# Release notes

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Release notes

Welcome to the new desktop

In this update, we've put a lot of effort in optimizing the flow and layout of the dialog panels and enable the agent to work with an increased number of simultaneous dialogs. Another huge improvement is the way agents end dialogs. We've streamlined the process so it's possible to quickly finish a conversation and move on to the next. Or work with a case in more detail before finishing the dialog.

1 Queue handling

1.1 New visitor in queue – manual routing

Visitors enter the queue area just like before. The visitor information e.g. message, navigation history, waiting time and the visitor's device and browser information are all grouped inside a visitor card. The small dots represent the browser history, showing the five most recent navigations. Clicking any of these will expand the visitor card and expose the entire history along with the device and browser information.
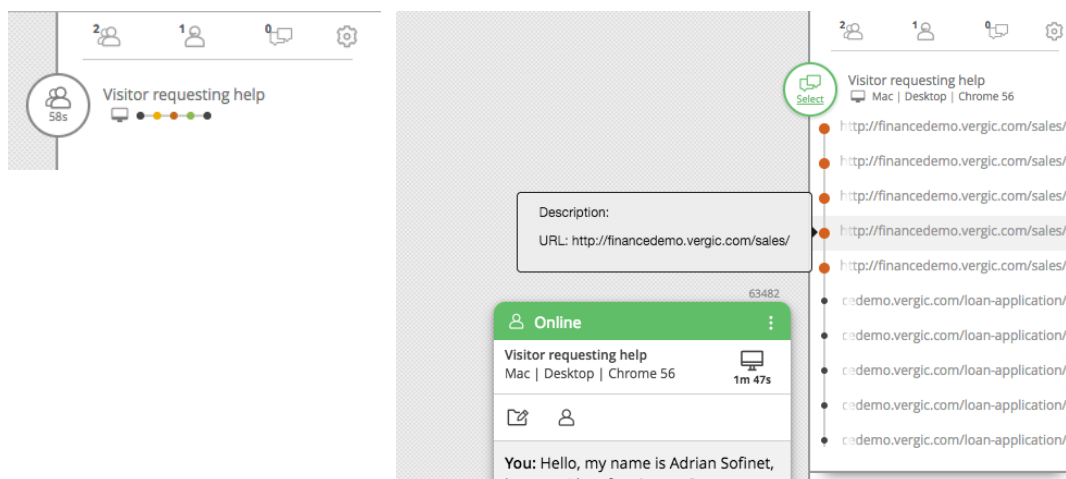
### 1.2 Selecting a visitor – manual routing

When you hover a visitor card, the green circle will indicate where to click in order to start the conversation.
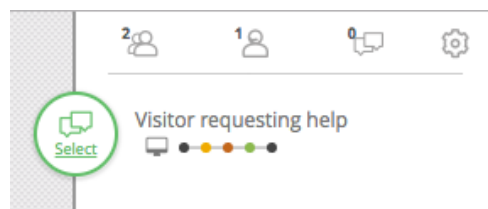
1.3 New visitor – automatic routing

When automatic routing is used, the visitor will, as before, be automatically assigned to an agent. You accept the dialog by pressing Start. If you don't accept within the defined time limit, the system will

automatically set your presence to Away and the dialog will be transferred back to the queue. You need to change your presence to Online again before you can receive any new dialogs.
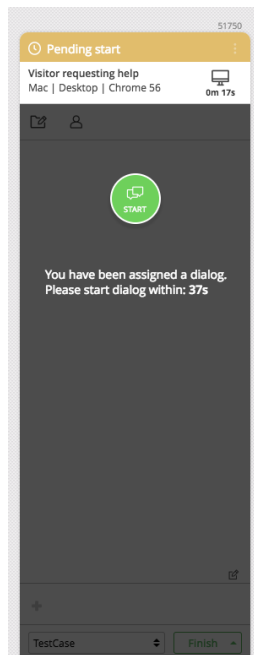
1.4 New visitor – external routing

When external routing is used, the interaction request will be routed to an external system, e.g. contact center platform, and that system will determine which agent that should be assigned to the interaction request. Once the agent has accepted it, it will be routed back to Vergic Engage Platform. A new feature is that this type of dialogs now will be started when they appear in Desktop. The agent no longer needs to accept the interaction twice.

1.5 Other states in queue

Besides being in queue, a visitor can be in transfer or lost. Lost in this case means that the visitor has lost connection with an agent and has been routed back to queue by the system. This is simply indicated on each visitor card with a label. Blue label "In transfer" and red label "Lost visitor". The circle will also have that same color.

1.6 Queue dashboard

The queue dashboard in Desktop has been made agent centric. It will show information about number of visitors in queue, online agents and ongoing dialogs for the groups that you belong too. For a more extensive overview of the current status and performance the Dashboard or Monitor should be used.
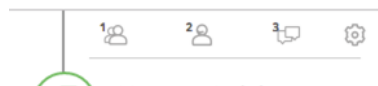
1.7 Desktop functions

As in previous desktop, we've grouped some desktop functions inside the queue area. For example, you can un-pin the queue panel for more space, toggle group availability, generate meeting codes and

personal desktop settings. At the very top of the queue area there still is meta info about the entire desktop status e.g. total number visitors in queue, -logged in agents and -ongoing dialogs.
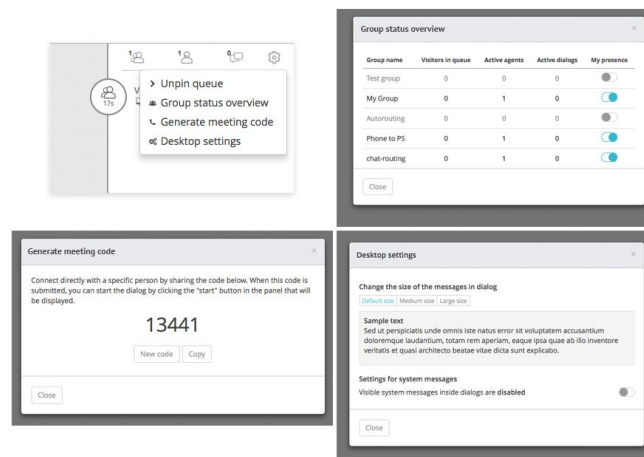
2 Dialog

We've drastically improved the flow and layout of the dialog panels. All dialogs are now placed horizontally and chronologically right to left. This enables the agent to have up to eight (depending on screen size) ongoing dialogs without losing orientation.
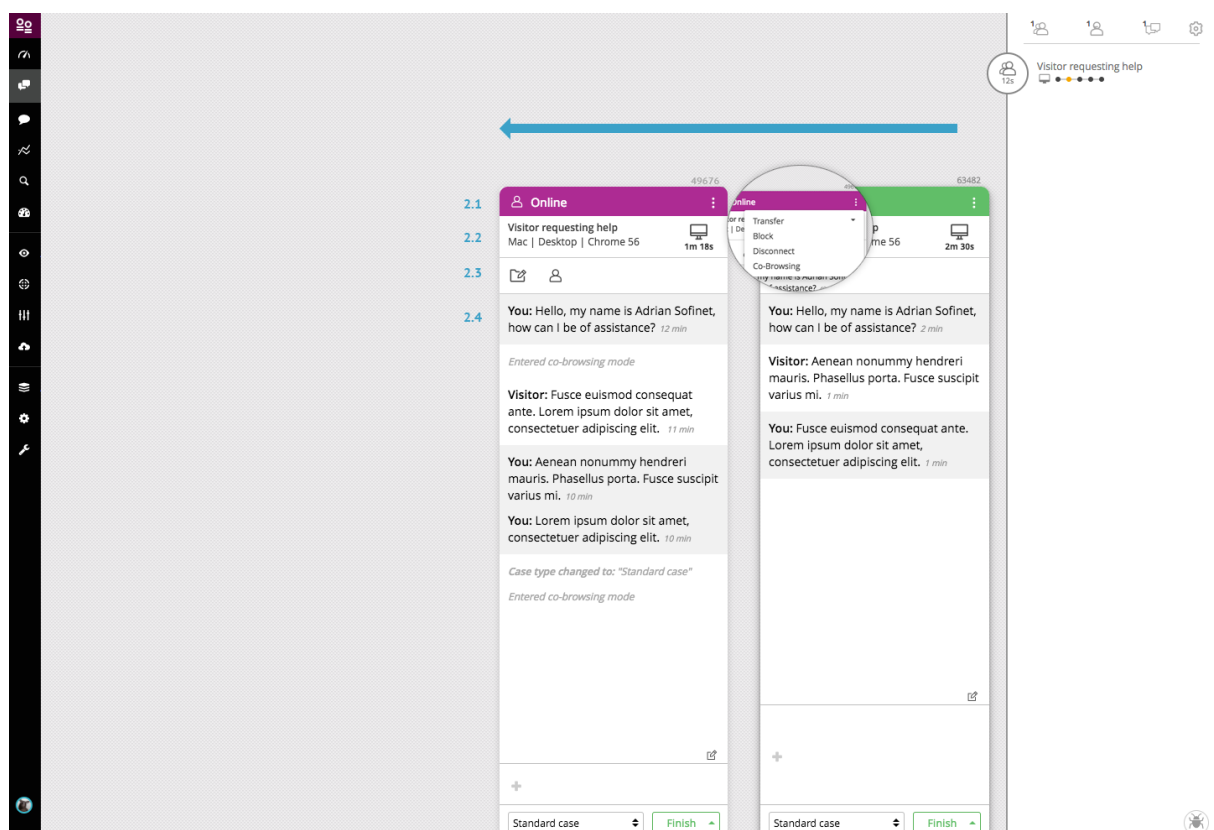
2.1 Header

This section presents the state of the dialog e.g Online or Disconnected. There's also a dropdown with functions like Transfer, Block and Disconnect.

2.2 Visitor meta data

This section shows the message that was displayed in the visitor card in queue, along with device and browser information. A timer counts the time you spent on this dialog. (This isn't stored anywhere) If the visitor is identified, a compact version of that information will be shown here as well. The complete information can be found below, under the Visitor Profile section.
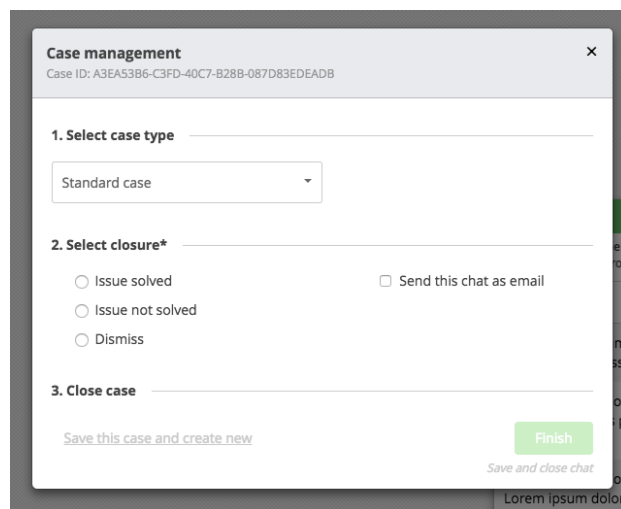
2.3 Sections

Visitor profile section and Case management section

2.3.1 Visitor profile

Extended information about the visitor if any is registered or any information is available.

2.3.2 Case management

This section enables you to work with cases available to you. From here, you can switch cases, add closures and even end a dialog. The case id has been added to the title.
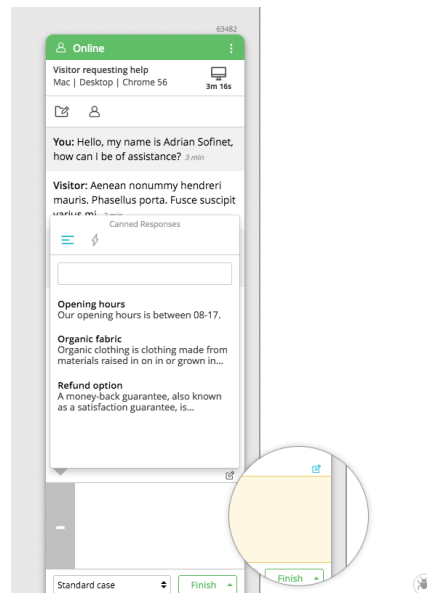

2.4 Dialog

This is where all messages are displayed. Hovering a message gives you the option to "copy to clipboard" with a single click on the appearing icon. All unread messages are highlighted with a black border on their left side. The latest message across all dialogs, that has gone longest without a replay, will have a red border. This means that you can quickly scan all dialogs and find the one that has been waiting the longest.

2.5 Writing messages

Besides writing messages, you can send canned responses and actions, and write notes that only are not visible to the visitor

2.5.1 Input menu

"+"-icon opens the input menu and enables you to view all the canned responses and actions within the active case. We've also added a filter so you can find what you need more effectively.
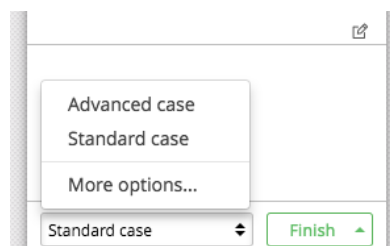
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2.6 Footer section
This is where you switch cases and end a dialog.

2.6.1 Switch cases
In the dropdown, you'll find available cases to switch to. A "more options" link will open the Case management section


2.6.2 Finish
This button lets you wrap up dialogs in a heartbeat. Click finish and select outcome. This is the fastest way to complete a dialog. There are however more options available if you need. For example, you can end case and continue with a new one. Or choose to send an email with the entire conversation to yourself.
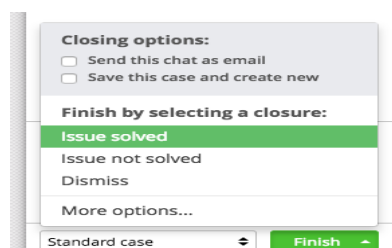

2.7 Leaving desktop
When there are ongoing dialogs and you decide to leave the desktop you'll need to confirm the action. If you decide to leave all ongoing dialogs will be transferred back to the system. The recommendation in this scenario is that you change your presence to *Away*, complete the ongoing dialogs and then leave

desktop. If you e.g. need to check the status on Dashboard we suggest you open Dashboard in a new browser tab
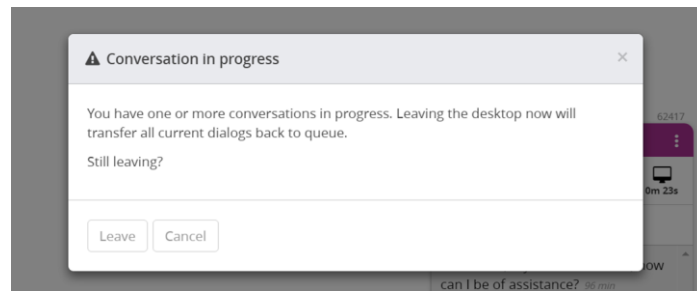
3 Co-browsing

One major improvement area is co-browsing. We still support the same functionality but with an improved user experience for the agent. Co-browsing is started from the menu.
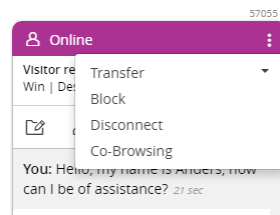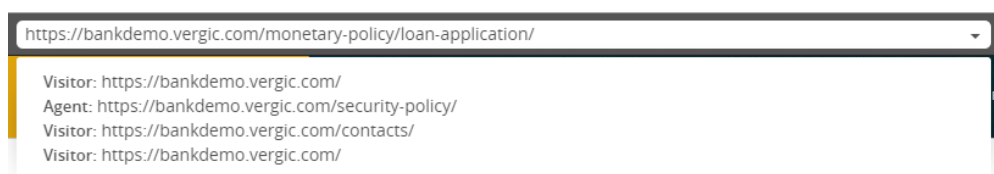

3.1 Co-browsing functions

For easy access and to ensure that the agent can work efficiently with the dialog we've added the most common functions as buttons.


The functions are:

1. Navigation history - Visitor and agent initiated page navigation history. Each entry is a link and by pressing it the agent will navigate the visitor to that page.

2. Pause – enables the agent to change page without navigating the visitor, e.g. to find information. While paused the agent will be informed if the visitor makes a new navigation. If the agent want to navigate the visitor to the current page the Navigate visitor function is found in the menu (Menu – access to the extended co-browsing menu). When resuming co-browsing the agent will return to the same page as the visitor.
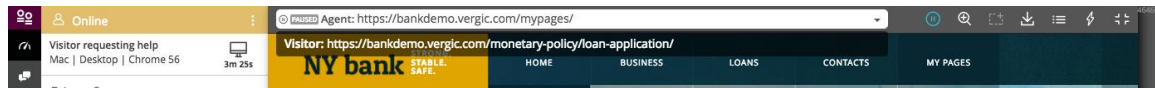
3. Zoom – lets the agent zoom the page

4. Highlight – lets the agent highlight elements on the web page for the visitor

5. Get form values – retrieves the form values from the visitor web page

6. Menu – access to the extended co-browsing menu

7. Input menu – alternative way to access the input menu while in co-browsing mode

8. Close – closes the co-browsing window

3.2 Multiple dialogs

Another improvement is that the agent now more easily can work with multiple dialogs even in co-browsing mode. Only one dialog can be in co-browsing mode at the time but the agent can communicate with the other visitors without scrolling or changing focus. The agent can at any time change which dialog that will be in co-browsing mode. If more space is needed the other dialogs can be minimized.
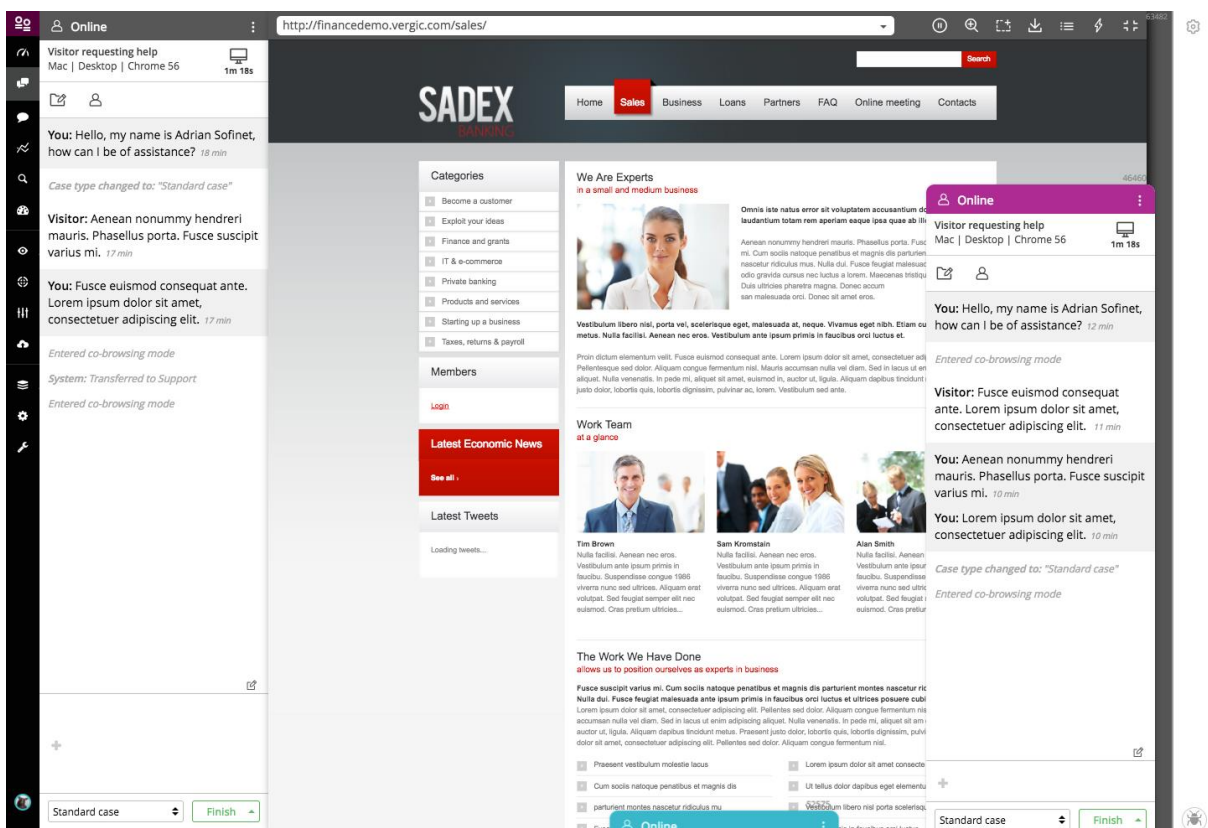
4 Bugs and errors

In the event that something unexpected should happen, we've provided a simple way for you to file a bug report. In the bottom right corner, you'll find a Bug Button. Click this and it will give you the opportunity to write a few lines about the error, what you expected to happen and then generate a

zip-file. Download the zip and submit it in a ticket in YouTrack along with a screenshot. This will be a huge help for us in finding out what happened and fix the issue.
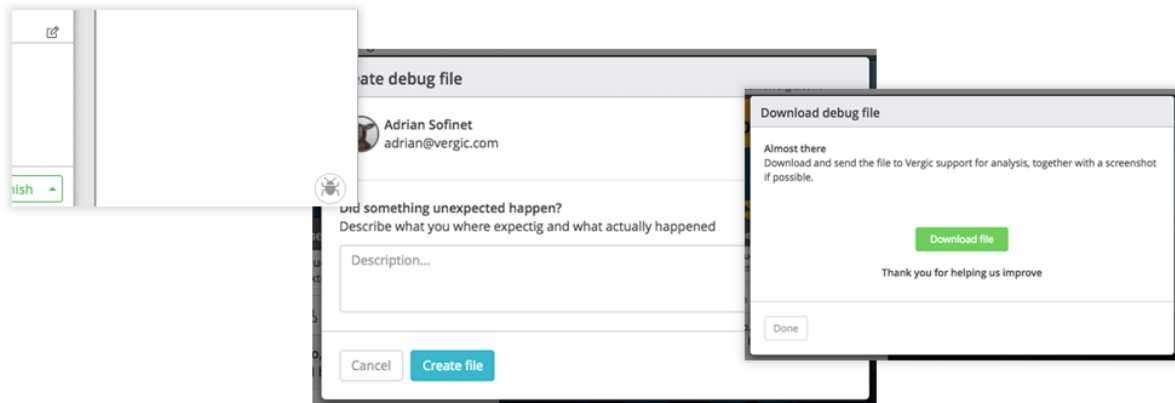
5 Known limitations

This version doesn't support:

- Video dialogs
- Multi-part dialogs
- Booked meetings
- Additional language support. This version only supports Desktop in English and Swedish.

We're working as fast and hard as possible to add these features and updates will be released continuously.