Release Notes
CoreInteract (**CI**), CoreAttendant (**CA**), CoreEngage (**CE**), Workgroup Insights (**WI**)

Change Type: Major
Release Date & Time: Monday, January 9, 2023, 1:00am US Eastern Standard Time
Environment: CI Production (US)
Rollback Plan: If issues are found, rollback will take place within 1 hour of release
Cycle 0 testing: Monday, January 9, 2023, 1:00am-6:30am US Eastern Standard Time

Product/Features & Brief Description:

1. **CA Call Controls** (Web & Desktop Version)
   - Manage Calls within CoreAttendant ****Answer from Teams Popup*
   - Transfer, Consult Transfer, Hold/Resume

2. **CE Connect** (Web Version)
   - Integrate business systems with CE for custom Contact Card to pop-up with incoming calls
     - **Example:** Salesforce, Dynamics, SharePoint, etc.
   - Altigen Professional Services Required

3. **CE Call Controls** (Web & Desktop Version)
   - Manage Calls within CoreEngage ****Answer from Teams Popup*
   - Transfer, Consult Transfer, Hold/Resume

4. **CE Outbound Calling** (Web & Desktop Version)
   - Ability to Make Outbound Calls

5. **CE Queue View** (Web & Desktop Version)
   - View Calls in assigned Queue(s)

6. **CI Workflow Call Transfer** (CI Admin Web Version)
   - Transfer Calls to an External Number
   - Set up with Workflow Builder using External Transfer Logic Card

7. **CI Power BI Integration** (CI Admin Web Version)
   - Access Power BI Reports through CI Admin

8. **CI Power BI Report for Outbound Calls** (CI Admin Web Version)
   - Outbound Call Data added to standard CI Power BI reports
   - Teams Calls

9. **WI Dashboard Permission Management** (Web & Desktop Version)
   - Access CI Admin for Permission Management from WI Dashboard

10. **WI Supervisor Join** (Web & Desktop Version)
    - Ability for Supervisor and/or User with WI Enabled to Monitor Workgroup Calls
    - Agent can see when supervisor/User initiates join feature
    - Caller is unaware of supervisor join
    - Supervisor continues if/when call is transferred

Change Details & Effect on Customers:

1. **CA Call Controls** (Web & Desktop Version)
   - Call Controls (Hold, Blind Transfer, Consult Transfer, End) appear when there is an active call
   - Answer from Teams pop-up

2. **CE Connect** (Web Version)
   - CoreInteract for Admin includes a new Advance Setting tab within Workgroup Settings
   - A Pop-up URL Field is available to enter a custom URL
   - This allows for the custom designed contact card to pop-up within CoreEngage Connect
   - Professional Services engagement is required for implementation

3. **CE Call Controls & Home Page** (Web & Desktop Version)
   - Call Controls (Hold, Blind Transfer, Consult Transfer, End) appear in Conversation Window with an active call
     - Answer from Teams pop-up
   - New Home Page Layout
     - Take Conversation workgroup list relocated to right side
     - Conversation log replaces blank contact card
     - New queue view is location under conversation window
     - New Setting icon at top right & dial pad icon at bottom left for outbound dialing

4. **CE Outbound Calling** (Web & Desktop Version)
   - CI Admin – Resource Management
     - Setting to Enable External Calling by Resource Account
   - CE Home Page
     - Setting Gear found at top right to enable outbound calling
     - Dial Pad icon bottom left
   - **Note:** Outbound dial functions by ringing CE user/agent first and then dials outbound number. This ensures the user/agent is on the line before outbound party dialed.

5. **CE Queue View** (Web & Desktop Version)
   - Located below Conversation Window
     - Selected as default and will show all calls in queue across all workgroups user is assigned
     - View only, does not allow to pick/take calls from queue view

6. **CI Workflow Call Transfer** (CI Admin Web Version)
   - CI Admin – Resource Management
     - Setting to Enable External Calling by Resource Account
   - CI Admin – Workflow Builder
     - External Transfer Logic Card to add to workflow

7. **CI Power BI Integration** (CI Admin Web Version)
   - CI Admin Setting
     - Power BI Report Access tab
     - Ability to create tabs for additional Power BI reports
   - **Note:** Power BI Pro license (per user) required for CI Power BI report setup

8. **CI Power BI Outbound Call Detail**
   - Outbound call detail included with the standard CI Power BI reports

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9. WI Dashboard Permission Management (Web & Desktop Version)
- Setting Gear at top right of dashboard
  - Pop-up will access permission settings for the workgroup selected

10. WI Supervisor Join (Web & Desktop Version)
- Workgroup Stats – Active Conversation Column
  - Phone icon appears when user has active conversation in progress
  - Allows to click and silent join to monitor and use to click to end monitoring
  - Caller is unaware of silent join
  - Agent may be aware with Teams view

After Release Limitations and Known Issues:

1. CA Call Controls (Web & Desktop Version)
- **Consult Transfer:** Stopping consult while target is ringing, target can still answer call and talk to user
- **Resume Call:** When 1st call is placed on hold and take second call then go back to 1st call the active call window is empty, does not display 1st call information.
- **Wrap-Up:** When call on hold ends from either side, wrap-up time does not work.

2. CE Connect (Web Version)
- **End:** Hang up, the contact information card is closed, unable to retrieve to add/update information
  - Wrap-up feature will be included with future release
- **Custom screen pop:** Only available with web version - Limitation

3. CE Call Controls (Web & Desktop Version)
- **End:** Hang-up, contact information card is closed, unable to retrieve to add/update information
  - Wrap-up feature will be included with future release
- **Call Distribution:** User/agent has 2 calls for different workgroups in queue, once agent is available, both calls will be dispatched at the same time.
- **Consult Transfer:** Stop consult while target is ringing, target can still answer call and talk to user – Limitation

4. CE Outbound Calling (Web & Desktop Version)
- **DTMF:** Extension dial is not available
- **No DID:** User can enable outbound call without a DID number, does not function
- **Reporting:** Outbound unavailable in CI report only available with CI Power BI reports – Limitation

5. CE Queue View (Web & Desktop Version)
- **View:** Shows user all calls in queue across all their assigned workgroups (mixed) – Limitation
- **Calls in View:** Cannot select or answer any call in the queue view – Limitation
- **Hold View:** Not across workgroups, user only sees their calls on hold - Limitation

6. CI Workflow Call Transfer (CI Admin Web Version)
- **Resource Accounts:** Some Resource Accounts are not showing

7. CI Power BI Integration (CI Admin Web Version)
- Must have Power BI Pro License per User

8. CI Power BI Outbound Calls Detail (CI Admin Web Version)
- Must have Power BI Pro License per User

9. WI Dashboard Permission Management (Web & Desktop Version)
- No Known Limitation or Issues

10. WI Supervisor Join (Web & Desktop Version)
- **Call Transfer**: When call is transferred, monitor capability continues if supervisor does not end - Limitation

Additional Requirements or Awareness

Post Release Info

- Altigen Deployment will provide new CE/CA App to install

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