

Release Notes

v11.3

EMPLIFI AGENT
FEBRUARY 2023

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Table of Contents

	Introduction.....	1
	Users of Internet Explorer (IE) Browser.....	1
	Users of ePowerCenter Earlier than 10.5.....	1
	Users of PCEmail using CIC 2015 R1 and Earlier	1
	Help File	1
	New Features	2
	Added a New Notification option to send notifications from a case.....	2
	Added the ability to create a New Case for Caller.....	4
	Added the Related Cases Feature	6
	Summary of new features for version 11.3.....	8
	Bug Fixes	9
	Summary of fixes to software elements for version 11.3.....	9



Introduction

This document describes the upcoming software changes in Emplifi Agent version 11.3. This document does not cover previous releases.

Emplifi Agent version 11.3 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.

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 Astute 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.

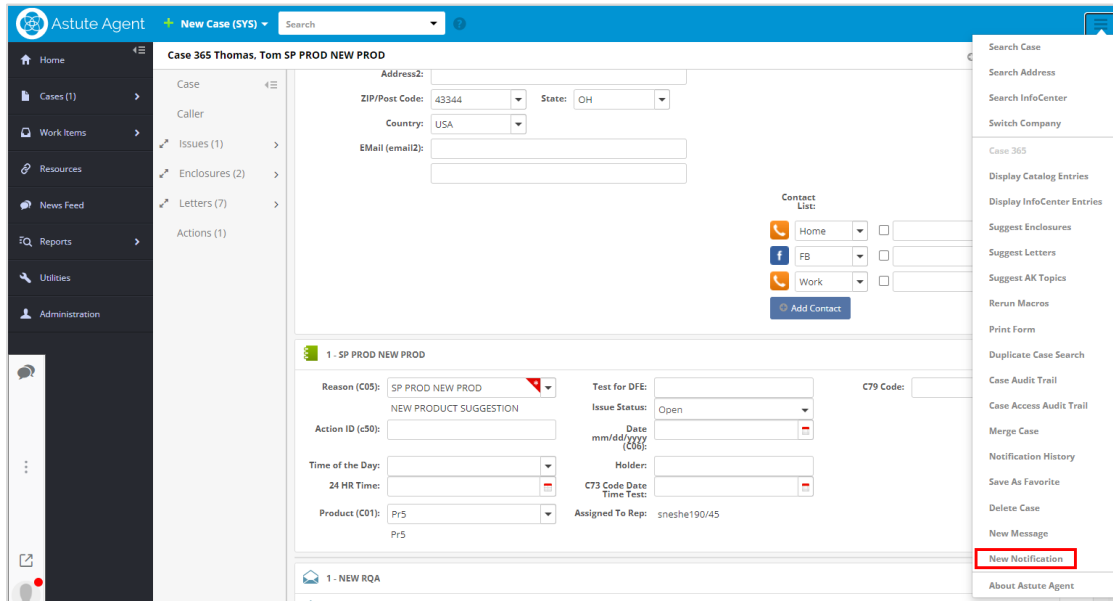
Standard Interface



New Features

Added New Notification option to send notifications from case A11-508

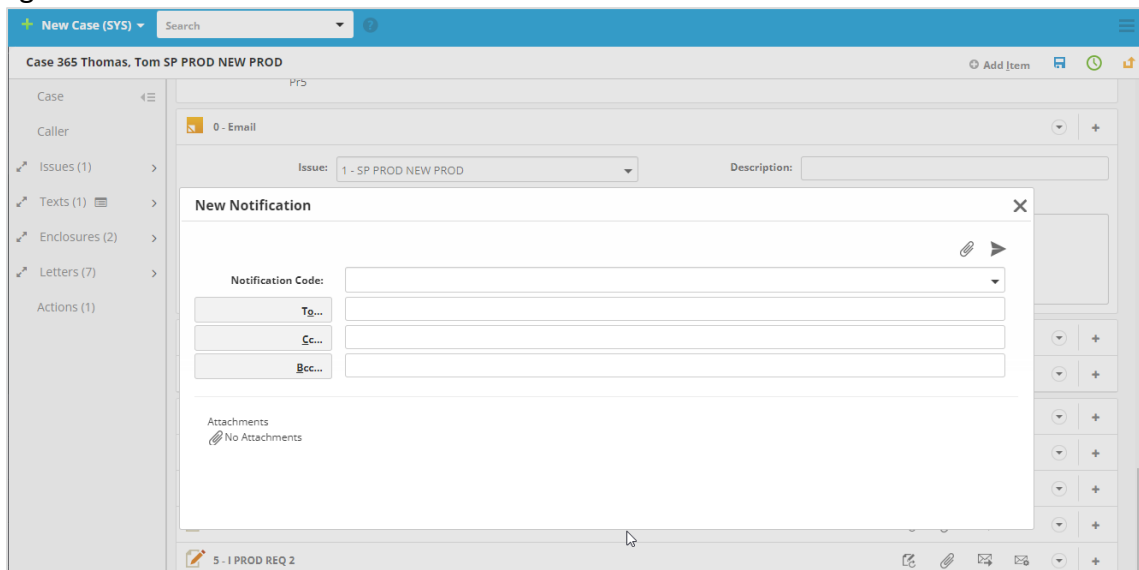
An agent can now send a manual notification from the case by selecting the **New Notification** option on the Application Menu. This option allows an agent to quickly create a notification related to the case and add related attachments, if needed. This is useful for communicating with vendors.




The screenshot shows the Astute Agent interface. On the left is a sidebar with navigation options: Home, Cases (1), Work Items, Resources, News Feed, Reports, Utilities, and Administration. The main area displays a case titled 'Case 365 Thomas, Tom SP PROD NEW PROD'. The case details include fields for Address, ZIP/Post Code (43344), State (OH), Country (USA), and Email. Below these are contact list options for Home, FB, and Work. A 'New Notification' option is highlighted in the application menu on the right. The menu also includes options like Search Case, Search Address, Search InfoCenter, Switch Company, Case 365, Display Catalog Entries, Display InfoCenter Entries, Suggest Enclosures, Suggest Letters, Suggest AK Topics, Rerun Macros, Print Form, Duplicate Case Search, Case Audit Trail, Case Access Audit Trail, Merge Case, Notification History, Save As Favorite, Delete Case, New Message, and About Astute Agent.

Note: The case must be saved before you can add a notification.

Once the **New Notification** option is selected, the New Notification window will open for an agent to create and send a notification.

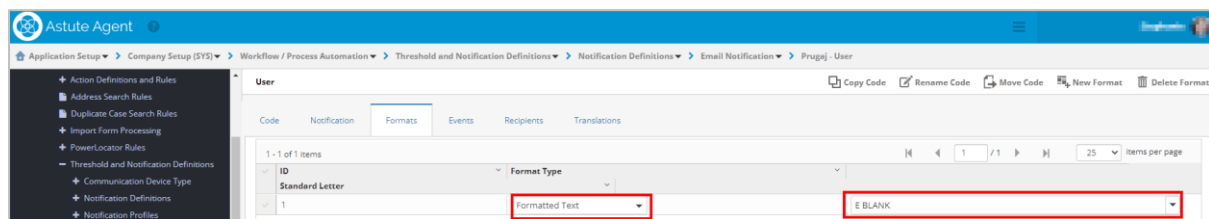


The screenshot shows the 'New Notification' window. It has a title bar with a close button. The window contains a 'Notification Code' dropdown menu, a 'To...' field, a 'Cc...' field, and a 'Bcc...' field. Below these fields is an 'Attachments' section with a 'No Attachments' message. The window is overlaid on the main case view, which shows the case details and a list of actions.

The agent will select a **Notification Code** from the list of notification definitions. Then, select to whom the notification should be sent, copied, or blind copied. By clicking the **Add Attachments** button  related attachments can be added to the notification.

Before an agent can send manual notifications, an administrator must create a new Notification Definition code. Be sure to enter the tab settings as shown below.

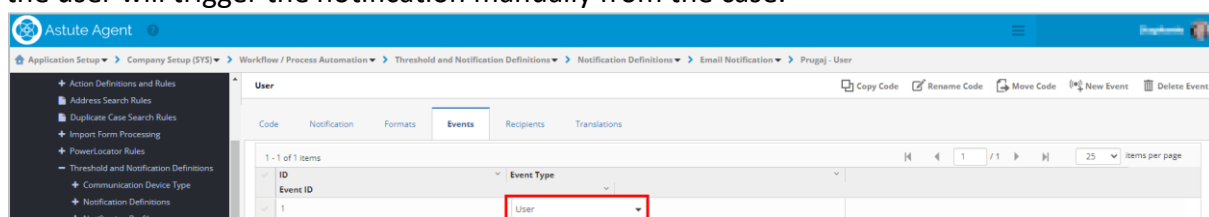
In the Formats tab, select the **Format Type** and **Standard Letter** that is sent with the notification.



The screenshot shows the 'Astute Agent' interface with the 'Threshold and Notification Definitions' menu open. The 'Notification Definitions' sub-menu is selected, and the 'Email Notification' tab is active. The 'User' notification definition is selected. The 'Formats' tab is active, showing a table with one item. The 'Format Type' is set to 'Formatted Text' and the 'Format' is set to 'E BLANK'.

ID	Format Type	Format
1	Formatted Text	E BLANK

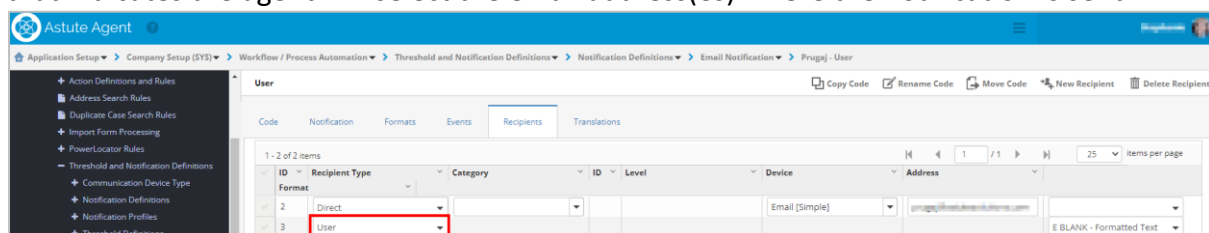
In the Events tab, select the **Event Type** as "User". This is a new type of event that means the user will trigger the notification manually from the case.



The screenshot shows the 'Astute Agent' interface with the 'Threshold and Notification Definitions' menu open. The 'Notification Definitions' sub-menu is selected, and the 'Email Notification' tab is active. The 'User' notification definition is selected. The 'Events' tab is active, showing a table with one item. The 'Event Type' is set to 'User'.

ID	Event ID	Event Type
1		User

In the Recipients tab, select the **Recipient Type** as "User". This is a new type of recipient that indicates the agent will select the email address(es) where the notification is sent.



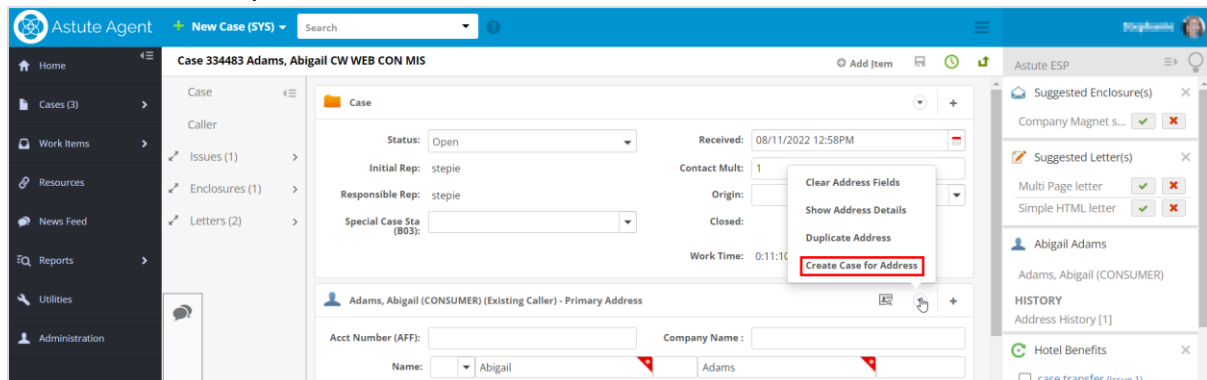
The screenshot shows the 'Astute Agent' interface with the 'Threshold and Notification Definitions' menu open. The 'Notification Definitions' sub-menu is selected, and the 'Email Notification' tab is active. The 'User' notification definition is selected. The 'Recipients' tab is active, showing a table with two items. The 'Recipient Type' is set to 'User' for the second item.

ID	Recipient Type	Category	ID	Level	Device	Address
2	Direct				Email (Simple)	pragaj@astuteagents.com
3	User					E BLANK - Formatted Text

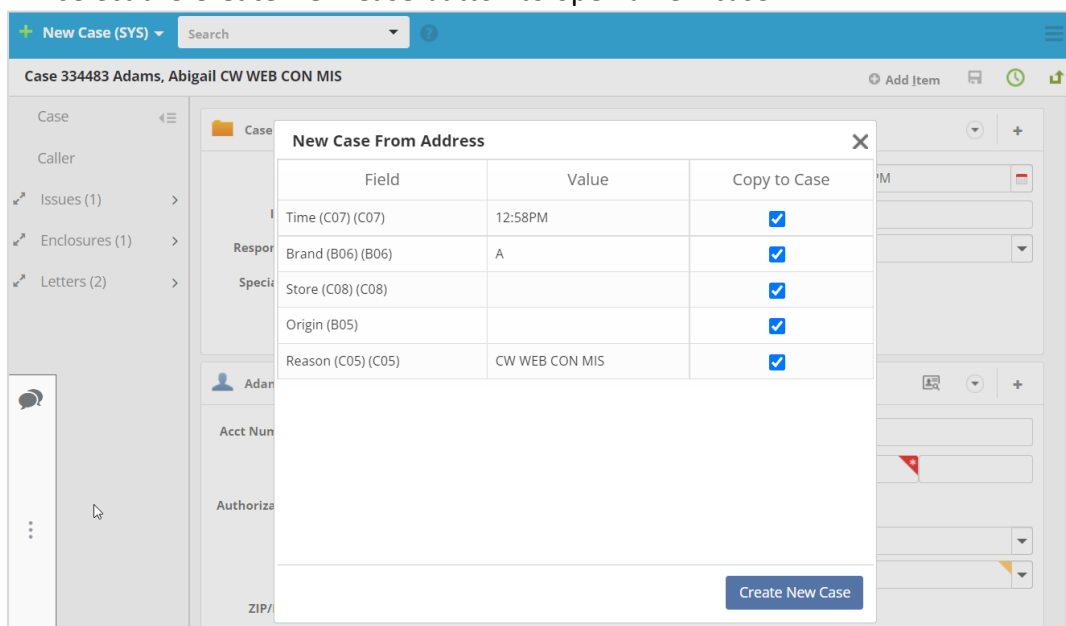
Added the ability to create a New Case for Caller

A11-878

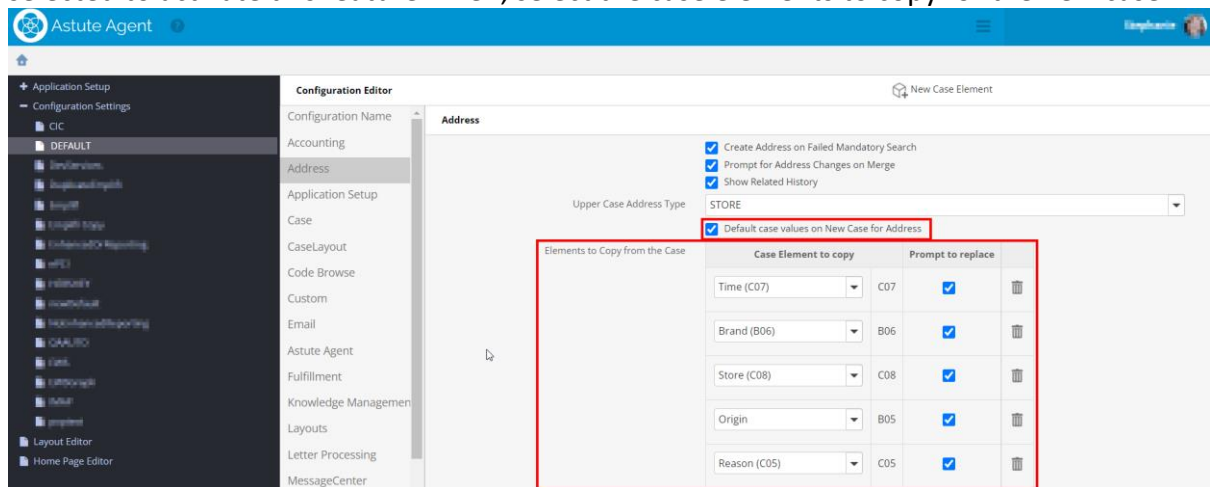
A new option is added for an agent to easily create a new case based on the current case. The elements from a previous case are applied to the new case created for the Address. This feature is especially useful for repeat callers. This is done by selecting the new **Create Case for Address** option on the Address Section Menu.



The New Case From Address window will display a list of field values to copy to the new case. An agent may clear any fields they do not want copied to the new case. Then, they will select the **Create New Case** button to open a new case.



To enable this new feature, an administrator will configure it on the Address Configuration Editor screen. The new **Default case values on New Case for Address** checkbox must be selected to activate this feature. Then, select the case elements to copy for the new case.



Configuration Editor

Configuration Name: Address

Address

Upper Case Address Type: STORE

☒ Create Address on Failed Mandatory Search

☒ Prompt for Address Changes on Merge

☒ Show Related History

☒ Default case values on New Case for Address

Elements to Copy from the Case

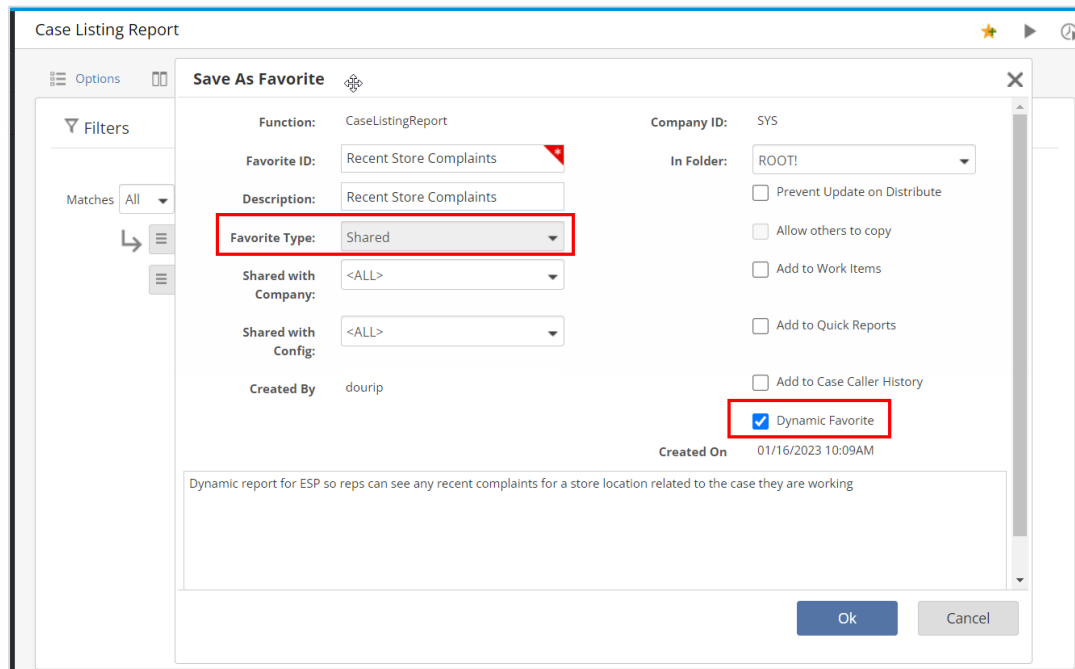
Case Element to copy	Prompt to replace
Time (C07)	C07 <input checked="" type="checkbox"/>
Brand (B06)	B06 <input checked="" type="checkbox"/>
Store (C08)	C08 <input checked="" type="checkbox"/>
Origin	B05 <input checked="" type="checkbox"/>
Reason (C05)	C05 <input checked="" type="checkbox"/>

Added the Related Cases Feature

A11-884

The Related Cases feature allows an agent to view other case information related to the case they are working on, such as potential product quality issues or service complaints. The agent can see how other agents have dealt with the same issue. When an administrator enables this feature, the agent will trigger an ESP card that gives them a link to the Related Cases.

For implementing this feature, an administrator will create a Case Listing Report with the filter(s) set for B-codes and/or C-codes. Then, the report is saved as a Favorite with the **Favorite Type** set to “Shared” and the **Dynamic Favorite** checkbox selected. Remember to add a report description in the **Note** text box. This will help you recall why the report was created.



Case Listing Report

Options

Save As Favorite

Filters

Matches: All

Function: CaseListingReport

Favorite ID: Recent Store Complaints

Description: Recent Store Complaints

Favorite Type: Shared

Shared with Company: <ALL>

Shared with Config: <ALL>

Created By: dourip

Company ID: SYS

In Folder: ROOT!

☐ Prevent Update on Distribute

☐ Allow others to copy

☐ Add to Work Items

☐ Add to Quick Reports

☐ Add to Case Caller History

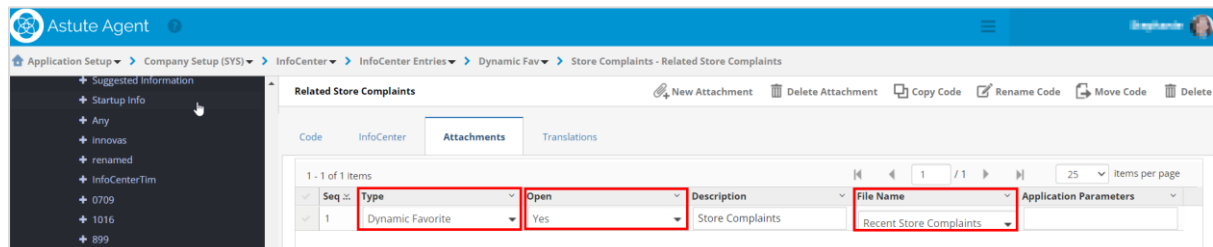
☒ Dynamic Favorite

Created On: 01/16/2023 10:09AM

Dynamic report for ESP so reps can see any recent complaints for a store location related to the case they are working

Ok Cancel

Next, an InfoCenter Entry for the ESP card will be created. The Attachment tab settings are shown below.



Astute Agent

Application Setup > Company Setup (SYS) > InfoCenter > InfoCenter Entries > Dynamic Fav > Store Complaints - Related Store Complaints

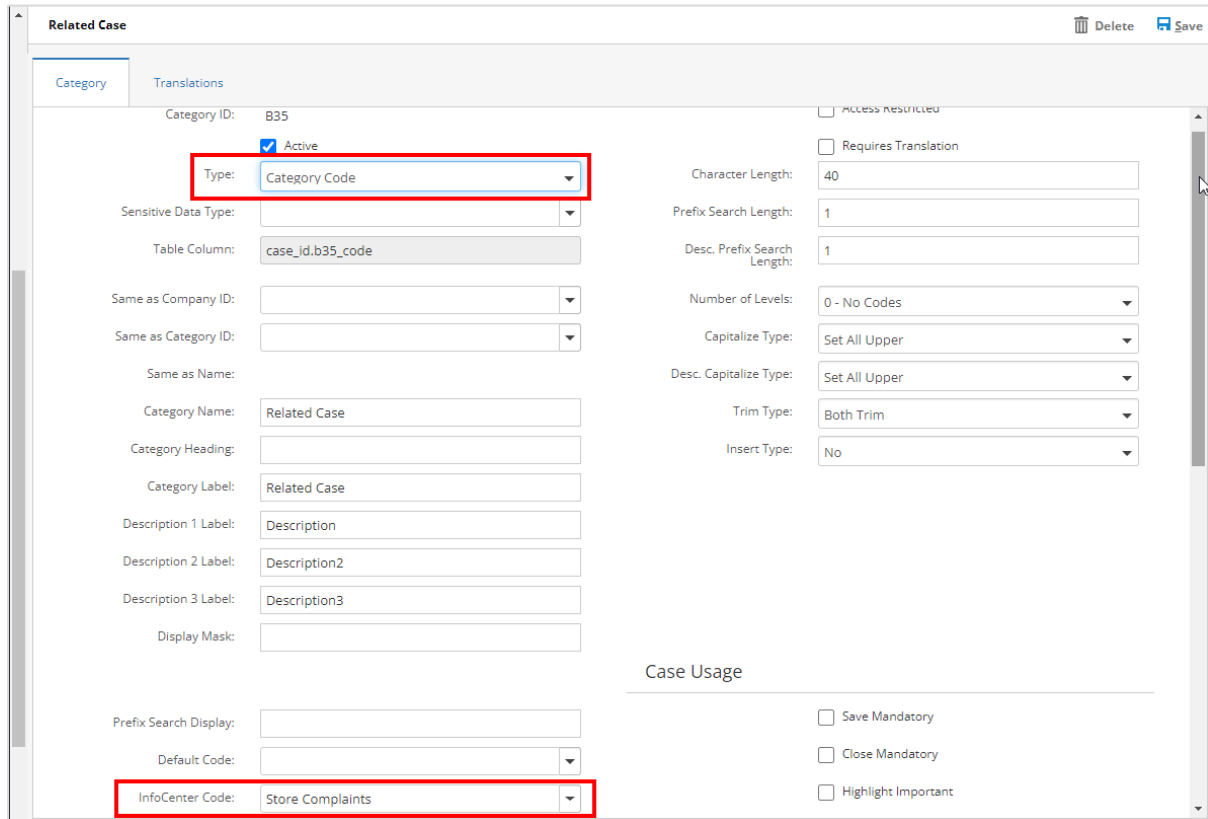
Related Store Complaints

New Attachment Delete Attachment Copy Code Rename Code Move Code Delete

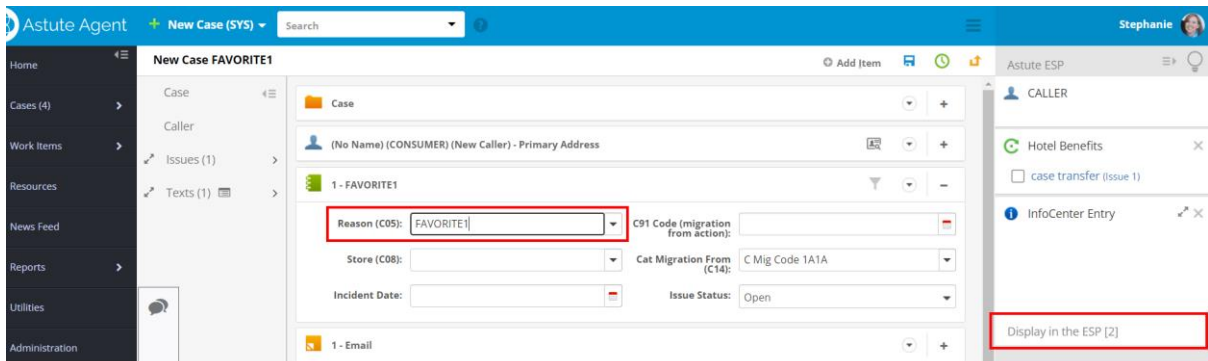
Code InfoCenter Attachments Translations

Seq	Type	Open	Description	File Name	Application Parameters
1	Dynamic Favorite	Yes	Store Complaints	Recent Store Complaints	

A category code or suggestion will be set up to trigger the ESP card on the case. Be sure to set the **InfoCenter Code** field to the new InfoCenter entry that was created above.



When an agent updates the specific category code that the administrator created, the Dynamic Favorite (Case Listing Report) will run, and the ESP card will show a link to the Related Cases.



When the link is selected, a Related Cases window will display for the agent to select specific cases to view.

Summary of new features for version 11.3

New Feature Description	User Impact	Case ID	Project ID
Added the ability to add new country codes in Standard.	Administrators	141645	A11-99
Updated third party libraries.	ALL		A11-688; A11-689
Added support for displaying “accordions” defined in AK topics in Agent Assist.	Agents		A11-862
Added the ability in Standard interface to rebalance an eGift card and to get an eGift Card Viewed status from a case.	Agents	146482	A11-187
Updated Migrations to work from Action categories such as action_date or response_due_date.	Administrators	136445	A11-95
Added the ability to send an ad-hoc notification from a case.	Agents		A11-508
Added a new option for additional security when accessing Attachments. This was added for those customers that need this to pass security audits.	Administrators		A11-690
Updated the sorting on Queue Details to sort all cases in the queue.	Agents		A11-874
Created a new Tag Type called “Email (Parse)” that pulls the email address out of the full value.	Administrators	146470; 200570	A11-288
Relaxed email verification so that Agent usernames are valid.	ALL		A11-922
Relaxed email verification to allow for longer top-level domains.	ALL	255574	A11-921
Relaxed email verification to allow for single quotes in email addresses.	ALL		A11-943

New Feature Description	User Impact	Case ID	Project ID
Added the ability to show translated Next Best Action recommendations.	ALL		A11-430
Veracode Security Enhancements	ALL		A11-822
Updated Outbound Graph Email to allow for different source email addresses from the same domain.	Administrators		A11-931
Updated all references of AstuteSocial.com to be EmplifiSocial.com.	ALL		A11-923
Added a new feature to create a new case from a caller.	Agents		A11-878
Added a new Related Cases feature for viewing case information related to the current case.	ALL		A11-884
Added new options to use customer entered data if any address field does not match the mapped field in the existing customer address record in the Agent database.	Administrators		A11-849

Bug Fixes

Summary of fixes to software elements for version 11.3

Bug Fix Description	User Impact	Case ID	Project ID
Fixed an error when regenerating layouts that if a field was missing a label, it did not display a system message.	Administrators		A11-139
Fixed an issue where w_case-address- <ADDRESS TYPE> with just select and process was not allowing the agent to select an existing address record of that type when searching.	Administrators	202930	A11-350

Bug Fix Description	User Impact	Case ID	Project ID
User interface improvements for the table in the Mass Mailing Utility.	Administrators		A11-363
Fixed an issue where deselecting a user in the Distribute Favorite window did not remove the user.	Administrators		A11-828
Removed some errors that were logged if the Config → Knowledge Management → Astute Knowledge Server was null or empty when adding new action definitions.	Administrators		A11-799
Fixed an issue with saved favorites for Category Import Utility not working if the favorite had not been run through the user interface first.	Administrators	248084	A11-760
Various updates were made based on recent audits that should not impact users.	ALL		A11-840
Removed “Enterprise Address Book” as a source of email addresses from the system.	ALL		A11-841
Fixed an issue when trying to switch companies when a case is already open with a “Reason” that does not exist in the new company.	Agents		A11-532
Enhanced the Search Case to display “No Cases found for search criteria” if no matching cases are found.	Agents		A11-617
Allow an agent to open a case and then dismiss it, if no changes have been made to the case, even if there are save mandatory fields that are not filled in.	Agents		A11-898
Fixed a gap between the Classic and Standard interface so that the	ALL	138613	A11-100

Bug Fix Description	User Impact	Case ID	Project ID
administrator can enter digits representing the hour of the day to be able to map to a different category code representing various times of the day.			
Fixed some issues with parsing dates when trying to determine if the date was before or after the min/max settings on the category.	Agents	202623	A11-336
Added some validation if trying to create a new category code but leaving the New Code field empty.	Administrators		A11-621
Added an "Allow others to Copy" checkbox to the Save Favorite window options.	ALL		A11-747
Fixed Quick Reports to use the title defined in the report.	Agents		A11-877
Fixed an issue where you could not merge cases if the save mandatory fields were not filled in.	Agents	255080	A11-911
Fixed an issue that could occur when editing Time Frame periods for systems with certain date formats.	Administrators	140981	A11-80
Added the display sequence numbers for Time Frame periods.	Administrators		A11-850
Fixed the filters in Next Best Action so that an administrator can delete them.	Administrators		A11-940
Fixed an issue where an error was displayed when trying to save a case when all issues have been deleted.	Agents		A11-851
Fixed an issue where Copy Migrations from Action Type Code (D01) did not work.	Agents		A11-866

Bug Fix Description	User Impact	Case ID	Project ID
Added the Changed By and Date Changed fields to the System User section of the user interface.	Administrators		A11-613
Updated the Attachment Processor Utility to work with existing cases.	Administrators		A11-637
Fixed an issue where White Pages Lookup would occasionally fail.	ALL		A11-904
Fixed an issue with distributing case favorites.	Agents		A11-971
Fixed an issue with the new RQA API calls to not require the Select permission for w_maint_system_configuration by agents to add a new RQA project.	Administrators		A11-986
Fixed an issue where the administrator was not able to select a device under Subscriptions tab in Notification Profiles. Also, the "Active" check box on the Code tab and the Notifications tabs now mirrors each other.	Administrators		A11-990
Fixed an issue in the Frequency Report when deleting a duplicate column row, the wrong one gets deleted.	Administrators		A11-991
Fixed an issue where folders could be created for Infocenters in any company other than SYS.	Administrators	146957	A11-284