

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.**

<input type="checkbox"/> Header	Show the Engage Integrated Agent Desktop header, which contains the product logo, the desktop clock and the header utility links (about & help).	NOTES
<input type="checkbox"/> 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.	
<input type="checkbox"/> 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 performance against Grade of Service (GoS) metrics (shading and up/down arrows).	
<input type="checkbox"/> Channel Editor Buttons	Show the Engage Channel Editors which let you create outgoing messages or phone calls, depending on your available channels.	
<input type="checkbox"/> Open Tasks Panel	Show the Engage Open Task Panel, which displays messages that are currently open and assigned to the agent.	
<input type="checkbox"/> Completed Tasks Panel	Show the Engage Completed Tasks Panel, which displays the list of your recently completed tasks.	
<input type="checkbox"/> 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.**

<input type="checkbox"/> 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.	
<input type="checkbox"/> Customer Response Options	Demonstrate Forward, Reply, Reassign, Transfer, Template Responses, Customer Categories, Message Scheduling, Email Receipt, Customer Note and Message Review.	
<input type="checkbox"/> Accept Inbound Voice Call	Show Campaign Name, Call Disposition Codes & DNIS information. Demonstrate call Hold, Transfer, Conference, Call Wrap Up and Call Back.	
<input type="checkbox"/> Customer Message History	Show customer message history across all six channels and Threaded Message Counts.	
<input type="checkbox"/> Customer CRM	Show the LiveOps built in Multichannel CRM functionality and easy to use CRM entry and search tools.	

Supervisor and Administration Checklist



	NOTES
<input type="checkbox"/> Activity Summary Show and describe the different tabs on the Activity Summary landing page.	
<input type="checkbox"/> LiveDashboard Show and describe the LiveDashboard.	
<input type="checkbox"/> LiveDashboard Details Show Dashboard View drop down options. Select highlighted fields and describe the associated below detailed information.	
<input type="checkbox"/> Column Options Select Column Options and demonstrate how to add or remove KPI's and drag and drop Selected Columns configuration.	
<input type="checkbox"/> LiveDashboard Configuration Show and describe LiveDashboard Dimensions, Views & Thresholds.	
<input type="checkbox"/> Report Tool Show the Sales Demo Call Segment – Detail report. Define report data, Call Visualization, Call/Desktop Recording, Report Modification & Report Scheduling.	
<input type="checkbox"/> Multichannel Reports Show the Performance By Channel, Performance Dashboard & Peak Concurrent Logins Reports.	
<input type="checkbox"/> Routing Explain the Clients, Programs, Campaigns & Call Flows hierarchy	
<input type="checkbox"/> Campaigns Show and explain the LOSalesDemo Outbound Progressive & Push Preview Outbound Dialing Campaigns	
<input type="checkbox"/> Call Flows Show and explain Call Flows, Call Actions, Arrival tab, Queue tab, On Call tab & Post Call tab	
<input type="checkbox"/> 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	
<input type="checkbox"/> 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
<input type="checkbox"/> Service Cloud Open CTI Describe the software less Open CTI integration between LiveOps and Salesforce.	
<input type="checkbox"/> Inbound Call Show an inbound call with Salesforce screen pop integration, Show the Phone Panel Conference and Transfer features.	
<input type="checkbox"/> Outbound Call Show an outbound call by clicking on a phone number within Salesforce.	
<input type="checkbox"/> 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.	
<input type="checkbox"/> Service Cloud Open CTI Describe the software less Open CTI integration between LiveOps and Salesforce.	
<input type="checkbox"/> Inbound Call Show an inbound call with Salesforce screen pop integration, Show the Phone Panel Conference and Transfer features.	
<input type="checkbox"/> Outbound Call Show an outbound call by clicking on a phone number within Salesforce.	
<input type="checkbox"/> 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.	



LiveOps, Inc., 555 Twin Dolphin Drive, Suite 400, Redwood City, CA 94065 USA
 Tel: +1.800.411.4700 | Tel: +1.408.844.2400 | Fax: +1.650.745.3756 | www.liveops.com