8x8 Global Cloud Communications

8x8 Contact Center

Release Notes

Contents

What's new in the 8x8 Contact Center 9.10 release?

Note: The 8x8 Contact Center 9.10 release is coming soon.

We have introduced the following enhancements to improve the productivity of agents, supervisors, and administrators in our new release of 8x8 Contact Center.

- Controlling call recording on third-party transfers
- Introducing SMS channels
- Introducing agent whisper for phone queues
- Transferring chat interactions with contextual information
- Intelligent routing of chat interactions based on customer data
- Enhancing data augmentation
- Announcing end of life for Support Center functionality
- Bug fixes 9.10

Controlled call recording on third-party transfers

As an 8x8 Contact Center administrator, you can choose to stop call recording on the third-party transfers when your last contact center agent leaves the call. Let's assume the contact center agent transfers a call (via a warm or cold transfer) to a customer or a third-party caller who is outside the contact center, or the agent decides to drop out of a conference call as the last contact center agent. With the help of this new feature, you can stop call recording to avoid sensitive information to be recorded after the call is transferred.

The call recording control is enabled at the tenant level and cannot be modified per agent. Once enabled, it becomes the default setting for call recording of the tenant and overrides the existing settings such as agent's ability to pause recording. The call recording stops as soon as the last agent leaves the call. Calls to 8x8 Work extensions are also considered third-party calls and therefore subject to this rule. Contact 8x8 Support for more information and to enable this feature. For details, see our content about Agent's Recording Controls.

Introduced 8x8 Contact Center SMS

In this release, 8x8 Contact Center introduces communication via SMS inbound channels. SMS has become a popular channel of communication in customer service. Let's say customers of a car insurance company want to check their claim status or send related inquiries, they can simply send SMS messages to an SMS number published by the insurance company. These messages are routed via SMS channels and chat queues to agents, and offered to them as chat interactions for responses. Agents can look up customer records if the message is from an existing customer. They can look up outstanding cases and history of interactions to handle the conversation effectively.

Audience

This guide is intended to educate:

- 8x8 Contact Center admins about setting up SMS channels.
- 8x8 Contact Center agents about handling SMS interactions via dedicated SMS channels.

Availability

The 8x8 Contact Center SMS feature is available to X Series customers (X7/X8) only. SMS channels for receiving SMS messages can be configured in 30 countries (see appendix). SMS messages can be sent to most countries in the world (note that the cost of sending messages to different countries varies based on the country, with the US and Canada being the least expensive).

Features

- **Connect and Communicate**: As contact center agents, receive SMS messages from customers and communicate in real time.
- **Publish SMS numbers**: Publish phone numbers having SMS-only or voice+SMS capabilities (voice+SMS is available only in the US and Canada) which can be provisioned as SMS inbound channels by 8x8.
- **Route messages**: Based on agent skills, route SMS messages via chat queues to available agents. Direct these messages to available agents based on rules/schedules/skills.
- **Engage with customers effectively**: Allow agents to multitask and maximize their productivity by handling messages from up to six customers at a time.

- **Handle interactions more efficiently** by accessing the customer record via screen pop. When an existing customer sends a message, quickly look up the popped customer record and learn about recent cases.
- **Track past activity**: Save the SMS interactions in a chat transcript and automatically link it as a case to the right customer record for future reference. Agents always end SMS interactions.

Limitations

- SMS conversations must be initiated by the customer (the external party). At this time, agents cannot initiate an SMS conversation with a customer (or other external party).
- We do not support SMS messaging to short code numbers currently. We support messaging to toll-free and regular phone numbers.
- The messaging does not support images or emojis. It is plain text only.

Use case

Acme Insure is a car insurance company that processes claims from insurers for traffic incidents. Their clients often reach out to their agents to file claims, inquire about the status of their claims, and other related questions. An insurance agent at Acme Insure, Robin, receives SMS messages from clients and responds to them in real time. During business hours, Robin and other agents interact with multiple customers simultaneously, increasing their productivity. For messages received during offline hours, Acme Insure sends an automatic response notifying the sender of Acme Insure's business hours and requests them to connect during business hours. The company also wants to keep track of the communication trail with their clients. Hence, agents save their chat transcript before ending the conversation and link it to the customer record. This helps all agents to review the cases, understand the status, and assist the returning customers effectively.

For more details about SMS channels see our topics below:

- Configure SMS channels
- Agents: Process an SMS interaction
- Supervisors: Monitor and track SMS interactions
- SMS: List of supported countries

Configure SMS channels

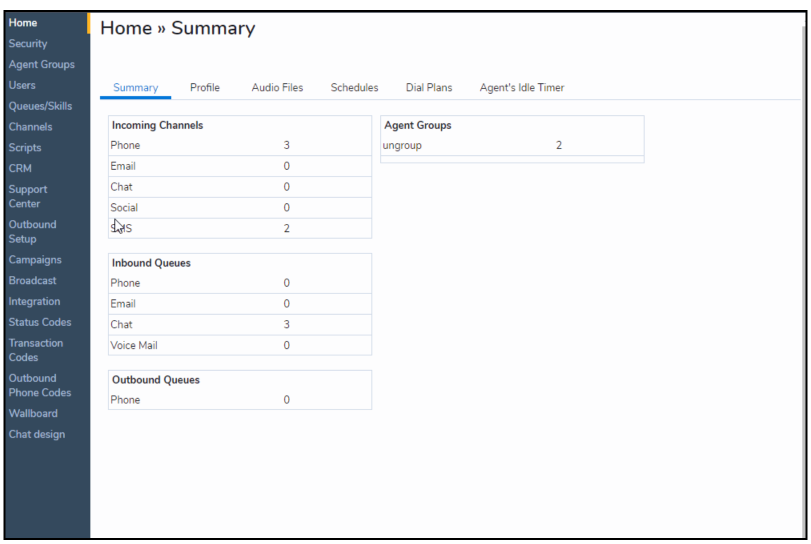
Note: This section is applicable to8x8 Contact Center administrators only.

8x8 Contact Center provisions SMS as well as voice+SMS channels. Note that SMS phone numbers that support both voice and SMS are only available in the US and Canada. Once the channels are provisioned, you see them in the 8x8 Contact Center 8x8 Configuration Manager application. As a next step, you need to configure these channels to receive SMS messages from customers and route them to available agents based on interactive response rules and agent skills.

Follow the steps to configure an SMS channel:

Step 1: View SMS channels in the 8x8 Contact Center 8x8 Configuration Manager

1. Log in to your 8x8 account.
2. In the application panel, select **Virtual Contact Center Configuration Manager**. The application launches.
3. Go to **Channels** from the navigation menu.
4. Select to view SMS channels.
5. From the list of SMS channels, select to edit an SMS channel.
6. Add the properties, and save.



Step 2: Add an SMS script

Use SMS scripts to prompt customers for more information, match against Local or External CRM customer records, forward the conversation to a queue of agents based on specific rules, or queue metrics.

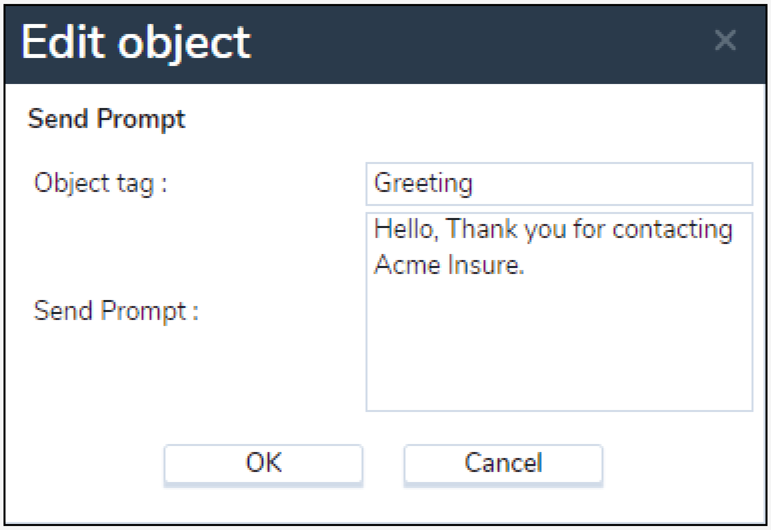
The following IVR nodes are available:

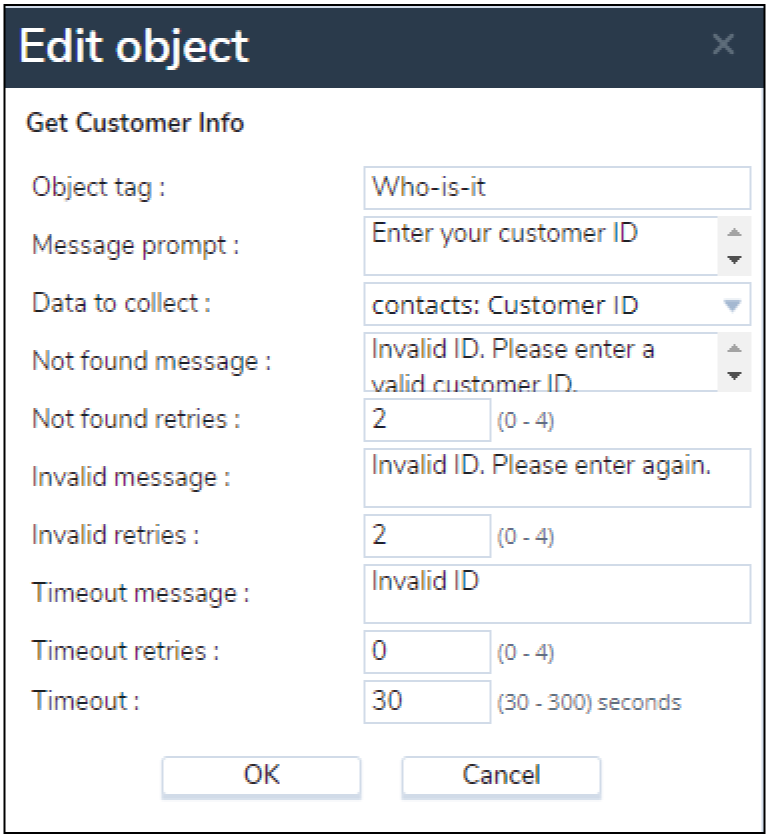
- **Schedule**: Use the Schedule node to determine if the business is open or closed, and add appropriate actions.
- **Send Prompt**: Use to auto-respond with predetermined greetings and messages.
- **Check ANI**: Use to identify customers based on phone numbers in the customer records.
- **Get Customer Info**: Use to collect information about the customer, such as Customer ID and Case ID, which helps in routing the interaction.
- **Test Condition of Queue**: Use to check the condition of a queue before directing messages to the queue. Test queue provides a set of conditions which, when met, triggers specified actions.
- **Forward to Queue**: Use to forward SMS messages to a specific chat queue (SMS messages must be routed via chat queues).

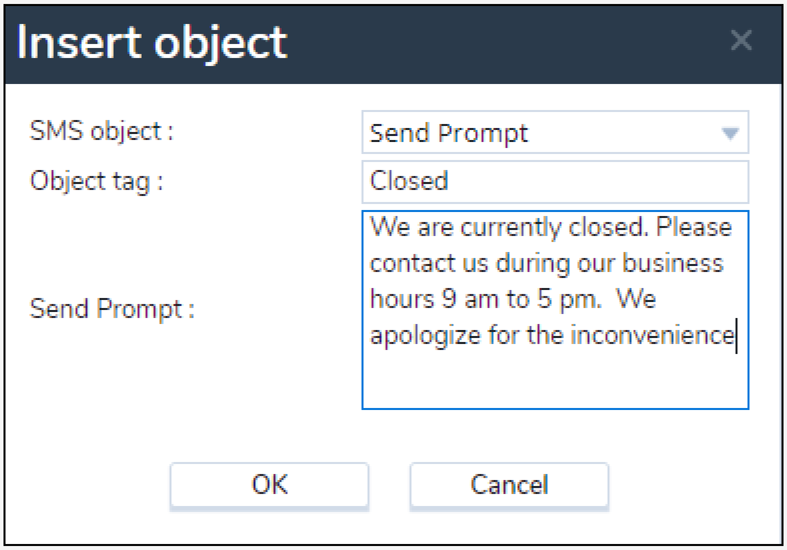
To add an SMS script:

1. Go to **Scripts** from the navigation menu.
2. Go to **SMS**, click to add a new SMS script.
3. Add a name for the script, a comment, and select a category.
4. Enable the script by checking the box.
5. Click **Save**. It launches the script definition window.
6. Use the following steps to create a simple script that checks if a message is received during the business hours, checks if it is from an existing customer, forwards them to an available agent via a chat queue, pops the matching customer record for review. If the message is received during closed hours, sends a response indicating the same.

IVR Node	Description
Add **Schedule**	Check if the business is open or closed. Add appropriate action nodes.
If (**Schedule**) is Open, add **Send Prompt**.	If the message is received during business hours, send a greeting. Example: Welcome to Acme Insure. How may I help you?

IVR Node	Description
	
Add **Get Customer Info**	The Get Customer Info collects data such as customer ID and case ID, retrieves the matching CRM record and presents it to the agent allowing them to handle the interactions better. Check if the message received is from an existing customer by prompting them for a customer ID. Example: Collect information about a pending case ID to quickly open and review the case details.

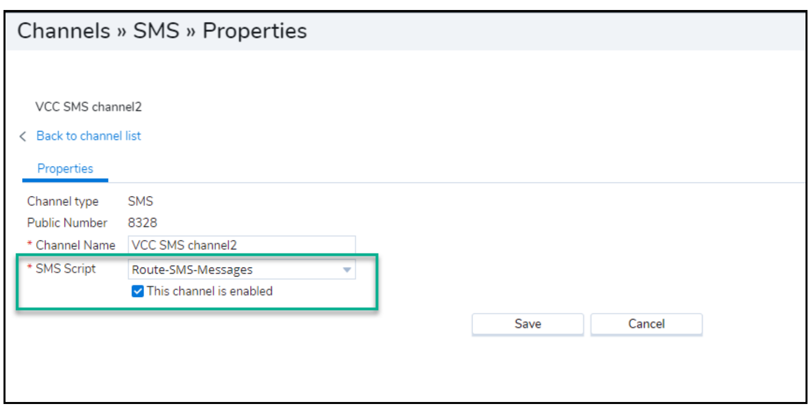
IVR Node	Description
	
Add **Send Prompt**	The Send Prompt node allows you to send predefined greetings or messages. Send a message that an agent will respond shortly. Example: Thank you for contacting us. We will be with you shortly.
Add **Forward to Queue**	Direct the message to a chat queue. It is then presented to an available agent serving the queue.
If (**Schedule**) is closed, add **Send Prompt** to indicate the business is closed.	If the message is received when the business is closed, send a response indicating the same.

<table>
<tr><th>IVR Node</th><th>Description</th></tr>
<tr><td>
</td><td>Example: Thank you for contacting Acme Insure. We are currently closed. Please contact us during our business hours 9 AM to 5 PM PST.</td></tr>
</table>

Step 3: Assign the SMS script to the SMS channel

You can assign the SMS script to a channel in two ways:

- Via Channels: Go to **Channels > SMS**. Select to edit a channel. Under **Properties**, select the SMS script from the list of available scripts.

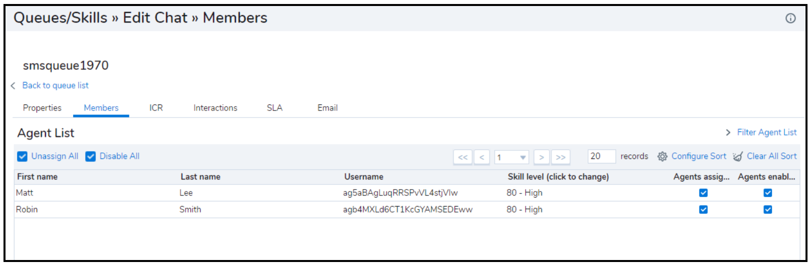


- Via Scripts: Go to **Scripts > SMS**. Select to edit an SMS script. Under **Properties**, click **Assign new channels** and follow the prompts to select channels to assign the script.

Step 4: Add users to the chat queue

SMS messages sent to a channel are directed to a chat queue to be processed by agents serving the queue. In this step, you can add agents to the chat queue used in the script.

1. Go to **Queues/Skills** from the navigation menu.
2. Select to edit the chat queue to which the SMS interactions are forwarded.
3. Under **Members**, assign and enable agents to the queue.



With these steps complete, the SMS channel in your contact center is now set up to process SMS interactions.

Agents: handle SMS Interactions

8x8 Contact Center agents receive SMS interactions via chat queues they are serving. When agents are available, an SMS message received by a customer is routed via the SMS channel to a chat queue and offered to them. The chat tab blinks red, indicating an incoming interaction. An incoming SMS message has its own distinct icon. If the message is from an existing customer, the customer record pops. You can now review the customer details along with any historical cases. Accept the chat and interact with the customer. Once the interaction is indicated as complete by the customer, save the chat transcript and end the interaction. The chat log is saved as a case linked to the customer record.

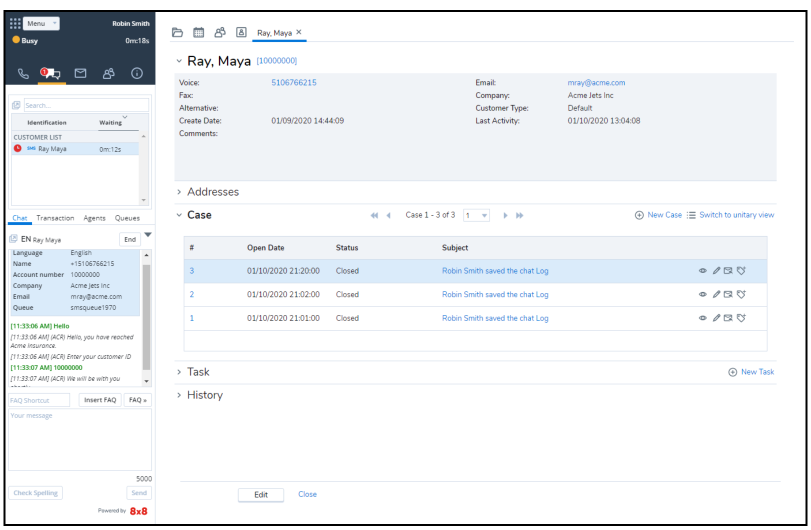
Prerequisites

To receive or send chats using 8x8 Contact Center, you must:

- Be a member of the chat queue to which the chat is routed.
- Place yourself in the Available status.

To process an SMS interaction:

1. In the Control Panel, click **Accept Chat** or in the chat tab, click on the check mark next to the customer name to accept the chat. If there is a customer match, the customer record pops.

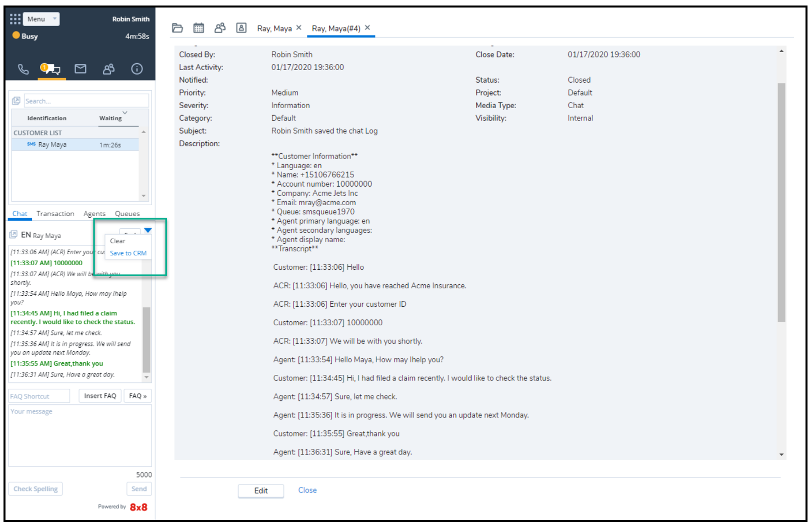


2. Review the customer details along with any historical cases in the customer record.
3. Respond to the messages and complete the interaction with the customer. You can insert FAQs with text-only

content.

Note: Images or emojis fail to relay to the customer.

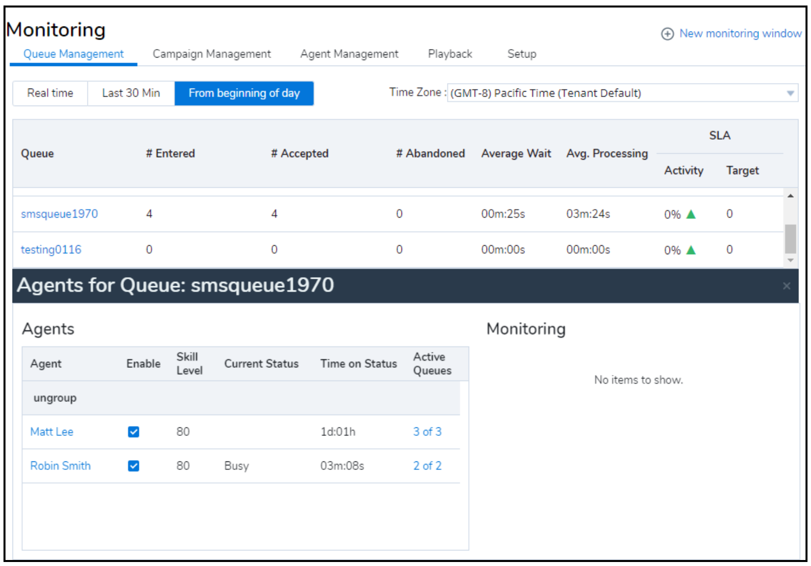
4. Once the customer indicates that the interaction is complete, Click  in either the Chat window or the chat pop-out window. Select **Save to CRM** from the menu. A new case is created and linked to the matched customer record.



5. Click **End** to finish the chat. The post-processing time initiates if your administrator has set it up for your tenant. Post-processing gives you time to add more notes for the chat.
6. Click **End Post Processing**, or wait for the chat to terminate.

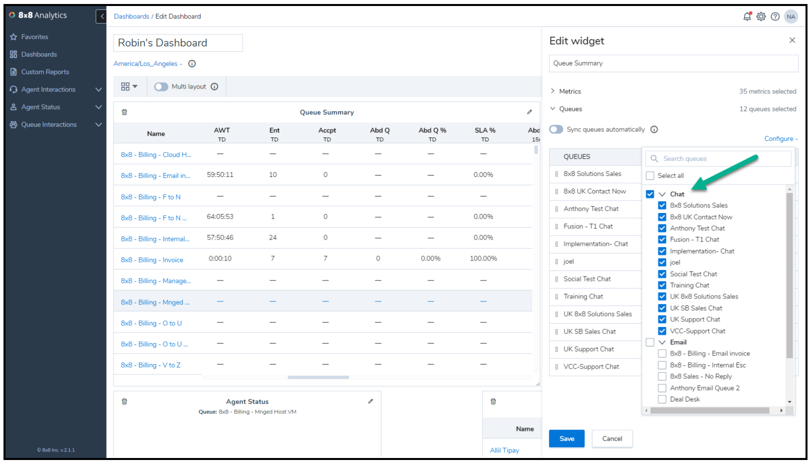
Supervisors: monitor and track SMS interaction metrics

Supervisors can monitor traffic in chat queues, which handle SMS interactions. From the Supervisor Console, go to **Menu > Monitoring**. Under **Queue Monitoring**, check out the number of interactions entered, accepted, rejected, or abandoned by an agent for each queue, including the chat queue that processes SMS interactions. This data is available in real time, for the past 30 minutes, and for the day.

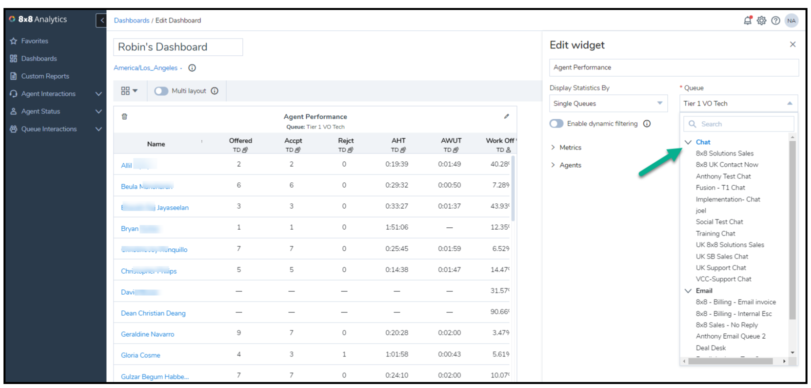


In the 8x8 Analytics for Contact Center, you can track historical data for SMS interactions based on queues and agents.

- In the Queue dashboard: Select a specific chat queue for SMS interactions and track the number of interactions entered, accepted, or abandoned in the queue.



- In the Agent Performance dashboard: Select a specific chat queue for SMS interactions and track the number of interactions offered, accepted, or rejected by each agent serving the queue.



Appendix: list of supported countries

The 8x8 Contact Center SMS service is currently supported in the following countries.

Note: 8x8 Contact Center SMS can send SMS messages to most countries in the world. However, SMS channels for receiving SMS messages into the contact center can only be configured in the countries listed below.

- Australia
- Austria
- Belgium
- Brazil
- Canada
- Chile
- Croatia
- Czech Republic
- Denmark
- Estonia
- Germany
- Hong Kong
- Hungary
- Israel
- Latvia
- Lithuania
- Malaysia
- Netherlands
- Norway
- Poland
- Portugal

- Puerto Rico
- Spain
- Republic of Korea
- Philippines
- Singapore
- Sweden
- Switzerland
- United Kingdom
- United States

Introduced Agent whisper for phone queues

In this release, 8x8 Contact Center agents can hear an audio message (whisper) about the context of the call they have dialed or received via a queue. Agent whisper is an audio file that can be uploaded and assigned by the tenant administrator to an inbound or outbound queue. Agent whisper informs the agent, upon connection, about the connected call. Let's say John serves support calls as well as sales calls. Upon receiving calls, the system plays a brief message stating if it is a sales or a support call. Agent whisper can be implemented for both inbound and outbound calls such as campaign calls. Agent whisper is only played for the agent. The agent and customer can talk to and hear each other while the whisper is playing.

Features

- Assign to both inbound and outbound queues.
- Alert agents when a call is being connected.
- Notify the agent on the call, and not the customer.
- Play an uninterrupted prompt for the agents. The whisper can be talked over by both parties.
- Agent whisper is not suppressed when the agent or customer talks.
- Agent whisper can be set up for all queued calls. It is not available for numbers dialed by the agent, direct agent calls (DAA/DAR), or agent-to-agent calls.

Known limitations

- In Auto Answer mode and in the process of validating a Persistent connection, at the very moment a call is offered, an agent will only hear the bleep and not the whisper for this interaction.
- In Persistent Connection Mode alone, if the call terminates before the whisper has finished playing, the agent will still hear the remainder of the whisper. In On Demand Connection Mode the above scenario does not apply.
- Supervisors hear the full whisper when they join an active call to monitor an agent and customer.
- With inbound and outbound calls, the whisper is played to the agent upon connection, however, when working in the preview mode, the whisper is played to the agent just before the call is connected.

Set up Agent whisper

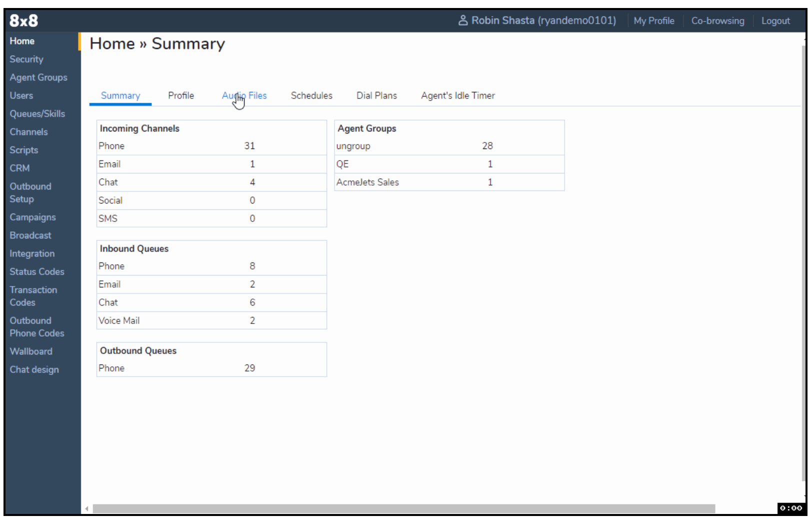
To set up Agent whisper, you must upload the Agent whisper file first and then assign the file to a queue:

Step 1: Upload Agent whisper files

Admins must add an audio file to a global folder under **Home > Audio Files > User-Agent whisper**. Any audio files added to that folder can be selected at queue level. Any file added to the standard User folder, is not part of the drop-down for Agent whisper in Queue settings.

To upload a new audio file for Agent whisper:

1. Log in to the 8x8 Configuration Manager.
2. Open **Home > Audio Files > User-Agent whisper**.
3. With User-Agent whisper highlighted, click to add **+ Audio Files**.
4. In the **Add** window, click **Choose Files**.
5. Find and add a file to upload. There is no limitation for the size of the Agent whisper file, however we recommend you to keep the message short. The file format must be .wav or .au.
6. Enter a **Name** and **Description** for the file.
7. Click to **Save** your changes. The new file is saved under the User-Agent whisper folder. You can click to play the audio file.

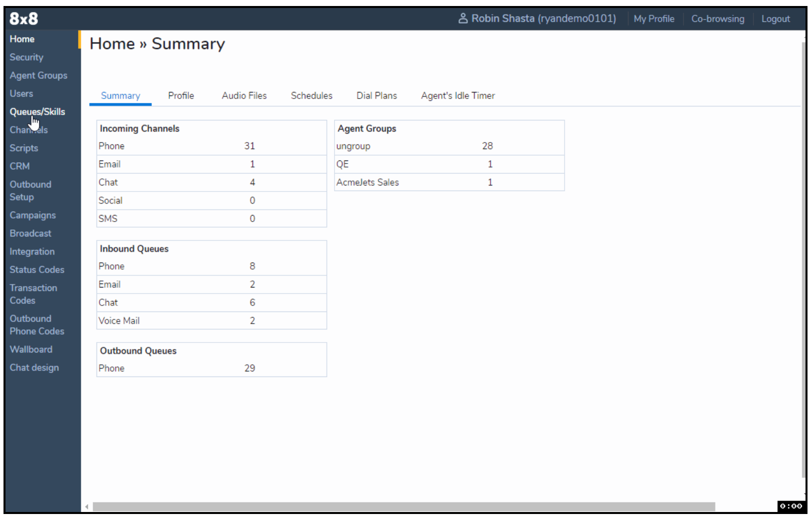


Step 2: Assign the Agent whisper file to a queue

After uploading an audio file for Agent whisper, you must assign the audio file to a phone queue.

To assign the Agent whisper file to a queue:

1. Log in to the 8x8 Configuration Manager.
2. Go to **Queues/Skills**.
3. Open an outbound or inbound phone queue.
4. Under **Properties**, select an audio from the **Agent whisper audio** drop-down. By default there is no audio file selected. You can click to play the audio.
5. Click to **Save** your changes.



Delete Agent whisper audio files

To delete an Agent whisper audio file:

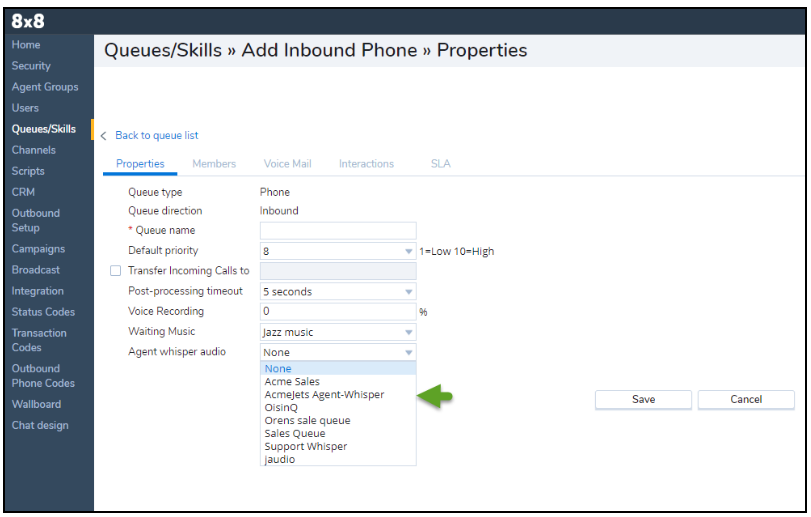
1. Log in to the 8x8 Configuration Manager.
2. Go to **Home > Audio Files > User- Agent whisper**.
3. Open an audio file and click **Edit**.
4. Click **Delete**.

Note: A warning alerts you if a file is still associated with a queue. Remove the Agent whisper audio file first before you can delete it from the tenant.

Replace Agent whisper audio files for a queue

If you have uploaded other Agent whisper audio files, you can simply change the audio file for the queue:

1. Log in to the 8x8 Configuration Manager.
2. Go to **Queues/ Skills**.
3. Open an outbound or inbound phone queue.
4. Go to **Properties > Agent whisper audio** and select another audio file from the drop-down.
5. Click **Save**.



Remove Agent whisper audio files from a queue

To remove an Agent whisper file from a queue:

1. Log in to the 8x8 Configuration Manager.
2. Go to **Queues/ Skills**.
3. Open an outbound or inbound phone queue.
4. Go to **Properties > Agent whisper audio** and select **None** from the drop-down.
5. Click **Save**.

Using Agent whisper in 8x8 Agent Console

In 8x8 Agent Console calls flowing into or out of 8x8 Contact Center stay in a queue until an agent is available. When an agent changes their status to Available, the longest waiting call in the queue is offered to the agent. If the agent is a member of multiple queues, and the Agent whisper is set up for the tenant, Agent whisper informs the agent, upon connection, about the connected call. Agent whisper provides a useful prompt to the agent. For example, in Auto Answer mode, agents typically do not have time between calls. The whisper helps them identify the context of the incoming call even before the customer information pops for preview, thus allowing them to prepare for the call. Agent whisper messages can be heard on both inbound and outbound calls.

Enhanced outgoing email settings for channels and agents via SMTP

As an 8x8 Contact Center agent, when you send an email to a customer, you want to ensure that the customers receive them without being blocked by outbound email servers on the agent's side or blocked by spam or spoofing filters set in the email servers on the customer's side. Prior to this release, a single configuration was used for all outgoing email, whether a system, pre-configured SMTP server, or a custom SMTP server. To ensure delivery of emails sent by agents, 8x8 8x8 Contact Center now supports an enhanced configuration for outbound mailing system which is only available for custom SMTP servers.

Note: The overall tenant behavior in regards to outgoing emails is governed by the default server in the Security > SMTP Servers.

When an agent sends an email via a channel, it uses the channel address. When an agent sends an email via their own address, it uses their individual email address. When sending out emails, the **From** section in the email header must match the address used for sending out that email, which implies using correct accounts and credentials of the actual sender.

Features

- Prevents agents emails from being blocked by the agents outbound email servers.
- Prevents agents emails from going to the customer's spam and junk folder, or being blocked by spoofing filters.
- Ability to use the legacy pre-configured SMTP server with a single configuration.
- Ability to have one or more custom SMTP servers specifically configured for each email channel or agent.
- Uses the channel email address when agents send emails via a channel.
- Uses the agent email address when agents send email via agent's email.

Set up custom SMTP servers and configure email channels

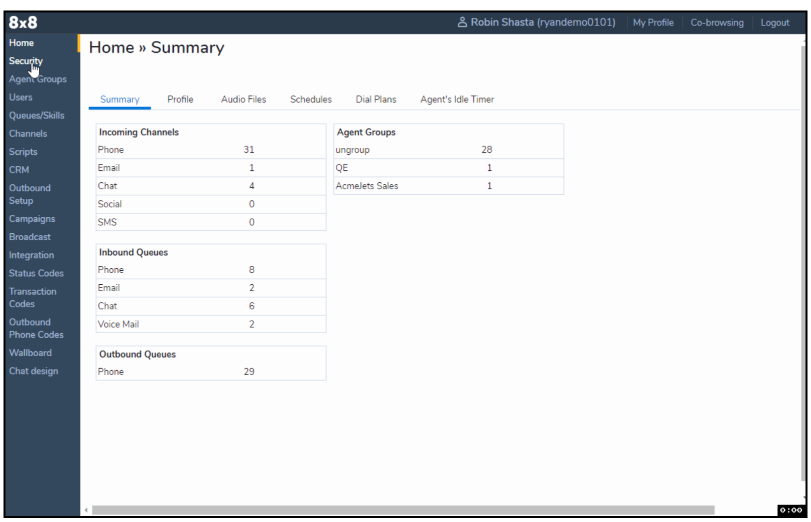
Follow the steps below to set up a custom outgoing SMTP email server, configure an email channel, and configure a user email channel:

Step 1: Set up a custom outgoing SMTP email server

SMTP servers control the email delivery process of your contact center. You may use the 8x8 provisioned internal server that is VCC Internal SMTP Server, or configure any number of custom servers. Having a default server ensures that all outgoing emails originating from email channels or agents will be using this server and a single default account. Having a custom SMTP server as default, however, allows email channels and agents to use distinct accounts for outgoing email, as configured individually.

To set up a custom outgoing SMTP email server:

1. Log in to the 8x8 Configuration Manager.
2. Go to **Security > SMTP Server**.
3. To add a custom SMTP server, click **+ SMTP Server**.
4. Enter a Name for your custom SMTP server such as [AcmeJets SMTP Server].
5. Enter a server name such as [smtp.gmail.com].
6. Add the **Port** number, select the **Connection Security** and **Authentication Method**. For details, see the instructions in creating an SMTP server.
7. Enter the SMTP server account's **User Name** and **Password**.
8. Enter a working email address to test the SMTP server connection and click **Test**.
9. Check your email inbox to see if you have received an email. A test email from 8x8 VCC is sent to test the settings of your SMTP server account.
10. Click **Save**.



If you have selected default, or every time that you change the default SMTP server, a prompt appears asking if you like to:

a. **Save and Update all**: Admin updates the configuration in bulk for all email channels and agents outside of business hours. Credentials still have to be updated individually.

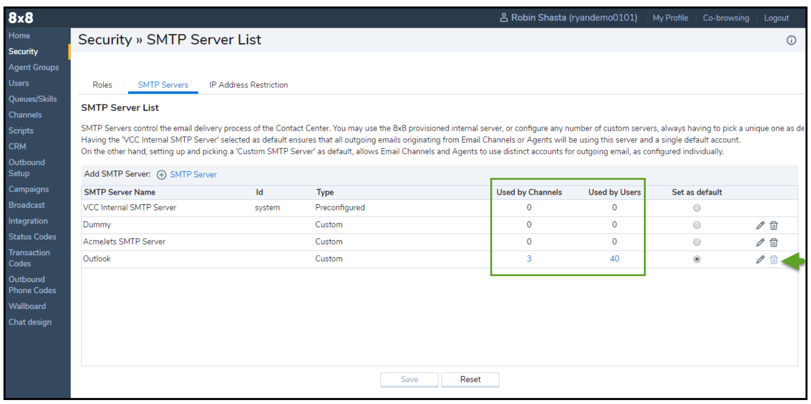
b. **Save and Keep settings**: Admin keeps the current configuration for the email channels and agents and updates them individually at a later time.

Under the SMTP server list, you can see the number of users for each server. Click the number and you will see more information regarding the servers **Used by Channels** or **Used by Users**.

11. Set the server as **default**.

> **Note:** You cannot delete the default server unless you set another server as default first.

12. Click **Save**.



Step 2: Configure an email channel

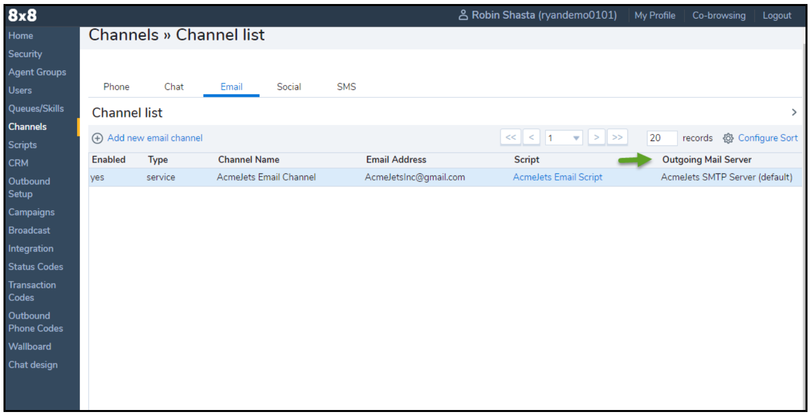
Go to Channels > Emails to see a list of outgoing mail servers. You can sort and filter the list of servers. If the channel is set up with the system server, all outgoing mail channels go through the same system server, whereas in the channels with a custom server, you can select an outgoing mail server to send your emails from. When you select a custom server for your outgoing mail, you need to enter an email address for the channel and a specific password for that channel.

To configure an email channel:

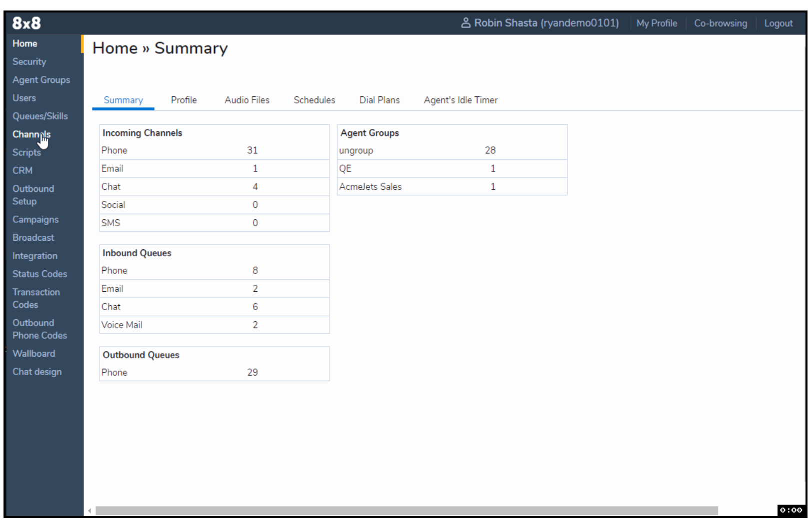
1. Log in to the Configuration Manager.

2. Go to **Channels > Email**.

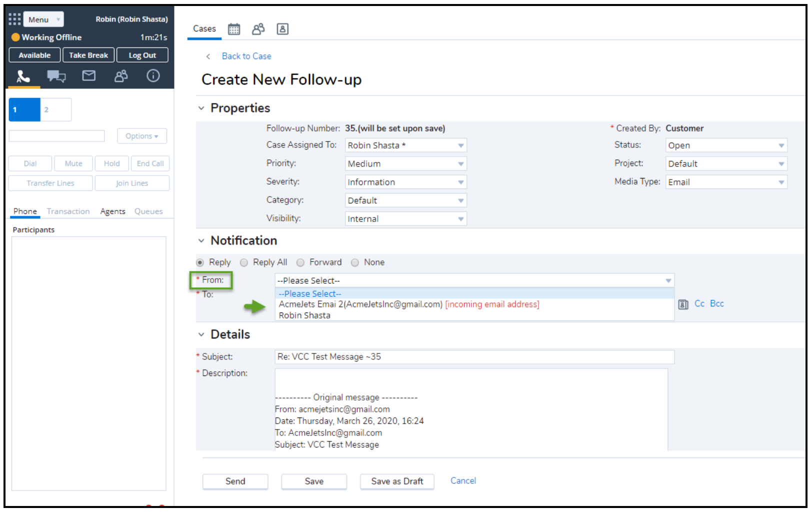
   Note that a new column is added to show the Outgoing Mail Server. You can sort or filter your channel list.



3. Click **Add new email channel**.
4. Enter a **Channel Name** and enter or select values for the channel.
5. Enter **Incoming Mail Configuration**.
6. For **Outgoing Mail Configuration**, the default SMTP server is automatically populated:
   a. If the system SMTP server is selected as default, you cannot modify the outgoing mail server.
   b. If a custom server is selected as default, you must select an outgoing mail server and its password.
7. Click **Test connection**. A message appears to show the connection to the outgoing mail server is successful.
8. Click **Ok**.
9. Click **Save**. The outgoing email channel is now configured.



In Agent Console, when sending an email, the agent can select this outgoing email channel to send emails to customers.



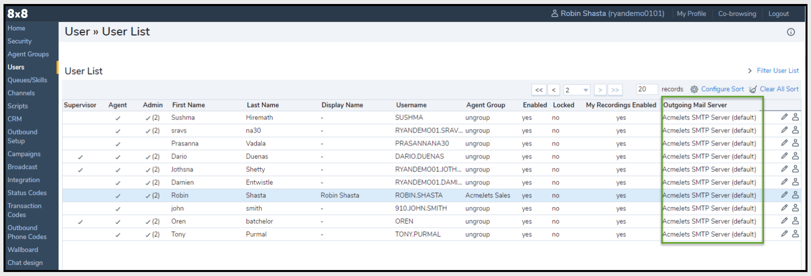
Step 3: Configure a user email channel

Designate an outgoing mail server for the user in Configuration Manager and under **Users > General**.

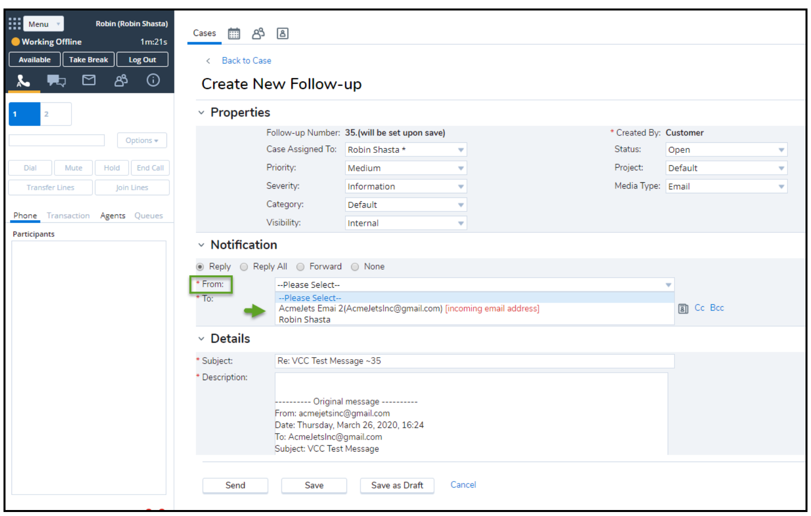
To configure a user email channel:

1. Log in to the 8x8 Configuration Manager.
2. Go to **Users** and select a user from the list.
3. Enter an email address for the user if there is none already.
4. The **Outgoing Mail Server** is automatically populated with your custom default SMTP server. You can change the SMTP server. For the system default mail server, the above field is disabled.
5. Click **Save**.

Note: You can view the **Outgoing Email Server** in the users list. To show this column, open Users, right-click the header bar of the Users list and select **Columns > Outgoing Mail Server**.



In Agent Console, the agent enters their email address and password in the Profile page and tests the connection. If there is no password set up, a message prompts notifying the agent that there is no email password configured for your email account. To send an email from the custom email server, the agent must select his email to send emails to customers.



Transferred chat interactions with contextual information

When your agents know who your customers are, what they're looking for, and what they've already shared with another agent, they can give better service, faster. Contextual information informs agents facilitating more productive conversations while handling customer issues. 8x8 Contact Center introduces the ability to hand off the conversation with interaction details when transferring a live chat.

Let's say a contact center agent interacting with a customer via chat, has to transfer the customer to another department. Transfer the live chat interaction to another queue. Upon transfer, the agent receiving the transferred chat interaction can view the customer details gathered via the pre-chat form, the agent name transferring the interaction, the channel the interaction was initiated on, and the queue to which it is transferred. With all this information, the second agent quickly reviews the customer information as well the context of the conversation, processes the chat interaction more effectively. At the termination of the chat, the chat log includes the original transaction ID along with the chat transcript. The chat log created with the first agent indicates the chat was transferred.

The transfer of information is supported throughout the customer journey, in a chain interaction where a chat interaction is transferred to and processed by multiple agents. Every agent receives the information until that point.

As a supervisor, you can review the path of an interaction by accessing the transfer details via Monitoring. Who accepted the chat first, which queue did they transfer it to, who was the second agent to receive the interaction and so on.

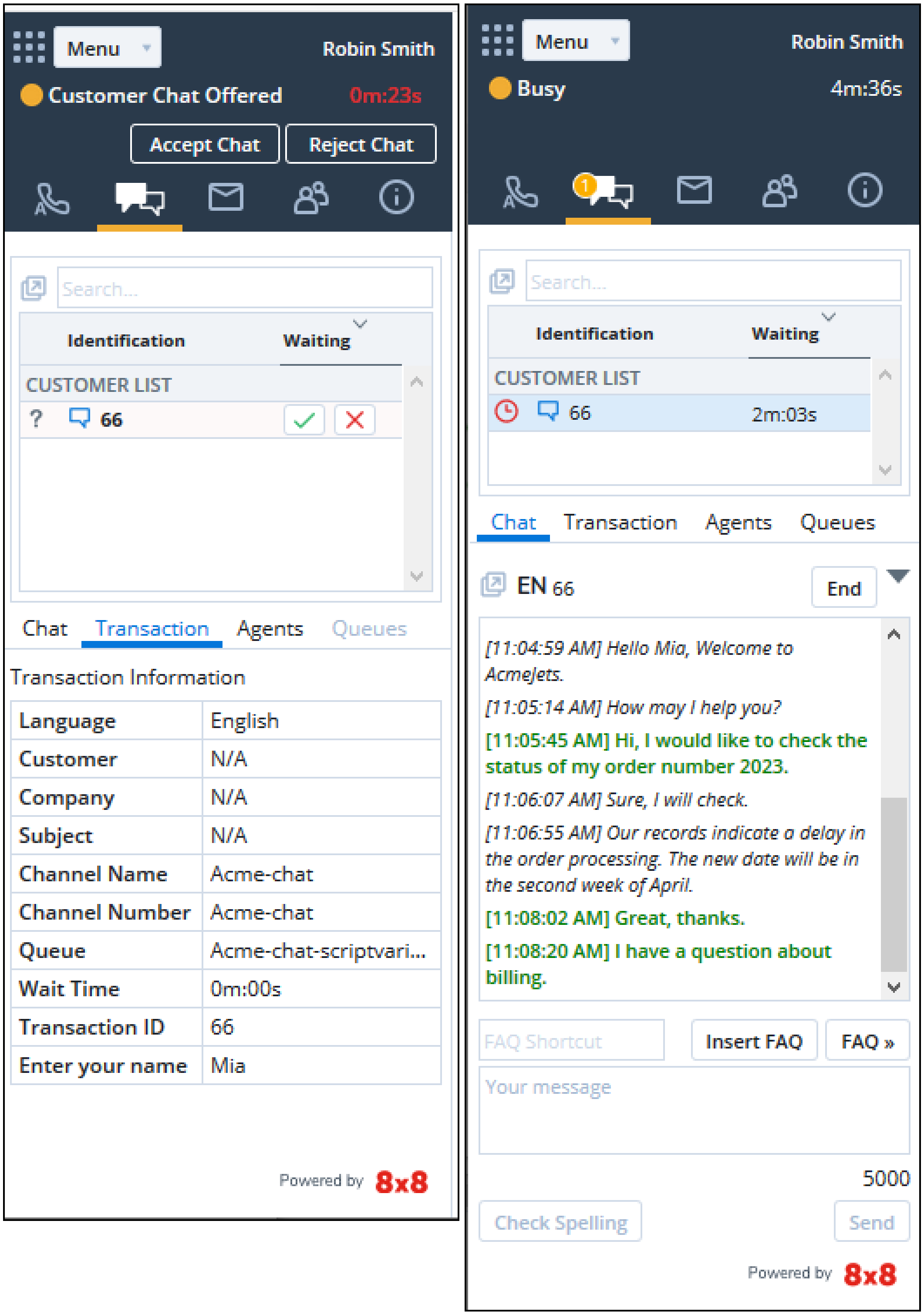
Note: The chat history is bound to the customer and the channel, so agents can see chat history from all previous interactions with the customer on the same channel. Agents cannot see what happened on another channel that the same customer might have used in the past.

Use case

At AcmeJets, agent Robin accepts a chat request from customer Mia, who is looking for information regarding a recent sales order. Agent Robin pulls up the order information and processes the request. Mia then has a billing related question. Robin must now transfer the live chat to their billing queue. She then informs Mia about the transfer and transfers the conversation to the billing queue. Agent John receives the chat request, takes a quick look at the customer information collected during pre-chat, accepts the chat to view the conversation details with agent Robin.

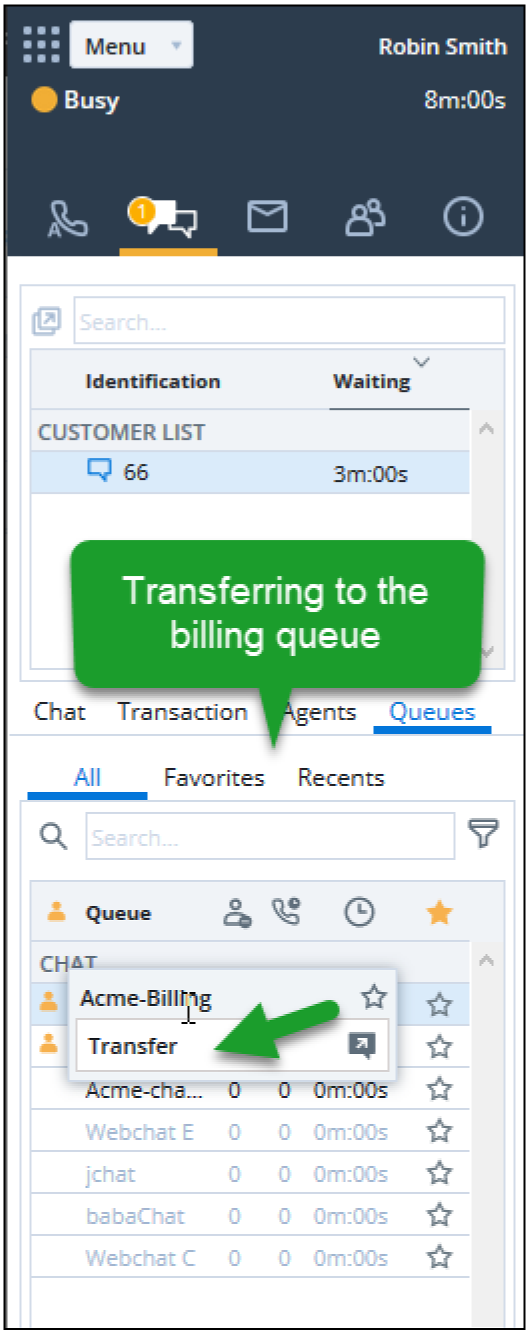
Step 1: Agent Robin accepts a chat interaction from customer Mia.

Agent Robin in the Sales department accepts the chat interaction from customer Mia and answers her questions.


Menu
Robin Smith
Customer Chat Offered
0m:23s
Accept Chat
Reject Chat
Search...
Identification
Waiting
CUSTOMER LIST
? 66
Chat
Transaction
Agents
Queues
Transaction Information
Language English
Customer N/A
Company N/A
Subject N/A
Channel Name Acme-chat
Channel Number Acme-chat
Queue Acme-chat-scriptvari...
Wait Time 0m:00s
Transaction ID 66
Enter your name Mia
Powered by 8x8
Menu
Robin Smith
Busy
4m:36s
Search...
Identification
Waiting
CUSTOMER LIST
66 2m:03s
Chat
Transaction
Agents
Queues
EN 66
End
[11:04:59 AM] Hello Mia, Welcome to AcmeJets.
[11:05:14 AM] How may I help you?
[11:05:45 AM] Hi, I would like to check the status of my order number 2023.
[11:06:07 AM] Sure, I will check.
[11:06:55 AM] Our records indicate a delay in the order processing. The new date will be in the second week of April.
[11:08:02 AM] Great, thanks.
[11:08:20 AM] I have a question about billing.
FAQ Shortcut
Insert FAQ
FAQ »
Your message
5000
Check Spelling
Send
Powered by 8x8

Step 2: Agent Robin transfers the interaction to the Billing queue

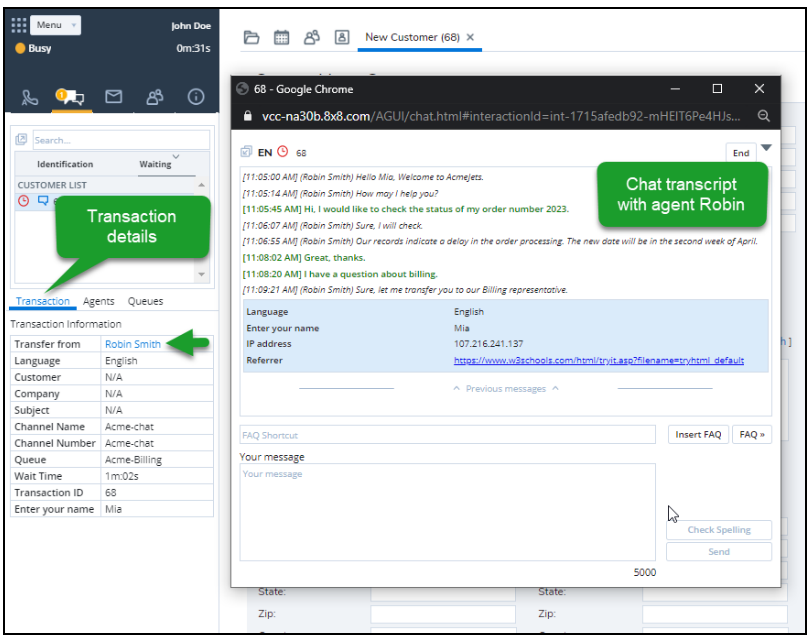
Mia has a billing related question. Agent Robin must transfer her chat to the Billing queue. He informs customer Mia about the transfer.



Step 3: Agent John in Billing accepts the chat.

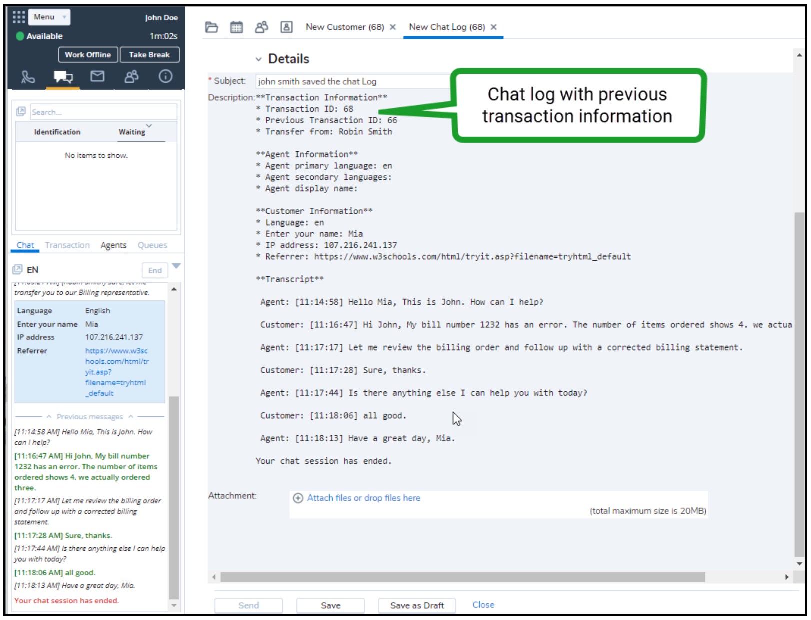
Agent John in Billing accepts the chat and receives all the information about the customer along with the chat transcript with agent Robin. The Transaction tab displays the following information:

- **Transfer from**: Indicates the agent who transferred the interaction
- **Channel Name**: The chat channel that received the interaction
- **Queue**: The chat queue that is currently offering the interaction
- **Customer**: Customer name if this is an existing customer
- **Company**: Company name the customer is affiliated with
- **Pre-chat information**: Information collected via pre-chat (such as language and customer name)
- **Transaction ID**: The transaction ID of the chat interaction with this agent

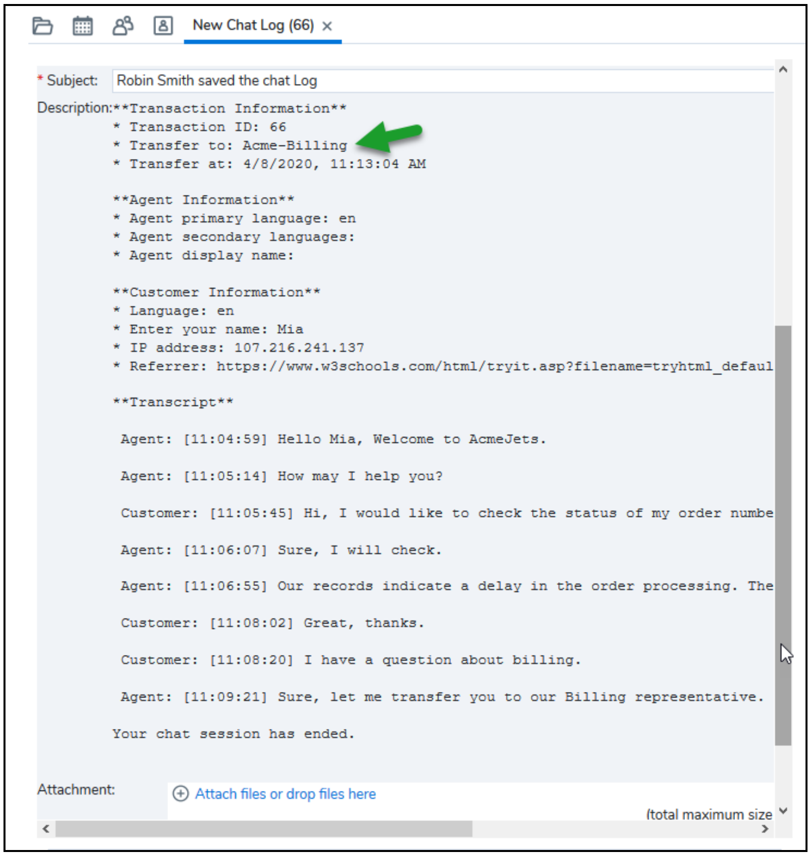


Step 4: Agent John processes the customer’s billing question and ends the chat conversation.

Agent John chats with Mia, processes the interaction, and ends the conversation. Upon termination of the chat, the chat log pops. It includes the current transaction ID as well as the previous transaction ID. It also indicates that the chat is transferred from agent Robin.



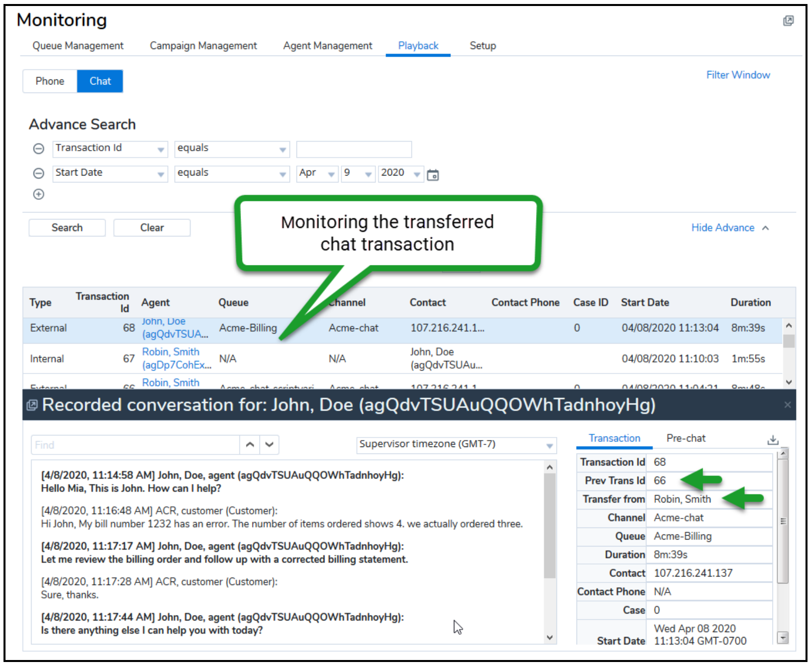
The chat logged with agent Robin indicates that it is transferred to the billing queue.



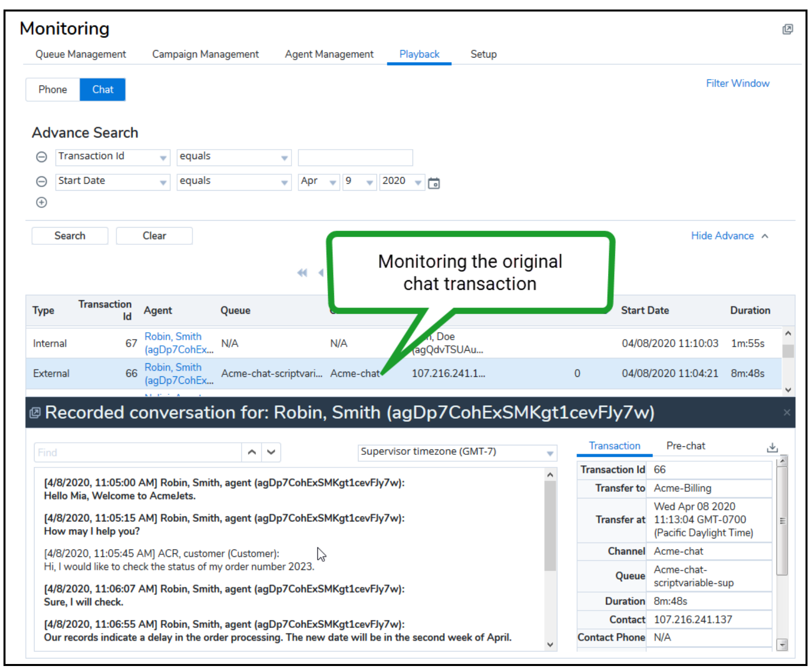
Monitoring transferred chat interactions

As a contact center supervisor, you want to track how efficiently the chat interactions are being handled by agents. When agents transfer interactions, you want to understand the reason for transfer, was it transferred to the right department? Did the agent ask all the right questions before transferring? Did the agent accepting the transferred conversation receive all the necessary information to handle the chat? You now get answers to all your questions in your Monitoring tool.

1. Log in to Agent Console as a supervisor.
2. From the menu, go to **Monitoring**.
3. In the **Playback** tab, select **Chat**. You will see the list of chat interactions for a specified time range.
4. From the list, select a specific transaction to view the transaction details as well as the chat transcription for that leg.



If the details indicate that it was a transferred chat, you can fetch the previous transaction ID, look for it in the list, and bring up the details (see below).



Intelligent routing of chat interactions based on customer data

Before initiating a chat interaction in 8x8 Contact Center, customer information such as account numbers or case numbers collected via the pre-chat form, can now be used to determine routing of the chat interaction. You can now collect customer data, store them into system and user-defined variables, and use values stored in these variables to direct the interaction to the appropriate queue. This improves the efficiency of handling chat interactions.

Let’s say your company wants to route interactions based on the customer language. Collect the preferred language choice in a variable, and use this data in the IVR to direct them to the appropriate language queue. Let’s say your company wants to route interactions based on the department such as Sales or Support, you can collect this information during the pre-chat, and use it to route the interaction to the right queue.

These variables can be used to store data in advanced interaction routing involving external IVR. To learn more, see our content on enhanced data augmentation.

You can also use variables to present personalized greeting messages based on the customer input. If the customer enters their name, then greet them by name.

Note: The variables are also supported in the Embedded Chat API.

Let’s say your contact center has implemented the 8x8 web-chat solution. Your users log into the website so you already have information about the customer based on their account, e.g. language of the account or the browser language. You do not have to ask the customer for this information in the pre-chat form again. Use the 8x8 Embedded Chat API to post this information using variables. The contact center admin has to make sure to define the same name for variables in the IVR script as used in the API, to ensure routing based on this customer information.

Limitations

- Pre-chat forms can only collect data for a single CRM field.
- Variables are limited to string data type.

Using script variables in chat channels

In this topic, we’ll demonstrate the usage of script variables in chat channels based on the following use case.

AcmeJets Inc. is a premium jet service company that serves its customers via chat channels. When a customer initiates a chat, AcmeJets collects basic information such as customer name, account number, and the preferred language for chat. AcmeJets serves customers in English and Spanish, and have dedicated queues for each language. They want to direct customers to the appropriate queue based on the language choice. Additionally, the company wants to personalize their conversation for best customer satisfaction.

Assumptions

Let’s assume that AcmeJets contact center has:

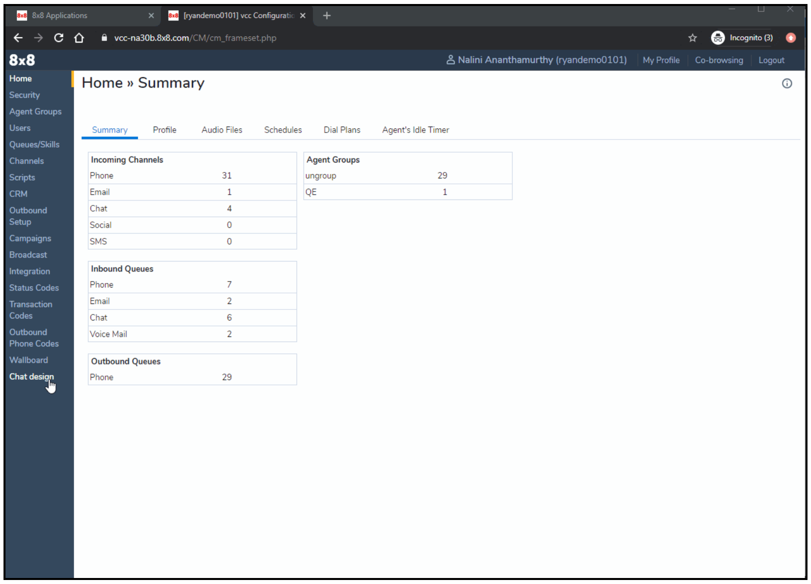
- Configured a chat channel
- Configured chat queues
- Designed chat elements (chat button, pre-chat form, and chat window)

To support the use case, follow the steps discussed here:

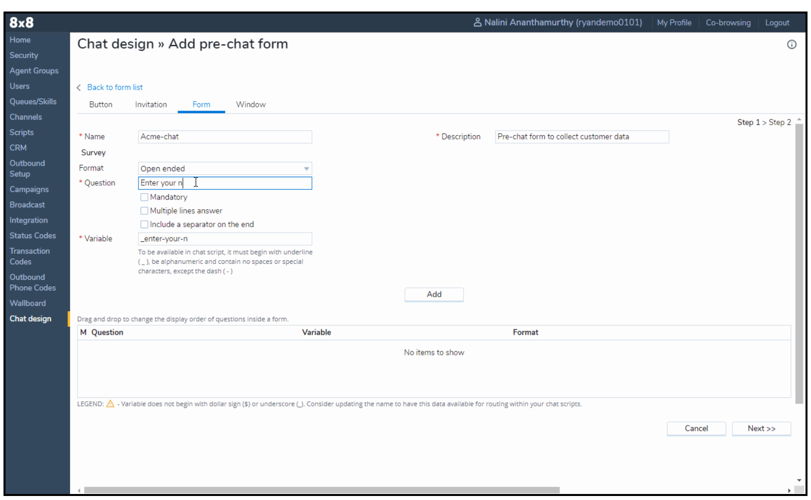
Step 1: Create a new pre-chat form or edit an existing pre-chat form

In this step, we create a new pre-chat form which collects a customer’s name, and preferred language for chat. Store the values in a custom variable and a translation variable respectively. Important: For custom variables, note down the variable names to be used in chat scripts.

1. Log in to the 8x8 Contact Center 8x8 Configuration Manager.
2. Go to **Chat Design > Form**.
3. Click **+Pre-chat** to begin creating a pre-chat form.



4. Enter a name and description for the pre-chat form.
5. Add your first question to collect customer information.
   a. **Format**: Select <Open-ended>.
   b. **Question**: Enter the question: <Enter your name>.
   c. **Variable**: Note that the variable name is automatically generated. Edit as you want <_name>.
   d. Click **Add**.



6. Add a question to collect the customer's language preference.

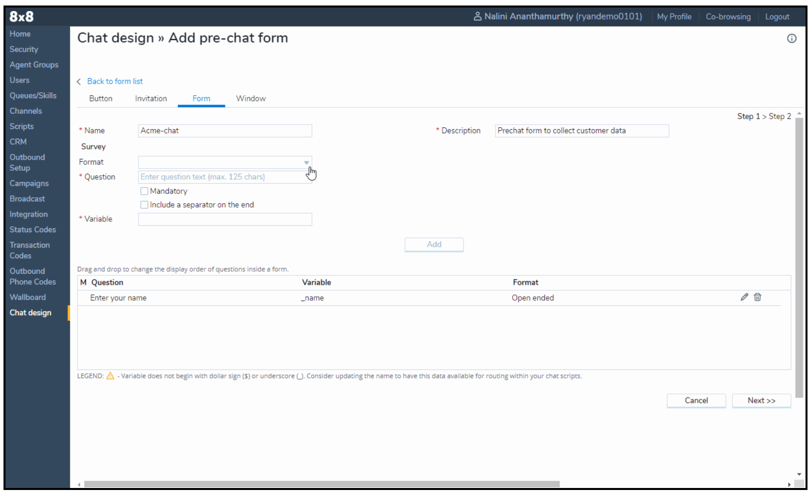
a. **Format:** Select <Translation>.

b. **Question**: Enter the question: <Enter your language>

c. Select language choices from the list: Select <English> and <Spanish>.

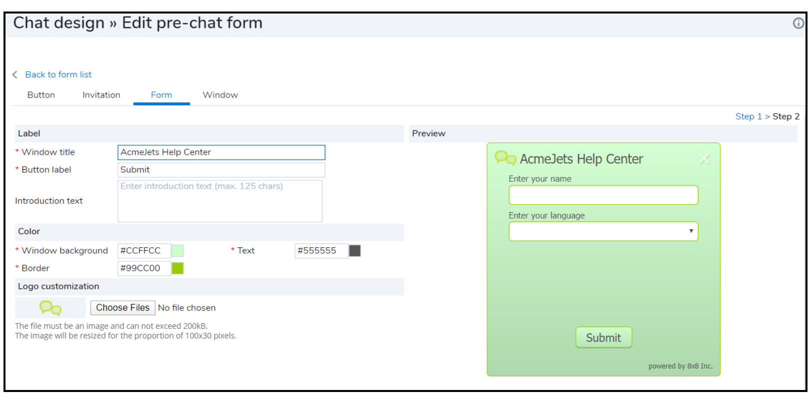
d. **Variable**: Note that the system variable ($language) is automatically populated. You are not allowed to edit the system variable names.

e. Click **Add**.



7. Optionally, add a question to gather either account number or case number. Select the format CRM field.

8. Click **Next>>** to proceed to define the visual design of the pre-chat form. Select the colors and labels. Save your preferences.



Step 2: Create a chat script

In this step, you will define a script that determines the routing of each chat interaction from your customers. When a customer initiates a chat session, they are prompted to submit data through the pre-chat form. Based on this data, they are then directed to the appropriate queue.

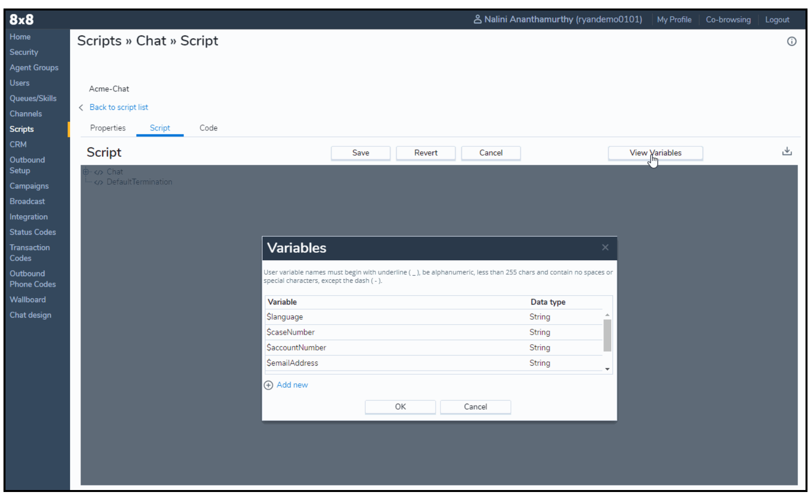
1. Go to **Scripts** from the main menu in Configuration Manager.
2. Select **Chat > Add new chat script.**
3. In the **Properties** tab, enter a name, category, and comment. Optionally, add the chat channel you wish to apply the script to. Save the properties.

Step 2a: Add a custom variable to the variables list.

If you added custom variables in your pre-chat form, you must add them to the variable list here. By default, the View variables lists all system variables. To add a custom variable you have already added in your chat design,

1. In the Script tab, click **View variables**. A list of system variables shows up.
2. Click **Add new** and enter the custom variable name defined in the pre-chat form.

Important: Ensure the custom variable defined in the pre-chat form is added here.



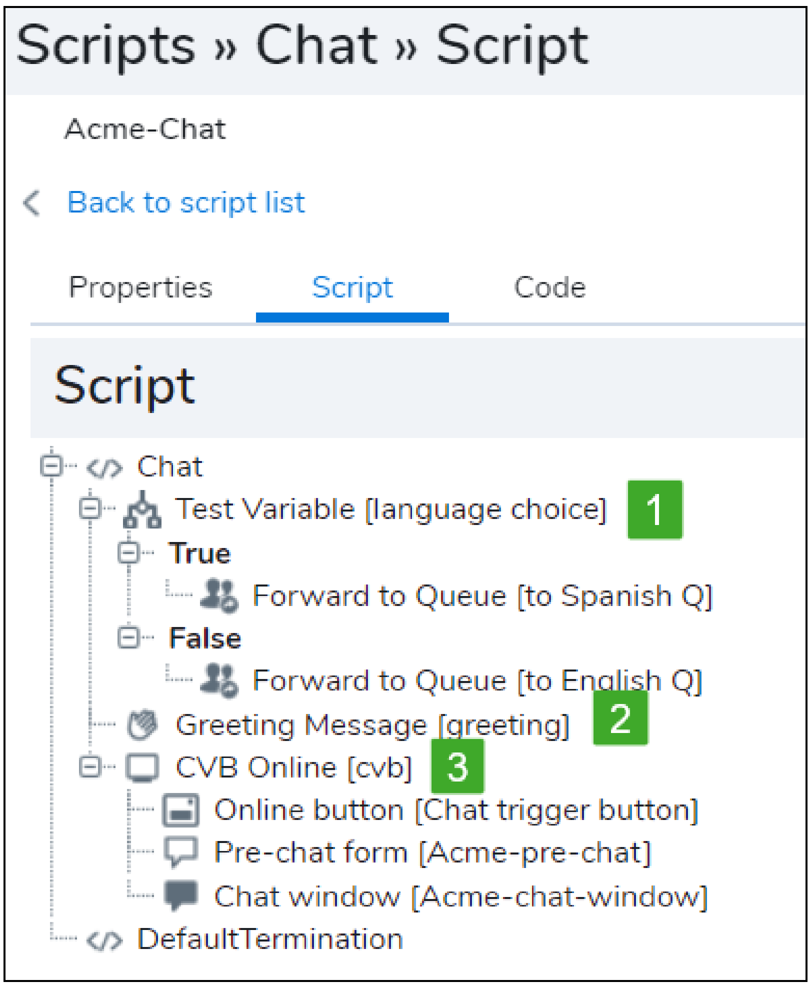
Step 2b: Begin crafting the script.

The chat script will embed a greeting message which includes the customer name. Use a test variable to identify the language choice and direct them to the right queue.

1. Add **Test variable** > Tests if the variable value of language equals Spanish. Tests if a customer selects to chat in Spanish.

- If **True**, add **Forward to Queue**. choose to forward it to the queue serving customers chatting in Spanish language.
- If **False**, add **Forward to Queue**, choose to direct the interaction to the queue serving customers in English.

2. Add a greeting message to the customers. Example: Welcome to AcmeJets. We will be with you shortly.
3. Add all the chat visual block elements you have defined.
   - Chat button (Triggers chat interaction)
   - Pre-chat form (Collects information from the customer; Add the newly defined pre-chat form here.)
   - Chat-window (Allows a customer to interact with the agent)
4. Save the script.

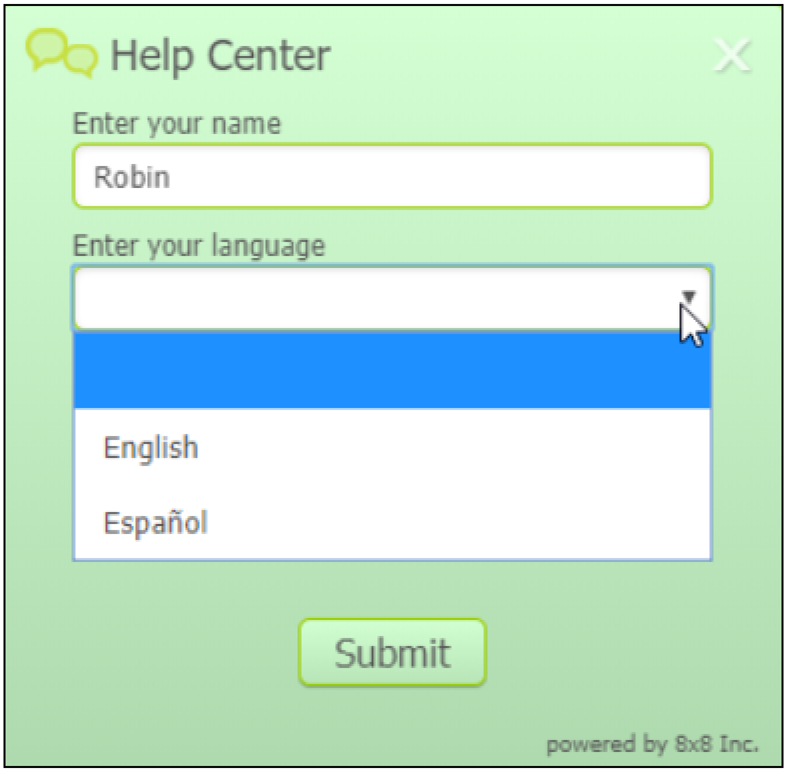


5. In the **Code** tab, select the chat channel to apply this script to.

6. Click **Generate Code**. Copy the code and embed in your website which hosts the chat.

Step 3: Verify the chat workflow

1. To verify the chat workflow, simply initiate a chat as a customer.
2. In the pre-chat form presented, enter your name and select the language - English.



3. Click **Submit**.
4. Log in as an agent serving customers in English. You should now receive the interaction in English.
5. Trigger a second chat interaction as a customer and select Spanish in the pre-chat form and submit.
6. Log in as an agent serving customers in Spanish. You should now receive the interaction in Spanish.
7. If you received interactions via the correct queues, your setup is correct and complete.

Persistence of variable values in historical reports

As a supervisor, you can review customer data gathered via variables. Whether you want to track the number of interactions in English or Spanish, you can verify these values via reports. Chat logs are persisted for later reference.

Supervisor can access chat logs via Monitoring. Agents can access chat logs via CRM Case/Follow-up. The data is also available for integrators via the Call Recordings and Chat Transcripts API.

Enhanced data augmentation

In 8x8 Contact Center, data collected by external CRMs and third party integrations can now be used in a more meaningful way. The data augmentation API allows you to tie data between external applications and call data. This facilitates greater resolution and drives call volumes and time handling. Prior to this release, the two nodes: 8x8 IVR, and forward to external IVR, have been limited in terms of data variables.

Features

- Allows 8x8 customers to tie data between external applications and call data.
- Facilitates routing calls to the correct queues based on data collected.
- Drives down call misroutes and call handling times.
- Results in richer data and better insights in 8x8 Analytics for Contact Center.

Use cases

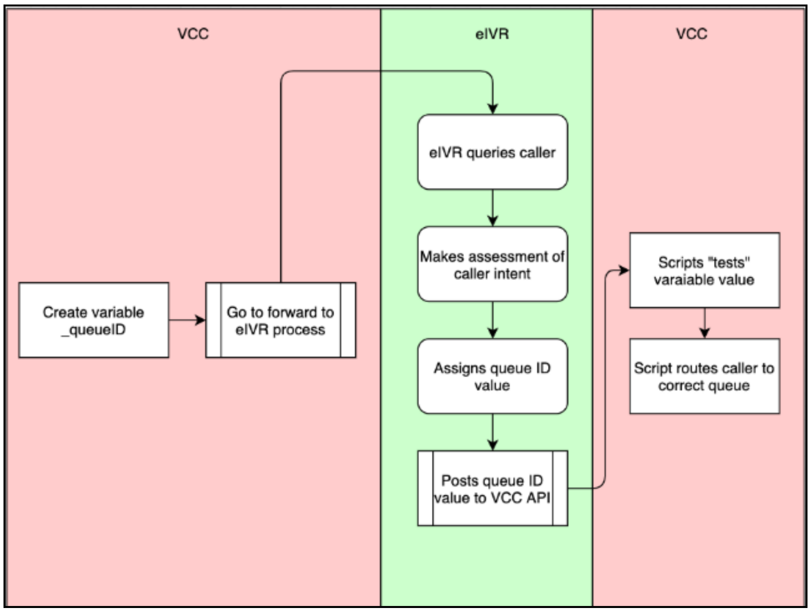
Here are some common use cases for data augmentation:

- Route calls to queues by name, ID, or intention of the call
- Use for advanced Auto Attendant systems
- Route to different stores, locations, or offices
- Route to the last agent who handled the call previously (by integrating to a system that recorded the last interaction)

An example workflow

1. A variable is created based on the call flow or data need.
2. Call arrives at the 8x8 Contact Center.
3. The call is then forwarded to external IVR (eIVR).
4. eIVR asks questions or queries a background integration or CRM, based on caller inputs.
5. The intent of the call is assessed by eIVR.
6. eIVR assigns a queue ID value to the call.
7. eIVR posts the queue ID value to VCC API.

8. Calls are terminated in eIVR.
9. The call is resumed in VCC with the queue ID value assigned.
10. A phone script tests to see if the variable matches.
11. The call is then routed to a queue based on data collected from eIVR.

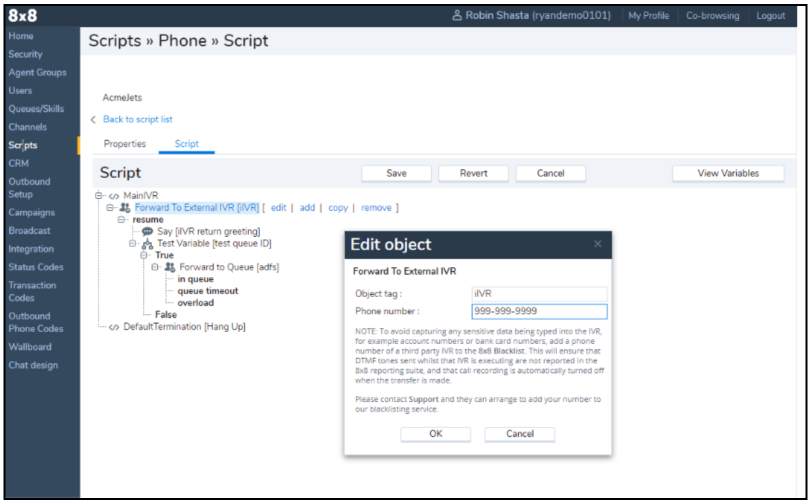


Steps to forward calls to an external IVR (eIVR)

The following steps explain how you can forward calls to an external IVR such as intelligent IVR. Using the phone script in the 8x8 Configuration Manager, forward an incoming call to the external IVR, assign a queue ID inside the intelligent IVR, check the queue ID inside the phone script, and forward the call to the right queue.

Step 1: Forward calls to an external IVR

When a call comes in to a contact center channel, the first step is to forward the call to an external IVR. In the 8x8 Configuration Manager, go to **Scripts > Phone** to create or edit a new script. For details, see our documents on how to create an inbound phone script. When creating or editing a phone script, use the forward to external IVR object to forward the phone interaction to an external IVR server such as intelligent IVR.

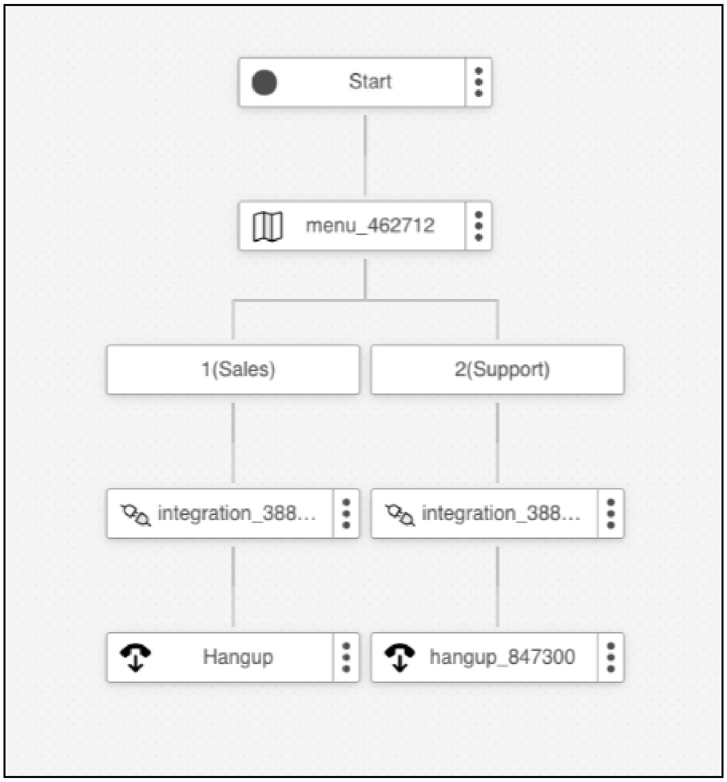


Step 2: Assign a queue ID inside the external IVR

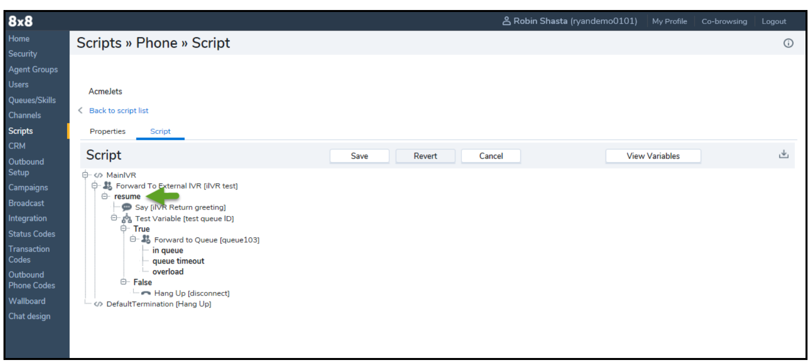
Within the external IVR such as intelligent IVR application, the caller selects a menu choice that assigns a queue ID or variable, then sends the call back to the 8x8 IVR. The queue ID can be assigned based on:

- An integration between 8x8 and eIVR solutions
- A menu selection
- The caller identity verification

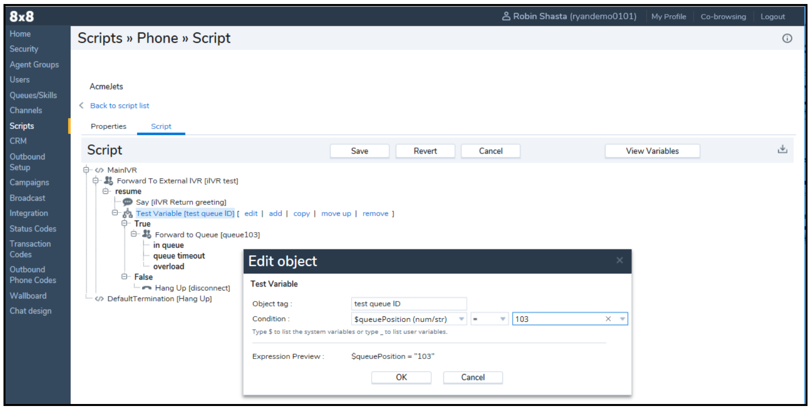
The simple menu below shows the selection to attach the variable. The caller selects 1 or 2 to be directed to either the Sales or Support queue. A queue ID is assigned and the call is sent back to the Contact Center. Inside the intelligent IVR integration, multiple variables can be attached based on the customer needs, such as queue names or phone numbers. 8x8 uses the basic authentication method or SIP call ID as the primary key to correctly identify the caller and apply the right variable to the call.



Step 3: Check the queue ID in the 8x8 phone script

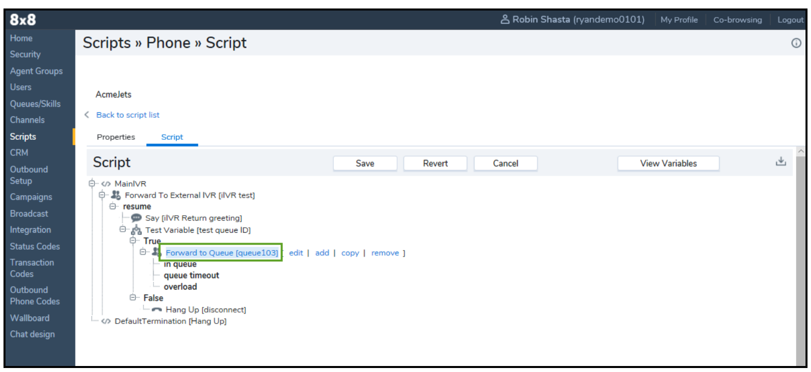


Use the phone script **Test Variable** object to run a simple variable test with a true or false statement. If the queue ID matches the variable assigned in the external IVR, the call is routed to the correct queue. You can also check a call by name or a phone number. The simple task below shows the ability to take action based on a variable returned by data augmentation API:



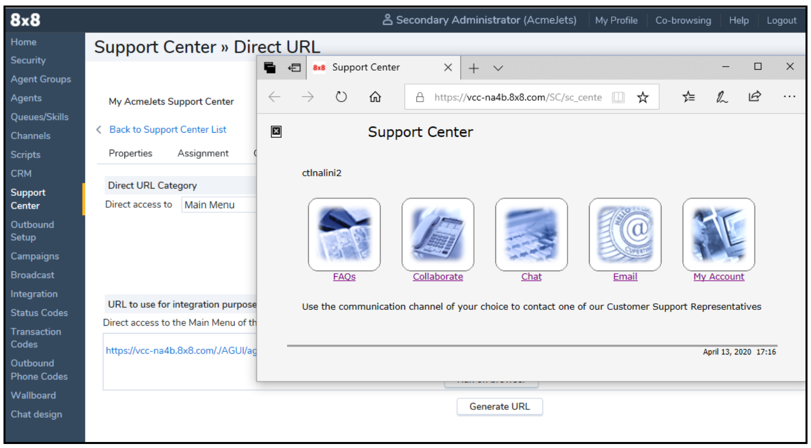
Step 4: Forward the call to the right queue

If the variable test is passed, we forward the call to the correct queue within the same script using the Forward to Queue object.



Announced end of life for Support Center functionality

In this release, 8x8 Contact Center is retiring the Support Center functionality. Support Center previously offered communication channels and information services for your customers to reach your contact center agents and get help. We offered direct URLs to the default or custom Support Center which could be embedded in your company website.



In this release, access to Support Center functionality is not provided through Support Center, but through new tools and interfaces as seen below:

Feature	Description	Access
FAQ	FAQ was a repository of frequently-asked questions and answers for customers which was accessed via a user interface.	Use the CRM API to add, modify, get, delete, and list FAQs. For details, see our CRM API documentation.
Collaborate	Collaborate was a mechanism for agents to remotely access and control a customer's computer.	The control functionality is no longer available, however, the remote access and user guidance functionality is replaced by the improved Co-browsing feature to offer remote customer access.
Chat	In the Support Center, chat provided a user interface for customers to initiate a chat with live contact center agents.	We now offer chat, SMS, and social media channels with better chat workflow and design. For details about chat, see our documents for the Embedded Chat Channels. To take advantage of social media to service customers, such as Facebook and Twitter, see our guide about Social Media Integration.

Feature	Description	Access
Email	The Email functionality in the Support Center offered a user interface for customers to send emails to agents.	Customers can now publish the email addresses for support, as configured in the email channels on Configuration Manager. Or, implement their own email submission forms on their websites and forward them to the inbound email server as configured for 8x8 Contact Center. For details, see how to set up email channels.
My Account	My Account was a portal for customers to submit information requests or open cases and receive responses to requests. Customers could check the status of their cases, or close their cases using this portal.	We are no longer offering My Account, by default, for Local CRM. However, for more advanced implementations we offer the CRM API which can be used by Contact Centers to implement their own portal similar to My Account. For details, see our CRM API documentation.

Bug fixes 9.10

In 8x8 Contact Center, we have fixed the following bugs in this release:

Bug	Summary
VCC-41861	Tenant error when a session expires; after the session expires and the user is logged out, it goes to a legacy login page.
VCC-41844	On select tenants, agents get stuck in post processing if agent A's inbound caller hangs up while agent A is consulting with agent B.
VCC-41659	In Persistent connection mode, agent workplace phone with spaces in the DID causes an internal server error and does not release call ports.
VCC-41516	Inbound callers hear dead air when an agent transfers the caller to a queue that has call-forwarding set up to a VCC channel while the agent is being monitored by a supervisor.
VCC-41418	In Monitoring > Advanced Search, performing a search by contact name returns no results.
VCC-39130	Detail Transaction Activity Reports does not show calls in the correct date and time order.
VCC-39087	Post Call Survey is played to agent instead of caller after a warm transfer.
VCC-39049	Wallboards cannot run under an iframe after the 9.8.0 upgrade.
VCC-39039	Duplicate voicemail transactions are generated.
VCC-37620	Forwarding an email to a queue results in the incorrect case being transferred.
VCC-37513	Status Code List on the Monitoring Window > Agent Management >Real Time tab is not displaying what has been selected.
VCC-36612	Line 2 recording does not resume if you click the hold button on line2.
VCC-36520	Running historical reports returns some negative values.
VCC-34126	WAPI does not allow an email address for a customer to be set to an empty value.
VCC-33668	In Scripts the Get Digit, 0 seconds timeout option actually takes 10 seconds.
VCC-28755	A localization error offers the schedule in a different language, when the admin language is other than English (US).

Bug	Summary
VCC-25625	Getting a list of chats takes an extended period of time.
VCC-36951	Queue timeout interactions block call ports.
VCC-40007	Agent Console is stuck in a busy state after ending chat.
VCC-41019	Searching for the alternative number returns no results, full or partial.
VCC-41113	Unable to save email as a draft if there is an attachment.
VCC-38032	Outbound email stops sending intermittently.
VCC-41531	Recording deletion API returns the right response code, but those recordings are not deleted.
VCC-40959	Local CRM does not allow the editing or closure of cases with html tags in the body.
VCC-40903	Agent status changes from Working Offline to Available if Line 2 is hung up last.
VCC-40989	If the external password has special characters, the agent login keeps on spinning.
VCC-40211	Email reply from Agent Console does not provide the reply-to address.
VCC-40210	On Agent Management, from the beginning of day, the time on Status % color bar is not calculating correctly.
VCC-39953	UK agent profiles with date format of dd/mm/yyyy get stuck at contacting the server when editing FAQ.
VCC-39478	Inaccurate time for On Break status when the agent places an outbound call at the same time as an inbound transaction is assigned.
VCC-39054	When replying via unitary view there is a message saying: Network Error. Please try again later.
VCC-38779	In the Customer tab, using an apostrophe (') in any text field will save as an inverted comma (").
VCC-38502	VCC Monitoring Playback shows all internal chats.
VCC-38259	Cases in draft status cannot be deleted.
VCC-37172	Security fix is required on the agent side of chat.
VCC-36550	Historical reports for agent transactions do not reconcile totals with the counts for accepted/rejected/abandoned interactions.

Bug	Summary
VCC-36320	Caller name and Caller number data is missing from Quality Management interactions data from Direct Access calls.
VCC-35687	Changing the Integration Type does not update the Outbound set up target type when disabled.
VCC-35349	Inconsistent ready time is displayed in the Teleopti integration.
VCC-29959	Phone tab cannot be saved if the primary agent directory number is longer than eight digits.
VCC-27464	Internal features are visible to external customers.
VCC-26112	Phone IVR scripting node (Say) does not handle contractions such as: you've, can't, and don't correctly.
VCC-43167	Agent 2 doesn't receive a Line 2 Agent-to-Agent call from Agent 1 when both agents have a persistent connection.
VCC-42418	When a Persistent Mode agent transfers an inbound call to another queue it fails intermittently.
VCC-41997	CM Admin gets stuck with contacting the server if they try to change a supervisor role for an admin, or update TCL list.
VCC-41868	In Local CRM a PDF attachment converts to .utf file when you click on it to view.
VCC-41847	The case report times out after two minutes.
VCC-41759	The copied CM Campaigns do not show up on the Monitoring page.
VCC-41682	Unable to update email addresses using WAPI when the email address contains an apostrophe.
VCC-41511	Error in a provisioning description causes an infinite loading indicator during Agent Console login.
VCC-40923	Callers are unable to leave a voicemail message when on line 2.
VCC-40911	Internal error appears when trying to download a phone script as a PDF file.
VCC-40829	VCC call recordings are still initiated for agents and queues set at 0 percent call recording.
VCC-40055	Outbound call on a queue does not change its status to Busy for Line2 if Line1 has active post processing. The agent goes back to the Available state even if they are still on outbound call.

Bug	Summary
VCC-39208	Excessive delay occurs when trying to open the selected follow ups in an open case.
VCC-38514	Call activity is missing in reporting when Outbound Phone Codes are used.
VCC-43839	Multiple calls appear in the same recording.
VCC-43727	Queued emails are missing original recipients that were on the main and cc sections.
VCC-43523	Paused recording resumes automatically after you either put a caller on and off hold, or switch back from line 2.
VCC-43246	A customer chat window keeps spinning when they input valid HTML or JavaScript strings into chat.
VCC-40762	Chat from API auto abandons after 35 or 36 minutes of holding.
VCC-42427	Unable to view the full list of email recipients in VCC CRM cases.
VCC-38667	Agent status shows up incorrectly in the VCC directory section.
VCC-35329	Agent calling a Supervisor who is also monitoring them, can cause total loss of audio.
VCC-24921	The # Key has an inconsistent result when used as an IVR menu option.