



8x8, Inc.

Virtual Contact Center

Release Notes

Version 8.0

Revision 1.0



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About the Release

The 8.0 Release Notes for Virtual Contact Center offer you the information required to get started with the new features and enhancements of the latest release. Please refer to the 8.0 product documentation for additional details.

The 8.0 Release Notes provide:

- Detailed overview of enhancements to existing features
- Detailed overview of new features
- Instructions on how to set up and use the functionality

Let the Release Notes guide you through the transition to the 8.0 release of Virtual Contact Center.

Summary of Features and Enhancements

The 8.0 release offers features and enhancements that impact all users of the Virtual Contact Center including administrators, supervisors and agents. Some features are available to agents and supervisors by default, while others need to be enabled by administrators to benefit from the functionality.

Some features are included in various 8x8 packages while others are optionally added. Some features require assistance from 8x8 professional services. Please contact your [Account Executive](mailto:vccsales@8x8.com) at vccsales@8x8.com with any questions on the product packaging or purchase options.

The following table lists the features and enhancements of the 8.0 release and their availability to users.

New Features/Enhancements	Requires Administrator set up	Feature available to Administrator	Feature impacts Agents	Feature impacts Supervisors
<u>Multi Browser Support</u>		✓	✓	✓
<u>Redesigned Agent Console</u>			✓	✓
<u>Local CRM Enhancements *</u> <ul style="list-style-type: none"> <u>Integrated CRM Record View</u> <u>Screen Pop improvements</u> <u>Support for Auto Log</u> <u>Enhanced Case Notification</u> <u>CRM Workflow Programming</u> 	<ul style="list-style-type: none"> ✓ ✓ 		<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓
<u>Enhanced Queue and Agent Directory</u>			✓	✓
<u>Supervisor Console Enhancements</u> <ul style="list-style-type: none"> <u>Historical Reporting</u> <u>Monitoring Playback</u> <u>Enhanced FAQ</u> 			<ul style="list-style-type: none"> ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓ ✓
<u>Configuration Manager Enhancements:</u> <ul style="list-style-type: none"> <u>Ability to control agent's My recording</u> <u>IVR Queued Callback</u> <u>UI changes</u> <u>Updated UI for Support Center</u> <u>Configurable SMTP server*</u> <u>Improved Dialing for Direct Agent Access</u> <u>Enhanced Ring Tone</u> <u>Campaign Preview Timer *</u> <u>Importing CRM data *</u> 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓ 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✓

New Features/Enhancements	Requires Administrator set up	Feature available to Administrator	Feature impacts Agents	Feature impacts Supervisors
<u>Wallboard</u>	✔		✔	✔
<u>Enhancements to API library</u>				

* This feature is subscription based.

Multi-Browser Support

In this release, we extend our browser support to the following browsers:

- Chrome
- Firefox
- Internet Explorer® 10

Agent Console – Redesigned Interface

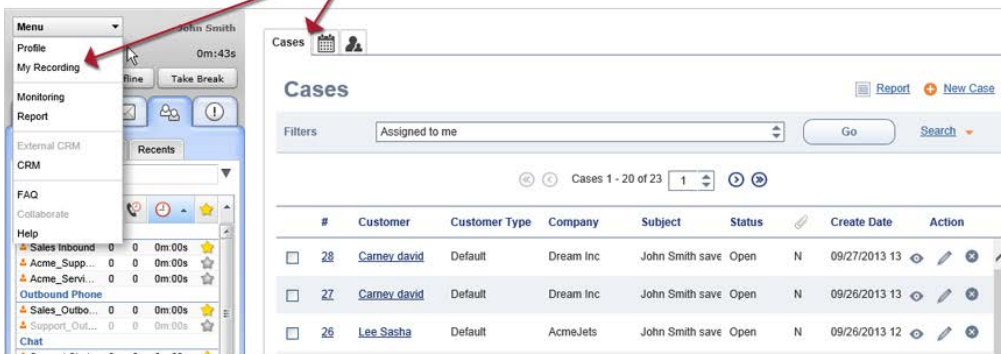
We have made significant UI improvements in Agent Console for better navigation and improved workflow. We have moved the navigation panel icons from right hand panel to action items under the Control Panel menu and CRM tabs:



Pre 8.0 interface



Pre 8.0 navigation panel



Post 8.0 interface

Agent Console Redesigned Interface

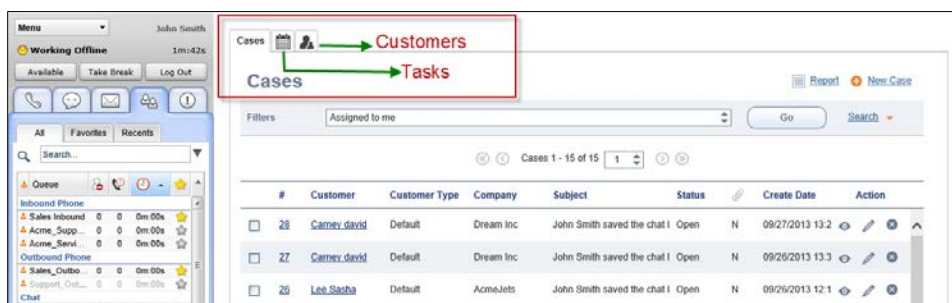
Control Panel Menu

The menu in the control panel features the following options:

Control Panel Menu	Description
Profile	To define account settings and permissions including phone, external CRM connectivity, security, and queue assignments.
My Recording	To record messages to be played to callers.
Monitoring (Supervisor)	To monitor agents and queues real time.
Report (Supervisor)	To assess contact center performance using reports.
CRM	To access the local CRM records.
External CRM	To access the external CRM such as Salesforce® and NetSuite®.
FAQ	To access frequently asked questions and answers for repetitive use.
Collaborate	To remotely connect to a customer computer with remote desktop control options and co-browsing capabilities.
Help	To look for help on the Agent Console functionality including Support Center resources.

CRM Tabs

The CRM tabs on the right hand panel provide access to cases, customers, and tasks.

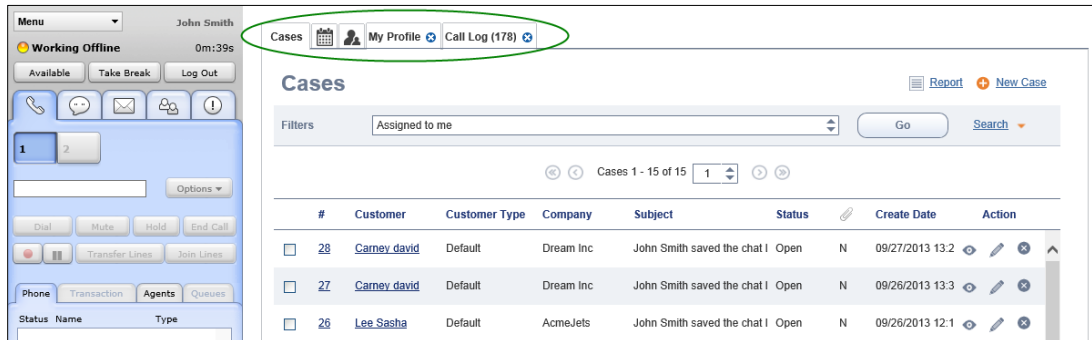


Agent Console: CRM Tabs

Tabbed Workspace

The Agent Console now offers multi-tabbed workspace for a better navigation between tasks. The multi tabbed workspace opens new tabs for menu actions and screen pop without overriding the content in the existing tabs. The new interface allows agents to multi-task. For example, agents can wrap up case work while tweaking profile settings and more.

Prior to 8.0, the single tabbed interface in Agent Console had the limitation of overriding existing content on initiating new actions.



Agent Console: Multi-tabbed Interface

Local CRM enhancements

Availability: Subject to subscription to local CRM services

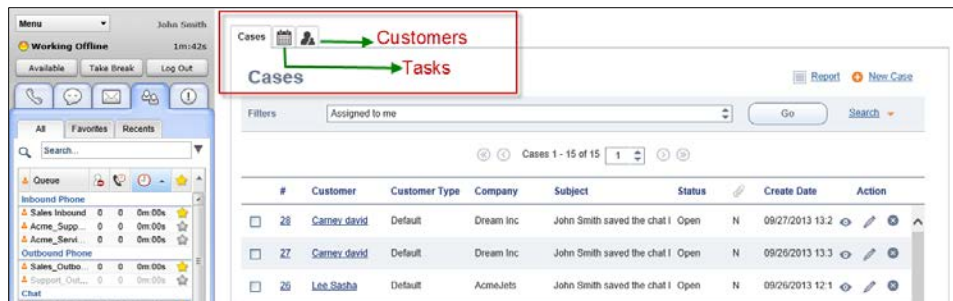
Previously referred to as the Case and Contact Management tool, the local CRM presents newer and better workflow with a redesigned interface. Some of the key improvements are:

- **Convenient CRM landing Page:** Access to customers, cases and tasks through separate tabs.
- **Integrated CRM record view:** Ability to view, search, create, edit, and delete a CRM record from an integrated tab eliminates the need to navigate to multiple screens.
- **Improved screen pop behavior:** Ability to define and control screen pop behavior.
- **Support for auto log:** Automatic logging of phone and chat interactions.
- **Enhanced CRM case notification:** Address book enhancements and more.
- **Improved ability to associate cases to customers:** VCC searches for existing CRM data based on certain parameters such as email ID. If an existing customer sends an email from an email address not on CRM record, VCC triggers a new customer or case entry or creates an independent task. This results in many orphan cases. You can associate these orphan cases with existing customers.
- **Flexibility to create standalone tasks:** You can create standalone tasks without linking to a customer record to create personal reminders.

CRM Landing Page

A new CRM landing page presents cases, customers and tasks into a convenient tabbed environment allowing agents to quickly view and switch between all of their assigned cases, customers and tasks quickly and easily. When agents log into Agent Console, the Display Panel presents CRM data in separate tabs:

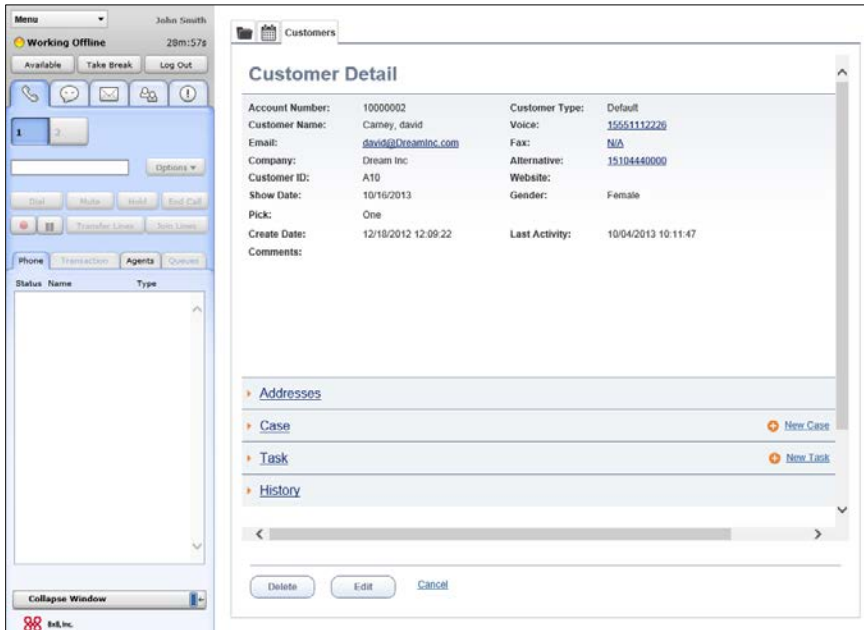
- **Cases:** lists cases assigned to you, groups all related tasks such as – create new case, edit, and delete case, report, search,
- **Customers:** lists customers assigned to you with centralized access to related tasks such as editing a customer record, adding a case, a follow up, or a task.
- **Tasks:** Lists tasks assigned to you with the ability to create new tasks, edit, or delete tasks.



Local CRM > Landing Page

Integrated CRM Record View

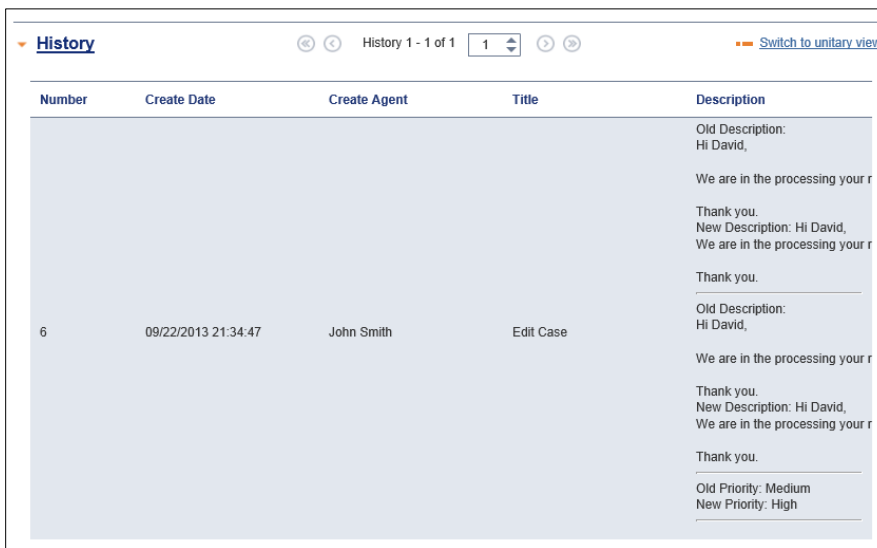
The integrated CRM record view improves agents' productivity by centralizing all the data and the related action links in the same tab. For example, a customer record view presents primary customer data, address information, associated cases, follow-ups, tasks, and any historical data of changes in collapsible views. You do not have to toggle between screens to access related data or perform related tasks.



Agent Console > Customer record detail view

Access to History of Changes

You can track historical data regarding changes to customer records, cases, follow-ups and tasks. History reflects all changes to a CRM record at each save.



Agent Console > Customer record detail view

Enhanced View

In a customer record, you can view related data such as cases or follow-ups or tasks in:

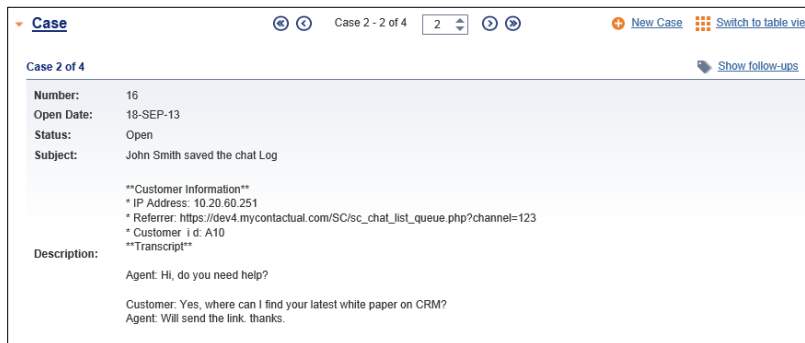
- **Table View:** Presents data in a list format. For example: list of cases



The screenshot shows a table view of cases. At the top, there is a header bar with a dropdown menu set to 'Case', navigation arrows, 'Case 1 - 4 of 4', a page number '1', and buttons for 'New Case' and 'Switch to unitary view'. The table has four columns: 'Number', 'Open Date', 'Status', and 'Subject'. Each row represents a case with a set of action icons on the right.

Number	Open Date	Status	Subject	
17	20-SEP-13	Open	John Smith saved the chat Log	
16	18-SEP-13	Open	John Smith saved the chat Log	
4	04-SEP-13	Open	Check for validity	
2	18-DEC-12	Open	ability to delete a case	

- **Unitary view:** Presents details of each item in the list with controls to navigate to other records. For example: Case record details



The screenshot shows the unitary view for a case. At the top, there is a header bar with a dropdown menu set to 'Case', navigation arrows, 'Case 2 - 2 of 4', a page number '2', and buttons for 'New Case' and 'Switch to table view'. Below the header, the case details are displayed in a structured format.

Case 2 of 4 [Show follow-ups](#)

Number: 16
Open Date: 18-SEP-13
Status: Open
Subject: John Smith saved the chat Log

Description:

****Customer Information****
* IP Address: 10.20.60.251
* Referrer: https://dev4.mycontactual.com/SC/sc_chat_list_queue.php?channel=123
* Customer i d: A10

****Transcript****
Agent: Hi, do you need help?
Customer: Yes, where can I find your latest white paper on CRM?
Agent: Will send the link. thanks.

Screen Pop – Improvements

Availability: Subject to subscription to local CRM services.

Screen Pop is a process that presents matching customer or case records to agents during interaction processing eliminating the need to manually dig relevant customer record. Screen Pop is based on searching existing customer and case records with matching data.

Pre 8.0 Behavior

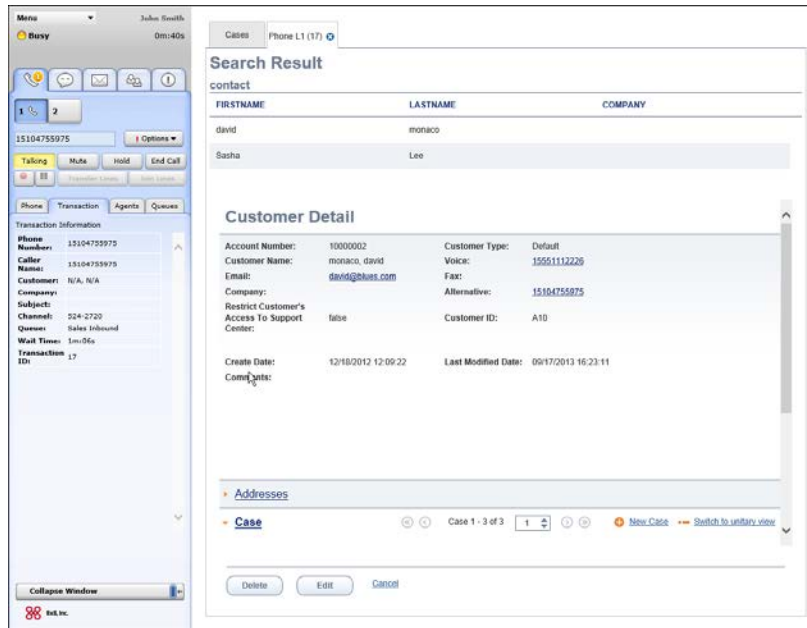
Prior to 8.0, we experienced the following screen pop behavior:

- **Media for screen pop:** Screen pop occurred for all media by default.
- **Event for screen pop:** Screen pop of a matching CRM record occurred only after agents accepted an interaction.
- **Lack of matching data:** Screen pop did not occur in the absence of matching records.
- **Searching and retrieval:** Searching the CRM database for matching data stopped at finding the first matching record and hence did not support multiple matching records. Consequently, the screen pop was limited to the first matching record.

Post 8.0 Behavior

In 8.0, the screen pop behavior for local CRM is configurable. Using the screen pop settings in the Configuration Manager, you can now change the default screen pop behavior. The configurable behavior allows you to control media and event type for screen pop.

- **Select media for screen pop:** By default, Screen Pop is turned on for phone, chat, voicemail, and email. You can allow or block screen pop for media by enabling or disabling the settings. Refer to [Configuring Screen Pop Settings](#) for details on configuration.
- **Select event for screen pop:** Allows you to select events that trigger Screen Pop for an interaction. Refer to [Configuring Screen Pop Settings](#) for details on configuration.
- **Screen pop for new entry:** In the absence of a CRM record matching the data from an incoming interaction, the system prompts agents to enter new customer record using the screen pop for new record.
- **Screen pop for multiple records:** If searching the existing CRM data yields multiple matching records, the screen pop lists all matching records and displays details of the first found record.



Screen Pop of Multiple Matching Records

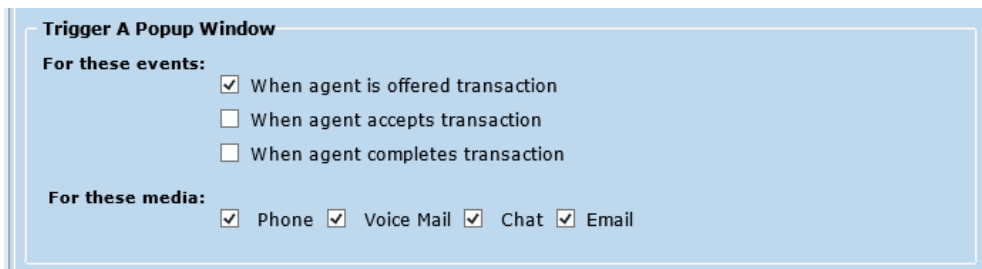
Note: Screen Pop requires agents' visibility to required CRM objects.

Configuring Screen Pop Settings

By default, screen pop occurs for all media after agents accept interactions. To alter the default behavior, you must change screen pop settings in the Configuration Manager.

To configure screen pop settings:

1. Log into Configuration Manager.
2. Navigate to **Integration > Screen Pop** tab.
3. Configure settings to alter the current behavior of screen pop.
4. Specify one or all events that trigger screen pop from the following choices.
 - o When agent is offered transaction
 - o When agent accepts transaction
 - o When agent completes transaction



CM > Integration > Screen Pop Settings for Local CRM

5. Allow or block screen pop for media by enabling/disabling the settings for phone, voicemail, chat and email.

Preview CRM Record

The ability to select events for screen pop gives agents the flexibility to preview CRM records before accepting an interaction and be better prepared. You can program the screen pop settings in the Configuration Manager to trigger screen pop while offering interactions and not delay until agents accept interactions.

Support for Auto Log

Termination of all phone and chat interactions using the Agent Console may trigger an auto log. A screen pop of the auto log can occur at the end of an interaction if configured by the administrator. An auto log automatically saves transaction details of phone, voicemail, and chat interactions. For example, a call log includes information such as transaction ID, media type, call type, call answered time, and call duration.

An auto log saves as a task or a follow-up record and associates to the matched customer or the case record. For example, a call log includes information such as transaction ID, media type, call type, call answered time, and call duration.

Pre 8.0 Behavior

- Pre 8.0 behavior does not support auto log for phone, or voicemail.
- **Manual support for chat log:** For chat interactions, manual saving of chat transcript generated a new case/ or a follow-up.

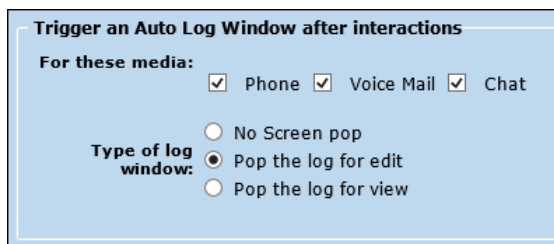
Post 8.0 Behavior

In 8.0 release, Virtual Contact Center supports auto log for phone, voicemail, and chat media if configured by the administrator.

Note: By default, auto log is turned off for tenants.

To enable auto log:

1. Log into Configuration Manager.
2. Navigate to **Integration > Screen Pop** settings.
3. Under the auto log settings, select the media for auto log.
4. Select the mode for screen pop of auto log from the following choices:
 - **No Screen pop:** Prevents screen pop for auto log.
 - **Pop the log for edit:** Offers the ability to edit auto logs
 - **Pop the log for view:** Limits auto log to view mode



CM > Integration > Screen Pop Settings

Virtual Contact Center creates an auto log for:

- Inbound interactions
- Outbound interactions
- Web Callback interactions
- Click to Dial interactions

An inbound/outbound auto log automatically associates with the matching record:

- **Call log:** An auto log for inbound/outbound phone calls creates a new task/follow-up record and associates with the relevant customer/case record. The absence of a matching case/customer record creates an independent task and allows agents to manually associate the task to a customer record.
- **Chat log:** A chat log automatically saves chat transcript and includes details such as date and time a chat occurred and more. Chat log creates a new case for a matching customer record. It creates a follow-up record for a matching case. The absence of a matching record for a chat interaction creates an independent case.
- **Click to Dial call log:** Associates with the customer record from which the call originated.
- **Web Callback log:** Follows the same format as a call log based on the call type.

CRM Workflow Programming

Enabling customization allows you to modify the local CRM standard workflow to suit your business requirements. For example, you can program your CRM workflow to look up for CRM data based on primary phone number (voice) or custom phone fields such as mobile phone, or home phone number. This option instructs a tenant to execute a custom XML script for the desired workflow.

On enabling customization, you must provide a valid URL pointing to the location of the custom script in the Screen Pop settings in Configuration Manager. Saving these settings replaces the default CRM workflow with your customized flow. Agents will see the changes with their next login.

Contact 8x8 Professional Services for customizing the CRM workflow requirements using scXML script.

Target Attributes

Target type: NetSuite Salesforce Zendesk Microsoft Zoho custom
 Local

Integration Type: Enhanced

Account: _____

Service Name: _____

Login URL: _____

Branding URL: _____

URL: /NewGenMashUp/MashUp.html

Enable Customization

Script URL: _____

Use Remote Login

API Token: _____

Use client login session to pop

Launch native login window at agent login

Configuration Manager > Screen Pop settings

CRM Screen Pop on Attached Data

Prior to 8.0, we were limited to searching for customer records based on specific data such as phone number, account number, case number or any custom field of numeric data type for phone media. In this release, we support screen pop based on any attached data. For example, if a customer record is searched based on text data such as Medical Record number, then the eIVR can get and pass this data for look up in Virtual Contact Center database. Our database can be searched against any arbitrary data using custom scXML script without any pre-defined key distillation.

Enhanced Case Notification

The local CRM now consolidates editing and notification of cases into single tab. Additional enhancements include:

- Enhanced address book
- Ability to insert FAQs and
- Ability to drag and drop attachment files

Consolidated Case Notification tab

Pre 8.0: Separate tabs for editing and notifying a case.

The screenshot shows a CRM interface with two tabs: 'Properties' and 'Notification'. The 'Notification' tab is active, and a red box highlights it. The interface contains several dropdown menus for case details: Case Number (8), Status (Open), Priority (Medium), Severity (Information), Category (Default), Created By (John Smith), Assigned To (John Smith), Project (Default), Media Type (None), and Visibility (Internal). Below these is a rich text editor for the description, with a toolbar and the text: 'Dear John, I would like to report a delay in receiving our order no: 1123 dated 3/12/2011. Let us know the cause of the delay. Regards, Sam Lee'. At the bottom are 'Send', 'Save', and 'Cancel' buttons.

Editing and notifying cases prior to 8.0

Post 8.0: A single tab consolidates editing and notification of cases.


Editing and notifying cases in 8.0

Enhanced Address Book


The Address book now offers you the ability to bookmark addresses used often. The local CRM address book now groups addresses by agent groups, agents, and customers. You can filter addresses quickly using the groups and avoid scrolling through the long list of email addresses. To search within each group, you must select the desired group. Each of these groups is further organized as:

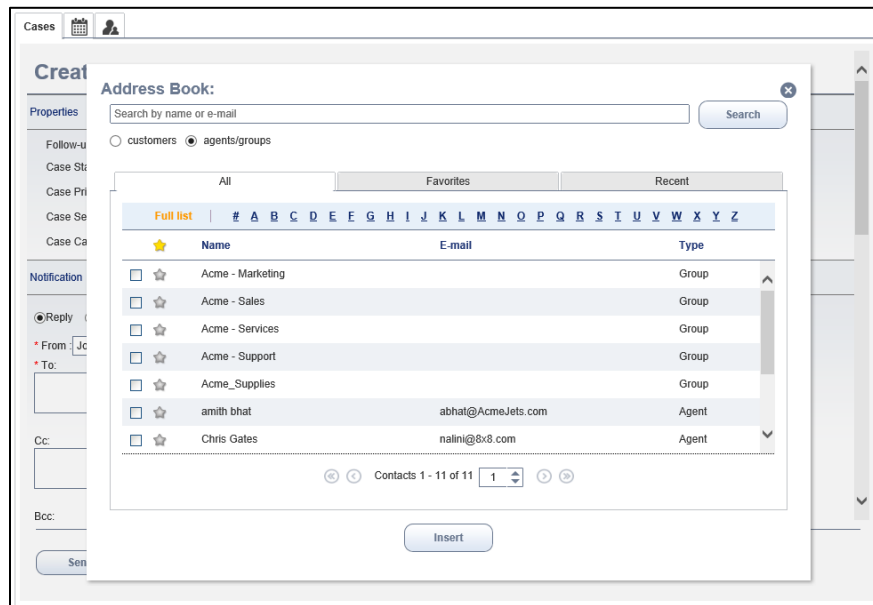
- **Recents:** Lists email addresses of agents/groups/customers which were used previously. Your search results are locally stored.
- **Favorites:** Lists bookmarked agents/groups/customers in your address book.
- **All:** Lists all addresses in the CRM address book.

To search for a desired email ID:

1. In your case notification, click the address book icon . The address book opens.

TIP

Bookmark most frequently used addresses by marking them as favorites . Find them quickly by looking up in Favorites or Recents tabs.





Local CRM > Address Book

2. To search for an address:
 - Enter partial or full name of an agent or a customer in the search box. Click **Search**.
 - Look up in the alphabetical list by clicking the desired alphabet.
3. To further filter your search, indicate if the address belongs to an agent or a customer by selecting the right category (Agents/Groups, Customer). The matching addresses show up.

Ability to Insert FAQs


Insert FAQs in your case notification by entering the FAQ shortcut or browsing through the FAQ directory. When you browse through the directory, you have the options to insert a hyperlink to the FAQ or paste full text of FAQ within the body of your email.

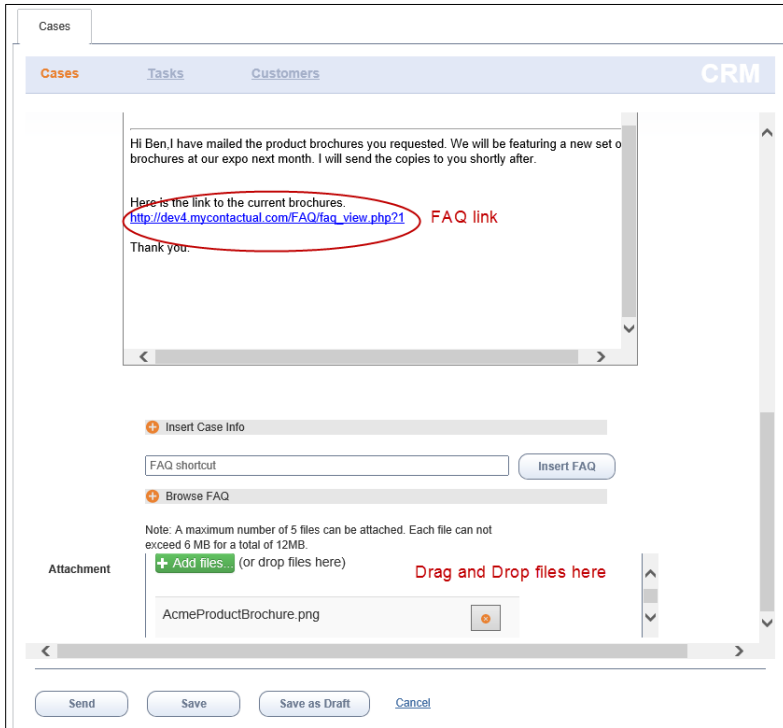
To insert FAQ:

1. In the case notification, enter an FAQ shortcut or click **Browse FAQ** to find one.
2. Search and find the desired FAQ.
3. Insert the FAQ as link or as full text by clicking  or .

The FAQ inserts in your email body accordingly.

TIP

Bookmark most frequently used FAQs by marking them as favorites . Find the desired FAQ quickly by looking up in Favorites or Recents tab.



Inserting FAQs in Case Notification

Ability to Drag and Drop Attachment

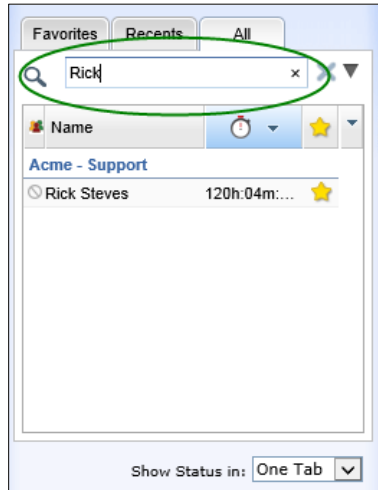
Attaching files to your case notifications got easier. You can drag and drop files in the attachment box from your local system.

Note: Limited to IE 10 and other HTML5 supported browsers.

Enhanced Queue and Agent Directory

The Queue and the Agent Directory in the control panel provides real time status about the number of interactions waiting to be served in a queue, longest waiting interaction in a queue, number of eligible agents in busy state, and status of fellow agents. Supervisors can check the status of queues and agents they supervise, communicate with agents instantly through chat or call. In this release, we have introduced enhancements to the Queue and Agent Directory in Status tab.

- **Ability to search:** Search and retrieve status about a specific queue or an agent instantly. Search is case insensitive.



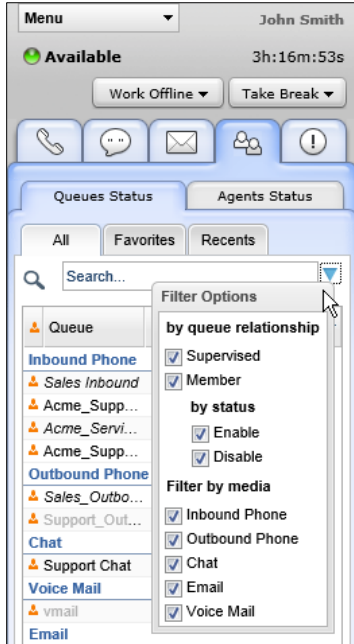
Search in Agent Directory

- **Ability to filter:** Filter queue status information by queue type and queue member status. View status of queues:
 - supervised by you
 - you are a member of and you are enabled
 - you are a member of but disabled
 - Note:** If you are disabled to serve a queue, you can still view the status of this queue, but the queue appears grey in the directory.
 - Queue type (Inbound Phone, Outbound Phone, Chat, Email, Voicemail)

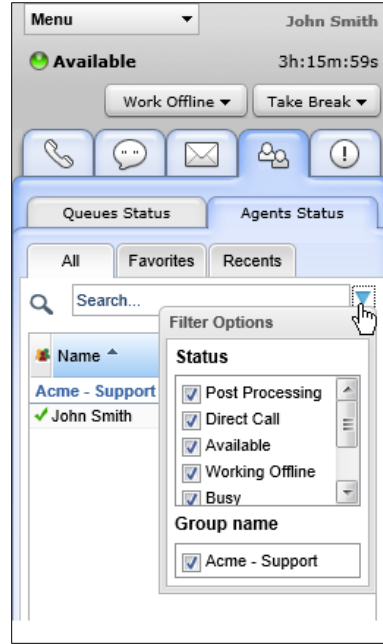
Similarly, you can filter agents based on agent group affiliation and current status. Status may be one or all of the following: available, working offline, on break, busy, post processing, direct call, on email, and logged out.

The following icons represent the varying agent status.

- - Available
- - Busy
- - Post Processing
- - Working Offline
- - on Break
- - on Email
- - Logged out

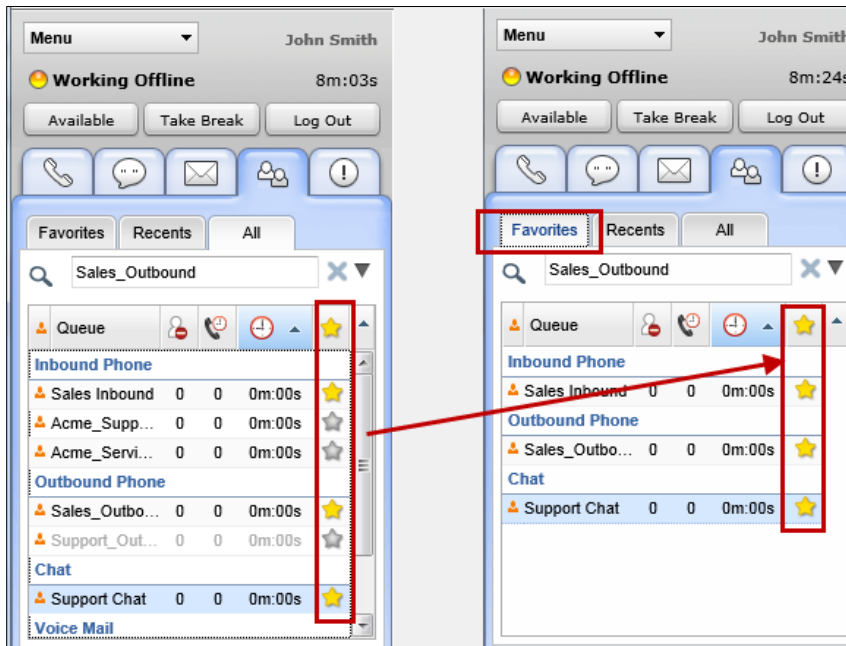


Filter for Queue Search



Filter for Agents Search

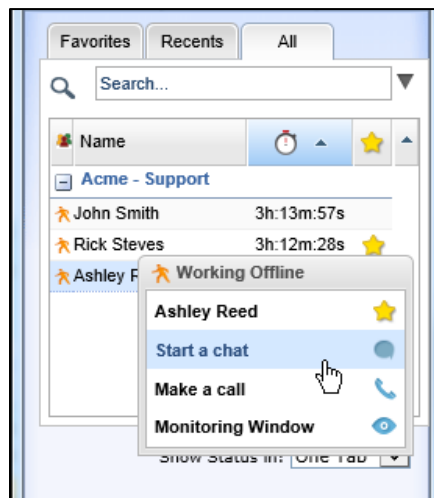
- **Define Favorites:** Bookmark agents you contact often and queues used often and track their status every time you log in with just a click on the **Favorites** tab. For example, you are one of the five managers in AcmeJets - Support agent group. You manage 7 team members out of the 50 members belonging to the group. You can mark these seven team members as your favorites and monitor their status with just a click rather than sifting through the status of the whole team.



Defining Favorites

- **Track Recents:** Using the Recents tab,
 - Track those agents with who you initiated a call or a chat session in the past. The **Recents** tab lists those agents and displays their status. Your search results are locally stored.

Note: Does not qualify participation in a chat or a call.
 - Track the status of queues you transferred the calls to in the past.
- **Click to Chat or Call:** With just a single click, you can call or chat with an agent from the status tab. You do not have to toggle between Status tab and Phone or Chat tab to initiate a chat or a call with a fellow agent. In the Status tab for agents, right click an agent in the panel for a context sensitive pop up menu with options to:
 - **Start a Chat:** Initiate a chat with the agent
 - **Make a Call:** Place a call to the agent
 - **Monitor:** Monitor the agent activity (*Supervisor Only Privilege*)



Context Sensitive Menu for Agents

- **Widened Access:** Ability to initiate a call or chat with a fellow agent is now extended to the Agents tab within Phone tab or Chat tab or Status tab.
- **Ability to sort:** Sort queue names, by agent status, and longest waiting interactions. If there is a long waiting interaction, you can sort the column to find the queue with the longest waiting interaction.

Note: VCC stores your directory searches and bookmarks locally within your machine. If you logged in from another machine, you cannot retrieve these settings.

Enhanced Audio Recording

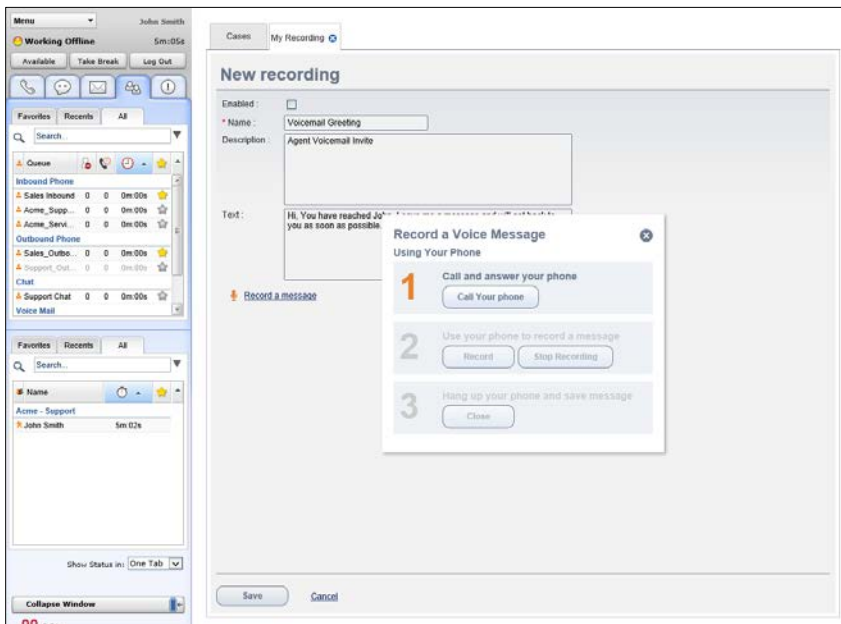
The interface for **My Recording**, which allows agents to record custom messages, is now enhanced with centralized access to controls. The improved interface launches a list of existing recordings with the ability to play, edit, and delete any of them. The exclusive edit tab allows you to re-record an existing recording.



Agent Console > My Recording

Recording your message is just a few steps away.

1. Click **Record a message**.
2. Click **Call your Phone** button in the pop up dialog box.
3. Answer your phone and listen to the prompts.
4. Click **Record** and say the message.
5. End the call and click **Close**.
6. Click **Save**.



Supervisor Console – Enhancements

The 8.0 release offers enhanced tools to supervisors to function more effectively:

- **Historical Reporting:** Ability to name filtered reporting templates to ease repetitive tasks
- **Monitoring Playback:** Enhanced ability to access call recordings and availability of waveform display for recordings
- **Enhanced FAQ:** Improved tools to create FAQs

You can access Monitoring, Reporting, and FAQ functionalities from the Control Panel menu in Supervisor Console as shown here.



Control Panel > Supervisor Privileges

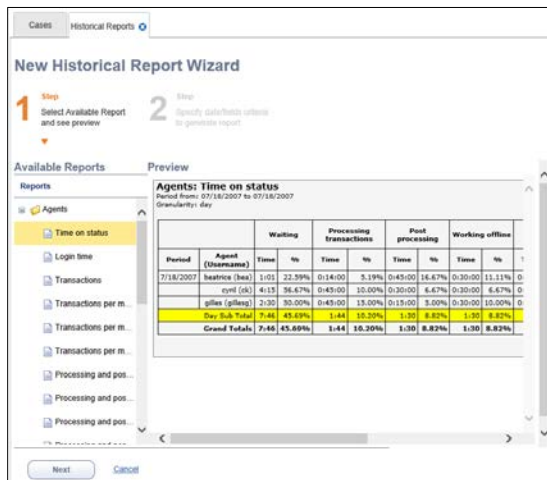
Historical Reporting

The Historical Reporting tool in Virtual Contact Center now allows you to define a report with required parameters, and save it for reuse. The reporting supports named filter templates to ease repetitive tasks.

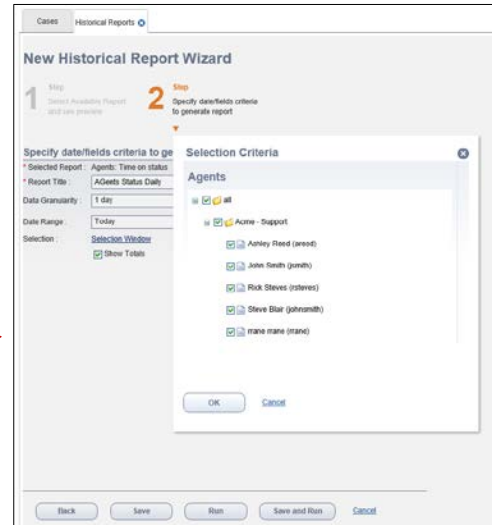
The new Historical Report Wizard walks you through the steps:

1. Select a pre-defined report template.
2. Add or customize reporting parameters such as agents and queues.
3. Save and run the report.

Access and run this report when required.

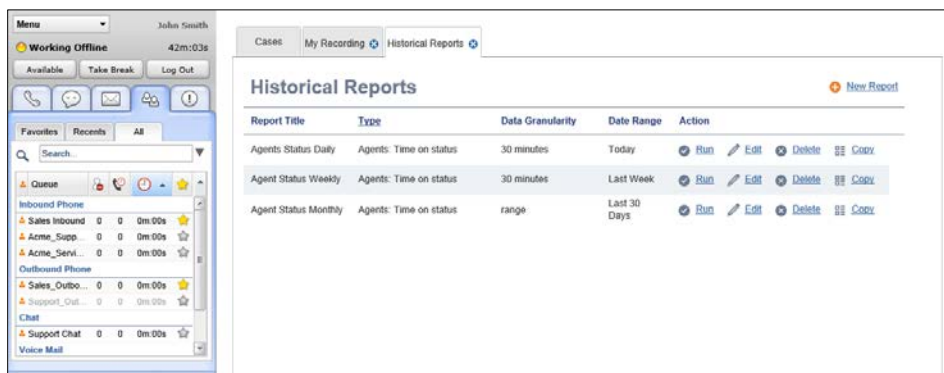


Historical Report Wizard – Step 1



Step 2

You can access all the saved reports from the Reporting tab.

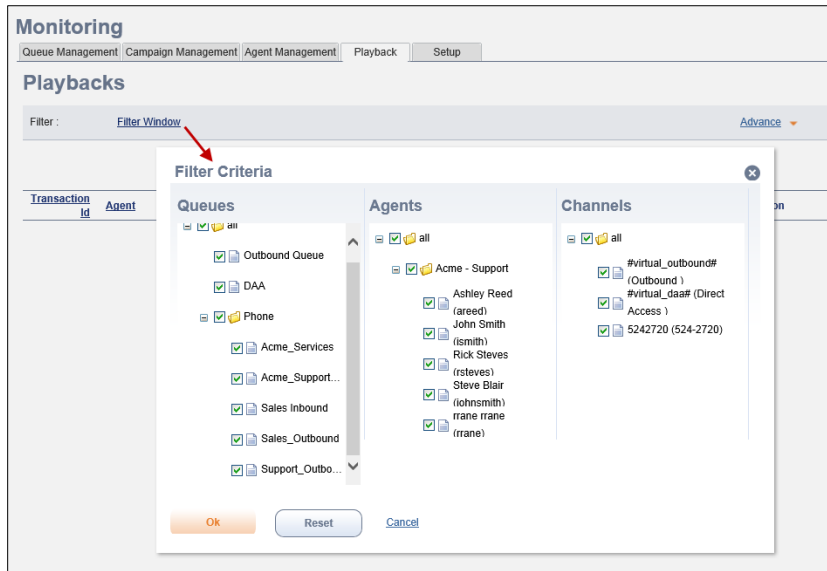


List of named reports

Monitoring Playback

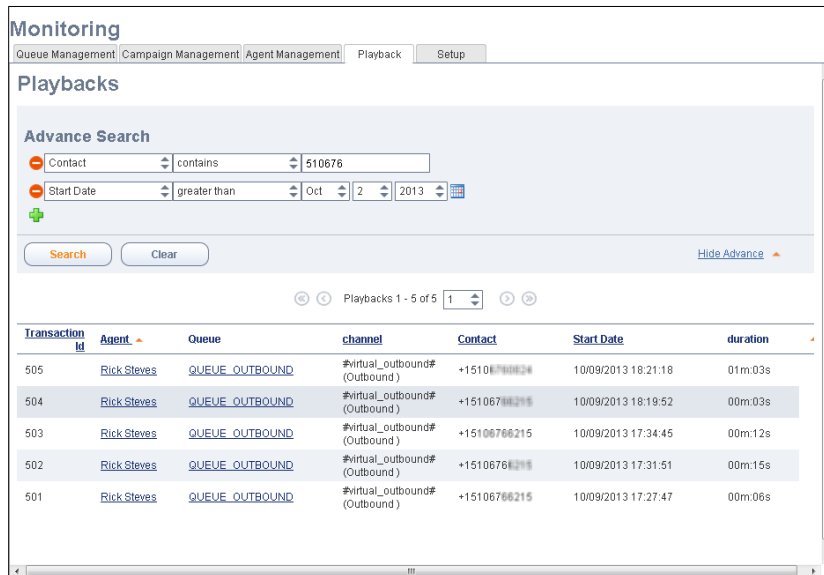
Supervisors can now access call recordings quickly and more efficiently using enhancements in Monitoring Playback:

- **Standalone playback tab:** The Playback functionality is now moved from Agent Management tab to a standalone tab.
- **Ability to filter:** With the ability to search and filter, you can look for recordings from a specific queue by specific agents, or from specific channels.



Monitoring > Playback > Filtering

- **Ability to search:** The advanced search allows you to look up recordings based on transaction id, contact, start date, and duration. For example, you can look for all recordings specific to a customer in the last week.

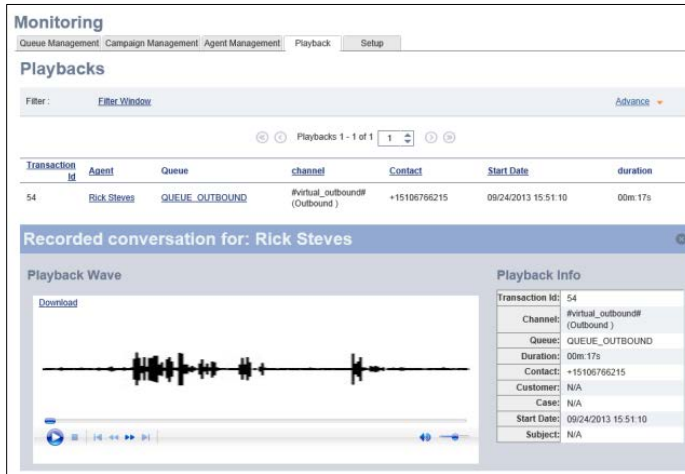


Monitoring > Playback > Filtering

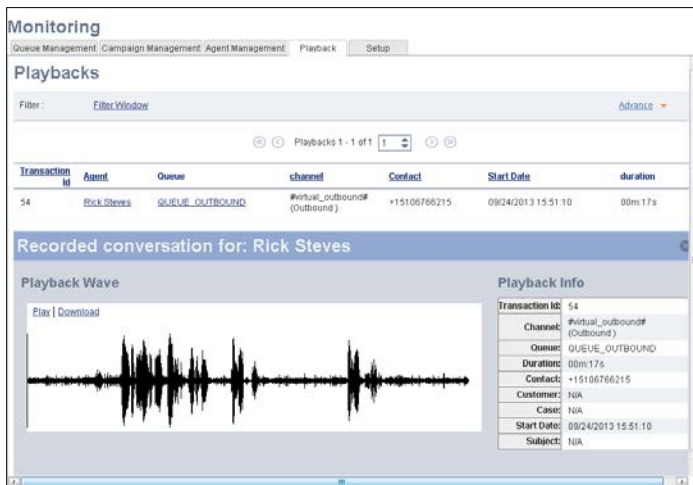
- **Waveform display of recordings to provide clear audio spectrum:** The waveform display of recordings are useful for navigating through parts of your audio and getting a quick glance at the pauses in the conversation.

Waveform display is mouse driven in HTML5 supported browsers, while the waveform display is play bar driven in Internet Explorer.

Note: Firefox requires Quick Time plugin for playback.



Waveform Display in IE (Play bar driven)



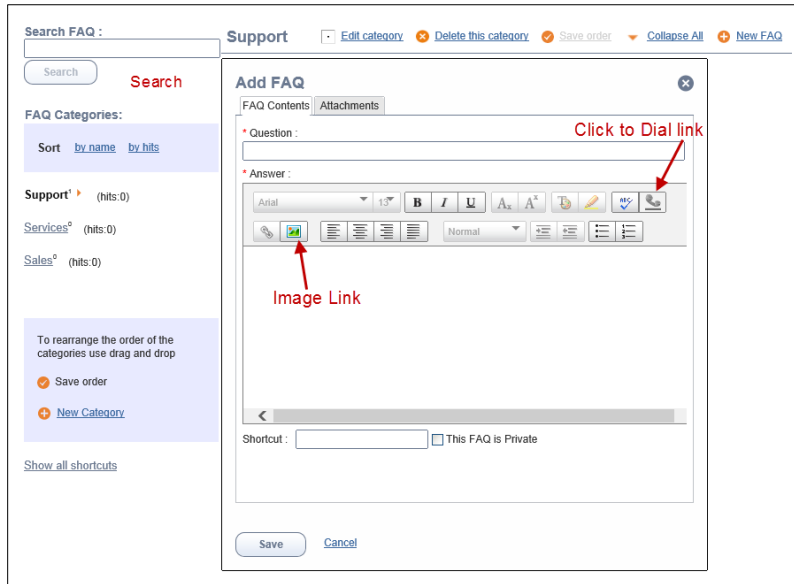
Waveform Display in Chrome (Mouse driven)

Note: Mouse driven waveform display requires HTML 5 compliant browsers such as Chrome and Firefox. Internet Explorer does not support browser embedded playback.

Enhanced FAQ

The FAQ functionality in your Agent Console is now revamped with cooler and quicker enhancements:

- **HTML Support:** The rich text editor allows you to easily insert HTML rich text. You do not need to add html tags any more.
- **Quick Links:** You can add image links and click to dial links with just a click.



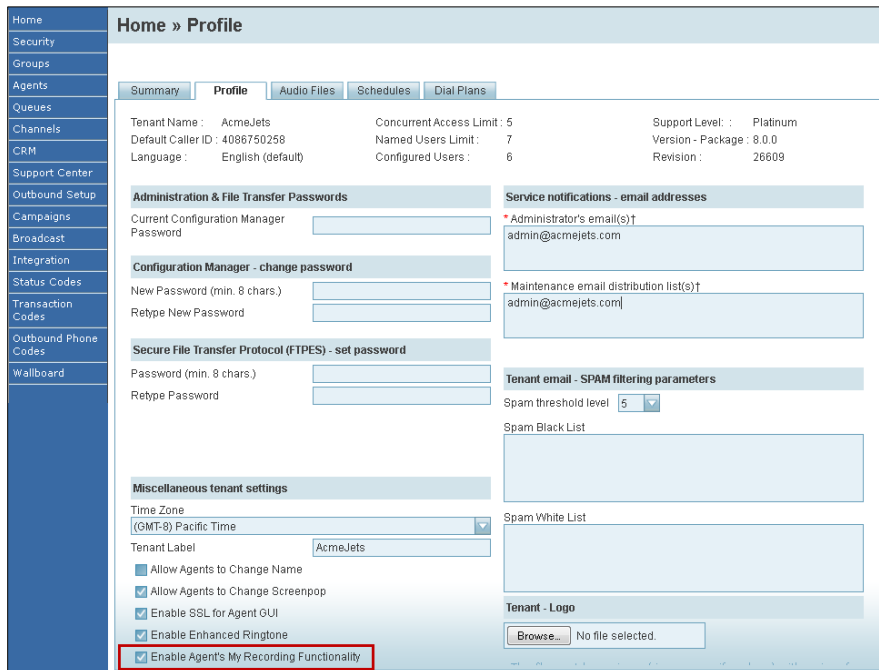
Agent Console - FAQ

Configuration Manager – Enhancements

In 8.0, we have bundled the Configuration Manager with a few changes and enhancements.

Ability to Control Agents' My Recording

We have introduced the ability to enable or disable agents from recording and playing custom messages during calls. The Agent Console allows agents to record and play custom messages during calls using the My Recording feature. You can control the availability of My Recording functionality to agents at the tenant level, group level, or agent's level.



By default, the functionality is enabled.

To disable at the tenant level:

1. Login to Configuration Manager. Click **Home > Profile**.
2. In Miscellaneous settings, uncheck **Enable Agent's My Recording Functionality**

To disable at the group level:

1. Click **Groups** tab.
2. Select an agent group for editing and uncheck **Enable Agent's My Recording Functionality** in the General tab.

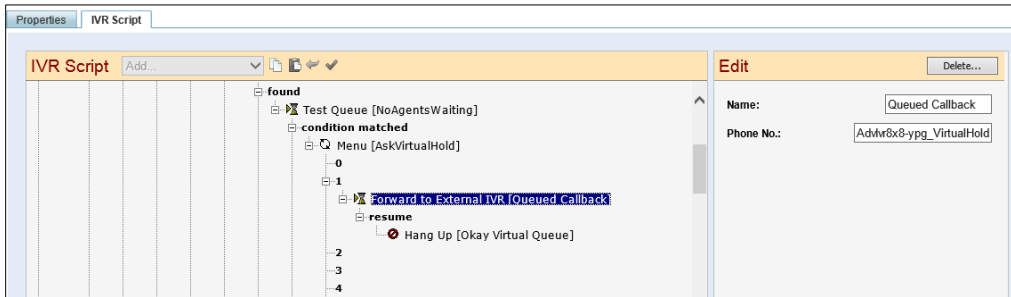
To disable at an agent's level:

1. Click **Agents** tab.
2. Select an agent and uncheck **Enable Agent's My Recording Functionality** in the General tab.

Improved Availability with IVR Queued Callback

The Virtual Contact Center IVR introduces the ability for queued callback which improves customer experience and reduces frustration from long holding times. Customers can opt to be called back instead of waiting on hold. The Queued Callback places the call request in the queue maintaining call priority and calls the customer back when an agent is available. To set up Queued Callback, you must route it through eIVR.

In your channel IVR script, set up an eIVR script which confirms call back phone number. The phone number is then used for placing an outbound call from Agent Console. At first, an agent is offered an outbound call. When the agent starts the call, the call is dialed out to the customer.



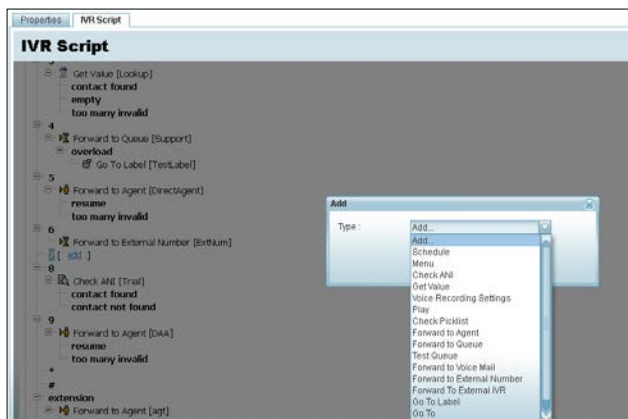
Configuration Manager > IVR Script

Note: The Queued Callback currently requires 8x8 Professional Services to set up.

Look out for more enhancements to Queued Callback in our future releases.

Enhanced IVR Script Interface

This release provides a user friendly interface for writing or editing IVR Script. The contextual access to add, edit, copy, and remove IVR node options improves access and is more efficient.



IVR Script – Adding a node



Editing an IVR option

Support Center – Fetching Direct URLs

Support Center offers direct URLs to embed into your webpage facilitating better customer support service.

In 8.0, we have updated the user interface for fetching direct URLs from Support Center configuration:

- Drop down menu to select access to different service destinations
- Ability to customize back URLs
- New option for Stylized Chat

Better access to Direct URLs

The updated interface in the Configuration Manager for **Direct URL** tab allows you to generate direct URLs for the desired service and launch them for testing. You can also customize back URLs wherever applicable.

To generate direct URLs:

1. Select a service from the drop down menu.
2. Enter the required parameter options.
3. Click **Generate URL** to get a live link.
4. Click **Run on browser** to test if the link works as intended.

You can embed these links in your website.

The following table summarizes the direct access URLs and the parameter options.

Direct URL	URL Destination	Parameter Options
Main Menu	Direct link to the main menu of Support Center with Chat, Email, and other capabilities.	<p>Email Title: Overrides the default title of the email page of the Support Center.</p> <p>Custom Email: Overrides the default email address to which the email notification should be sent.</p> <p>Language: Choose the language to display the page in.</p>
Collaborate Menu	Direct link that enables desktop sharing.	Back URL is used for navigating away from the page.
Email Menu	Direct link to the email menu of Support Center	Back URL Email Title Custom Email
Chat URL Chat Channel Chat Queue	Direct access to the chat channels menu of the support center.	Back URL Language
Stylised Chat	Direct access to the stylized chat interaction window	Survey Template: Specify the URL for a chat survey template. Language
My Account Login Page	Direct access to the My Account login page that checks entry through account number	Back URL Language
My Account as a user logged in Account Number of a customer Password set up by customer	Direct access to the My Account page after passing a valid account number and password.	Back URL Language
Submit a new case	Direct access to submit a new case from your account after passing a valid account number and password.	Back URL Language
My profile as a user logged in	Direct access to view or edit a customer's profile information	Back URL Language

	after passing a valid account number and password.	
FAQ URL	Direct access to the FAQ list of the support center.	Language

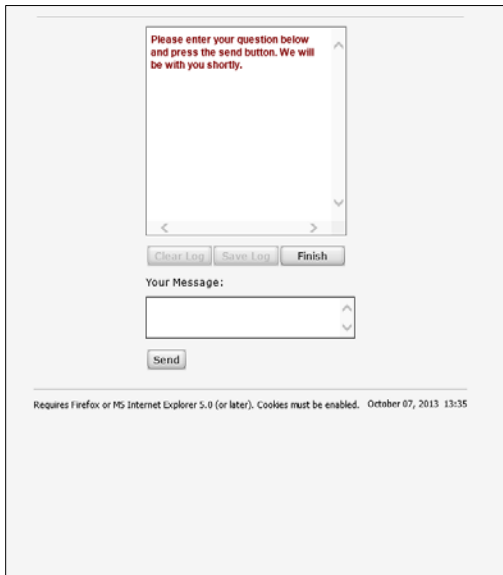
Stylized Chat

Support Center offers Stylized Chat - another style option for chat interaction welcome window. It differs in style from the standard chat interaction window. You can further customize using the private labeling.

To generate direct URL for Stylized Chat:

1. Navigate to **Support Center > Direct URL** tab.
2. Select Stylized Chat from the Direct Access drop down menu.

Enter the required parameter options and click **Generate URL** to get a live link.



Standard Chat Interaction Window



Stylized Chat Interaction Window

Configurable SMTP server

By default, your tenant outbound email communication is routed via the pre-configured VCC internal SMTP servers. Virtual Contact Center now allows you to configure a custom SMTP server for better security and HIPAA compliance. The tenants can leverage their own infrastructure and ensure delivery of emails to the final recipient. VCC establishes a secure connection with the tenant SMTP server. The SMTP server should be configured with authentication and STARTTLS to ensure emails are not hijacked on its way to the tenant facilities.

Tenants without custom SMTP server configuration do not experience any change in the current behavior.

To configure a custom SMTP server:

1. Log into the Configuration Manager.
2. Navigate to **Security > SMTP Server** tab.

Note: By default, your outbound email communication is routed via the pre-configured VCC internal SMTP servers.

3. Click + or **SMTP Server** link.



Configuration Manager > Security > SMTP Server

4. Enter the following information:

SMTP Server Definition	Description
Name	Label for the SMTP server
Server Name	Name of the SMTP server as registered.
Port	A specific port number that varies with the choice of connection security method. The default port for SMTP server is 25.
Connection Security	Select your preferred way to encrypt communication using SSL or TLS or STARTTLS.
Authentication Method	Authentication method that decides how to bundle the password.
User Name	User name for the email address
Password	Password for the email address

5. Enter an email address to send a test mail and verify the SMTP server is configured correctly.

6. Click **Test** to verify the set up.
If the configuration is correct, you should receive a test email in the test email account.
7. Set up this SMTP server as the default.

Note: If VCC fails to deliver emails when the remote SMTP server is down or when configuration parameters are invalid, VCC attempts to determine the reason for failure and retries a few times before a sending failure notification.

Configuration Manager - UI Improvements

We have redesigned the User Interface for some of the configuration components in Configuration Manager. With improved interface, you can navigate, sort, and group data better. Check out the new user friendly interface for:

- Home
- CRM
- Support Center
- Status Codes
- Outbound Phone Codes
- Transaction Codes
- Outbound Setup for Campaigns configuration

Data Pagination

If you have a large number of agents in your contact center, you can define the number of agent records you wish to see per page view for better usability. Pagination allows you to define the number of records you want to see per page view in the Configuration Manager by including the previous and next links. By controlling the number of records displayed in a single page, you can access the desired records quickly. Pagination is available for agents, groups, queues, channels, code lists, campaigns, and wallboards in Configuration Manager.



Improved Dialing for Direct Agent Access (DAA)

Prior to this release, callers trying to reach agents directly from IVR menu entered extension numbers followed by a # key. The # key minimized the three second delay in connection. In this release, we have eliminated the need for # key by giving you the ability to define the number of digits in extension numbers

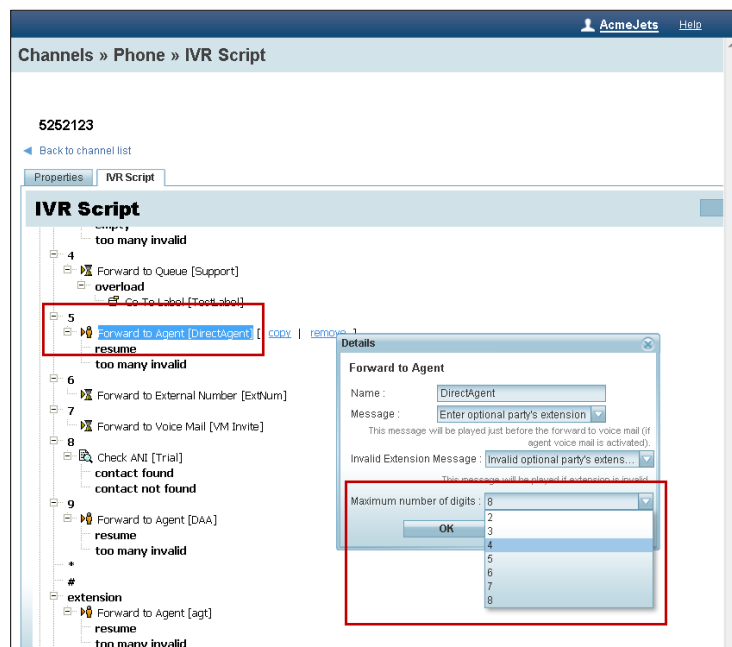
in your IVR script. The **Forward to Agent** option in your channel IVR script allows you to select the maximum number of digits allowed in the extension number. With this enhancement, the callers can now enter extension numbers and get connected instantly eliminating the need for #.

For example, If your company's extension numbers are three digits long, select 3 from the drop down menu for **Maximum number of digits** in your IVR script using the **Forward to Agent** primitive. The caller can then enter a three digit extension number and get connected instantly.

To configure enhanced DAA dialing:

1. Log into Configuration Manager.
2. Navigate to **Channels**.
3. Select a phone channel and go to the corresponding IVR script.
4. Under **Forward to Agent** settings, select the maximum number of digits in your extension number.

Note: By default, the value is set to 8.



CM > Phone Channel > IVR Script > Forward to Agent Settings

5. Save the script.

Enhanced Ring Tone

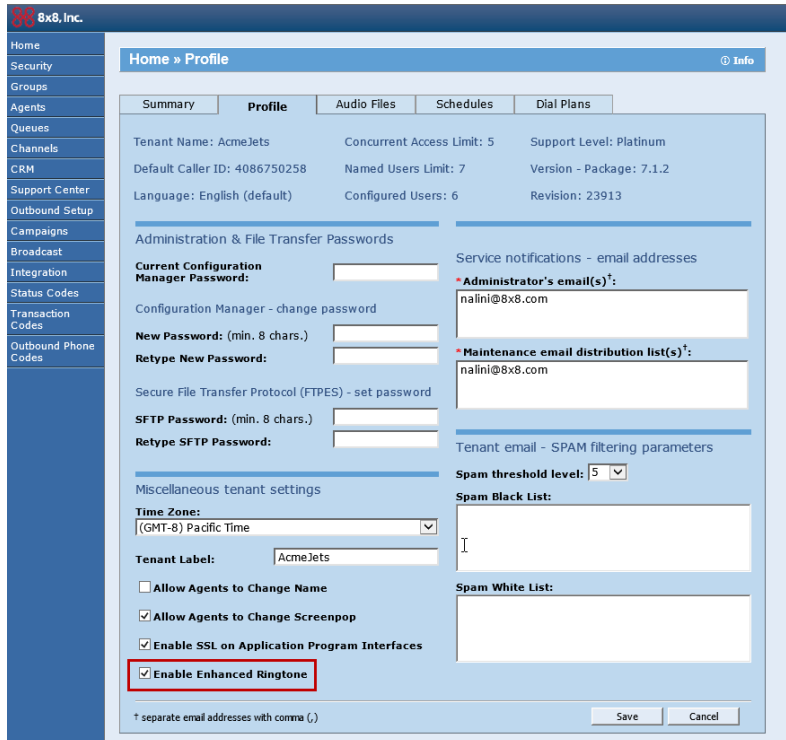
During an inbound call, caller's experience in a queue while waiting to be connected to a live agent is enhanced. Until now, callers waiting in a queue listened to queue music/greetings followed by an alerting ringtone when the call was forwarded to an available agent. If the (available) agent rejected the call, the call was routed back to the queue and the queue music continued to play. In the event of multiple rejections, the caller would keep switching between queue music and ringtone multiple times before being finally answered.

With this enhancement, the caller hears continued queue music until an agent accepts the call. Once the call is accepted, a short alerting ringtone is played back to the caller to signal the start of the interaction. Simultaneously agent hears a beep notification to prepare them for the call.

Note: The enhanced ring tone is available only when the tenant profile is configured to support it.

To configure:

1. Log into Configuration Manager.
2. Click **Home > Profile** tab.
3. Check **Enable Enhanced Ringtone** option.



Configuration Manager > Profile

Campaign Preview Timer

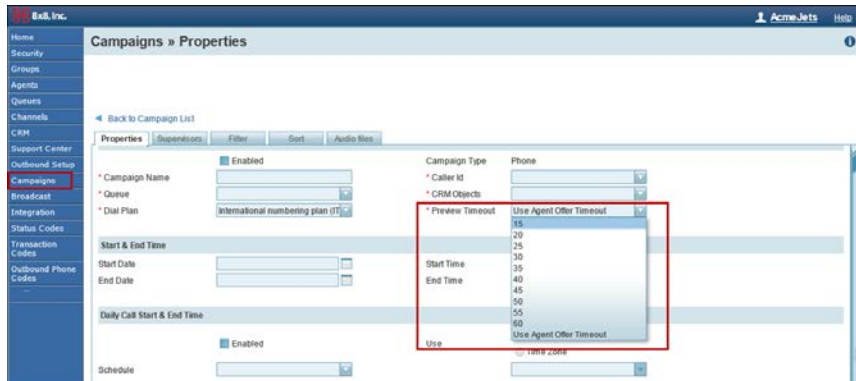
Prior to the release, agents handling campaign calls were restricted to the same preview time as regular interactions. With this release, you can configure preview time for campaign calls separately. You can set up a preview time desirable for each campaign offering sufficient time for agents to prepare for the call. You have the flexibility to keep the agent’s default preview time or define a desirable preview time for each campaign.

To define Campaign Preview Timer:

1. Log into Configuration Manager.
2. Select **Campaigns** tab from the navigation menu.
3. Select a campaign and view the properties.

- 4. From the drop down options in **Preview Timeout** field, select a value from the drop down menu or enter a desired value.

Note: Accepts directly entered values such as 180 seconds.



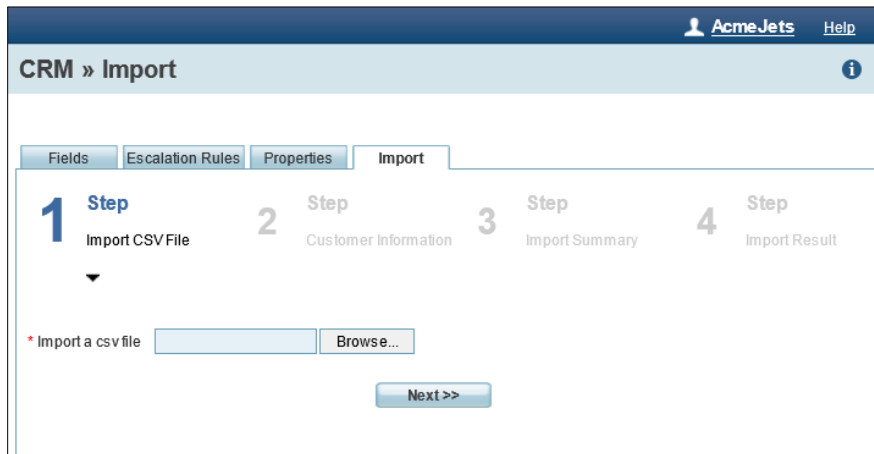
CM > Campaigns > Properties

Note: By default, the campaign Preview Timeout value is set to use Agent Offer Timeout.

- 5. Save the campaign properties.

Upgraded Limit for Importing CRM Data

The local CRM now allows 50000 records for each import operation from a CSV file.



Importing CRM Data

Wallboard

The 8x8 Wallboard for Virtual Contact Center presents real time metrics of your contact center operations on a desktop, a mobile device, or a monitor on a contact center floor. You can get key statistics to questions such as:

- How productive are my agents?
- What is the number of interactions waiting in a queue?
- What is the current longest waiting interaction in a queue?
- What is the current SLA activity?
- What is the total number of accepted transactions since the beginning of the day?

The metrics provide an insight into queue traffic, the longest waiting interactions in a queue, agent's productivity status, and more. Access to these metrics allows agents and supervisors to respond to increased call volume quickly and maintain service levels of your business.

You can choose from readily available stats or generate custom stats to suit your business requirements. Be it a supervisor, or an agent, you can look at the metrics and make instant adjustments to serve your customers better.

Benefits

The 8x8 Wallboard offers the following benefits:

- Get a bird's eye view of call center performance and track agents' availability.
- Get real time metrics on your contact center operations.
- Apply business intelligence to the decision making process.
- Manage customer demand proactively and reduce waiting time for customers.
- Access dozens of pre-calculated stats built out of pre-defined queries.
- Customize stats to suit business needs by building custom queries.
- Display data on web browsers - IE, Chrome, Firefox.
- Configure thresholds against key performance indicators alerting potential or actual slips in the performance.
- Set up audio and visual alerts on breaching thresholds.
- Filter data to suit individual needs.
- Get metrics in tabular format for easier navigation.
- Availability of separate login access to wallboard.
- Access wallboards on mobile devices

Requirements

- **Wallboard Configuration** – Login access to Configuration Manager with permissions to configure Wallboards
- **Wallboard Access** – Access to login credentials of Configuration Manager.

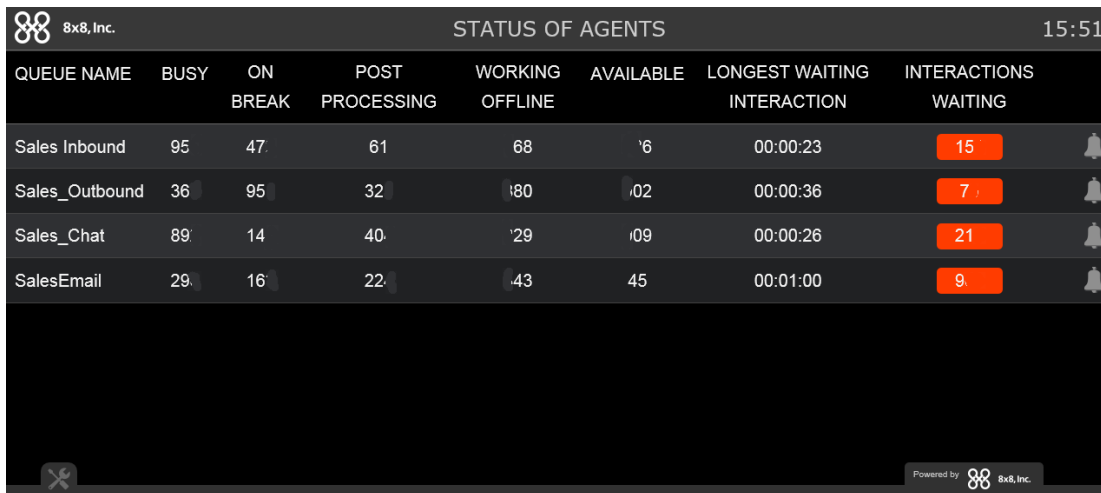
Configuring a wallboard – Define steps

Setting up an 8x8 Wallboard is simple and quick. Determine the key metrics for your business, simply select the data from the readily available stats or define custom stats, and run the wallboard. With just a few clicks, you are on your way to monitoring your contact center performance real time.

Configuring an 8x8 Wallboard involves:

- Defining wallboard general properties - Required
- Specifying desired Metrics - Required
- Defining thresholds for better supervision - Optional
- Selecting skills/queues for which you need metrics - Required

Once configured, you can run a wallboard with a simple click. Typically, a contact center would monitor critical data on agent status as shown here.



The screenshot displays the 8x8 Wallboard interface. At the top left is the 8x8 logo and '8x8, Inc.'. The title is 'STATUS OF AGENTS' and the time is '15:51'. The table below shows agent status for four queues: Sales Inbound, Sales_Outbound, Sales_Chat, and SalesEmail. Each row includes columns for Busy, On Break, Post Processing, Working Offline, Available, Longest Waiting Interaction, and Interactions Waiting. The Interactions Waiting column has orange buttons with numbers: 15, 7, 21, and 9 respectively. A bell icon is next to each row. At the bottom right, it says 'Powered by 8x8, Inc.'.

QUEUE NAME	BUSY	ON BREAK	POST PROCESSING	WORKING OFFLINE	AVAILABLE	LONGEST WAITING INTERACTION	INTERACTIONS WAITING
Sales Inbound	95	47	61	68	16	00:00:23	15
Sales_Outbound	36	95	32	180	102	00:00:36	7
Sales_Chat	89	14	40	129	109	00:00:26	21
SalesEmail	29	16	22	143	45	00:01:00	9

8x8 Wallboard

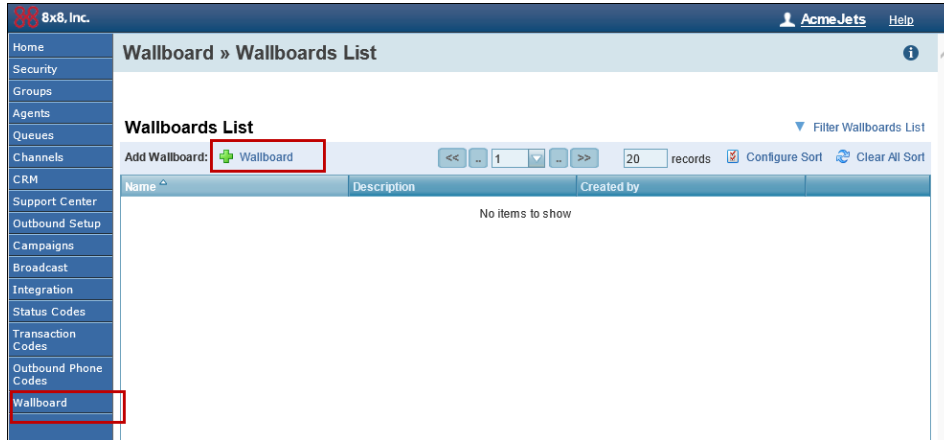
For a better understanding, let's create a sample wallboard to extract real time data shown here.

Defining a Wallboard

To configure a wallboard:

1. Log into Configuration Manager.
2. Click **Wallboard** from the Configuration menu.

3. Click **+** or **Wallboard** link.



Defining a new wallboard

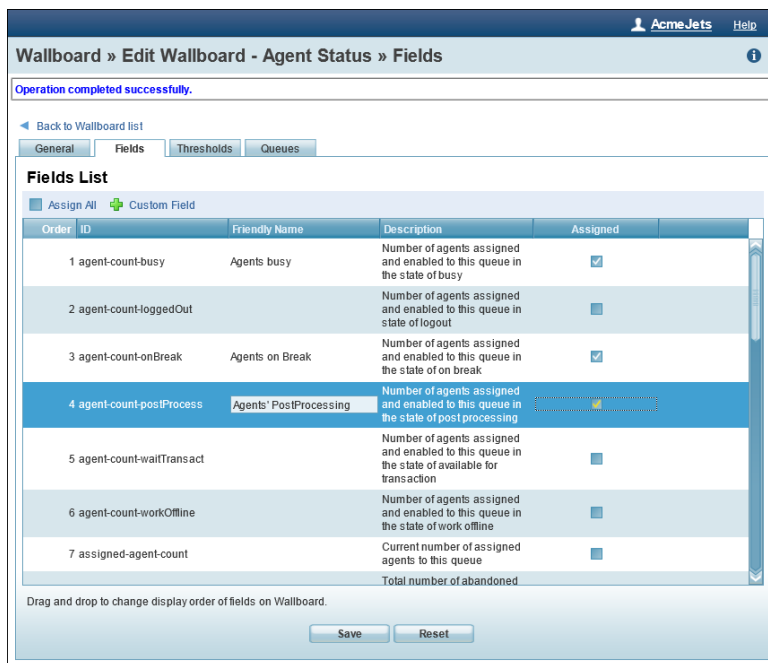
4. Enter a name and description for the wallboard.
5. Click **Save**.

The Fields tab opens.

Specifying Desired Metrics

Virtual Contact Center provides metrics out-of-the-box generated from pre-defined queries. Additionally, you have the flexibility to generate custom metrics using the available stats. The Fields tab in the wallboard definition lists all the available real time stats with a brief description. For example, you can track number of agents waiting for interactions in a queue, number of agents processing interactions in a queue by using readily available status such as *available*, and *processing*.

1. In the **Fields** tab, select desired stats from a list of available fields.



Wallboard > Fields tab

Note: You can also generate custom metrics by defining custom fields. For details, refer to [Customizing Metrics](#).

2. Enter a **Display Name** that replaces the standard field name on the wallboard.
3. Drag and Drop the fields to change the display order of the fields on wallboard.
4. Save the settings.

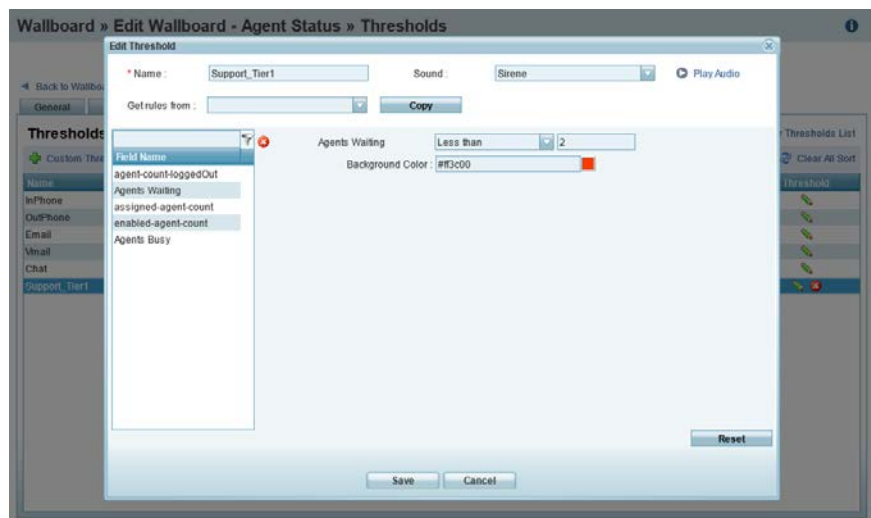
Defining Thresholds

The next step in configuring a wallboard is to set up thresholds which alert you in the event of potential or actual slips in the performance. You can set up audio and visual alerts and vary the alert type based on the severity of the situation. For example, you can set up a threshold alert to monitor service levels of your contact center. If the performance of a skill/queue falls below the set SLA, you set up an alert so you can look at the activity level of agents belonging to the queue, identify areas for improvement and act quickly to recover. Or you can set up a threshold to monitor the waiting time for interactions. If the waiting time in a queue exceeds a certain time, the threshold alert can trigger.

You can define thresholds for each media type and configure custom thresholds for each skill.

To define threshold for inbound phone media:

1. In the **Threshold** tab, select media type, for example InPhone.
2. From the list of fields, select a field.
3. To specify a threshold value, enter the required parameters/arguments.
4. Select a color from the color chart to highlight a breached threshold.
5. Specify an alert sound pattern.

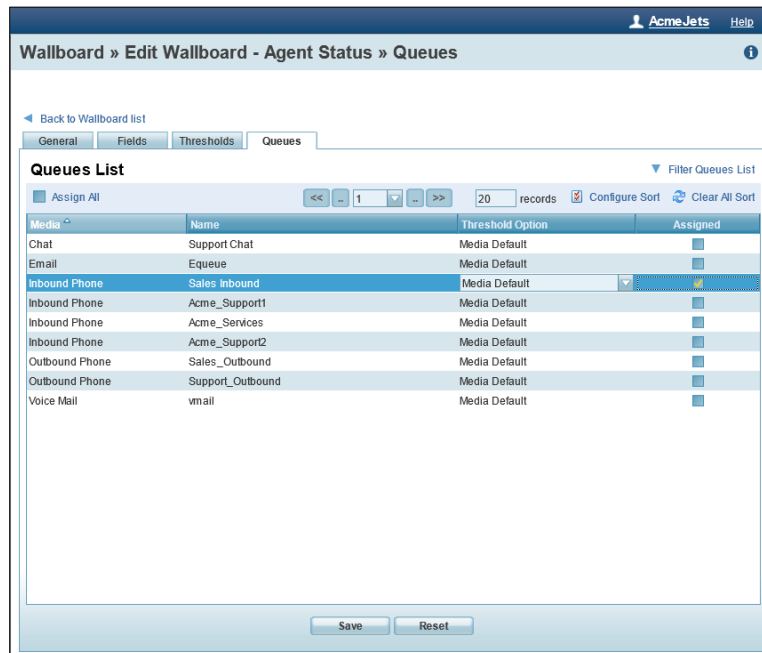


Wallboard > Thresholds tab

6. Save the threshold settings.

Selecting Queues

In the final step, you must select queues which require metrics. Optionally, you can select pre-defined thresholds for each queue.



Wallboard > Queues tab

To select queues:

1. In the Queues tab, select the queues individually or click **Assign All** to pull their stats.
2. Specify a desired threshold option from the drop down list of choices.
Note: You must have specified threshold settings previously.
3. Save the queue selections.

The wallboard configuration is now complete. You are now ready to run a wallboard.

Running a Wallboard

You can run a wallboard from Configuration Manager or access a wallboard directly. The login credentials for Configuration Manager allows access to the wallboard. You can run wallboards on your mobile devices as well.

Requirements:

- **Login Credentials:** You must have login credentials of Configuration Manager to access wallboards.
- **Browser Requirements:** Chrome by default blocks pop ups and limits you to run a single wallboard at a time. To run multiple wallboards simultaneously, *Check Allow all sites to show pop ups* option in chrome settings.

To run an 8x8 Wallboard from the Configuration Manager:

1. Log into Configuration Manager.
2. Navigate to **Wallboard**.

3. Select a wallboard and click  .

The wallboard runs in a new browser tab.

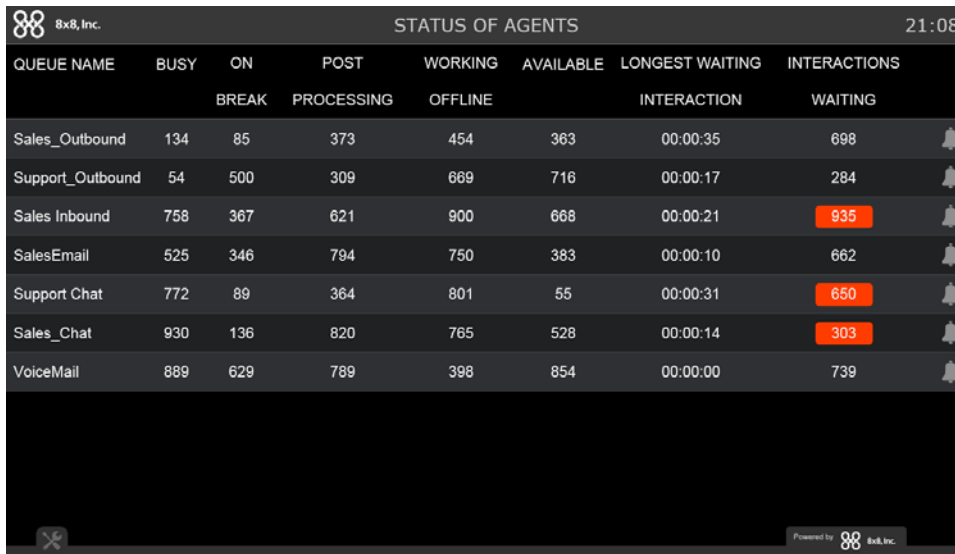
To access a wallboard directly:








1. In the Configuration Manager login screen, select to enter **Wallboard Access** option.
2. Enter the Configuration Manager login credentials and click **Login**.

The Wallboard launches displaying the list of configured wallboards.

Note: The number of wallboards you can run simultaneously depends on your subscription.

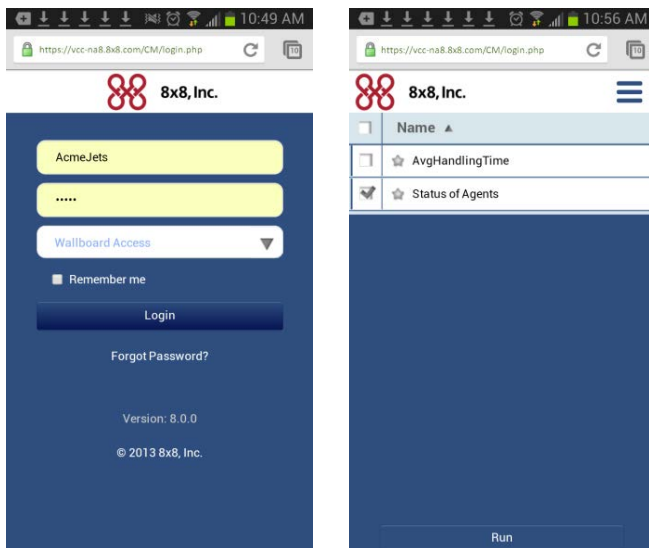
3. Select a wallboard and run.



QUEUE NAME	BUSY	ON	POST	WORKING	AVAILABLE	LONGEST WAITING	INTERACTIONS	
	BREAK		PROCESSING	OFFLINE		INTERACTION	WAITING	
Sales_Outbound	134	85	373	454	363	00:00:35	698	
Support_Outbound	54	500	309	669	716	00:00:17	284	
Sales_Inbound	758	367	621	900	668	00:00:21	935	
SalesEmail	525	346	794	750	383	00:00:10	662	
Support Chat	772	89	364	801	55	00:00:31	650	
Sales_Chat	930	136	820	765	528	00:00:14	303	
VoiceMail	889	629	789	398	854	00:00:00	739	

Accessing Wallboards on Mobile Devices

You can access wallboard from mobile devices. The display of the statistics on the wallboard will dynamically adjust to the screen size.



Wallboard Access from mobile devices

To access a wallboard from a mobile device:

1. Enter the CM login URL on your mobile browser. ([Check browser support](#))
2. At the login prompt, enter the credentials and tap **Login**.
Note: By default, the Wallboard Access option is selected.
A list of defined wallboards shows.
3. Select a wallboard to run and tap **Run**.

Customizing a Wallboard

You can customize a wallboard based on your business requirements. You can:


- Build custom queries and generate custom stats
- Set up custom thresholds
- Customize wallboard controls

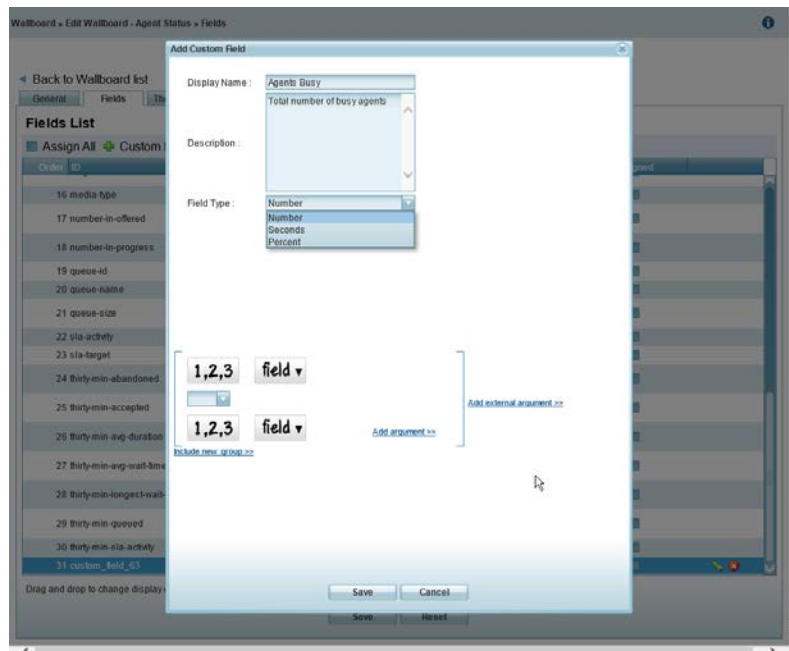
Customizing Metrics

If you need more stats than what is readily available, you can build custom fields by defining custom queries. For example, if you wish to track agents unable to answer interactions at a given time, you can define a custom field as follows.

Number of agents Busy = Offered + Processing + Post-processing

To define a custom field:

1. Click  or **Custom Field** link.
2. Enter the custom field details:



Field Name	Description
Display Name	The custom field name that displays on the wallboard
Description	A brief description of the metrics
Field Type	Select a data type from a choice of Number, Seconds, and Percent Note: The data type of custom field must match the data type of deriving fields.
Field Definition	Based on the requirements: <ul style="list-style-type: none"> ○ Select from the available fields drop down or enter a number value. ○ Select an operator -, +, -, *, / ○ Select another field or enter a number value Note: You can add any number of arguments.

Note: External arguments help grouping.

Customizing Threshold


Within each media, you can set up a custom threshold for each queue to suit your requirement. If the waiting time for an interaction in a queue exceeds 2 minutes, set up a first level threshold alert. If the time exceeds 3 minutes, set up an emergency alert. On breaching thresholds, wallboard gives corresponding alerts.

Customizing threshold is a two-step process.

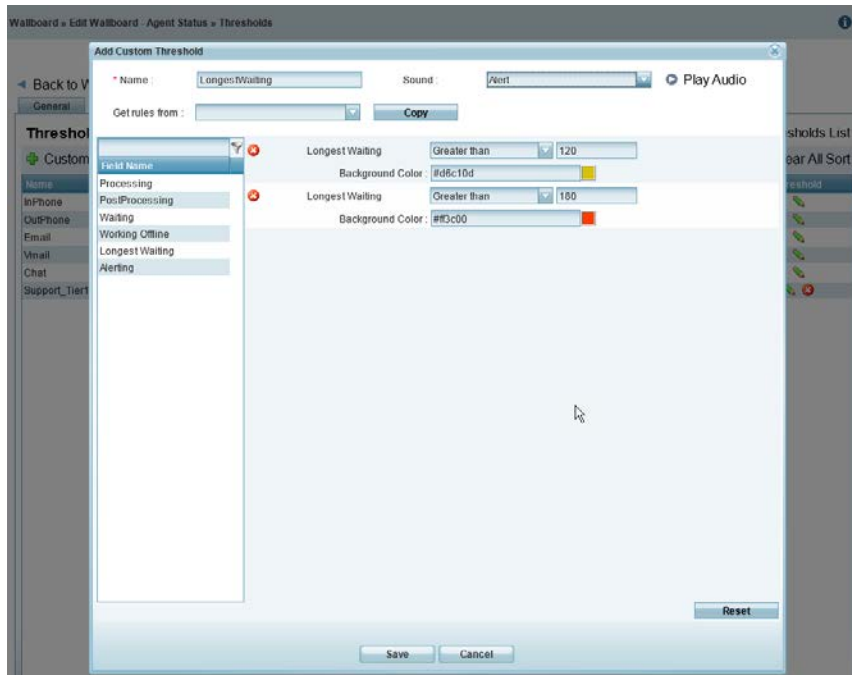
1. Set up a custom threshold with desired values and alert.
2. Apply this threshold to desired queues.

On running a wallboard with custom threshold, the alerts trigger on breaching the threshold for the selected queues.

To set up a custom threshold:

1. Navigate to the desired wallboard.
2. Click the Threshold tab.
3. Click  or custom threshold link.
4. Enter a name.
5. From the list of fields, select a field.
6. Using the right parameters, specify a threshold value.
7. Select a color from the color chart to pop a colored background to the data.

8. Select a sound alert from the drop down.
9. Add more fields as desired.



Defining a custom threshold

10. Save the custom threshold.
11. From the Queues tab, select the desired queue and apply the custom threshold from the drop down selections.

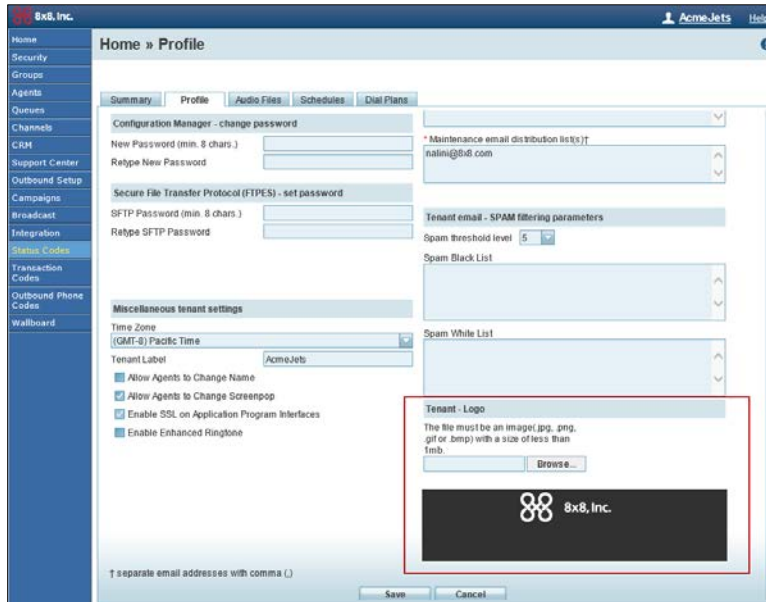
Branding your Wallboard

Brand your contact center wallboard by adding your company logo.

To brand your wallboard with your company logo:

1. Log into the Configuration Manager.
2. Click **Home > Profile**.

3. In the Tenant – Logo area, upload your company logo.

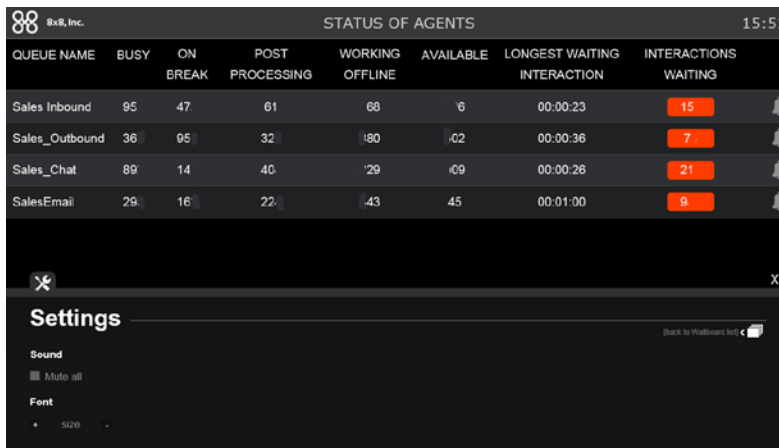


Uploading company logo

4. Save the changes.

Customizing Wallboard Display Font

You can control the font size of wallboard display and also mute audio alerts on your wallboard. Click the **Tools** area in the wallboard, and use the + and – signs to increase or decrease the display font size.



Enhancements to API Library

We have added three new APIs to our library.

- Recording Control API
- Provisioning API
- Streaming API

Improved PCI Support through Recording Control API

In a contact center environment, where payment card transaction is common, call recording can pose threat to data security. The 8x8 Recording Control API allows your custom web applications to programmatically pause and resume call recordings during a transaction. The API allows you to set up a secure environment and improves PCI support. With the API, you can stop recording the call while sharing sensitive information and resume when desired. Typically, this API can be triggered based on agent's cursor focus in your custom web application. For example, when an agent places the cursor focus on credit card data field, the API can be triggered to stop recording.

For details on how to access the API and the query parameters, refer to:

<http://www.8x8.com/Support/BusinessSupport/Documentation/VirtualContactCenterDocumentation/virtualcontactcenterrecordingcontrol.aspx>

Provisioning API

The 8x8 Provisioning API allows you to get the tenant schedule status at any time. Using the API, you can query if the contact center is open or closed at a given timestamp. Typically, you can use the API returned data for better processing of web callback transactions and external IVR transactions.

During a web callback transaction, use the contact center status data returned by API to determine if a web callback request can be honored. If the API response indicates the contact center is closed for the day, you can respond to the request accordingly. The External IVR can use the API to get required schedule status for setting up schedule based IVR directions. The Provisioning API responds with Open, Closed, or Choice1 to Choice 6 status as defined in the tenant schedule.

For details on how to access and query Provisioning API, refer to:

<http://www.8x8.com/Support/BusinessSupport/Documentation/VirtualContactCenterDocumentation/virtualcontactcenterprovisioning.aspx>

Streaming API

The 8x8 Streaming API is composed of set of functionalities enabling the tenants to receive real time information related to agent updates, agent provisioning updates, and interaction updates. This data could be streamed to a web server for review. For details, refer to:

<http://www.8x8.com/Support/BusinessSupport/Documentation/VirtualContactCenterDocumentation/VirtualContactCenterStreaming.aspx>