Evolve Contact Suite 5.0.1 Release Notes

We are excited to announce the Evolve Contact Suite (ECS) December 2018 v5.0.1 release that includes new capabilities for our customers.

What Do You Need to Know?

1. Any changes made to your environment must be fully deployed via Setup before the upgrade and previously deployed versions will no longer be available after the upgrade.
2. If you have agents staffed during the maintenance, they will experience downtime.
3. Users will get a notification on their first login after the upgrade to accept and download the newest update. Please instruct your users to accept the application update.
4. Review all updated documentation below, including the recently updated Report User Guide.

Why Update?

- New Features and Functionality
- Bug Fixes

What are the new features and functionality?

1. An updated ECS Reports interface that includes the ability to schedule reports for email delivery. The report scheduler can be accessed from the Supervisor Client or Application Portal. For more details, please review the ECS Report Scheduler Quick Reference Guide
2. Two new reports were added:
    - 1.06 – Staffing Report – Shows agent staffing by interval, day, week, and month and count of agents staffed, available, and the cumulative occupancy.
    - 5.05 – Queue Interval Summary Report – Shows key queue statistics in multiple interval combinations including hourly, daily, weekly, and monthly.
3. The Detailed Agent Interactions Report 2.01 was modified to optionally include CRM fields (First Name & Last Name) and the Remarks have been moved to a new column.
4. Agent Management via bulk upload within the Setup Client. Allows for the creation and modification of agents including skills, Business Processes, passwords, load allowance and agent characteristics. For more information, click here.
5. Routing Data via bulk upload: We've added a new Routing Data feature to ECS that is designed to ease the management of sophisticated contact centers that need dynamic routing capabilities especially for those organizations with hundreds or thousands of inbound phone numbers. In many instances, these phone numbers are linked to various products, marketing campaigns, or clients which dictate the caller experience and agent requirements. For instance, a contact center may represent many different product brands or clients. Based upon the number dialed or other attributes, ECS needs to dynamically adjust each caller's treatment such as:
    - Determine the proper greeting played to the caller
    - Look for agents with specific skills that are required to handle that interaction
    - Assign a specific language requirement
    - Pass information to the agent about the client, product, or campaign

    The new Routing Data capability provides customers with a wide range of data elements that can be used to dynamically control the call flow while simultaneously simplifying the actual programming / routing logic. Moreover, a new field called "Routing Info" was added to the Agent client that allows the agent to better serve each interaction since they will have additional information at their fingertips such as the marketing campaign, source of lead, or the path that interaction followed to reach that agent. Coming in our next ECS release will be the incorporation of some Routing Data attributes into the existing reports.
6. The following changes were made to the API methods:
    a. Add Contacts to Campaign – this new method will create or update existing contacts, add these contacts to the specified campaign, and optionally add these contacts to a list.
    b. Email – added new methods for email interactions:
        - Create Email Interaction – generates a new outbound email
        - Reply Email – creates a reply to an existing email interaction
        - Send Email – populates the content for an email reply
        - Upload Email Attachments – uploads the specified attachments
    c. Set Interaction Completion Status – this new method is used to specify the status of an interaction including creating a new callback.
    d. Get Agent Interactions – retrieves the current interactions for the specified agent
7. Interaction Handling Flow now supports call times in milliseconds when passing data to a third party application
8. New Campaign Setting – Dialing Order Strategy that determines the order that outbound calls are placed. We now offer 2 discrete dialing methods related to which takes precedence – dialing of new records or redialing of a previously called record as follows:
    - Exhaust List First – will prioritize new attempts over redials and call back requests
    - Exhaust Records First – will prioritize redials and call back requests over new attempts

    Both of these options are available as First In First Out (FIFO) and Last In First Out (LIFO) for a total of 4 choices in this drop-down.
9. Agents no longer need to be assigned an Agent Profile to receive Skill assignments. Skilling can now be managed within an individual agents profile in the Setup client.
10. In the Staffing section of the Setup Client agents can now be searched and filtered by the following parameters: *Name, Extension, End Point, Default Load Allowance, Available Load Allowance, Private Telephones, HPBX User, Email Address* and *Skill*
11. Minimizing the Agent Client now sends the client to the Taskbar.
12. The Setup client now performs error checking before every deployment. The newly added validate button must be selected first before deploying any changes. This process ensures that the changes made in Setup don't contain any logic or routing errors before they are deployed to the contact center. Please review How to Validate before Deployment for more information.
13. Agent assignment to Campaigns inside Supervisor has been moved to the Agent Assignment screen and now allows both temporary or permanent assignments. The Staff tab has been removed from Campaign Monitor. For more details, please review the Assign Agent to Business Processes and Campaigns section of the Supervisor Quick Reference Guide.

What are the Bug Fixes?

1. Agents were unable to perform a second consulted transfer after receiving an interaction from another agent within a Business Process queue.
2. At times, Dialer calls were not being reported correctly by the rest API when the interaction ends.
3. The Update Contacts API method was failing when using a contact ID.
4. In certain situations, the sound control buttons were missing on the Supervisor client.
5. The Setup Client occasionally would crash when deleting Agent Profiles.
6. The Add Remark method via the API wasn't functioning properly.
7. The Interaction ID was not populating on the Format text within the Interaction Handling flow and on the Remark displayed within the Agent client.
8. In certain situations, incoming calls could not be answered via the Supervisor Client.

Documentation

Supervisor User Guide

Supervisor Quick Reference Guide

Cloud Dialer User Guide

Report User Guide

Report Scheduler Quick Reference Guide

Agent User Guide

Setup and Manager Client Help Content

API Documentation – https://ecs-apps.voip.evolveip.net/API/Help

API Sample Page – https://ecs-apps.voip.evolveip.net/API/test.html

For customers that wish to utilize the Agent and Supervisor APIs – use the following link — **https://ecs-apps.voip.evolveip.net/Api**