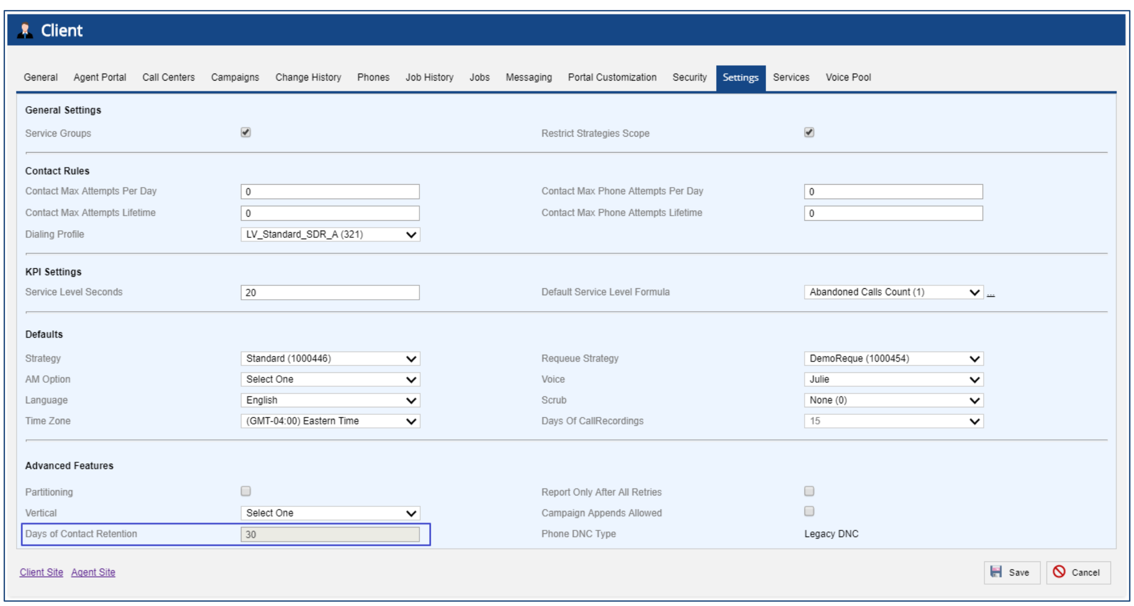


Figure 15: Days of Contact Retention setting

- The following updates are available within the *Agent Desktop> General tab > Settings section:*
  - New flag, **Block Manual Calls for Invalid Account Numbers**, that allows user to enable account validation based on whether the account exists in Contacts Manager.

        - If checked: blocks a manual dial if the account number entered does not exist in Contacts Manager.
        - If unchecked (default setting): can dial any account whether it exists in Contacts Manager or not.
    - **Hold Enabled** setting is now available for the users to enable **Hold** button on Agent Desktop:
        - If checked (default setting): agent desktop displays the **Hold** button.
        - If unchecked: agent desktop does not display the **Hold** button.
    - New **Force Specific Case** setting enables specific case that will be auto formatted on agent entered account number. Available options:
        - **None -** This is a default option. If selected, the account number will be the way agent enters it.
        - **Upper -** The account number will be in upper case.
        - **Lower -** The account number will be in lower case.

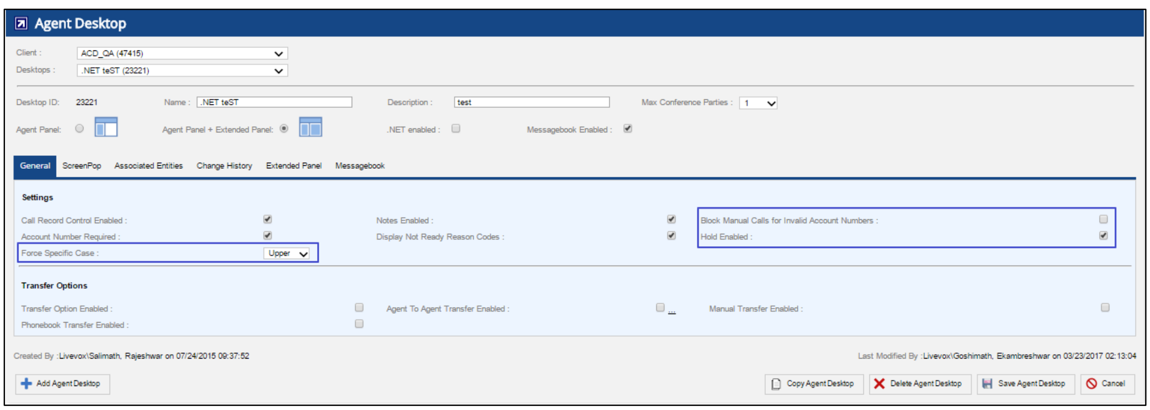


Figure 16: Agent Desktop General tab settings updates

- This version introduces **Preview Auto Completion** flag which when unchecked allows an agent to stay on the account and select additional numbers associated to the account or to manually enter a 10-digit number to be dialed. To update, navigate to *Services editor > Preview Settings tab > Agent Preview Settings* section.

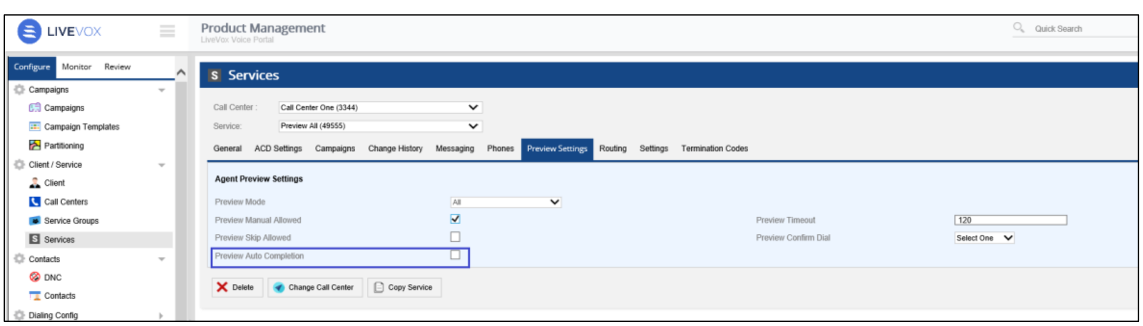


Figure 17: Agent preview settings screen

2.1.5 Password Management Enhancement

This version offers increased password security for users and agents through the introduction of the password strength. New setting in form of a slider, **Password Strength**, is now available under *Client Editor > Security tab*.

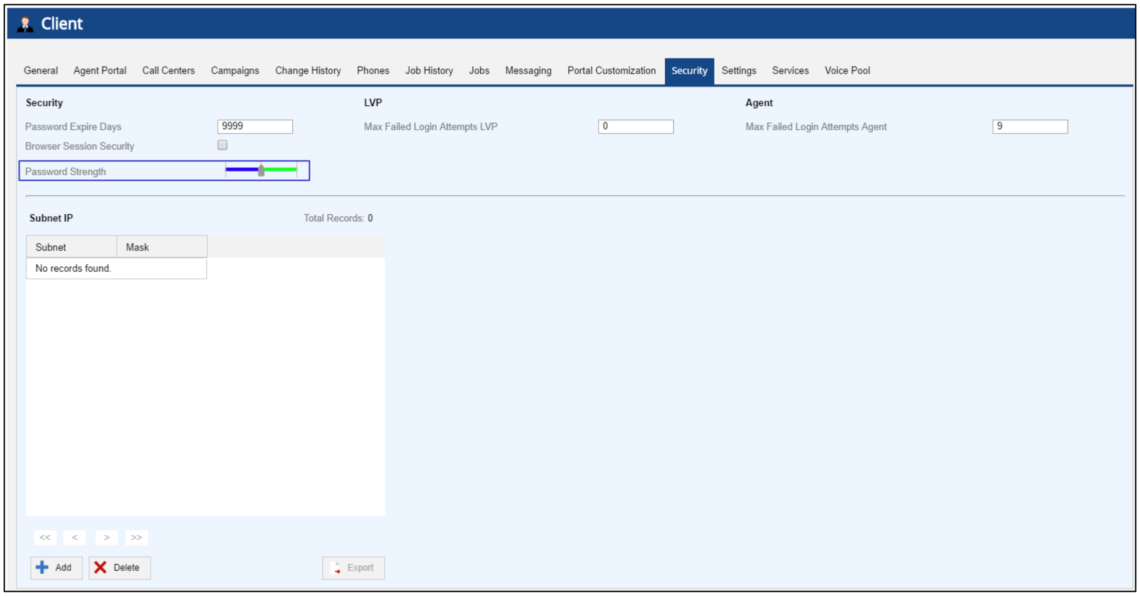


Figure 18: Password Strength setting

The password strength can be set at the following levels:

- Medium (8 characters minimum, 1 digit [0-9] minimum, 1 letter [a-z] minimum).
- Strong (8 characters minimum, 1 digit [0-9] minimum, 1 letter [a-z] minimum, 1 special character minimum).
- Very Strong (12 characters minimum, 1 digit [0-9] minimum, 1 letter [a-z] minimum, 1 special character minimum).

Special characters supported are the ASCII printable characters:

- (space) ! " # $ % & ' ( ) * + , - . / : ; < = > ? @ [\ ] ^ _ ` { | } ~

This new password setting applies to both, agent and user. Changing the password strength will not require users or agents to change their existing password; the new requirement will apply when a user's or agent's existing password expires.

2.1.6 Configurable Agent Pool for Agent to Agent Transfers

Previously, the transfer pool for agent to agent transfer was restricted to those agents within the same call center. Now, in addition to this option, users can define the transfer pool based on service group, service or agent team.

Also, transfer settings have been moved from the Services editor to the Agent Desktop editor.

Previously,

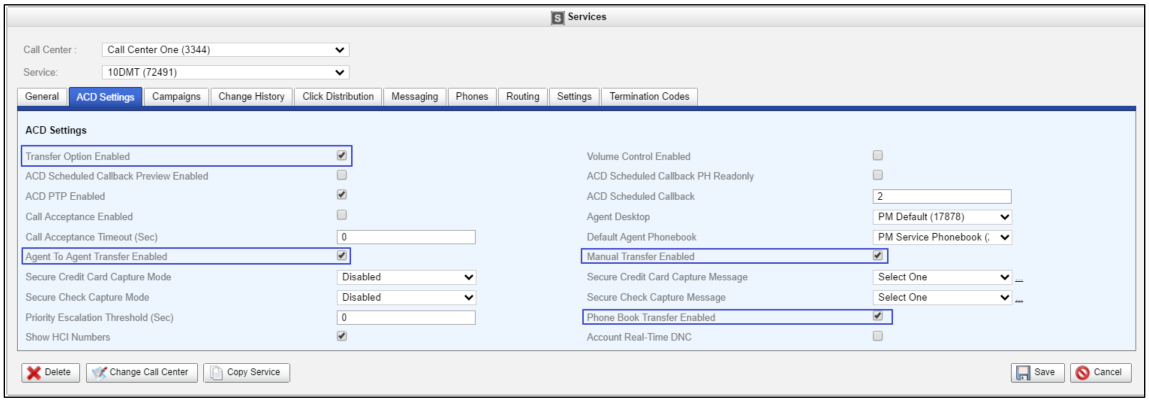


Figure 19: Transfer settings in Services editor - Platform 5

Now,

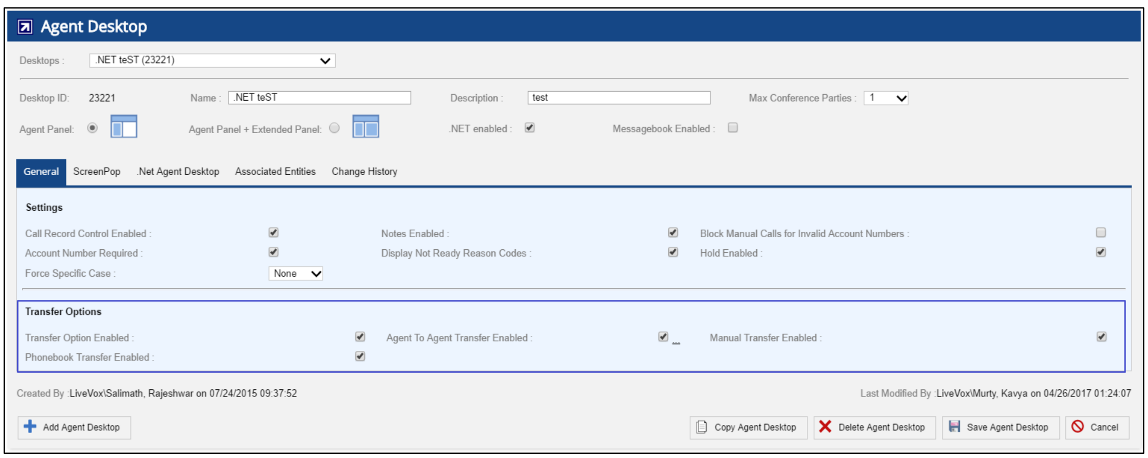


Figure 20: Transfer Options section in Agent Desktop - Platform 6

Agent to Agent Transfer Enabled setting now has a link next to it which when selected, brings up Agent to Agent Transfer Configuration screen.

Figure 21: Link to transfer configurations

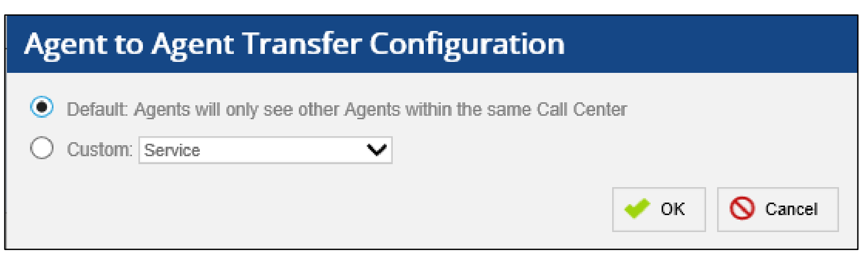


Figure 22: Agent to Agent Transfer Configuration screen

Agent Transfer Configuration screen offers the following options:

- **Default**: Same behavior as previously. Only agents within the same call center can receive transfers.
- **Custom**: Allows to define what agents can receive transfer. Options include:
  - **Service**: If selected, then any agent that is logged into the same service as the transferring agent will be able to receive the transfer.
  - **Agent Teams**: If selected, then any agent that is assigned to that agent team will be available to receive the transfer.

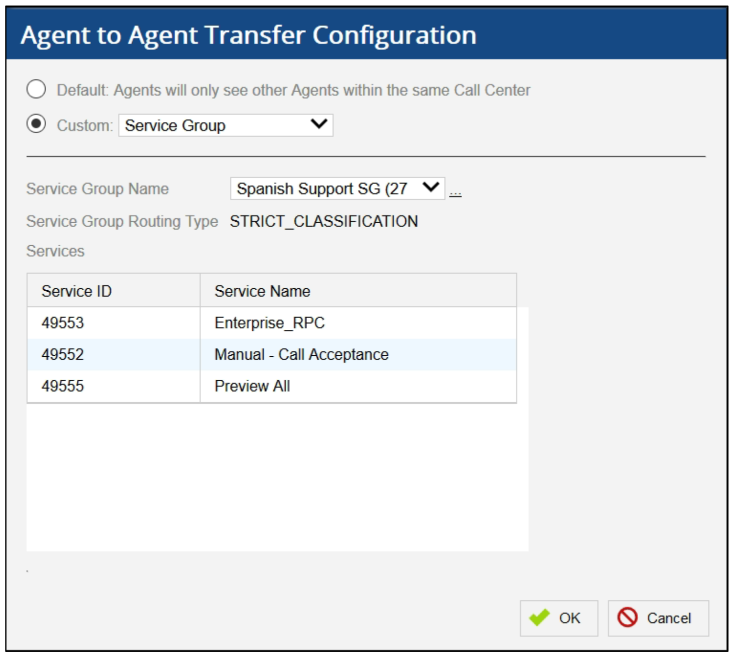


Figure 23: Service Group option

  - **Service Group**: If selected, then any agent logged into the same service group as the transferring agent will be able to receive the transfer.

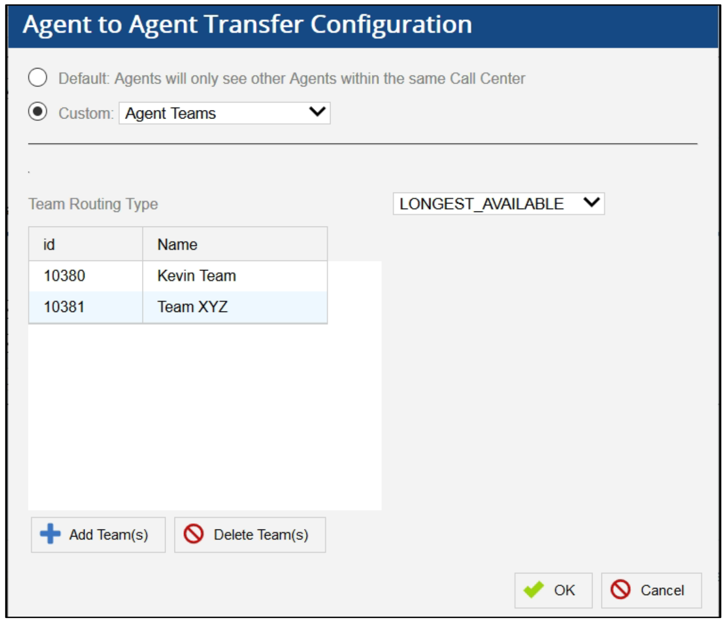


Figure 24: Agent Teams option

Note :

There are no changes in the agent behavior when initiating a transfer to another agent. Only agents in a Ready state at the time of the transfer will be visible for selection.

2.1.7 ScreenPop Tab in Agent Desktop Editor

ScreenPop settings, previously part of the **General** tab in the Agent Desktop editor, have moved to a separate **ScreenPop** tab.

Previously,

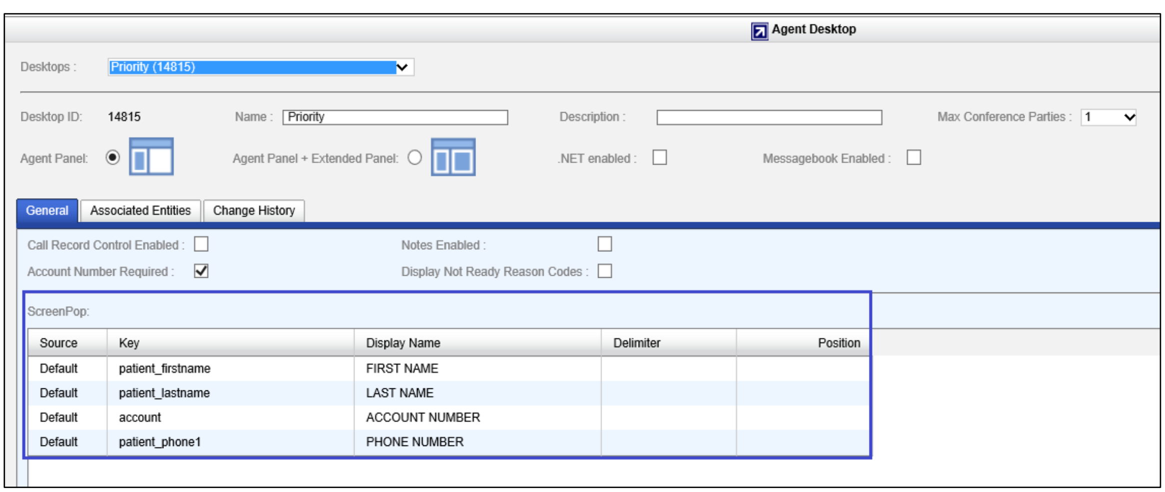


Figure 25: ScreenPop settings – Platform 5

Now,

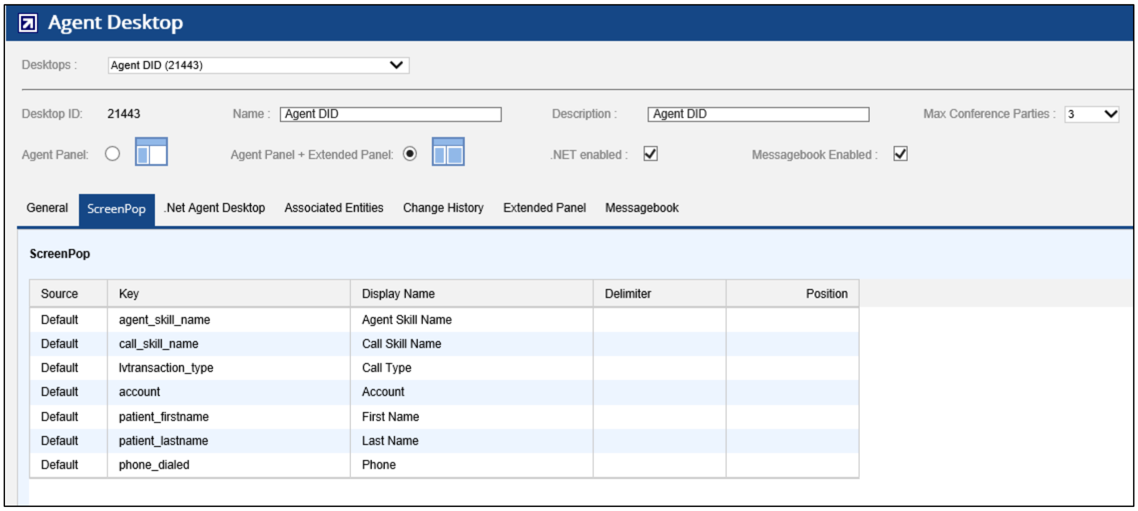


Figure 26: ScreenPop tab – Platform 6

2.1.8 New Change History Tab Inside Revise Limits Screen

This version introduces a **Change History** tab to the Revise Limits screen of the Activity widget to help track user changes made to pacing method, throttle or max wait for all services. The history will display changes made within last 90 days.

Select **Revise** button on the Activity widget to open the Revise Limits screen and select **Change History** tab to view history. Hovering cursor over the record displays greater detail.

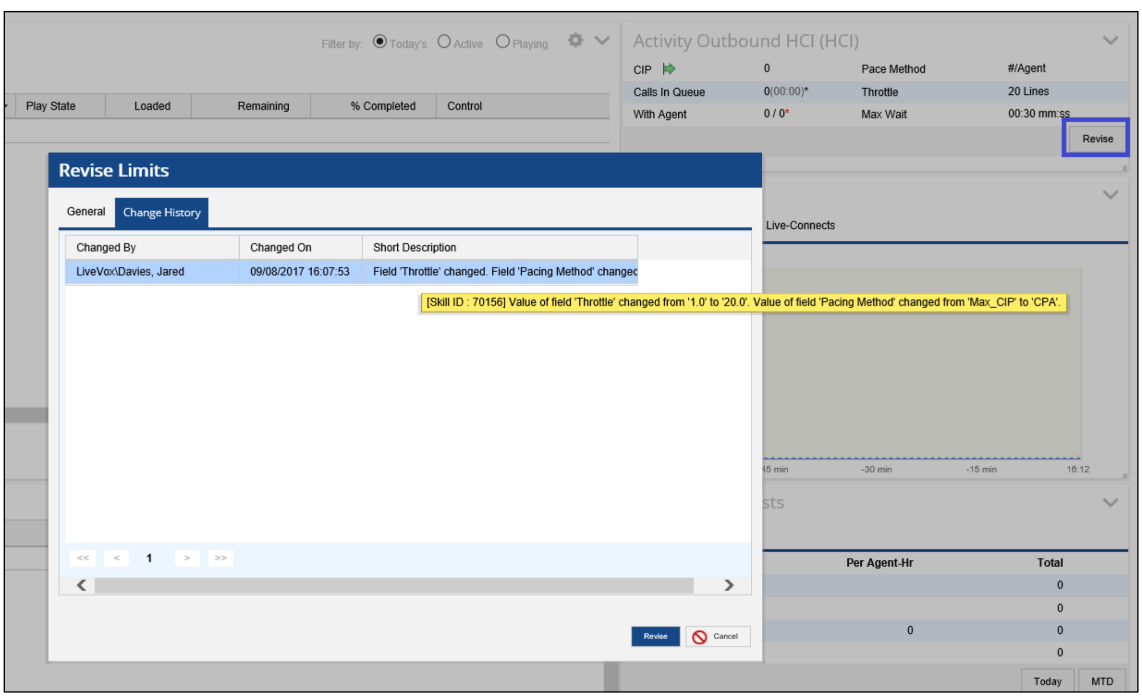


Figure 27: Change History tab inside Revise Limits screen

2.1.9 Inbound Service Monitor Enhancements

The following new metrics are available in the Inbound Service Monitor widget:

- **Calls Abandoned** - Total calls dropped before being connected to an Agent.
- **Average Hold Time** (mm:ss) - Total Hold Time / Total Calls Handled.
- **Average WrapUp Time** (mm:ss) - Total WrapUp time / Total Calls Handled.

Also, the **Calls In Queue** metric under **Service Totals** section has been removed as this information is already available in the Activity Widget as **Calls in Queue** (see below screenshot).

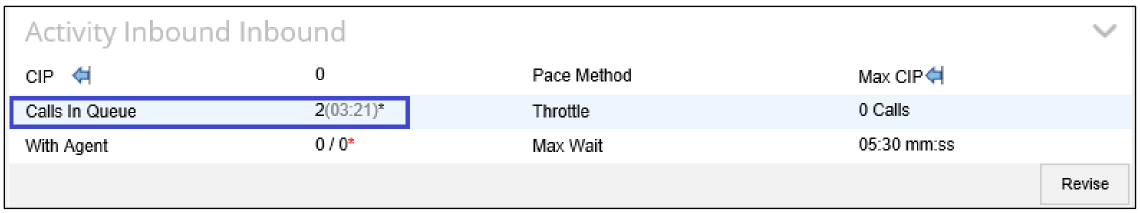


Figure 28: Calls In Queue in the Activity Widget – Platform 6.

Services Average section is re-labeled **Service Average** and **Services Totals** is re-labeled **Service Totals**.

Previously,

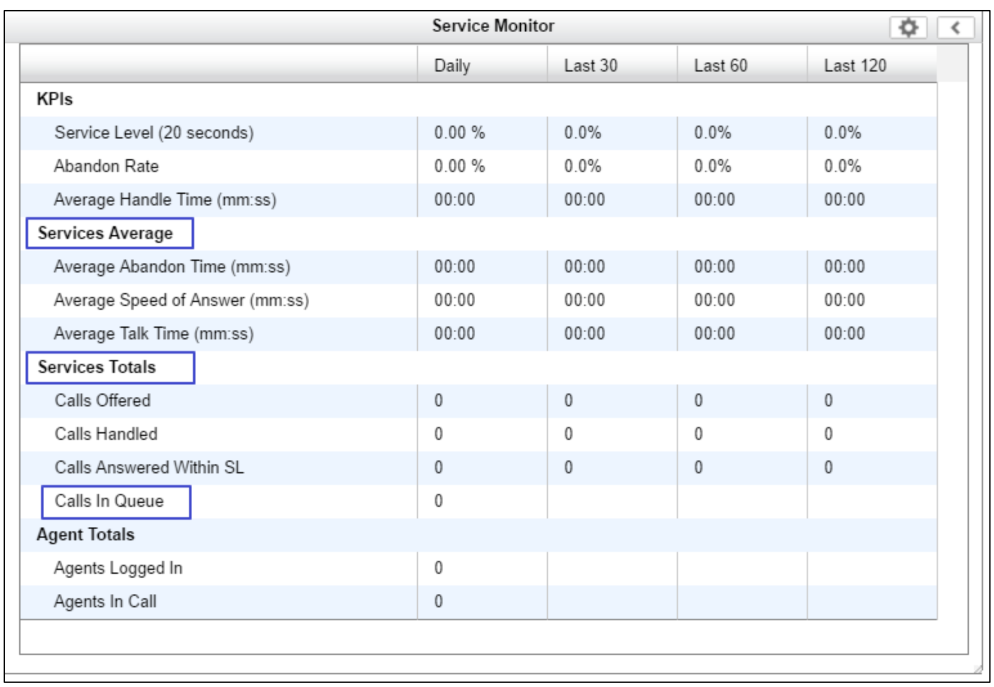
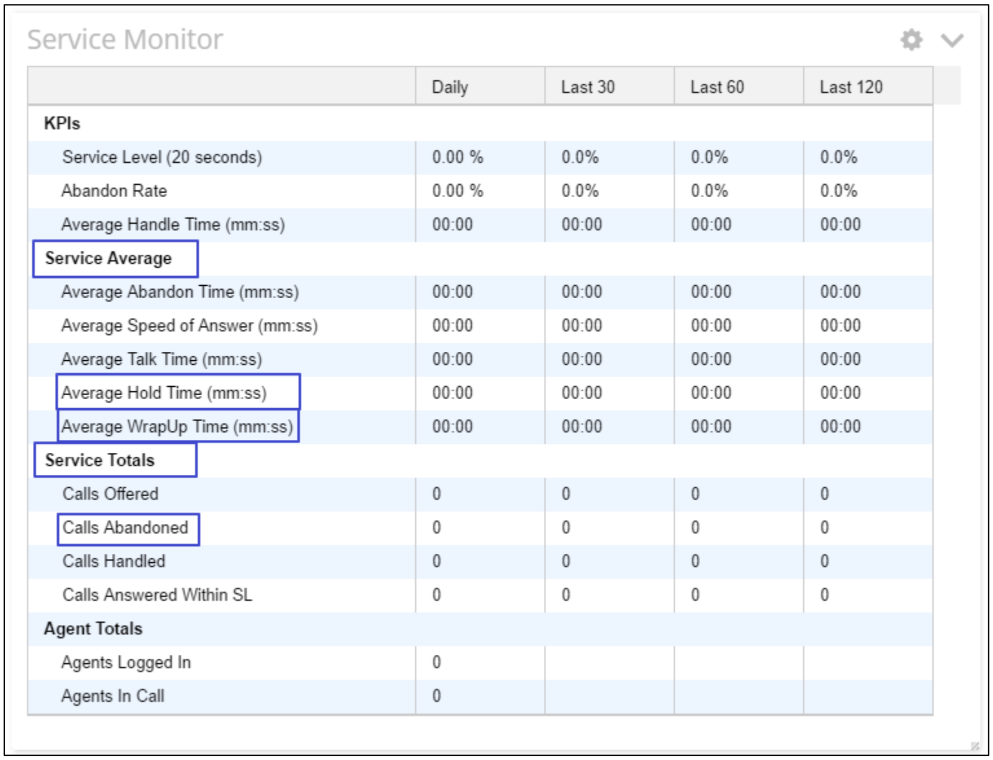


Figure 29: Inbound Service Monitor screen – Platform 5

Now,



Service Monitor

	Daily	Last 30	Last 60	Last 120
KPIs				
Service Level (20 seconds)	0.00 %	0.0%	0.0%	0.0%
Abandon Rate	0.00 %	0.0%	0.0%	0.0%
Average Handle Time (mm:ss)	00:00	00:00	00:00	00:00
Service 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)	00:00	00:00	00:00	00:00
Average Hold Time (mm:ss)	00:00	00:00	00:00	00:00
Average WrapUp Time (mm:ss)	00:00	00:00	00:00	00:00
Service Totals				
Calls Offered	0	0	0	0
Calls Abandoned	0	0	0	0
Calls Handled	0	0	0	0
Calls Answered Within SL	0	0	0	0
Agent Totals				
Agents Logged In	0			
Agents In Call	0			

Figure 30: Inbound Service Monitor screen – Platform 6

2.1.10 Updates to the Inbound Service Setting

Previously, the Inbound Service setting was part of the **General** tab in the Services editor. It has now been re-labeled to Services to Identify Inbound Caller and moved to the **Phones** tab. The new label is more accurately reflects this setting's function: lookup link for ANI and inbound routing components.

Previously,

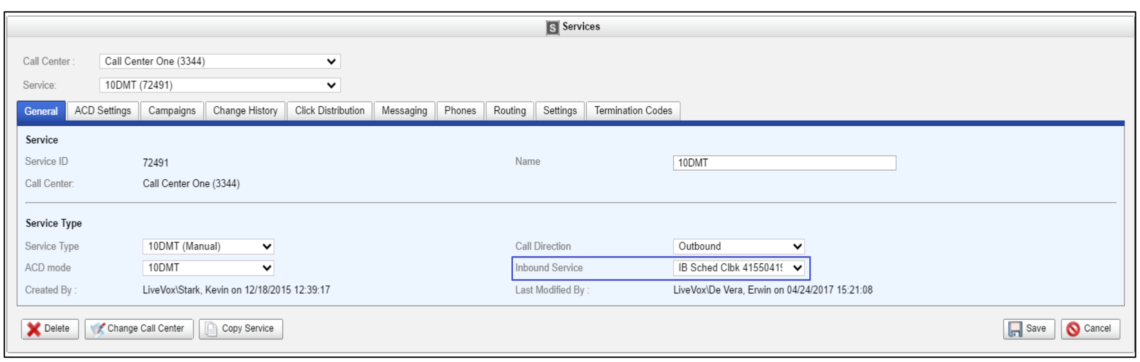


Figure 31: Inbound Service setting – Platform 5

Now,

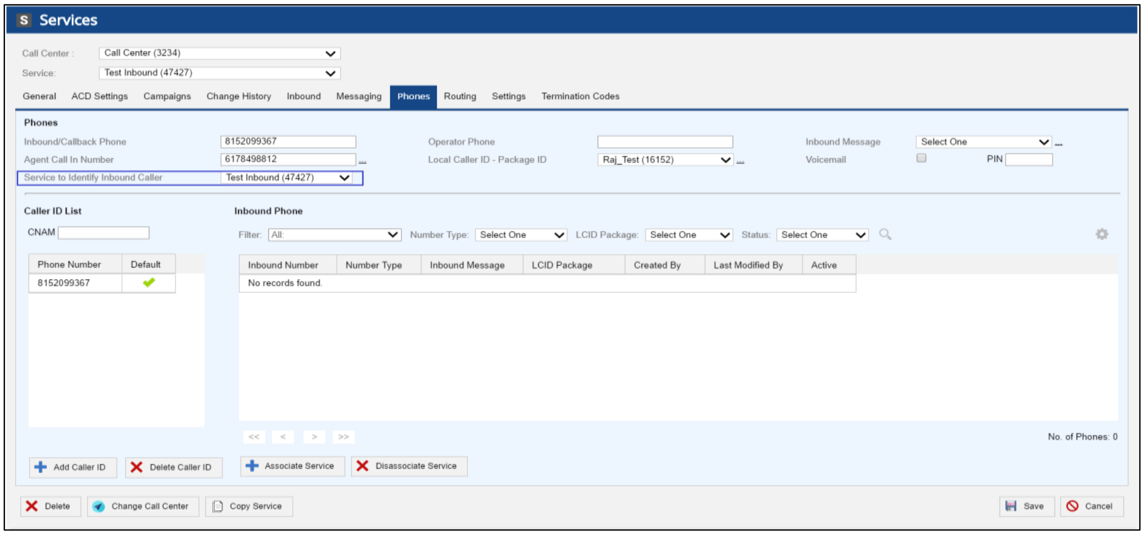


Figure 32: Services to Identify Inbound Caller setting – Platform 6

2.1.11 Preview Confirm Dial Setting Enhancements

Previously, **Preview Confirm Dial** setting was a separate checkbox that allowed agent to see a pop-up message that required confirmation before dialing. Once agent confirmed, the call would launch.

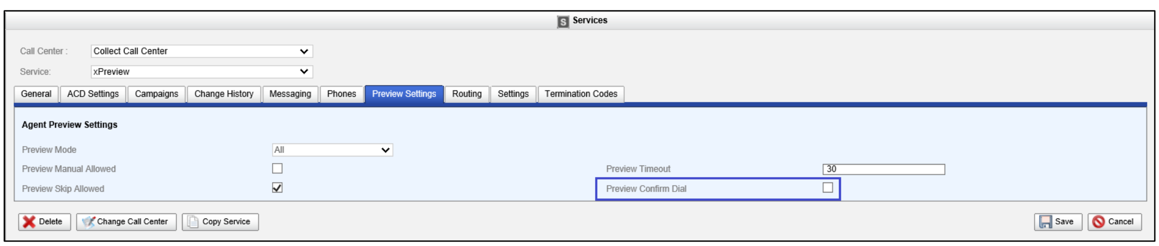


Figure 33: Preview Confirm Dial flag – Platform 5

Now, the original functionality is available as **Dial Button** in the **Preview Confirm Dial** drop down along with two other options, **Select One** and **10 Digit Entry (new)**:

- **Select One** – Agent will only be required to select the **Dial** button once.
- **Dial Button** – Agent will see a pop-up message which requires a confirmation. Once confirmed the call is launched.
- **10 Digit Entry** – Agent will see a pop-up message which requires 10-digit entry (see 10-Digit Entry on Preview Services section for more agent related information).

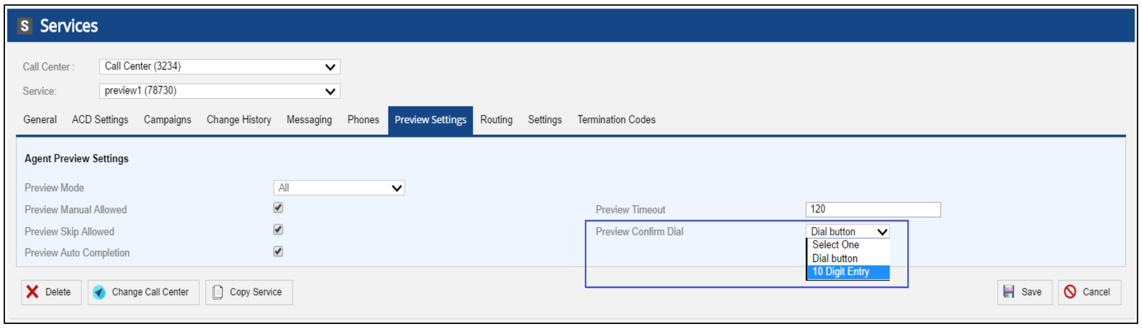


Figure 34: Preview Confirm Dial drop down – Platform 6

2.1.12 Changes to Scrub Wireless Option

Previously, **Scrub Wireless** setting was a separate checkbox under Defaults section of the **Settings** tab in the Services and Client editors. It allowed a permitted user to set the default for scrubbing wireless numbers within a campaign.

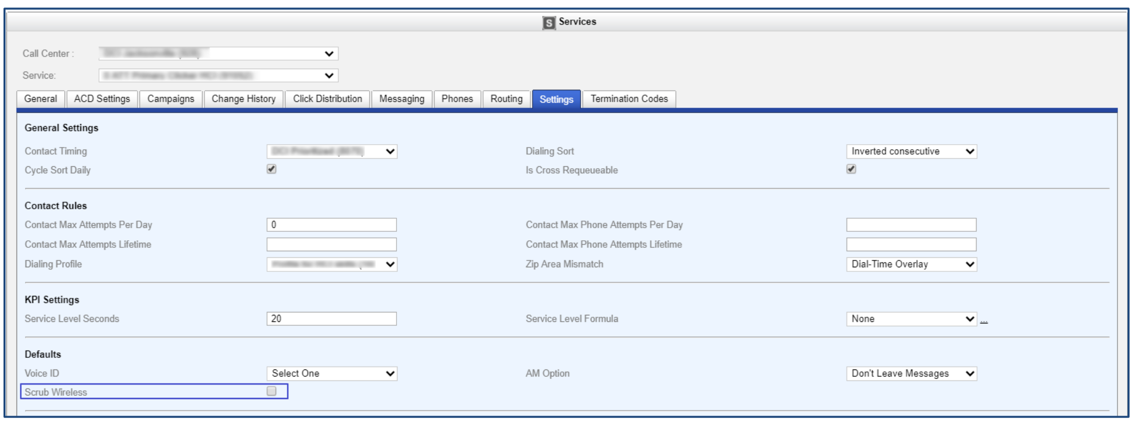


Figure 35: Scrub wireless flag – Platform 5

Now, the original functionality is available as **Wireless** option from the new **Scrub** drop down (same location) along with three other options:

- **None -** This is the default option and if selected, no scrub occurs.
- **Wireless** – If selected, scrubs all wireless phone numbers (at build time) so that all landline numbers can be dialed.
- **Landline (New)** - If selected, scrubs all landline numbers (at build time) so that all wireless phone numbers can be dialed.
- **Segment Wireless (New)** – If selected, scrubs all wireless phone numbers from phone fields 1-15 and places them starting at phone field 16, and places them correspondingly to original phone fields. With this option, users can separately dial wireless and landline numbers from the same upload file using dialing strategies.

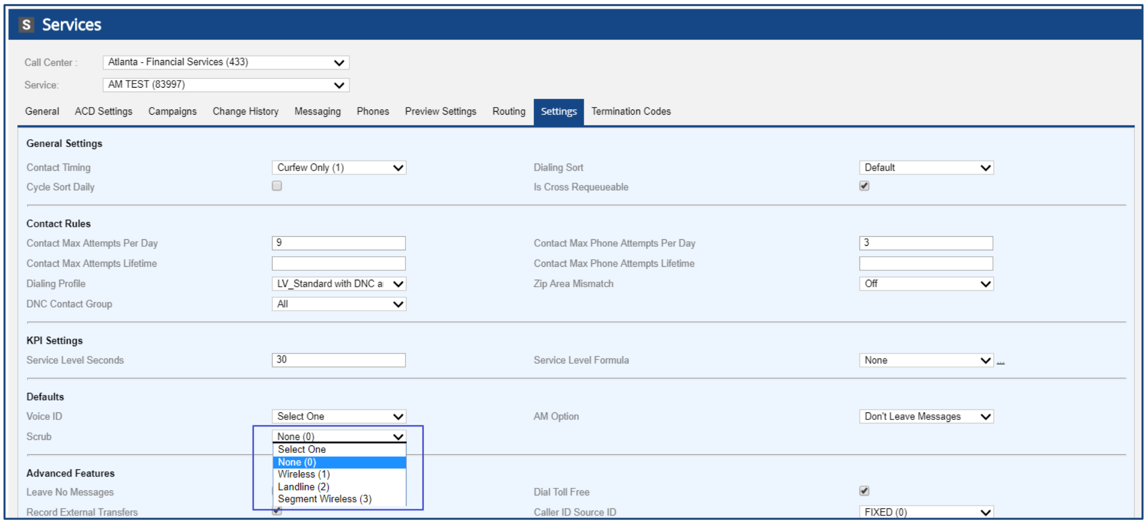


Figure 36: Scrub drop down – Platform 6

Similarly, the Upload Campaign screen has been updated to include the Scrub drop down.

Previously,

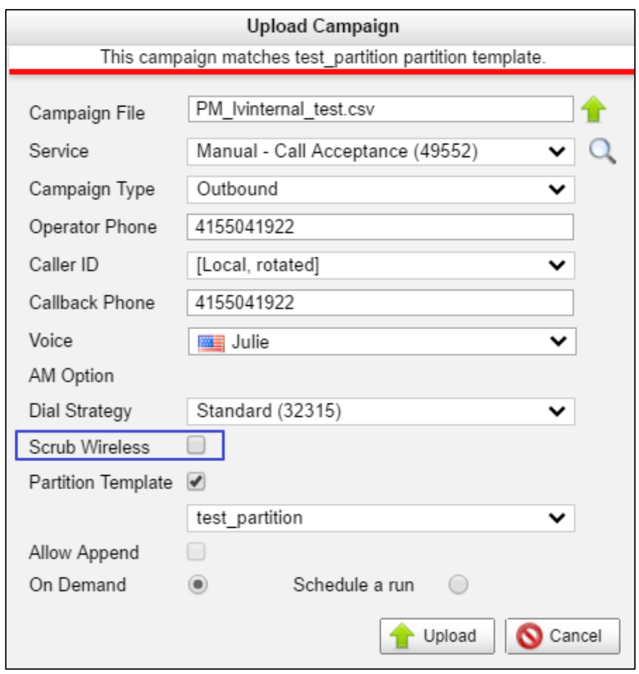


Figure 37: Scrub Wireless flag – Platform 5

Now,

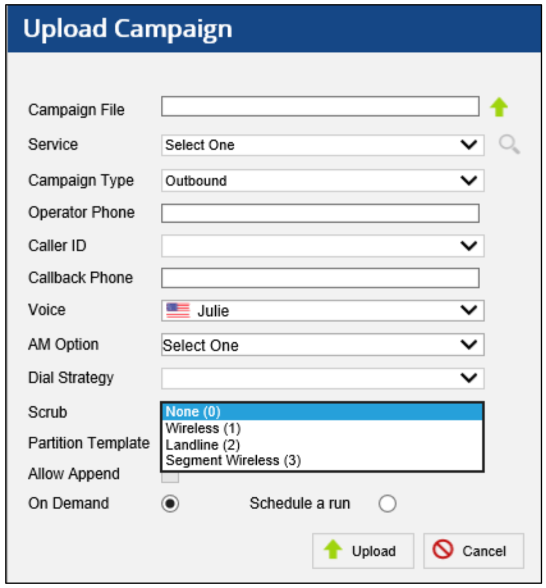


Figure 38: Scrub drop down – Platform 6

Note :

The new scrub options are available within every option for assigning campaign attributes and can be preconfigured as defaults:

- *Client editor*
- *Services editor*
- *Upload Campaign screen*
- *Partitioning editor*
- *Campaigns Template editor*
- *Campaign Details screen*

2.1.12.1 New Segment Wireless Scrub

Previously, users had to predefine the input filter, services and dialing strategies that would dial segmented campaigns. This was a very manual and complex process. Now, the process is to simply select Segment Wireless option and the appropriate dialing strategy.

Note :

Since wireless numbers must be dialed using Human Initiated Manual Dialing System, it is suggested that when dialing wireless numbers, users restrict dialing strategy to the specific group of manual services by enabling Restrict Strategies Scope flag in the Client Editor > Settings tab.

When selected, users can dial landlines only, wireless only or both based on a dialing sequence within the dialing strategy. Please note, wireless and landline scrub options remove the specified number type (wireless or landline) from the campaign. These scrubbed numbers cannot be added back to the campaign, thus, preventing them from being included in any subsequent requeues. To dial both, wireless and landline numbers, the user must select either **None**, to dial the numbers together or **Segment Wireless**, to dial them separately.

2.1.12.2 New Landline Scrub

This is a new option that allows users to scrub landline numbers.

A new result, *Landline Call Suppressed (Not Made)*, has been added to identify numbers that have been scrubbed as landlines.

2.1.13 Sorting of Contacts Through Contact Manager

This version introduces a new option to sort the selected contacts by any field stored in Contacts manager. It is done through the new **Sort Columns** tab in the Advanced Search screen of Contacts manager. The original functionality of the advanced search has not changed but now, the Advanced Search screen allows you to create search filters and sort contact fields within Contacts manager. The filter criteria is based on different account conditions such as lifetime attempts, recent LiveVox results, and any other variables stored within Contacts. Once a filter has been created and applied (original functionality), a user can select a contact field (or multiple fields) from the **Field** drop down (*Advanced Search > Sort Columns, "+" sign, Add Field screen*) to be sorted in ascending or descending order.

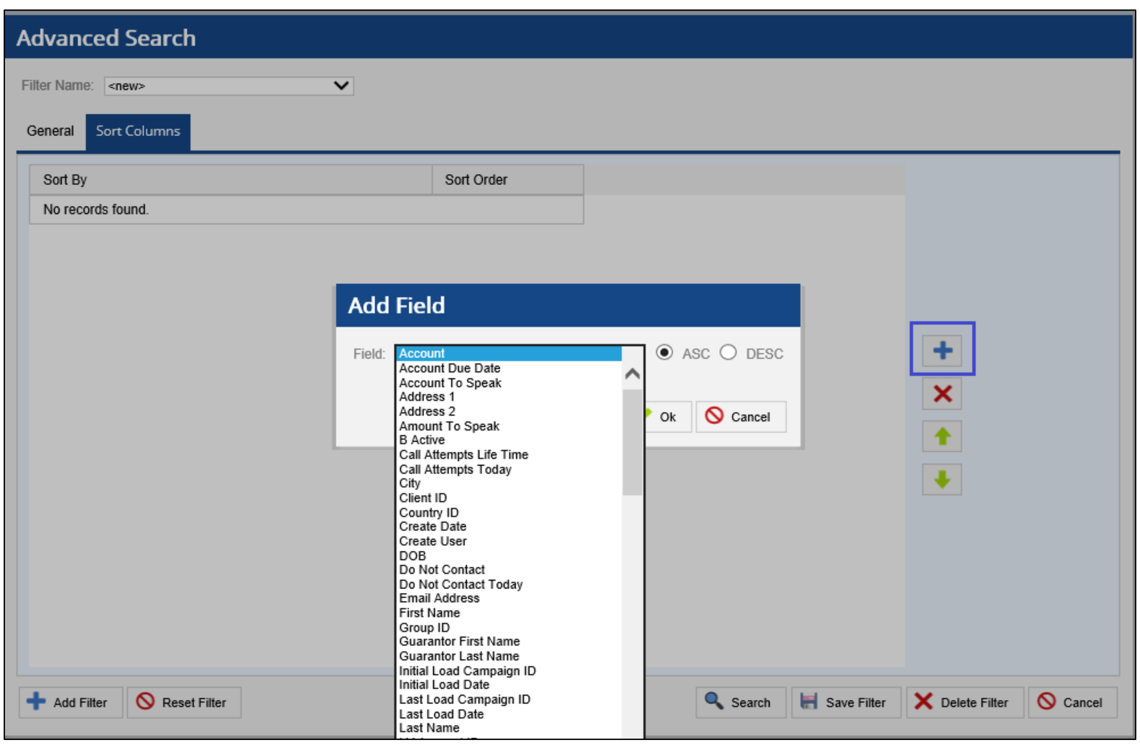


Figure 39: Sorting Contacts by available fields in Contacts manager

2.1.14 Dial-Time Phone DNC

Previously, the platform offered DNC tools (Legacy DNC) that were applied during campaign build time. Dial time blocks, known as Do Not Dial (DND), could only be added through the Contacts manager and were applied either on the account or account + phone levels.

This version offers Dial-Time DNC for phones, account and account + phone combinations, and checks against the Do Not Contact (DNC) list at the time of dialing instead of build time, thus removing the need for the users to rebuild or requeue the campaign.

Dial-Time Phone DNC is an optional feature that can be enabled through LiveVox client services and can be verified by the user from *Client editor > Settings tab > Advanced Features > Phone DNC Type.*

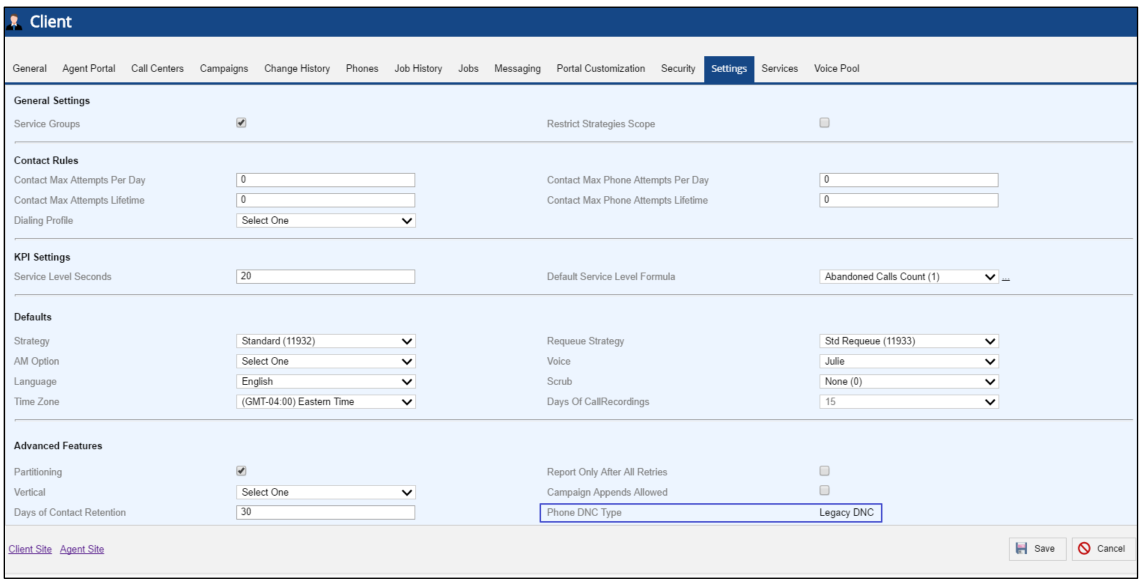


Figure 40: Phone DNC Type view only setting

Note :

- *While functionality within new Dial- Time Phone DNC does not require account + phone information to be included in the Contacts manager, to take full advantage of all that this feature has to offer, it is highly advisable to include it.*

Once Phone DNC Type is set to Dial-Time Phone DNC, users will no longer be able to use Legacy DNC. All existing permanent entries will migrate to Contacts manager and the new Dial-Time Phone DNC table.

Dial-Time Phone DNC offers users to scrub their records against the following lists:

- Account (daily and lifetime) - at dial time
- Account + Phone combination (daily and lifetime) – at dial time
- Phone (Daily and lifetime) – at build time and dial time
- Phone + Expiration Date (replaces daily phone DNC) – at build time and dial time

- Phone + Contact Group (replaced phone + service combination) – at build time and dial time,

where lifetime is the number of days the contact record is set to store in the Contacts manager based off last load date.

Note :

- *By default, the Days of Contact Retention is set to 90 days since the last load date. Please consider sending updated file within the set retention time frame before the contact records are purged.*

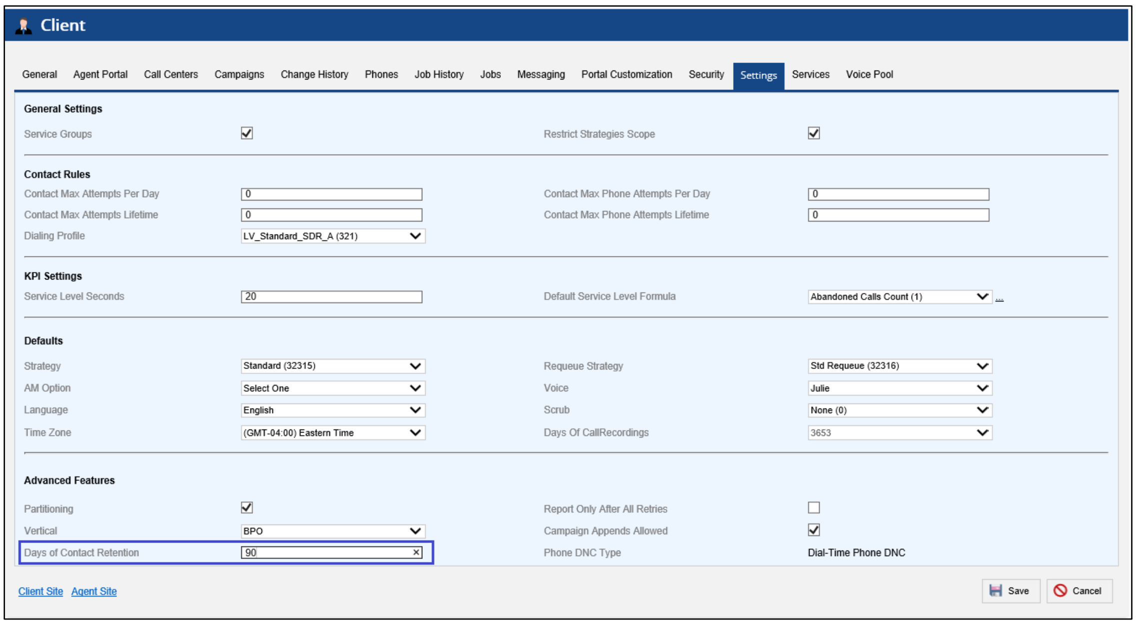


Figure 41: Days of Contact Retention setting in Client editor

- *Wildcards and zip code DNC are not supported by the Dial-Time Phone DNC.*

Phone + Expiration Date

This new feature allows a user to define how long a specific phone number will be stored in DNC. This feature is now used in place of daily phone DNC. The user can specify today's date for manual entries or 1 day for *Days to Expiry* column for batch file upload. To navigate to Expiration Date setting, go to *Configure > Contacts > DNC editor.*

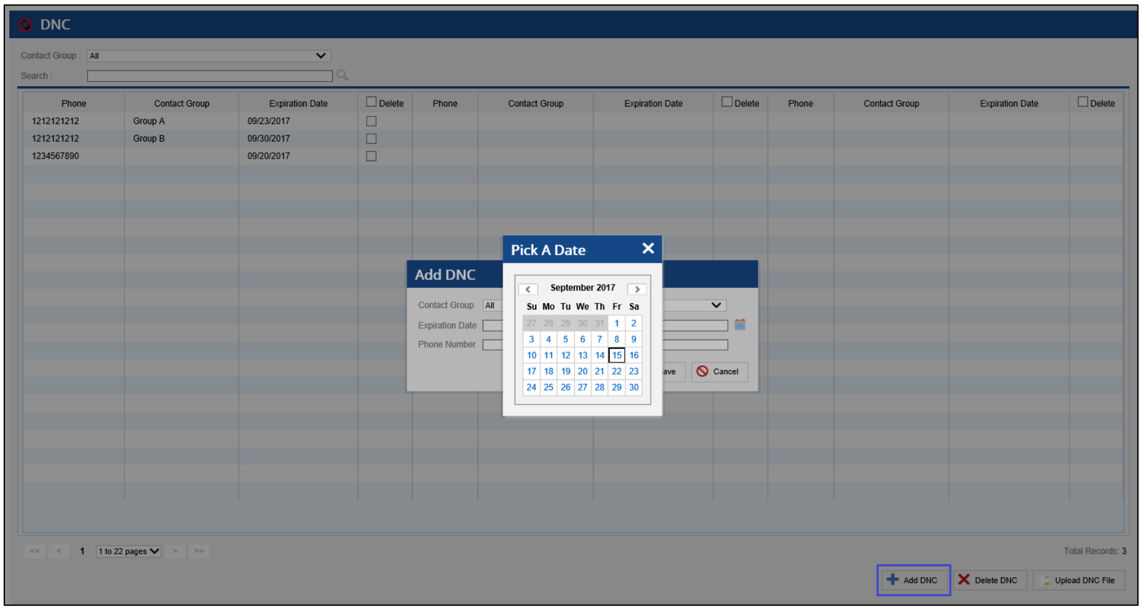


Figure 42: Selecting expiration date for manual DNC entry in DNC editor

Phone + Contact Group

This new feature allows a user to ensure that a phone number that may be available in different portfolios will only be restricted to the specified Contact Group associated with it. This feature is now used in place of phone + service combinations. If the service is contained in the defined Contact Group, the phone number (s) will be scrubbed. To navigate to DNC Contact Group setting, go to *Configure > Client/Service > Services > Settings > Contact Rules section.*

Note :

If DNC Contact Group is set to All, all Contact Group DNC entries apply.

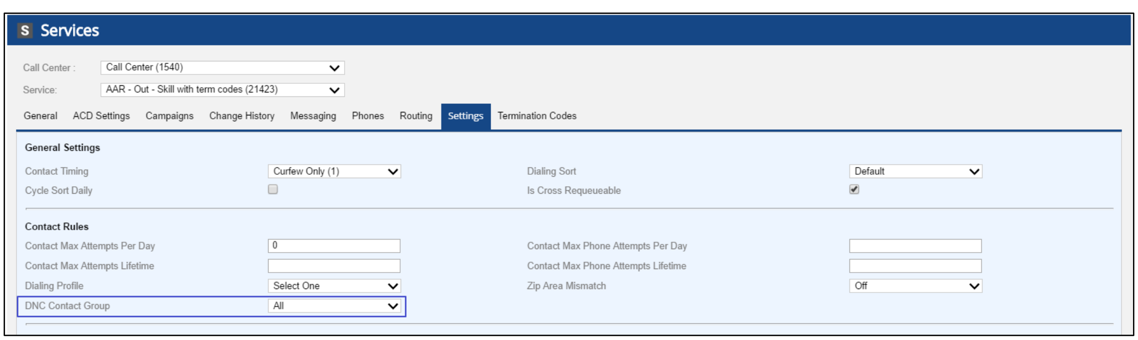


Figure 43: DNC Contact Group setting in the Services editor

2.1.15 Cold Transfers

Previously, to transfer a call to a phone book entry, the transferring agent had to wait for the receiving party to become available (be in a Ready state), initiate the transfer and then release the caller.

This version offers ability for the transferring agents to transfer calls without waiting for the receiving agent to become available. This optional feature, known as cold transfer, is especially useful during peak hours as it frees up agents to take more calls. See [Agent Transfer Enhancement - Cold Transfers]() section for more agent related details.

All agents' transfer activity can be viewed in the [Call Transfer Report.]()

Cold transfer feature is enabled on any internal phone book entry in the Agent Phonebook editor. Navigate to *Configure > ACD > Agent Phonebook > General tab* and select an existing or new internal phonebook entry. Double clicking on the phonebook entry, will bring up the Entry screen. **Cold Transfer** checkbox is available under Internal Transfer section of the screen.

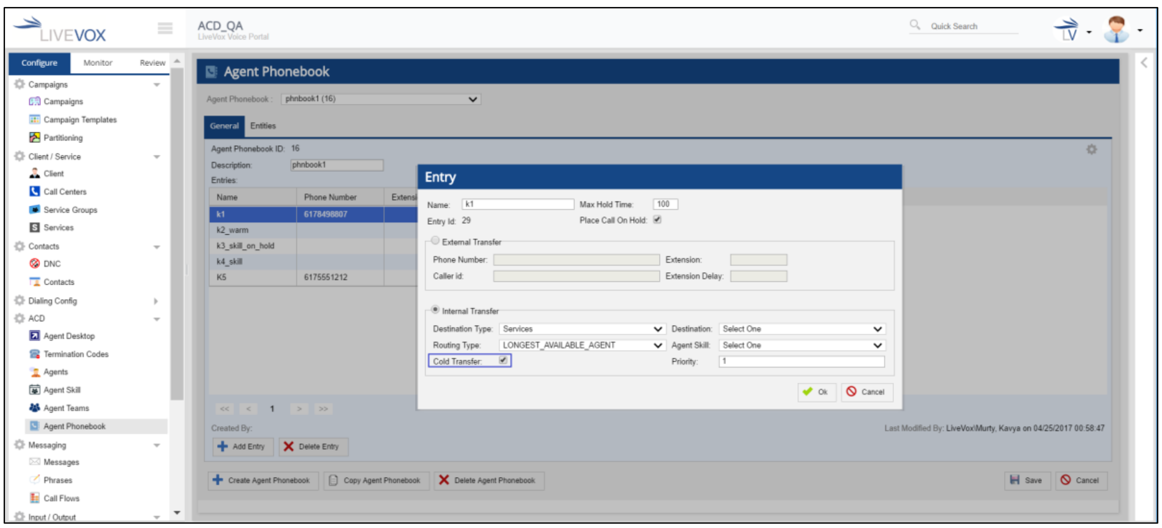


Figure 44: Cold Transfer flag

2.1.16 Unified Agent Desktop (UAD) Enhancements

2.1.16.1 Transactional SMS Using New Contact Details Widget

This version allows agents to initiate SMS on Unified Agent Desktop (UAD). To enable transactional SMS for the agents, users must add the Contact Details widget; configured on the Voice Portal by navigating to *Configure > ACD > Agent Desktop > Extended Panel tab > Available Widgets*.

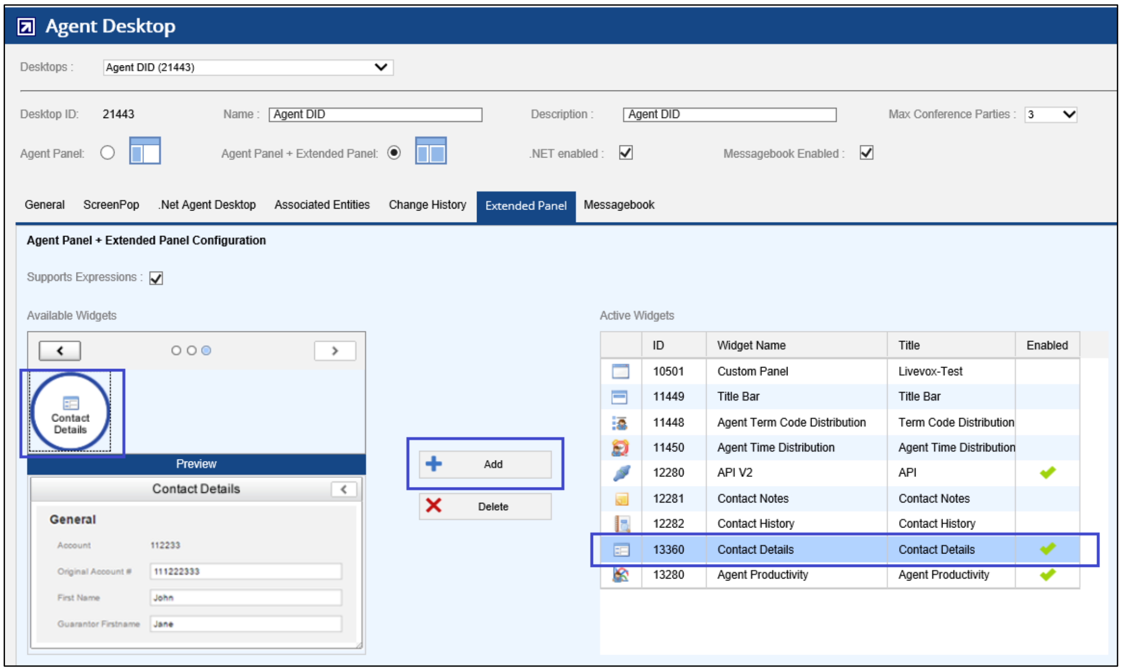


Figure 45: Contact Details widget

Once setup, the agent will see Contact Details panel on their UAD with the view only information for accounts existing in Contacts manager (see New Contact Details Widget (UAD) section for more agent related details).

The Contact Details widget allows a user to enable transactional SMS by selecting the following modes from the SMS Mode drop down:

- No SMS: Only displays the contact details and no SMS capabilities
- Read Only: Only allows agents to read historical SMS transactions for the displayed phone number
- Send Predefined Only: Allows agents to read historical SMS transactions and send only pre-defined SMS templates
- Send Custom SMS: Allows agents to read historical SMS transactions and send pre-defined SMS templates and create custom SMS messages.

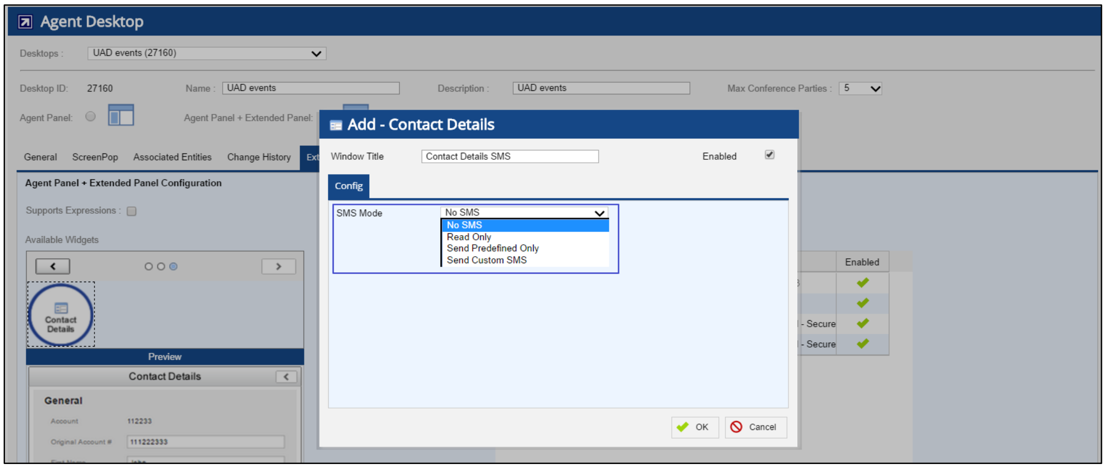


Figure 46: Contact Details Widget configuration

Note :

The SMS feature requires short codes which must be ordered through LiveVox Client Services. There is a 6-8-week procurement period for SMS Short Codes.

Users can define available transactional SMS templates or allow agents to create their own. Pre-defined SMS templates can be configured through Messages editor. There are two new LiveVox standard Call Flows available for that:

- SMS UAD Opt-In: The SMS UAD Opt-In is needed for any transactional SMS Opt-In requests.
- SMS UAD Widget: This is the standard SMS UAD Widget that can be used to define custom messages.

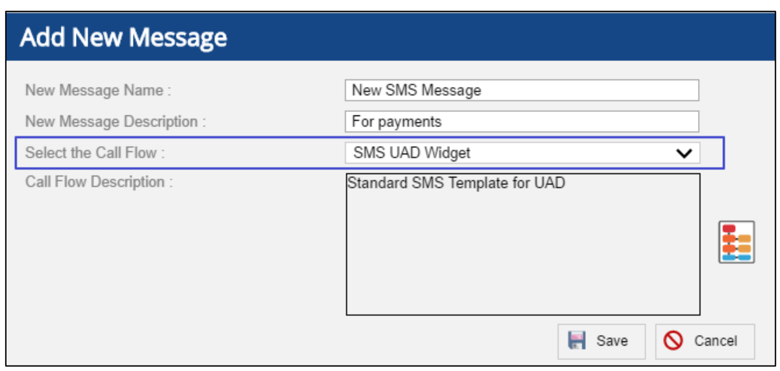


Figure 47: Selection of the Call Flow in the Messages editor

All SMS Messages support the expression builder that allows users to modify SMS templates to pull System or Call Flow Variables (i.e. Account Number, Payment Balance, etc.).

2.1.16.2 New Agent Productivity Widget (UAD)

This version introduces a new Agent Productivity widget. This is designed to give agents an opportunity to see how their performance compares to other agents.

The widget is configured on the Voice Portal by navigating to *Configure > ACD > Agent Desktop > Extended Panel tab > Available Widgets.*

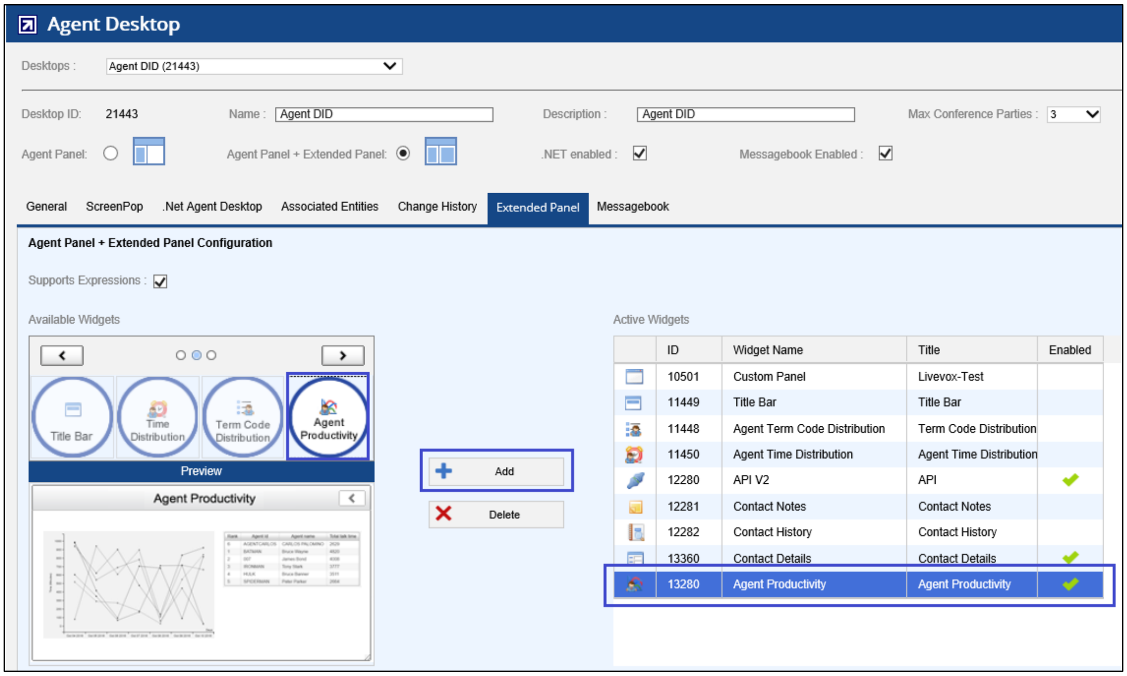


Figure 48: Agent Productivity widget

Once setup, the agents will see Agent Productivity panel on their UAD (see <u>New Agent Productivity Widget</u> section for more details).

Edit – Agent Productivity screen used to configure the widget allows users to determine when the widget should be displayed for the agent (Event), and whether to display chart (Chart Enabled flag) and table (Table Enabled flag) with the statistics.

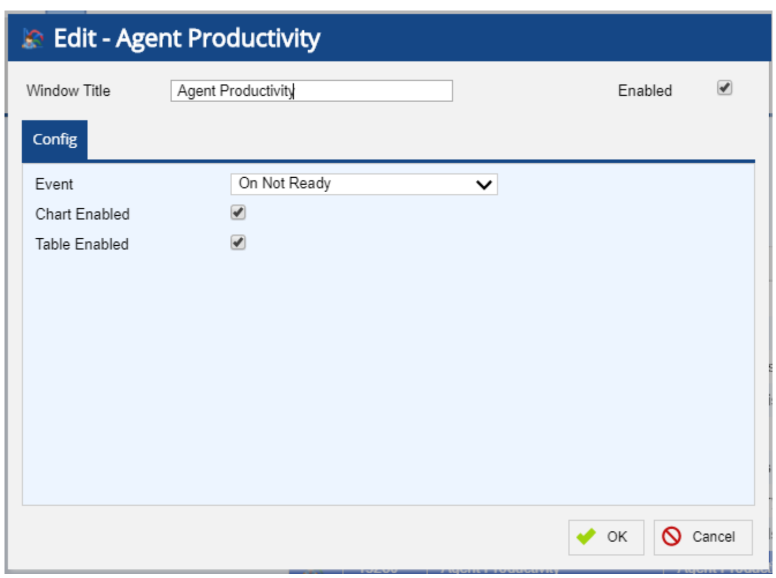


Figure 49: Agent Productivity widget configuration

2.1.16.3 New Event Triggers

Previously, all UAD widgets could only be configured to open for *On Call* or *Save Disposition* agent events.

In this version, Custom Panel and APIv.2 widgets can be configured to open for the following agent events (Open on Event drop down), thus giving users the flexibility to trigger third party applications (i.e. web-based CRMs) to be available at any time:

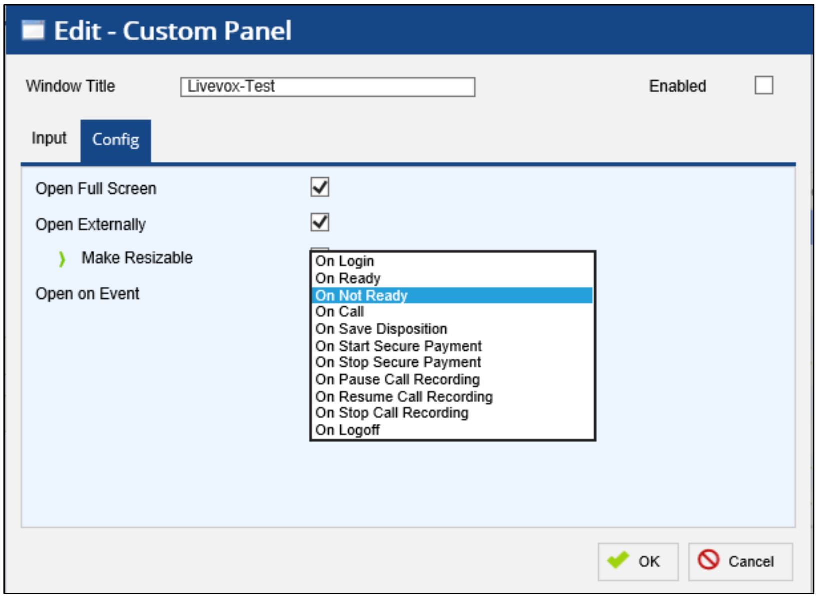


Figure 50: Custom Panel widget Open on Event configuration

2.1.17 Http Module and Call Flow Variable Enhancement

Previously, the Call Flows editor's HTTP module only supported the Content-Type text/plain and a fixed string for the URL.

In this version, the Call Flows editor's HTTP module supports more content types and allows for dynamic URLs based on variables.

The following is available with this release:

1. Support for additional Request and Response Content Types
    a. text/plain
    b. application/json
    c. application/xml

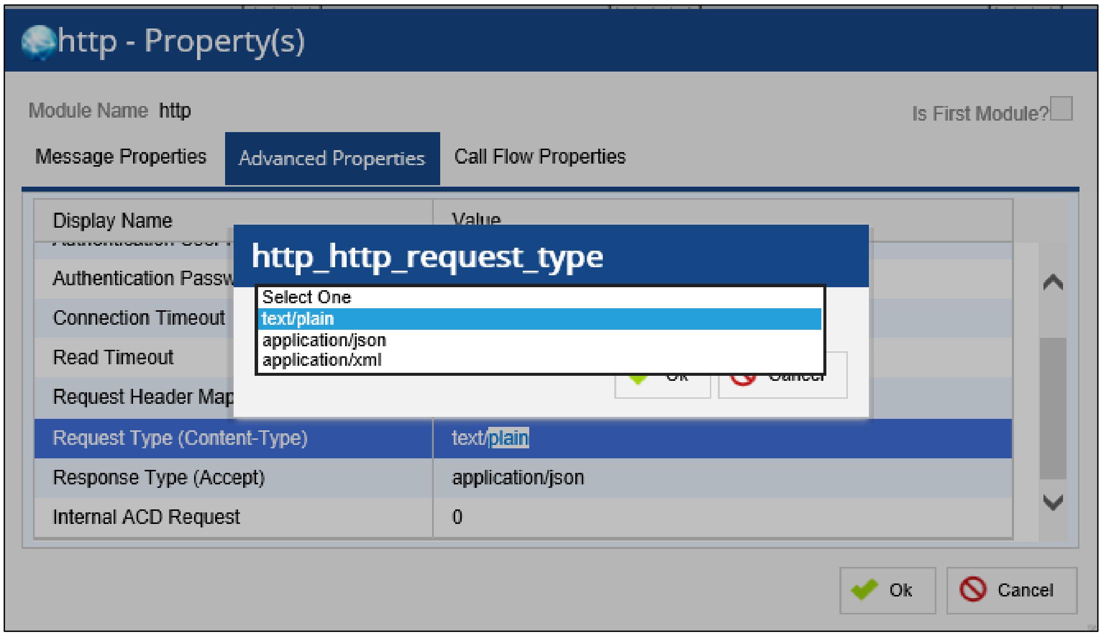


Figure 51: HTTP Request Type (Content-Type) options

2. URL can be configured to pull variables to construct the final URL per call, giving more flexibility with connecting to external sites.

2.1.18 New QC_AMD_Transfer Module

This version introduces the new **qc_amd_transfer** Call Flow editor module, which can be used for Quick Connect (QC), Preview All and Manual services. To navigate, select *Configure > Messaging > Call Flows > Call Flows* tab. New **qc_amd_transfer** module is available under Advanced modules.

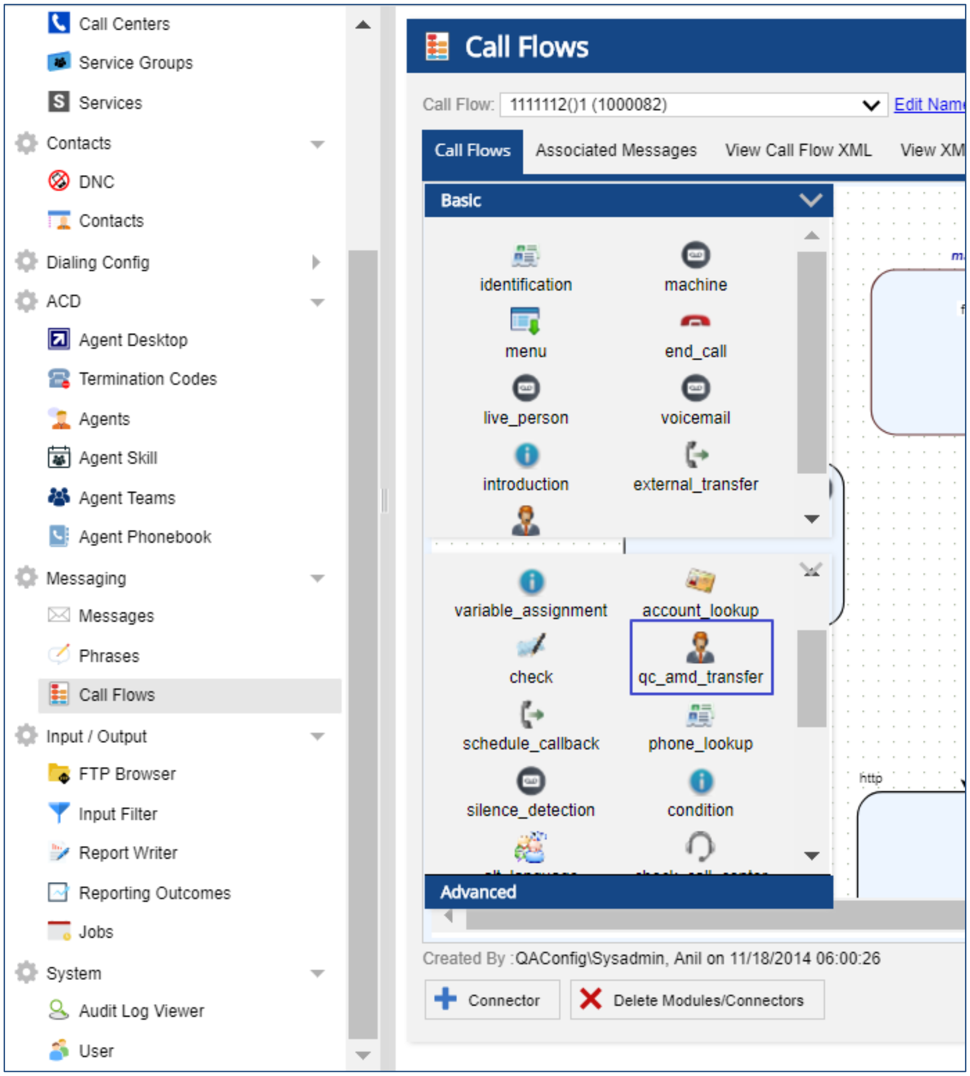


Figure 52: qc_amd_transfer module

2.2 *Agent Enhancements*

2.2.1 Agent Transfer Enhancement - Cold Transfers

Agent experience with the new Cold Transfer feature stays the same as with any internal phonebook transfers, except that the receiving party does not have to be available at the time of the transfer.

Agent will select phonebook from the Transfer Options screen.

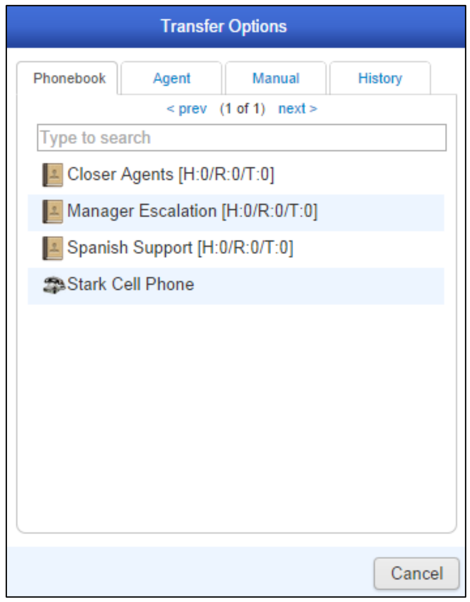


Figure 53: Phonebook Transfer Options screen

If Cold Transfer is enabled, agent will see two options on the screen - **Cold Transfer** and **Cancel**.

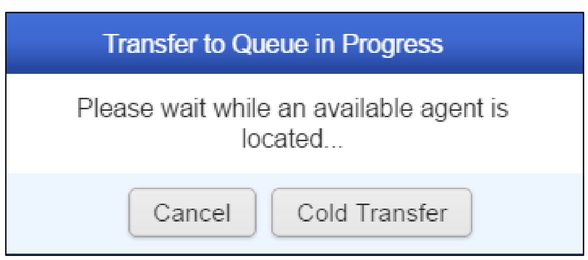


Figure 54: Cold Transfer option

Selecting **Cold Transfer** will move the transferring agent to the Wrap Up state. The caller will remain on hold, be added to the hold queue and given a priority based on what is configured in the phonebook entry.

Selecting **Cancel** option will connect the agent back to the caller.

2.2.2 Preview on Scheduled Callbacks

All scheduled callbacks are now being presented to agents as preview calls. The agent must click **Dial** to manually initiate the call.

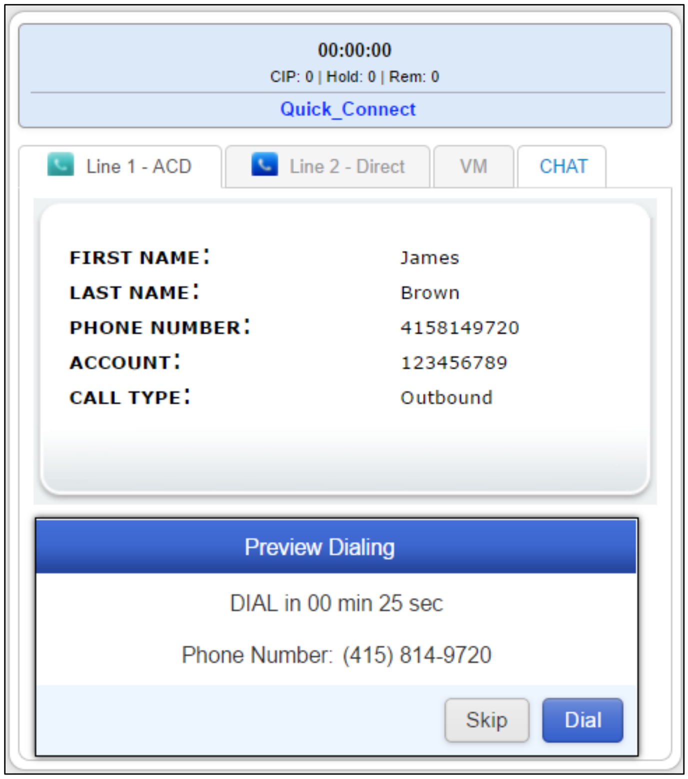


Figure 55: Preview on scheduled callback

2.2.3 10-Digit Entry on Preview

This version introduces a new configurable option for preview dialing that requires 10-digit entry. When enabled, once the agent selects the **Dial** button, they will be presented with the Confirm Number screen which requires them to enter the 10-digit number before initiating a call. The 10-digit entry must be completed by the configured preview timeout or the record is not dialed and the agent is taken out of Ready into Not Ready state. The record will then be presented to another available agent.

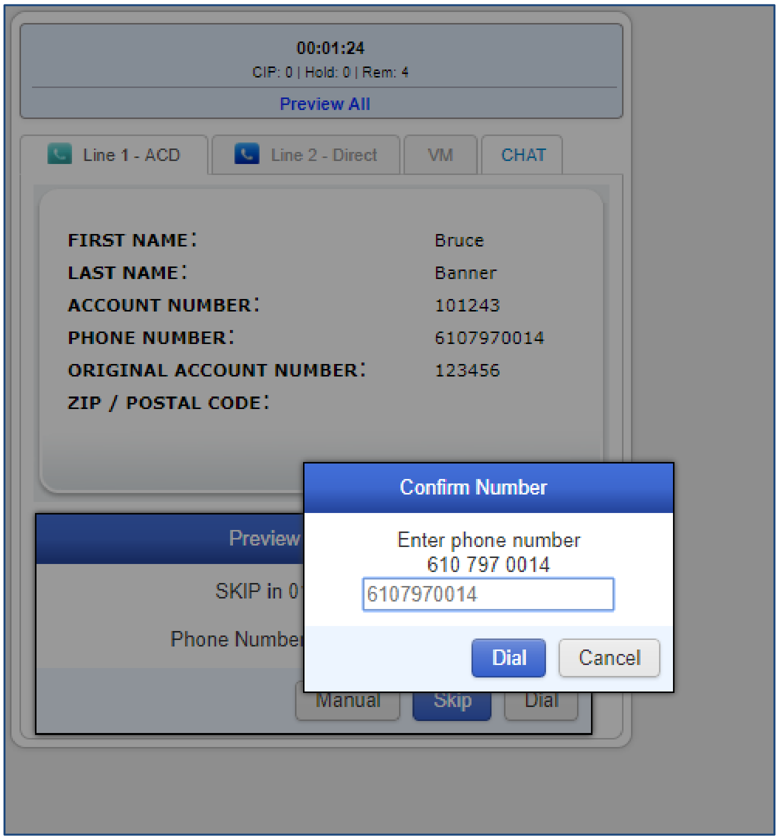


Figure 56: 10-Digit entry on preview

2.2.4 New Contact Details Widget (UAD)

This version introduces the Contact Details widget which enables the agents to view the existing customer details and send SMS to customers during or post-phone conversation directly from their desktop. If configured, agents will see the Contact Details widget to the right of their agent panel. If SMS is enabled, the SMS button will be available for all phone number fields.

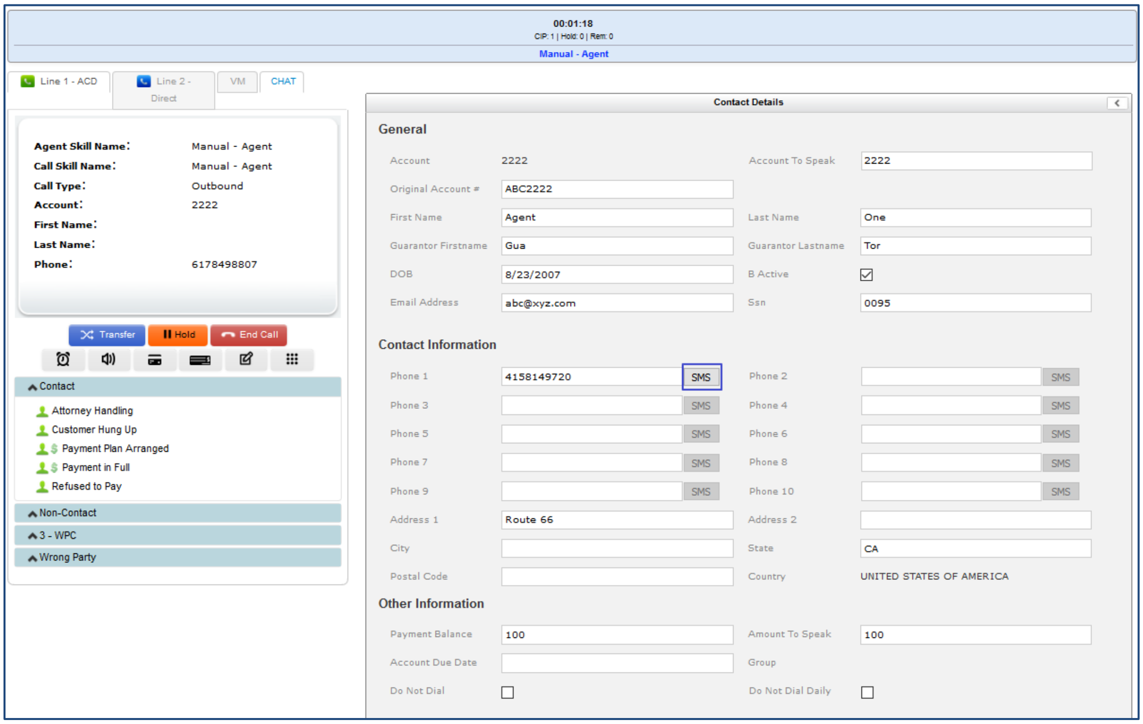


Figure 57: Agent Desktop with Contact Details widget and SMS enabled

Agents can select the phone number they would like to SMS. Selecting SMS button will bring SMS screen.

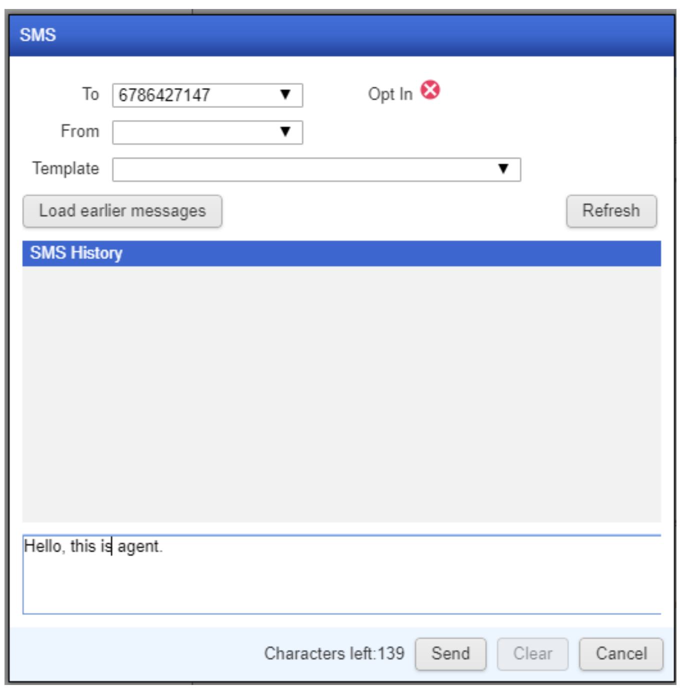


Figure 58: SMS screen

They can select the short code and SMS template.

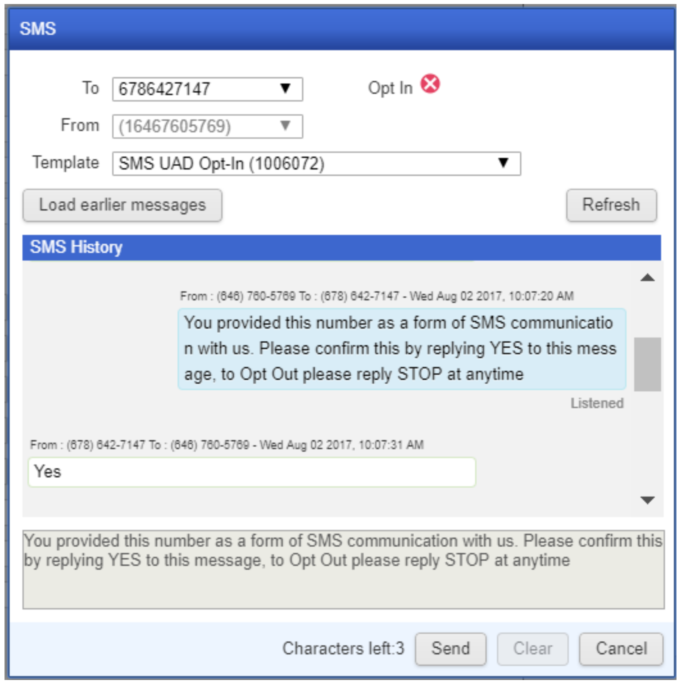


Figure 59: SMS template example

They can also create their own SMS instead of a predefined template by selecting *None* from the Template drop down.

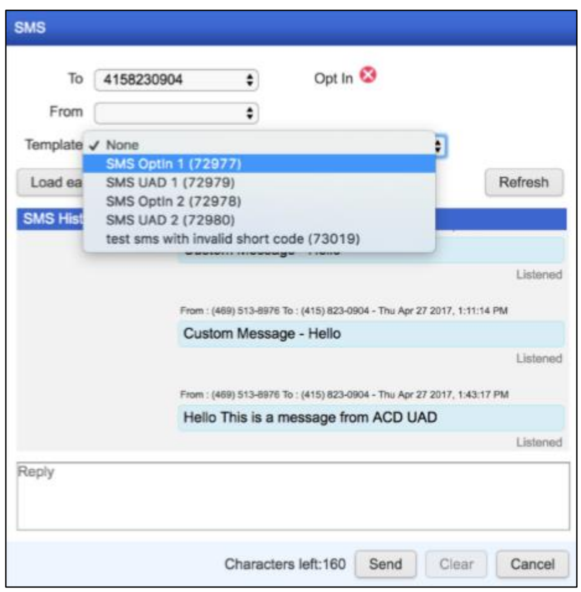


Figure 60: Template selection from the SMS screen

SMS History allows agents to view the communication and ability to load earlier messages if needed.

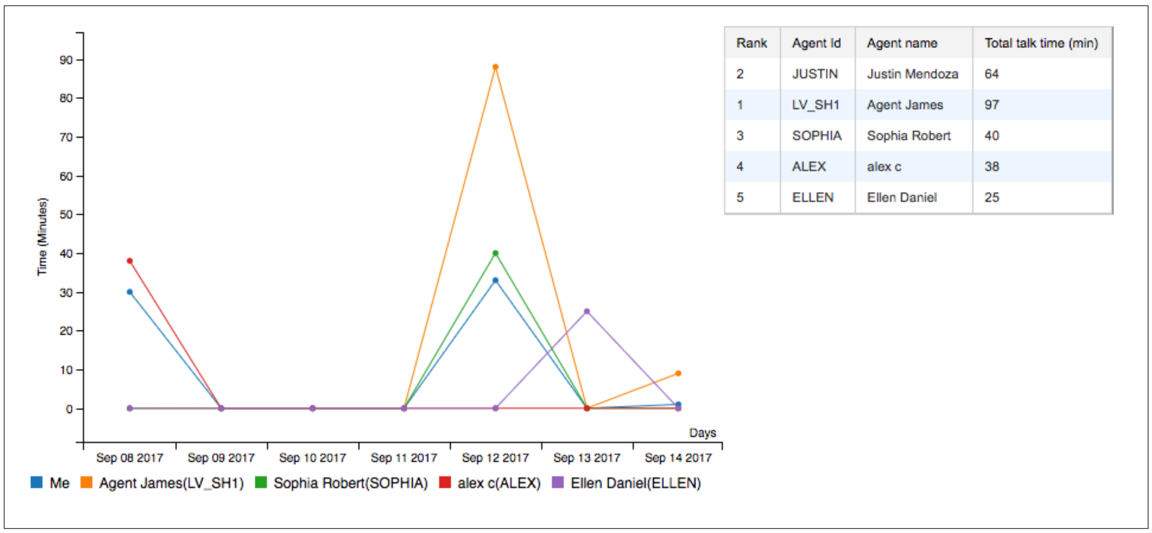
2.2.5 New Agent Productivity Widget (UAD)

The new Agent Productivity widget will display the top 5 productive agents. Productivity is defined as highest talk time (i.e. the time the agent is in call, not including wrap time). Two scenarios are possible and in both the agent will see their own rank:

1. If an agent is among the top 5 performers, the graph will reflect a total of 5 agents (the agent plus 4 other agents in the top 5) with their talk time across 7 days.

2. If an agent is not among the top 5 performers, the graph will reflect a total of 6 agents (the agent plus the top 5 performers).

The below example shows scenario 1, where agent JUSTIN is among the top 5 performers (ranked 2) and the graph reflects a total of 5 agents.



Rank	Agent Id	Agent name	Total talk time (min)
2	JUSTIN	Justin Mendoza	64
1	LV_SH1	Agent James	97
3	SOPHIA	Sophia Robert	40
4	ALEX	alex c	38
5	ELLEN	Ellen Daniel	25

Figure 61: Agent Productivity widget

2.3 *Reporting Enhancements*

2.3.1 Call Recording Report Handling of Expired Sound Files

In this version, Play and Download columns will indicate if the sound file is not available to play or download once a user clicks on play or download buttons:

- For expired sound files, the message ‘Not Available’ will be displayed when the user attempts to play or download the sound file.
- For encrypted sound files, the message ‘Unable to Play’ will be displayed when the user attempts to play the sound file.

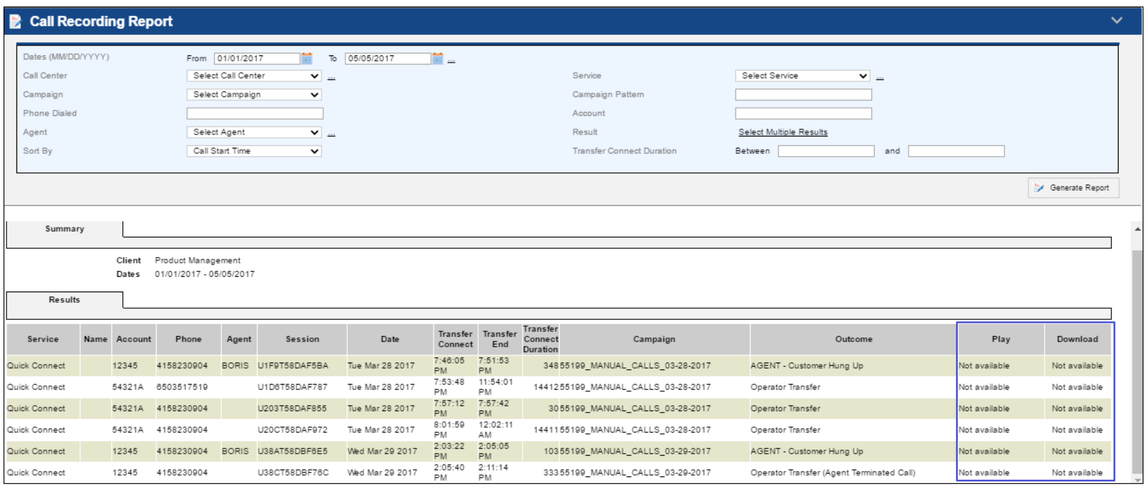


Figure 62: Example of Call Recording Report with files not available to play or download

2.3.2 Multi-Agent Selection for Agent Related Reports

Previously, ACD reports could only be generated for a single agent.

Now, users can generate the following reports for multiple agents:

- Call Recording Report
- Agent Activity Report
- Agent Summary
- Call Transfer Report
- Call Monitoring Report

Clicking the link next to **Agent** field will open Select Agent screen that allows to choose up to 100 agents.

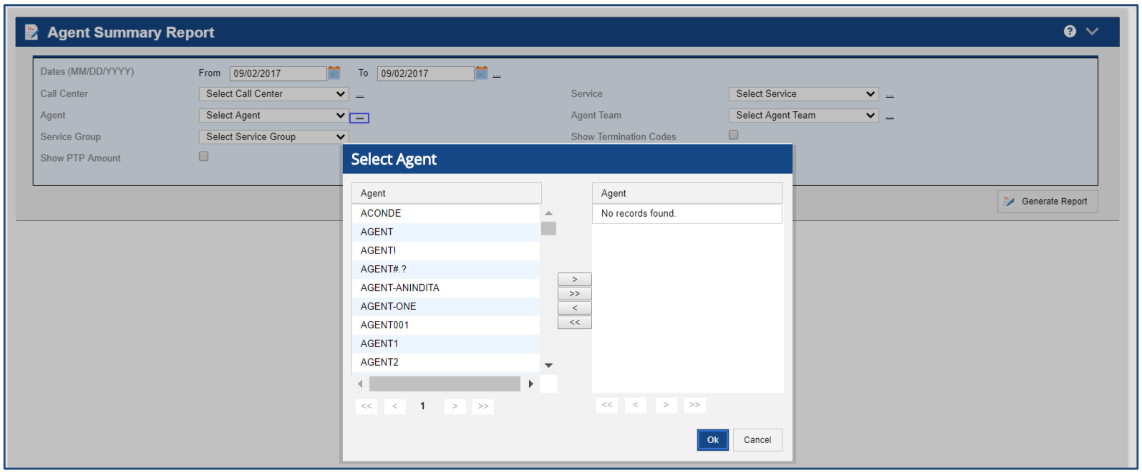
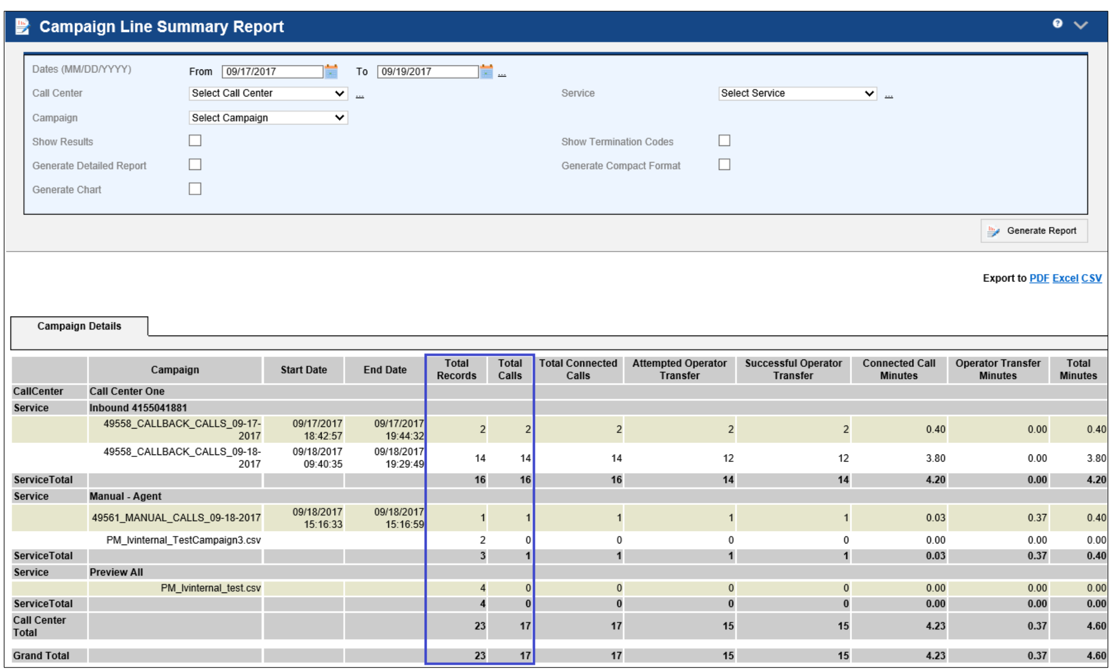


Figure 63: Example of multiple agent selection in Agent Summary Report

2.3.3 Updates to Campaign Line Summary & Billing Duration Reports

The following updates were made to the Campaign Line Summary Report in this release:

- Dials have been replaced by Total Records: The total amount of records in a campaign whether these records were dialed or not.
- Total Calls (new): Total number of dials attempted including records coded as Not Connected and excluding records coded as Not Made.
- Connect Rate (%): The formula is updated from Total Connected Calls / Dials to Total Connected Calls / Total Calls.



	Campaign	Start Date	End Date	Total Records	Total Calls	Total Connected Calls	Attempted Operator Transfer	Successful Operator Transfer	Connected Call Minutes	Operator Transfer Minutes	Total Minutes
CallCenter	Call Center One										
Service	Inbound 4155041881										
	49558_CALLBACK_CALLS_09-17-2017	09/17/2017 18:42:57	09/17/2017 19:44:32	2	2	2	2	2	0.40	0.00	0.40
	49558_CALLBACK_CALLS_09-18-2017	09/18/2017 09:40:35	09/18/2017 19:29:49	14	14	14	12	12	3.80	0.00	3.80
ServiceTotal				16	16	16	14	14	4.20	0.00	4.20
Service	Manual - Agent										
	49561_MANUAL_CALLS_09-18-2017	09/18/2017 15:16:33	09/18/2017 15:16:59	1	1	1	1	1	0.03	0.37	0.40
	PM_lvinternal_TestCampaign3.csv			2	0	0	0	0	0.00	0.00	0.00
ServiceTotal				3	1	1	1	1	0.03	0.37	0.40
Service	Preview All										
	PM_lvinternal_test.csv			4	0	0	0	0	0.00	0.00	0.00
ServiceTotal				4	0	0	0	0	0.00	0.00	0.00
Call Center Total				23	17	17	15	15	4.23	0.37	4.60
Grand Total				23	17	17	15	15	4.23	0.37	4.60

Figure 64: Campaign Line Summary Report – Platform 6

The following updates were made to Billing Duration Report in this release:

- Total Calls (updated calculations): Total number of dials attempted including records coded as Not Connected and excluding records coded as Not Made.

2.3.4 SMS Text Field on Account/Phone Lookup Reports

Previously, Account or Phone lookup report did not include the transaction type. Users had to check the service (often included in the name) or the campaign to confirm.

Now, the Account and Phone Lookup Reports include the **Transaction Type** drop down as part of the Search criteria. The user can filter the information in the report by selecting from the available options (Outbound, Inbound, Inbound SMS and Outbound SMS) in the drop down:

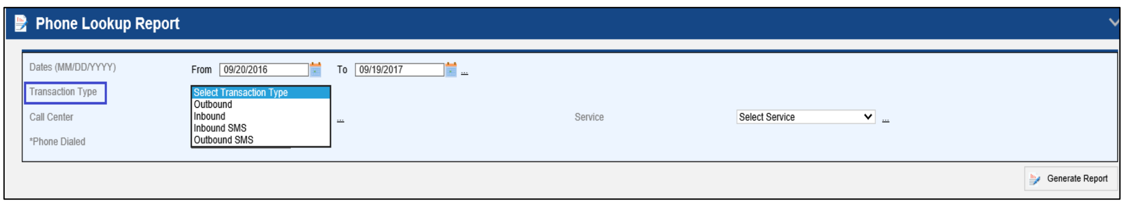
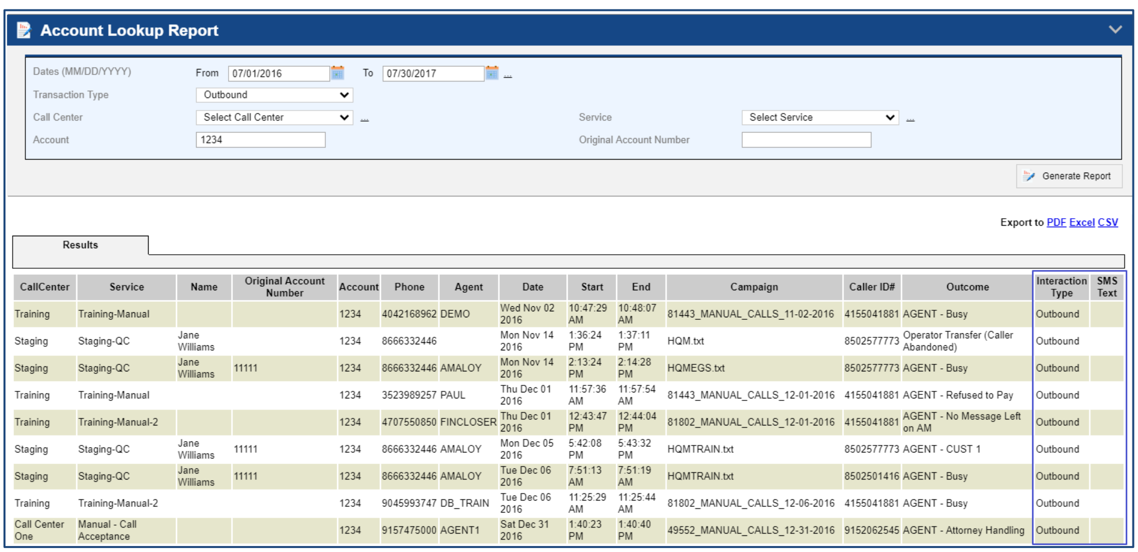


Figure 65: Transaction Type drop down in Phone Lookup Report – Platform 6

Once generated, users will be able to see two new columns, Interaction Type and SMS text.



CallCenter	Service	Name	Original Account Number	Account	Phone	Agent	Date	Start	End	Campaign	Caller ID#	Outcome	Interaction Type	SMS Text
Training	Training-Manual			1234	4042168962	DEMO	Wed Nov 02 2016	10:47:29 AM	10:48:07 AM	81443_MANUAL_CALLS_11-02-2016	4155041881	AGENT - Busy	Outbound	
Staging	Staging-QC	Jane Williams		1234	8666332446		Mon Nov 14 2016	1:36:24 PM	1:37:11 PM	HQM.txt	8502577773	Operator Transfer (Caller Abandoned)	Outbound	
Staging	Staging-QC	Jane Williams	11111	1234	8666332446	AMALOY	Mon Nov 14 2016	2:13:24 PM	2:14:28 PM	HQMEGS.txt	8502577773	AGENT - Busy	Outbound	
Training	Training-Manual			1234	3523989257	PAUL	Thu Dec 01 2016	11:57:36 AM	11:57:54 AM	81443_MANUAL_CALLS_12-01-2016	4155041881	AGENT - Refused to Pay	Outbound	
Training	Training-Manual-2			1234	4707550850	FINCLOSER	Thu Dec 01 2016	12:43:47 PM	12:44:04 PM	81802_MANUAL_CALLS_12-01-2016	4155041881	AGENT - No Message Left on AM	Outbound	
Staging	Staging-QC	Jane Williams	11111	1234	8666332446	AMALOY	Mon Dec 05 2016	5:42:08 PM	5:43:32 PM	HQMTRAIN.txt	8502577773	AGENT - CUST 1	Outbound	
Staging	Staging-QC	Jane Williams	11111	1234	8666332446	AMALOY	Tue Dec 06 2016	7:51:13 AM	7:51:19 AM	HQMTRAIN.txt	8502501416	AGENT - Busy	Outbound	
Training	Training-Manual-2			1234	9045993747	DB_TRAIN	Tue Dec 06 2016	11:25:29 AM	11:25:44 AM	81802_MANUAL_CALLS_12-06-2016	4155041881	AGENT - Busy	Outbound	
Call Center One	Manual - Call Acceptance			1234	9157475000	AGENT1	Sat Dec 31 2016	1:40:23 PM	1:40:40 PM	49552_MANUAL_CALLS_12-31-2016	9152062545	AGENT - Attorney Handling	Outbound	

Figure 66: Account Lookup Report - new columns - Platform 6

2.3.5 Addition of Not Ready Codes to the Agent Summary Report

Previously, the Agent Summary Report provided the summary of agent's Not Ready time. Now, the report includes breakdown of the Not Ready time based on the Not Ready reason codes, thus allowing users to better track agent's unavailable time.

To generate the report that includes agent's breakdown of Not Ready time, navigate to *Review > ACD Reports > Agent Summary Report*. Select **Show Detailed** option from the report Search parameters.

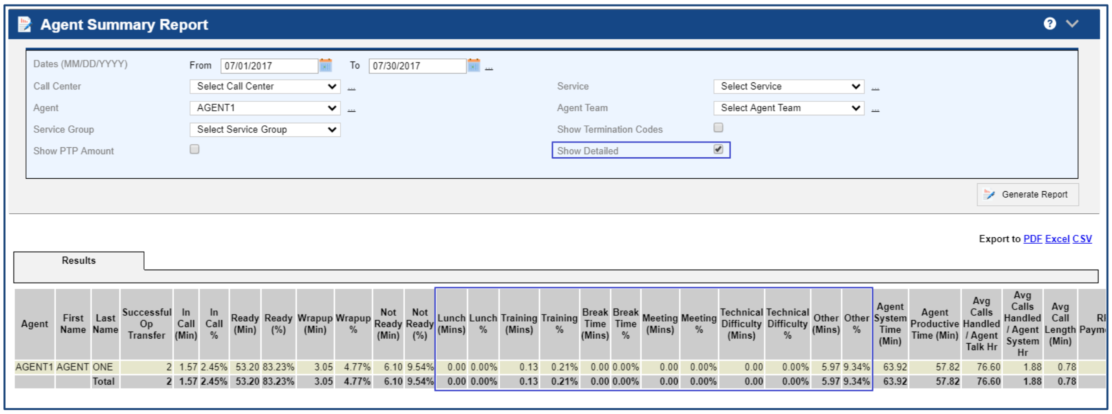


Figure 67: Agent Summary Report

The report will include the following information:

- **Lunch (Min):** Total time in minutes the agent spent on **Lunch** break code
- **Lunch %:** Total amount of time the agent spent on **Lunch** break code divided by the **Agent System Time**
- **Training (Min):** Total time in minutes the agent spent on **Training** break code
- **Training %:** Total amount of time the agent spent on **Training** break code divided by the **Agent System Time**
- **Break Time (Min):** Total time in minutes the agent spent on **Break Time** break code
- **Break Time %:** Total amount of time the agent **spent on Break Time** break code divided by the **Agent System Time**
- **Meeting (Min):** Total time in minutes the agent spent on **Meeting** break code
- **Meeting %:** Total amount of time the agent spent on **Meeting** break code divided by the **Agent System Time**
- **Technical Difficulty (Min):** Total time in minutes the agent spent on **Technical Difficulty** break code
- **Technical Difficulty %:** Total amount of time the agent spent on **Technical Difficulty** break code divided by the **Agent System Time**
- **Other (Min):** Total time in minutes the agent spent on **Other** break code

- **Other %:** Total amount of time the agent spent on **Other** break code divided by the **Agent System Time.**

2.3.6 Call Transfer Report Enhancement

In this version, the Transfer Outcome drop down in the Search parameters of the Call Transfer Report includes COLD_TRANSFER option.

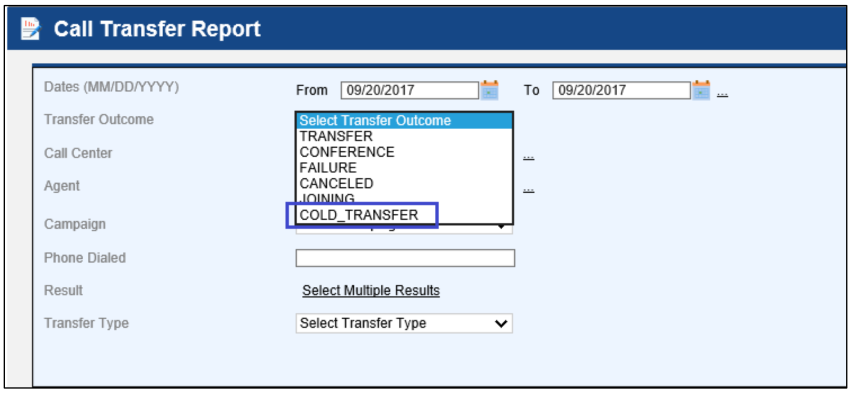


Figure 68: Transfer Outcome drop down in Call Transfer Report – Platform 6

To access report, navigate to *Review > ACD Reports > Call Transfer Report.* Selecting COLD_TRANSFER as an outcome, will generate a report specific to cold transfers. If no Transfer Outcome is selected, all transfers including will be included in the report.

In the following example, no specific Transfer Outcome is selected from the drop down:

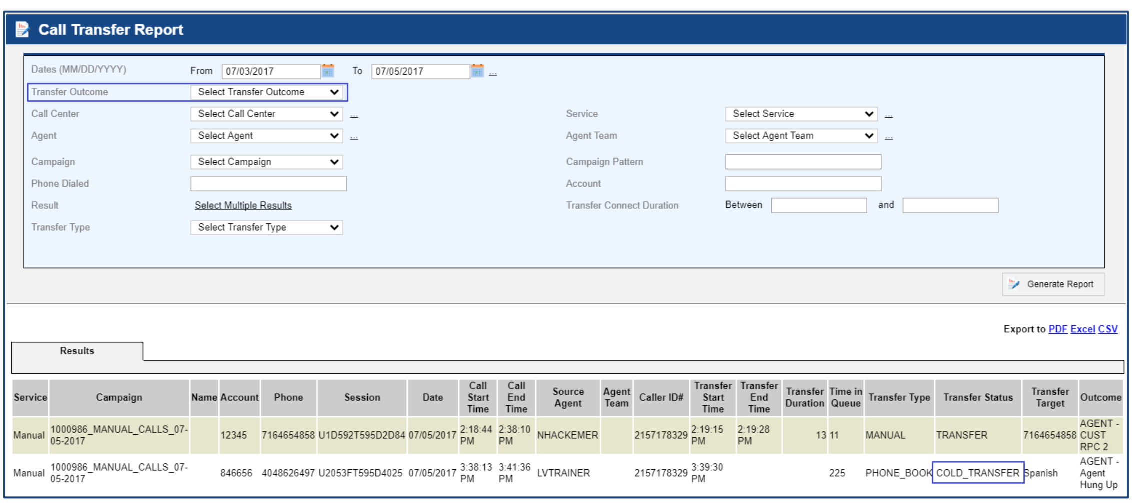


Figure 69: Call Transfer Report example – Platform 6