

# Non-Production Release Notes v12

EMPLIFI AGENT  
MAY 2023

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## Introduction

This document describes the upcoming software changes in Emplifi Agent version 12.0. This document does not cover previous releases.

Emplifi Agent version 12.0 is a SaaS-only deployment. In this release, System Manager will have limited functionality. If you are a SaaS customer, the required changes will be made during your upgrade.

Most changes to the software are available immediately after you upgrade; however, some changes may require setup or configuration before you can use them.

### New Name for Agent

Astute Agent is now rebranded to Emplifi Agent. As part of our rebranding, you will notice improvements to the user interface such as colors and font, as well as instances of Astute being renamed to Emplifi.

### Users of Internet Explorer (IE) Browser

**Important:** Microsoft ended support for Internet Explorer (IE) on June 15, 2022. Please visit the [Lifecycle](#) page on Microsoft's website for more information.

Emplifi Inc. supports the latest versions of the Chrome, Edge (including Chromium), and Firefox browsers.

### Users of ePowerCenter Earlier than 10.5

Emplifi Inc. no longer provides Development support for ePowerCenter versions earlier than 10.5. Please contact your Customer Success Manager to plan for an upgrade.

### Users of PCEmail using CIC 2015 R1 and Earlier

Emplifi Inc. no longer provides support for CIC 2015 R1 and earlier versions for PCEmail users. Please contact your Customer Success Manager to plan for an upgrade.

### Help File

The Emplifi Agent Help provides detailed documentation on how the system works. To display the Help topics provided in your most recent upgrade, click the **Help** button (or press [Ctrl + F2]) in either the Classic or Standard interface.



## New Features

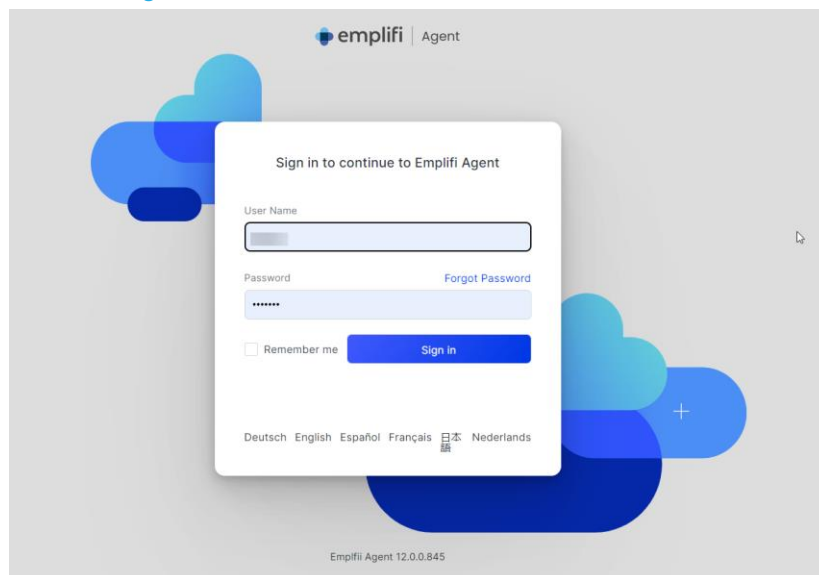
You can learn more about Emplifi Agent's new features by clicking this [New Release Webinar](#) link and watching the What's New in Emplifi Agent webinar.

### Refreshed User Interface

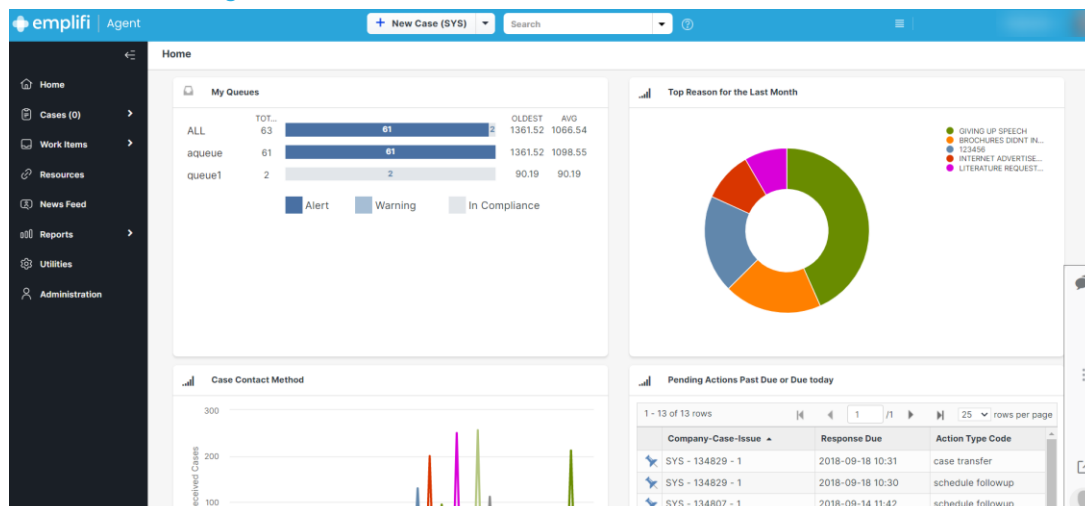
A11-665; A11-1149

We have refreshed the Emplifi Agent user interface to be cleaner, brighter, and more refined. It is on-brand with the new Emplifi Agent logo and colors, but it can still be personalized. There are no button changes, however the **New Case** and **Search** buttons are now located in the center of the page banner. There is no retraining required for these changes.

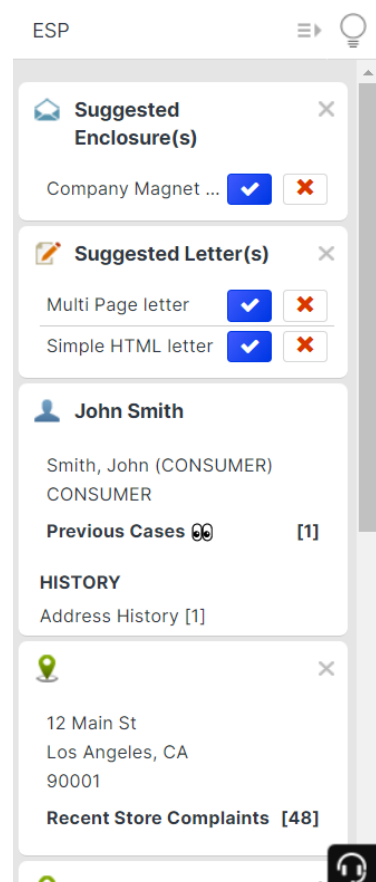
#### Refreshed Sign in Screen



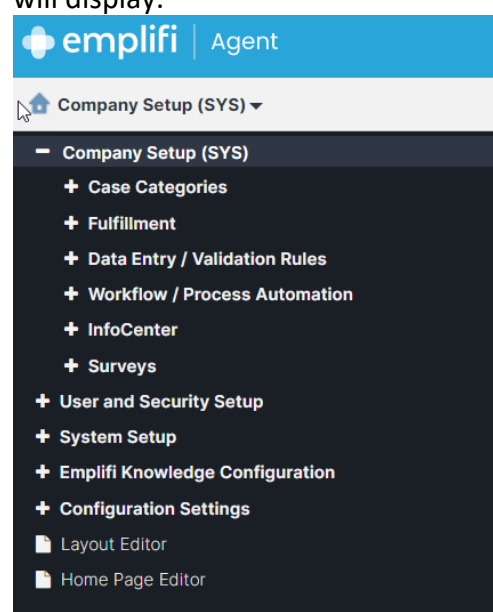
#### Refreshed Home Page



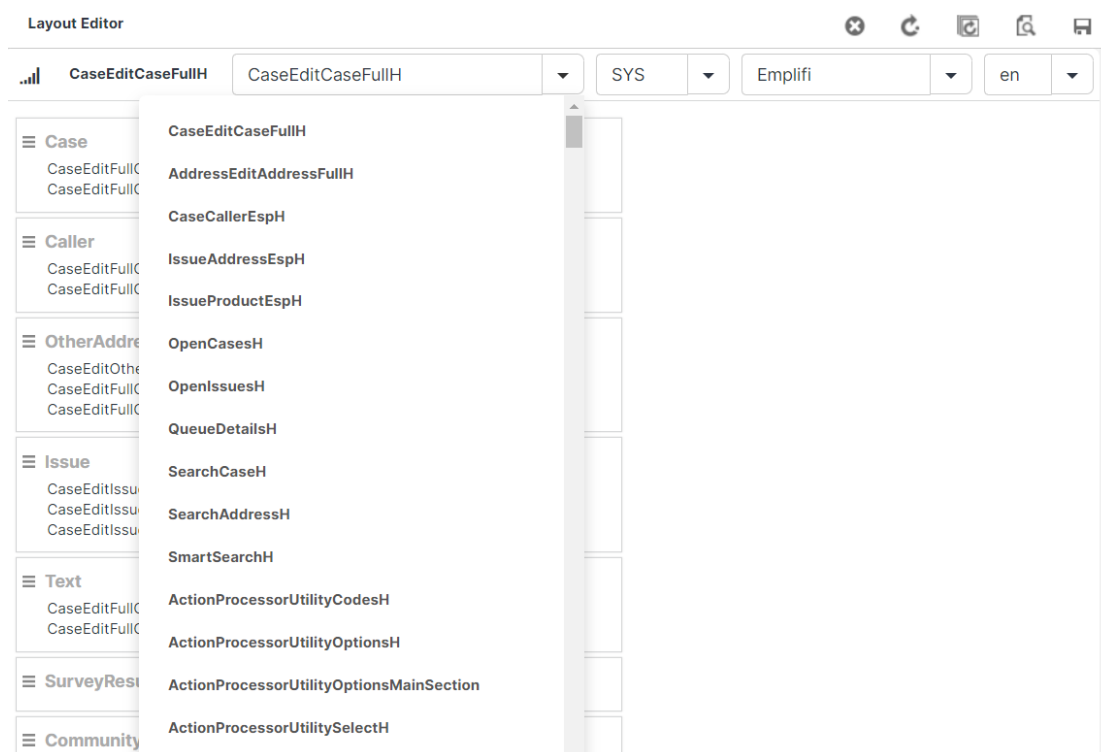
## Refreshed ESP Panel



We have also added some “Save a Click” items for administrators. We have reduced the number of clicks an administrator needs to perform in Administration. Now, when an administrator clicks **Administration** from the Application Function Bar, the following options will display.



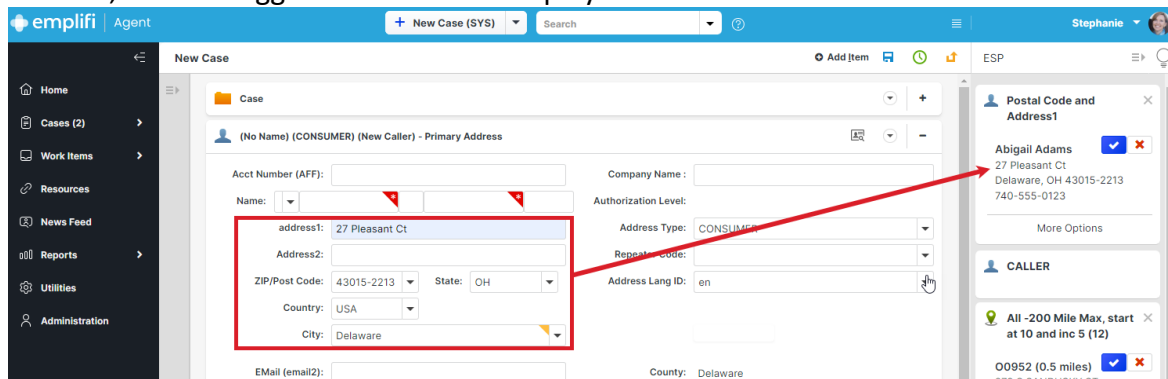
When selecting the Layout Editor, you will find it defaults to “caseeditcasefullH” and the most edited layouts appear at the top of the drop-down menu.



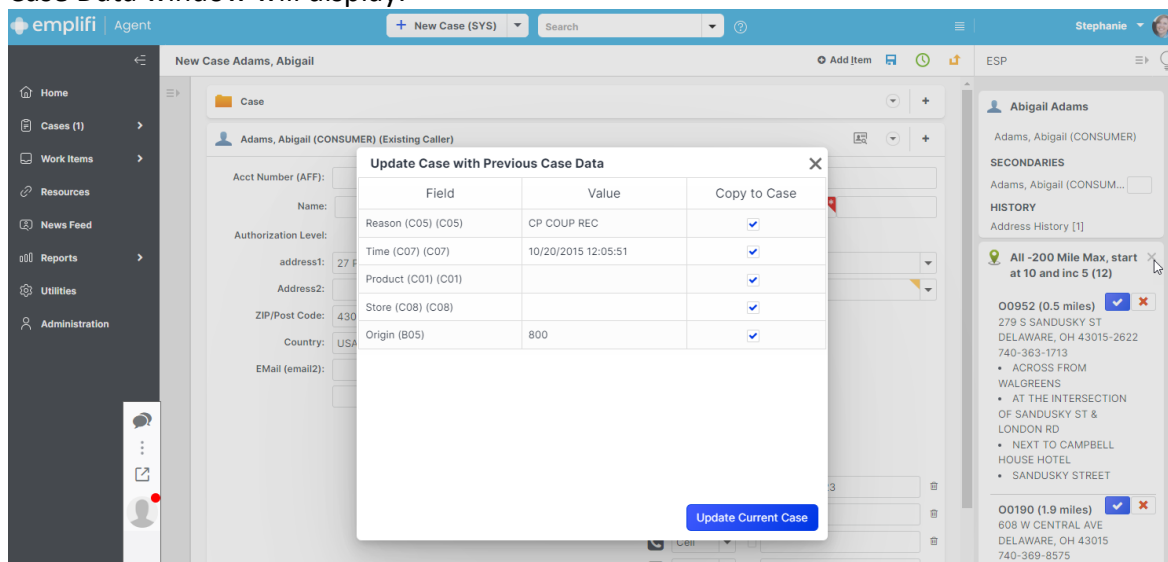
## Pull Data from Existing Case into Current Case A11-926

We have enhanced the New Case for Caller feature. In addition to easily creating a new case from an address, you now have the option to pull data from a previous case when an existing customer address is selected and add that data to the current case. This feature is useful for agents who are handling a repeat caller. For example, if a customer previously called about a store issue, there’s a good chance a repeat call from that customer has to do with the same store location. An agent can view the store details from a previous case and choose to autofill the current case with the same store information. This can apply to order numbers, products, store locations, etc.

When the Address Search Rule is set up by an administrator and an agent enters a caller's address, a list of suggested callers will display in ESP.



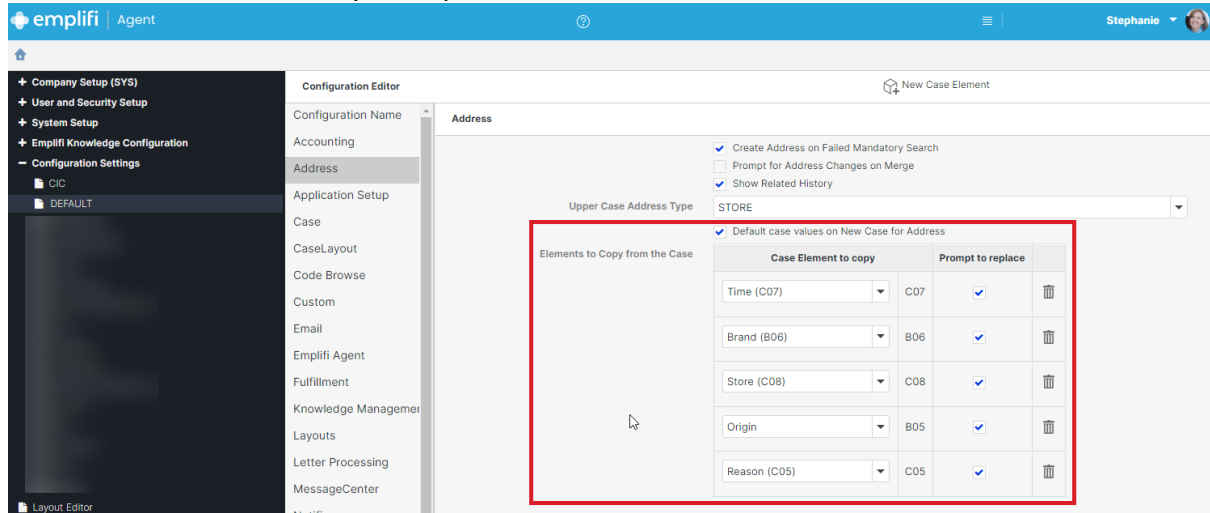
When an agent accepts the ESP suggestion for the caller, the Update Case with Previous Case Data window will display.



Field	Value	Copy to Case
Reason (C05) (C05)	CP COUP REC	<input checked="" type="checkbox"/>
Time (C07) (C07)	10/20/2015 12:05:51	<input checked="" type="checkbox"/>
Product (C01) (C01)		<input checked="" type="checkbox"/>
Store (C08) (C08)		<input checked="" type="checkbox"/>
Origin (B05)	800	<input checked="" type="checkbox"/>

On this window, a list of field values can be selected for copying to the current case. An agent can clear any checkboxes of field data they do not want copied to the case. When clicking the **Update Current Case** button, the selected field values are copied to the current case.

To enable this feature, an administrator must select the **Default case values on the New Case for Address** checkbox on the Address Configuration Editor screen. Then, select the case elements to pull into the current case. If the “Prompt to replace” option is not selected, the value will automatically be copied to the case.



## Improved the Related Cases Feature (Dynamic Filters)

A11-1066; A11-1069; A11-1070; A11-1072; A11-1084; A11-1071

We have added improvements to the Related Cases feature for dynamic filters. An administrator can now use the following codes for dynamic filters: Address/Caller (A codes), Product Attributes (E codes), Initial Rep (B01), Responsible Rep (B02), Reviewed By (BHA), and Assigned To Rep (C02).

For case-related categories (A codes and E codes), the dynamic filter will now pull the Address/Caller values and Product Attribute values from the case.

For user-related categories (B01, B02, BHA, and C02 codes), the dynamic filter will pull values from the *logged in* user. This is helpful for administrators to create one Case Listing Report with dynamic filters and save it as a shared favorite. An agent who has access to the shared favorite can access the report on the Home Page widget, Work Items, or Quick Reports. Then, the agent can view the report to see a list of cases they are responsible to handle, for example.

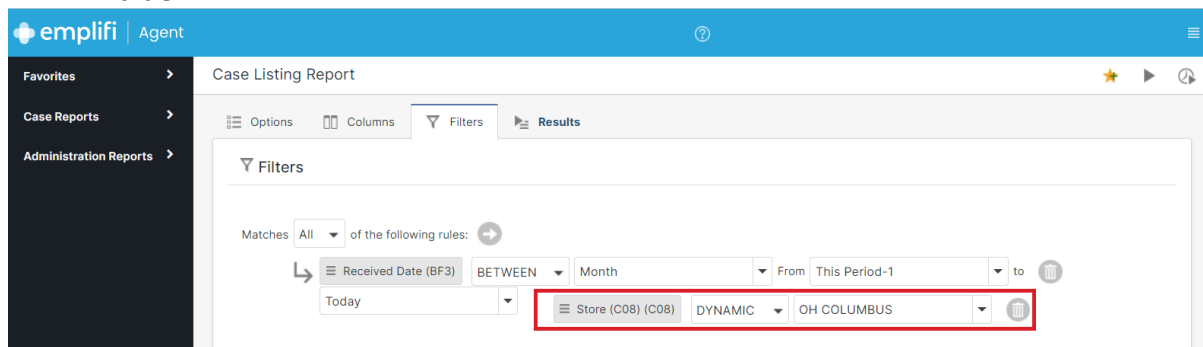
We have also improved the dynamic filter as the categories on the case change. Whenever a field updates, the dynamic filters and number count are automatically updated.

These improvements require some new setup for administrators. For more details, please refer to the following Agent Help Center topics: *Related Cases*, *Related Cases on ESP Setup*, and *Related Cases on Workbench Setup*. Below is a summary of the new setup options.

## Case Listing Report Setup

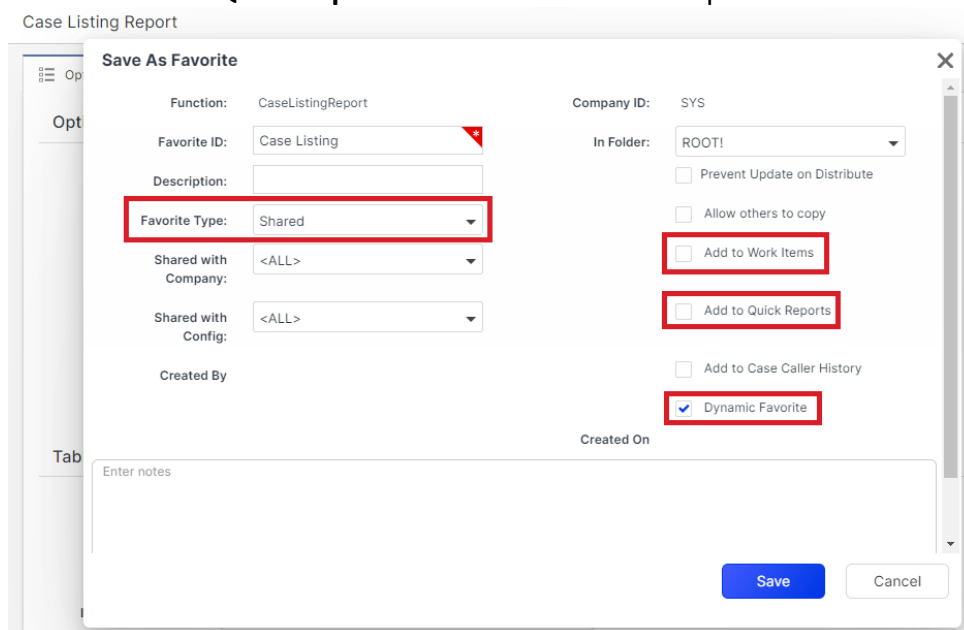
After setting up the report, be sure to:

- Add the filter category and set the **Operator** field to “DYNAMIC”. The specified value must be at the “Code Level”. It will be used when testing the report but will be replaced when running it from the Case/Home Page with the defined category code value.



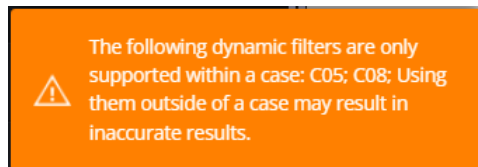
When you click the **Save as Favorite** button:

- If the report will be shown on the InfoCenter, Store, or Product ESP cards, select “Shared” from the **Favorite Type** list and select the **Dynamic Favorite** checkbox.
- If the report will be shown on the Caller card, select “Shared” from the **Favorite Type** list and select the **Add to Case Caller History** checkbox.
- If the report will be shown on Work Items or Quick Reports, select either the **Work Items** or **Quick Reports** checkbox to add the report there.



## Home Page widget, Work Items, and Quick Reports (User-Related) Setup

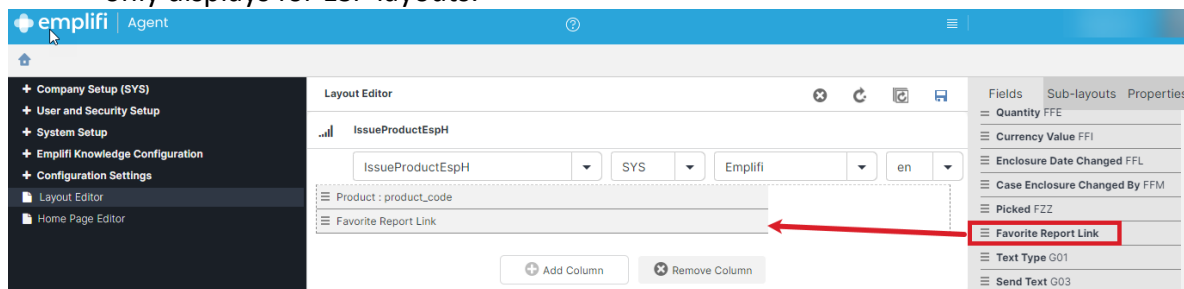
After you have configured the Case Listing Report favorite, no additional set up is needed. If you added dynamic filters other than user-related categories, a warning message will display.



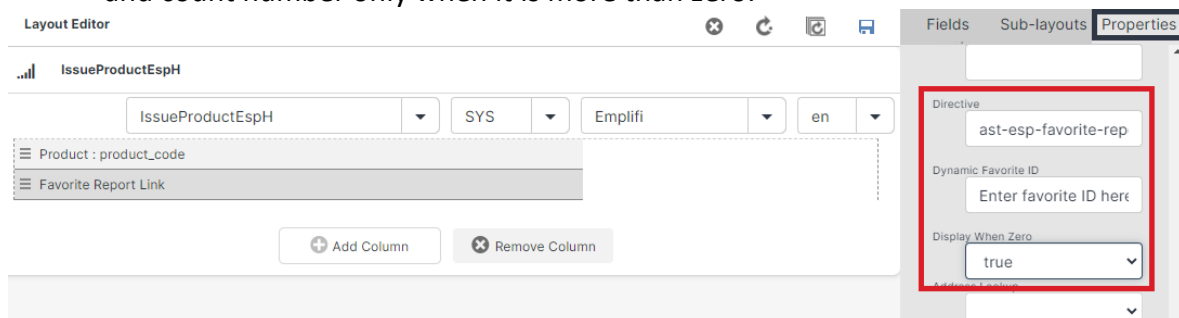
## ESP Card (Caller, Product, or Store) Setup

After setting up the report favorite:

1. On the Layout Editor, drag the **Favorite Report Link** field into the layout. This field only displays for ESP layouts.



2. In Advanced Properties, the **Directive** field will be prefilled as “ast-esp-favorite-report-link.” DO NOT CHANGE the **Directive** field.
3. Enter the favorite ID for the Case Listing Report in the **Dynamic Favorite ID** field.
4. Make sure the **Display When Zero** field is set to “true” to show the report link and count, *even when the count is zero*. Set this field to “false” to show the report link and count number only when it is more than zero.



5. **Save** and regenerate the layout.

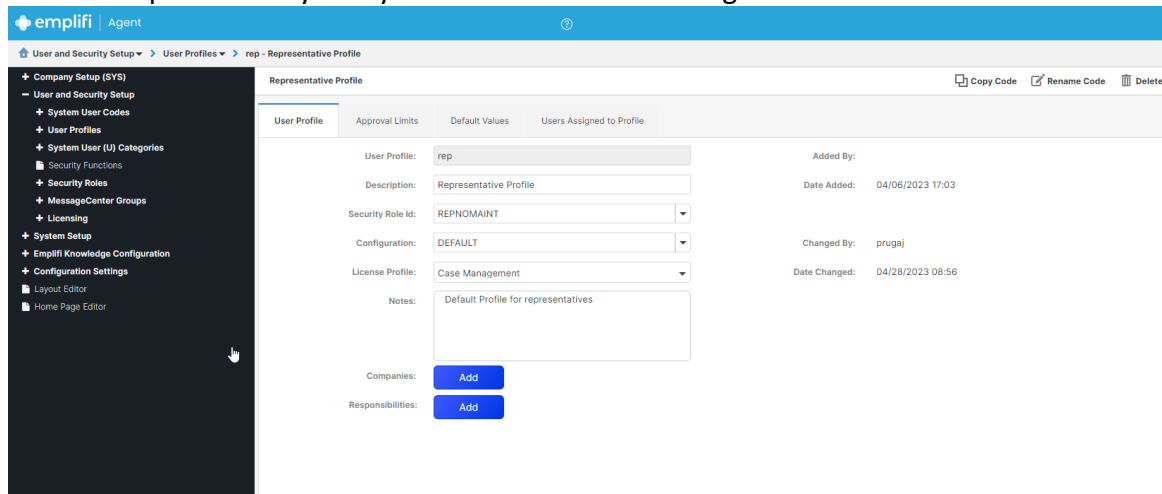
## Create User Profiles in Agent

### A11-1055

We have added the ability for administrators to create a single User Profile for multiple users with the same user settings. This will help administrators manage large groups of users. For example, the User Profile will contain common elements such as Configuration, Queue/Responsibility, Security Role, License, Approval Limits, and other User Preference options. Once the profile is created, it can be assigned to individual users. This way administrators do not need to add the common elements multiple times, but rather they can create a User Profile that can be assigned to users.

To access this new feature:

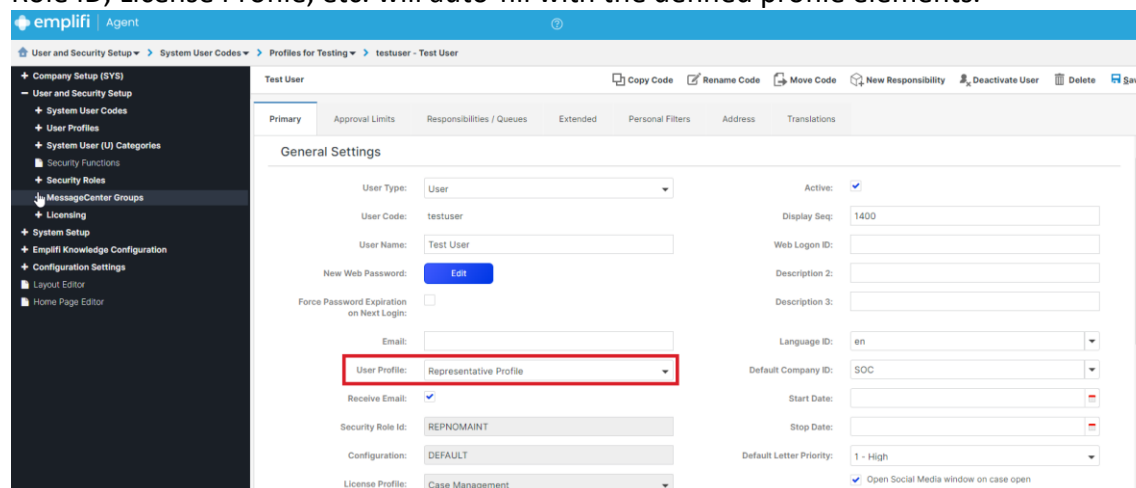
From Administration, select **User and Security Setup > User Profiles**. This is where you will create the profiles for your system users and make assignments.



The screenshot displays the 'User and Security Setup' interface in the Emplifi Agent application. The left sidebar shows a navigation menu with options like 'Company Setup (SYS)', 'User and Security Setup', 'System User Codes', 'User Profiles', 'System User (U) Categories', 'Security Functions', 'Security Roles', 'MessageCenter Groups', 'Licensing', 'System Setup', 'Emplifi Knowledge Configuration', 'Configuration Settings', 'Layout Editor', and 'Home Page Editor'. The main content area is titled 'Representative Profile' and contains a form for creating or editing a user profile. The form includes fields for 'User Profile' (set to 'rep'), 'Description' (set to 'Representative Profile'), 'Security Role Id' (set to 'REPNO MAINT'), 'Configuration' (set to 'DEFAULT'), 'License Profile' (set to 'Case Management'), and 'Notes' (set to 'Default Profile for representatives'). It also shows 'Added By' and 'Date Added' (04/06/2023 17:03), and 'Changed By' (prugaj) and 'Date Changed' (04/28/2023 08:56). At the bottom, there are 'Add' buttons for 'Companies' and 'Responsibilities'.

Elements on the User Profile tab and Approval Limits tab will be used when creating new users assigned to the User Profile and will update existing users when changes are made. Default Values will only be assigned to new users (or existing users with a “blank” value).

In addition to making assignments on the User Profile page, you can assign User Profiles by using the new **User Profile** field on the System User Code - General Settings tab. When you select the User Profile from the field list, the profile assignments for Configuration, Security Role ID, License Profile, etc. will auto-fill with the defined profile elements.

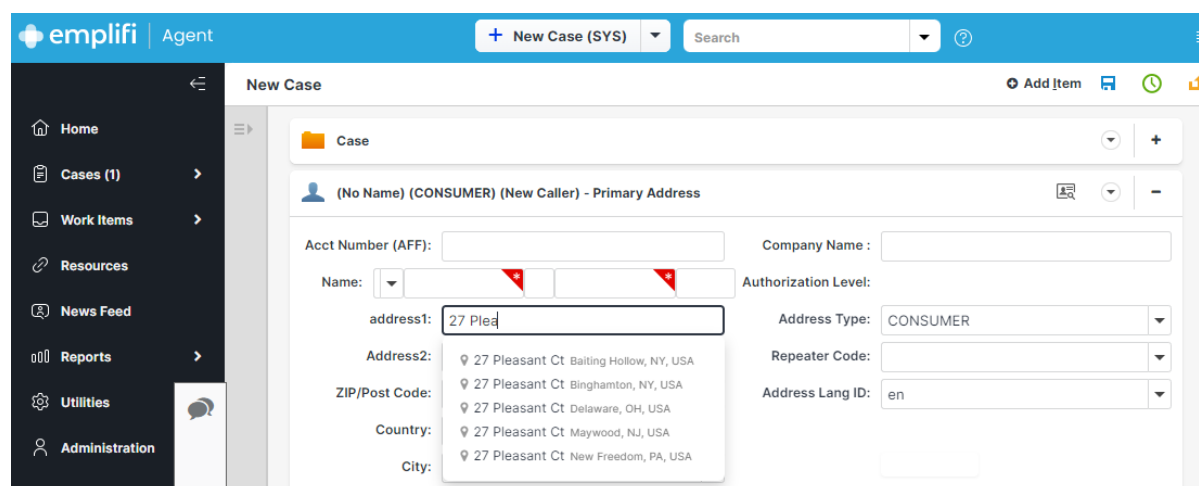


## Added Single Line Address Lookup w/Auto-Complete

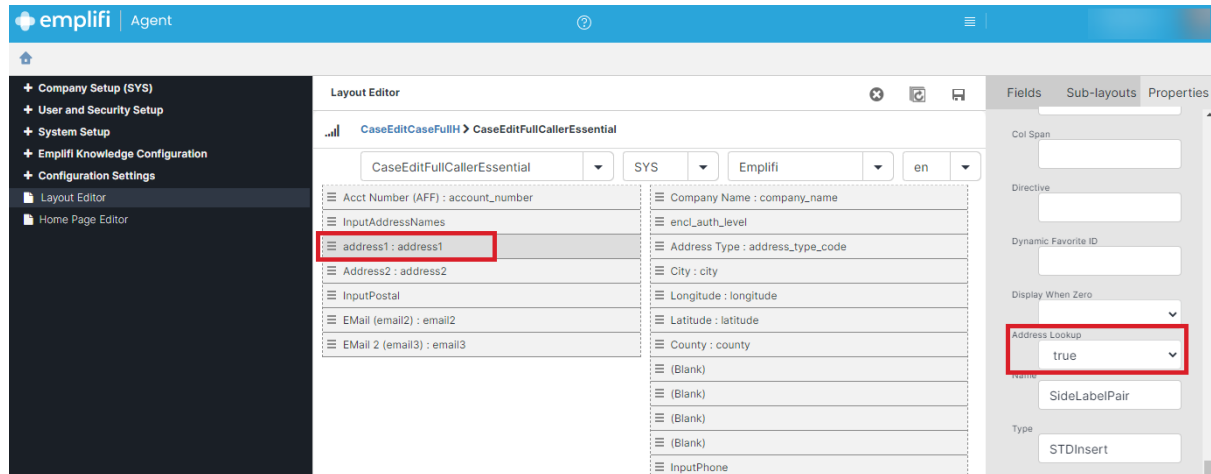
A11-1106; A11-1103

**Note:** This capability requires a separate licence key from a supported vendor (Melissa Data, Locate+, or Google).

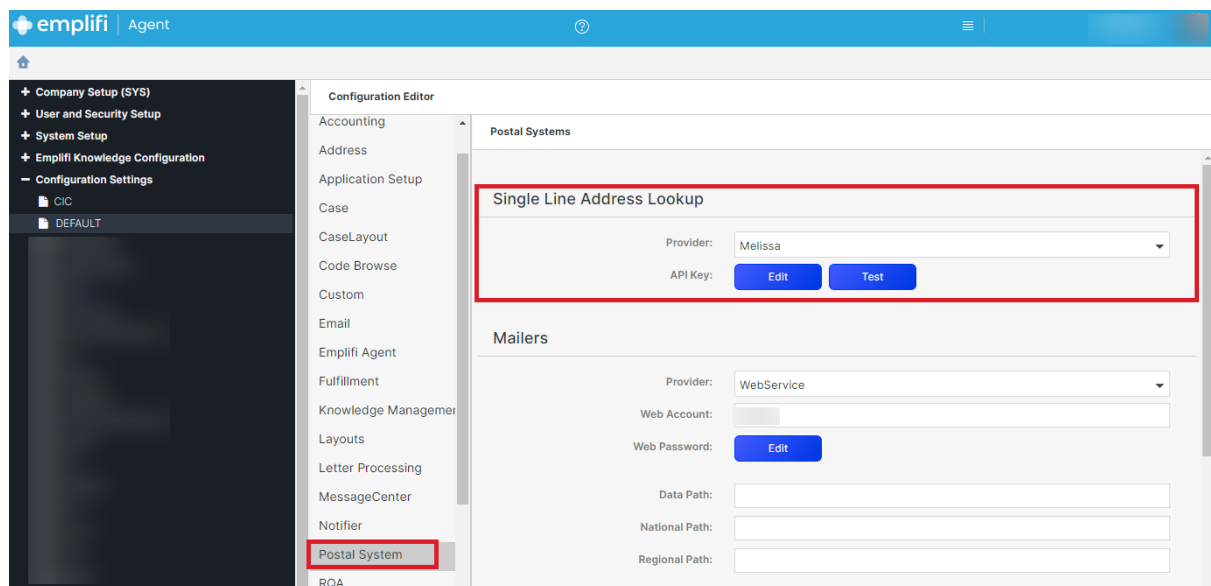
We have added the ability for agents to do a one-line address lookup, when the feature is configured by an administrator. When an agent begins to type a postal address (more than three characters), a list of matching postal address suggestions will display. The agent can select from the list to automatically fill in the address fields. This new feature also supports global postal address lookup (based on products purchased from vendor).



For an administrator to enable this feature, there are two steps. First, open the case caller layout on the Layout Editor. Select the field where address lookup will be enabled (usually address1) and set the **Address Lookup** property to “true.”



Second, select the Lookup Service Provider on the Postal Systems Configuration Editor.



## Summary of new features for version 12.0

New Feature Description	User Impact	Case ID	Project ID
Updated Case Export Utility so that special characters are not encoded in the file output.	Administrators	202436	A11-329
Enhanced the Case Export Utility to be able to export dates in a format that Excel recognizes as a date.	Administrators	202563	A11-351
Added a new feature to pull data from the previous case when an existing caller address is selected and add that data to the current case.	Agents		A11-926
Enhanced the date fields to allow for a positive integer (such as 0 or 3) to be entered to automatically fill out the date with the current date plus the number of integers specified.	Agents	260447	A11-1068
Simplified the Administration to reduce the number of clicks needed to access items inside of Company Setup.	Administrators		A11-1148
Moved the online Help to a separate server to allow for more frequent updates.	ALL		A11-1105
Improved the functionality of accordions inside of Agent Assist.	Agents		A11-1075
Updated report output to Excel so that the data type (number, date, string, etc.) is sent to Excel to format the data properly.	Administrators	124407; 202436	A11-328
Expanded the capability of the Related Cases feature to do the following: <ul style="list-style-type: none"> <li>Work with any user related category (such as Initial Rep, Responsible Rep, Performed By, etc.) to use the logged in</li> </ul>	ALL		A11-1072; A11-1069; A11-1070; A11-1084; A11-1066;

New Feature Description	User Impact	Case ID	Project ID
<p>user. This will simplify Work Items, Quick Reports, and Home Page widgets.</p> <ul style="list-style-type: none"> <li>● Improve the dynamic filter as the categories on the case change.</li> <li>● Use dynamic filters on A codes for Caller.</li> <li>● Work on E categories for Product Attributes.</li> </ul> <p>Add the ability to run a Related Cases report on the Caller, Product, and Store ESP cards.</p>			A11-1071
Added a new feature to add a default on date categories of [+XXX] number of days that should be added (or subtracted) from today's date.	Administrators	201505	A11-287
Added a <b>Refresh</b> button to get the latest data on the different reports in Work Items.	Agents	109006	A11-13
Updated the system if mailer fails to validate Address on Auto Prep Tags. Instead of leaving the field empty, the system fills in the value that came from the Import form.	Administrators		A11-675
Updated the system if mailer fails to validate Address on Auto Prep Tags. Instead of leaving the field empty, the system fills in the value that came from the Import form.	ALL		A11-1137
Added a new User Profiles feature for administrators to define common elements of a user and apply the profile to individual users.	Administrators		A11-1055
Added additional fields to the Layout Editor so that they can be made visible on the case.	Administrators	142433; 201230	A11-271
Improved usability by moving the "BH" Case Review Handling Scores from	Administrators		A11-1166

New Feature Description	User Impact	Case ID	Project ID
<p>under the Case Main (B) Categories to a new folder called "Case Review" under "Workflow/Process Automation."</p> <p><b>Note:</b> If you previously bookmarked any Case Review Handling categories, they will no longer work. You will need to create new bookmarks.</p>			
Added the ability to do a one-line address lookup, if configured.	ALL		A11-1106; A11-1103
Added the ability to create a Shared Favorite from a Personal Favorite.	ALL		A11-1054
Added a Support tool to capture information for the Emplifi Support team.	ALL		A11-1011
Added support for new Phone Types.	Administrators	136035; 216843; 240512	A11-423
Added additional paragraph inserts to be able to show description1 for changed_by_user_code fields.	Administrators		A11-1197
Pinned the most edited layouts to the top of the drop down in the Layout Editor.	Administrators		A11-1149
Refreshed the user interface to be brighter, more refined, and on-brand with the new Emplifi Agent logo and colors. There is no retraining required for these changes.	ALL		A11-665

## Bug Fixes

Summary of fixes to software elements for version 12.0

Bug Fix Description	User Impact	Case ID	Project ID
Fixed an issue in the Frequency Report when deleting a duplicate column row, the wrong one gets deleted.	Administrators		A11-391
Fixed an issue where a device could not be selected under the Subscriptions tab of a Notification Profiles in App Setup.	Administrators	231761	A11-453
Fixed an issue where favorites for the Mass Mailing Utility could not be opened.	Administrators		A11-743
Fixed an issue where Threshold Definitions did not appear in the drop-down menu for Threshold Events.	Administrators		A11-852
Fixed the Active checkbox on the Notification Definition to mirror the value in the Category Code tab.	Administrators		A11-891
Fixed an issue with case link in Related Cases report results when case company and current company are different.	Agents		A11-1000
Fixed user interface issues with scheduling jobs.	Administrators		A11-1030
Fixed an issue where multiple suggested actions could be duplicated on Save if the suggestion contained filters.	Agents	242052	A11-803
Fixed an issue with date pickers not working on pages other than the Case page.	ALL		A11-1063

Bug Fix Description	User Impact	Case ID	Project ID
Fixed an issue where cases with surveys would freeze the UI if the agent was using a high-resolution monitor.	Agents		A11-1033
Fixed an issue with Dynamic filters for InfoCenter attachments not working for Product (C01) codes.	Agents		A11-1089
Fixed an issue to correctly count the number of emails received to show a warning message if a threshold is reached when using Graph.	ALL		A11-934
Fixed an issue on reports where if no rows were returned and a custom file name was specified for an output of .xlsx, then an error would result instead of a spreadsheet with no data rows.	ALL		A11-901
Fixed some typos in various labels and logging messages.	ALL		A11-1044
Fixed an issue where favorites would not show under a folder with a name that contains a slash (/).	ALL		A11-1134
Updated the Graph Email implementation to send mail when an email is sent to quarantine. Also, updated the Configuration section for Graph to make it more obvious what fields are for SMTP vs. Graph.	Administrators		A11-1178
Fixed an issue where Auto Acknowledge for Emails was not working for existing cases if Sender Email from Tags was turned on.	Administrators	258215	A11-1053

Bug Fix Description	User Impact	Case ID	Project ID
Updated the Redaction Utility to run against the same address more than once.	Administrators	144754	A11-388
Improvements were made to reduce errors when trying to rebuild the field list and server cache due to the files being used by another process.	ALL		A11-1093
Updated the Clear Locked Users utility to be run in any company.	Administrators	201501	A11-283
Updated Agent to display an error message when logging in with a concurrent license when all licenses are in use and block the user from logging in, instead of allowing them in as an unlicensed user.	ALL		A11-885
Fixed an issue where the selected Time Frame in Data section of Frequency Report Options was not getting displayed when viewing the saved favorite.	Administrators		A11-1058
Fixed an issue where default values on a case would not trigger InfoCenter entries.	ALL		A11-1108
Added the <b>Refresh Dependent Codes</b> button to the Folder Dependent Code page in Administration.	Administrators	229137; 238277	A11-442
Added the ability to play .wav case attachments from the browser if supported by your browser. The exact way it plays is browser dependent.	Agents		A11-1203
Updated the Configuration for the Email Outbound settings to only show	Administrators		A11-1215

Bug Fix Description	User Impact	Case ID	Project ID
the needed settings based on the outbound type selected.			
Fixed an issue with the Address Redaction utility where it would not run if the "Remove attachments associated with redacted address" was selected.	Administrators		A11-1168
Fixed an issue where the Address Redaction utility would not run if the "Remove case texts for redacted address" option was selected.	Administrators		A11-1156
Improved performance of the Notification Profiles in Maintenance.	Administrators		A11-1143; A11-1237
Updated the Profile Notifications so that recipients of type Profile have the Category field appear so that a category can be selected.	ALL	262949	A11-1196
Updated the configuration to hide the Recording database connection string when returned to the user interface.	Administrators		A11-1185
Improved Date field entry to allow for a wider range of date formats. Also, fixed the date fields to allow for an integer to be entered, and the date will be calculated with that many days in the future.	Agents		A11-1188
Made some improvements to PCEvents to try to reduce the need to restart periodically.	Administrators		A11-1240
Rename instances of Agent to Emplifi	ALL		A11-553
Fixed the standard Special Report Columns so that they can be used in the Frequency Report in Standard.	Administrators	245428; 255315; 144135; 140297	A11-729

Bug Fix Description	User Impact	Case ID	Project ID
When posting an action, if the agent's email address is not licensed to send email with Graph, the system will attempt to send the email with the Graph Mailbox email address as the "from" address instead.	Administrators		A11-1213
Improved error handling when using the Forgot Password if the outgoing email is not properly configured.	Administrators		A11-1251
Fixed an issue where ESP suggestion cards were not always getting displayed on existing cases if the "enableAutoEspSuggestionsOnCase" setting is set to true (or not configured).	Administrators		A11-1257