LiveOps® Engage™ Checklist

☑	**Engage Home Panel**	**Show and describe the Engage Home panel, which is the default view you see when you first launch the Integrated Agent Desktop. Explain how this single web-based interface can harness six communication channels, which is unmatched in the industry at this time.**	
☑	Header	Show the Engage Integrated Agent Desktop header, which contains the product logo, the desktop clock and the header utility links (about & help).	NOTES
☑	Agent Information Panel	Show the Engage Agent related information, such as the Agent avatar, Agent information (name and talk path number) and Agent presence menu.	
☑	Agent Live Dashboard	Show the Engage Agent Live Dashboard which displays real-time information about the individual channel queues to an agent. This displays the number of messages or calls waiting in each queue, as well as the current performace against Grade of Service (GoS) metrics (shading and up/down arrows).	
☐	Channel Editor Buttons	Show the Engage Channel Editors which let you create outgoing messages or phone calls, depending on your available channels.	
☐	Open Tasks Panel	Show the Engage Open Task Panel, which displays messages that are currently open and assigned to the agent.	
☐	Completed Tasks Panel	Show the Engage Completed Tasks Panel, which displays the list of your recently completed tasks.	
☐	Side Panel	Show the Engage Side Panel, which is a pop-out control that gives you a quick access to three key features. These features are: Customer Search, Work Queue and My Tasks.	
☐	**Launch 6 Inbound Interactions**	**Initiate Inbound Voice, Inbound Email, Web Chat, Inbound Tweet, Inbound Facebook and Inbound SMS.**	
☐	Accept Web Chat Session	Demonstrate how to pivot to the other five channels (Outbound Call, Outbound Email, Outbound Tweet, Outbound Facebook and Outbound SMS) while maintaining the initial web chat session. Show how to share a link via Web Chat.	
☐	Customer Response Options	Demonstrate Forward, Reply, Reassign, Transfer, Template Responses, Customer Categories, Message Scheduling, Email Receipt, Customer Note and Message Review.	
☐	Accept Inbound Voice Call	Show Campaign Name, Call Disposition Codes & DNIS information. Demonstrate call Hold, Transfer, Conference, Call Wrap Up and Call Back.	
☐	Customer Message History	Show customer message history across all six channels and Threaded Message Counts.	
☐	Customer CRM	Show the LiveOps built in Multichannel CRM functionality and easy to use CRM entry and search tools.	

Supervisor and Administration Checklist

		NOTES
☐ Activity Summary	Show and describe the different tabs on the Activity Summary landing page.	
☐ LiveDashboard	Show and describe the LiveDashboard.	
☐ LiveDashboard Details	Show Dashboard View drop down options. Select highlighted fields and describe the associated below detailed information.	
☐ Column Options	Select Column Options and demonstrate how to add or remove KPI's and drag and drop Selected Columns configuration.	
☐ LiveDashboard Configuration	Show and describe LiveDashboard Dimensions, Views & Thresholds.	
☐ Report Tool	Show the Sales Demo Call Segment – Detail report. Define report data, Call Visualization, Call/Desktop Recording, Report Modification & Report Scheduling.	
☐ Multichannel Reports	Show the Performance By Channel, Performance Dashboard & Peak Concurrent Logins Reports.	
☐ Routing	Explain the Clients, Programs, Campaigns & Call Flows hierarchy	
☐ Campaigns	Show and explain the LOSalesDemo Outbound Progressive & Push Preview Outbound Dialing Campaigns	
☐ Call Flows	Show and explain Call Flows, Call Actions, Arrival tab, Queue tab, On Call tab & Post Call tab	
☐ Edit Users	Explain how to add a user. Edit your own User account and explain the Contact Info, Account Status, Recording, Routing, Administrative and User Preferences tabs	
☐ My Account	Show My Account and how and why an agent would change their Work Phone number	

LiveOps for Salesforce Checklist (one or both)

		NOTES
☐ Service Cloud Open CTI	Describe the software less Open CTI integration between LiveOps and Salesforce.	
☐ Inbound Call	Show an inbound call with Salesforce screen pop integration, Show the Phone Panel Conference and Transfer features.	
☐ Outbound Call	Show an outbound call by clicking on a phone number within Salesforce.	
☐ Reports	Show Salesforce Reports with LiveOps historical data. Show the ability to dial out of the Salesforce Report record using Open CTI. Show LiveOps voice recordings within the Salesforce report.	
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