Admin Portal

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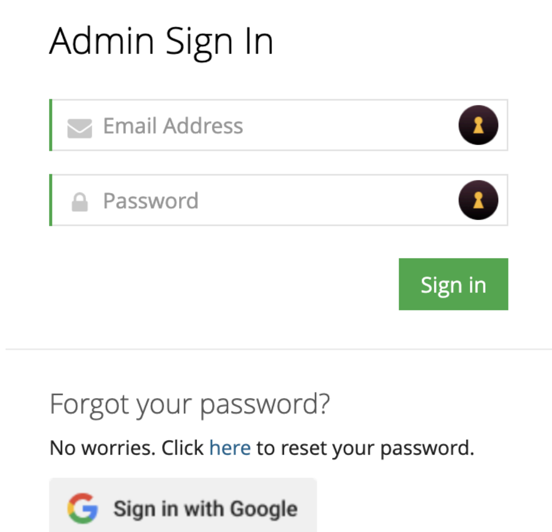
Introduction

Welcome to your Kauneonga Admin Portal! This guide is designed to assist you in efficiently managing and supporting your accounts, employees, clients, and permissions.

Log into the portal by visiting: https://{custom_subdomain}.kauneonga.com/admins, and entering your username and password.

Admins may also utilize the “**Sign in with Google**” OAuth implementation. Using this, supervisors can securely authenticate into the platform using Google's native MFA features to maintain security as well as add an additional seamless way to login.

It is important to note that this method will only be available to Liberty supervisors who use the same email in Liberty as they have in their Google account, meaning this requires a Google account to be possible.



User Groups & Permissions

In Liberty, each user is uniquely identified with a username, password, and profile. Together with other settings, the profile determines which tasks a user can perform, what data the user can see, what the user can do with the data, and which portal they will have access to.

User Groups & Permissions	Admins	Agents	Supervisors	Users *(Clients)*
View Admins	✓	✗	✗	✗
Edit Admins	✓	✗	✗	✗
Create Admins	✓	✗	✗	✗

View Supervisors	✓	✓	✓	✗
Edit Supervisors	✓	✗	✗	✗
Create Supervisors	✓	✗	✗	✗
View Agents	✓	✓	✓	✓
Edit Agents	✓	✗	✗	✗
Create Agents	✓	✗	✗	✗
View Accounts	✓	✓	✓	✓
Edit Accounts	✓	✓	✓	✓
Create Accounts	✓	✗	✗	✗
View Scripts	✓	✓	✓	✓
Edit Scripts	✓	✗	✗	✗
Create Scripts	✓	✗	✗	✗
View On-call Calendar	✓	✓	✗	✓
Edit Calendar Events	✓	✗	✗	✓
Create Calendar Events	✓	✗	✗	✓
Edit Calendar Contacts	✓	✗	✗	✓
Create Calendar Contacts	✓	✗	✗	✓

View FAQs	✓	✓	✗	✗
Edit FAQs	✓	✗	✗	✗
Create FAQs	✓	✗	✗	✗
View Users	✓	✓	✓	✓
Edit Users	✓	✗	✗	✓
Create Users	✓	✗	✗	✓
View Messages	✗	✓	✓	✓
Create Messages	✗	✓	✗	✗
Edit Messages	✗	✗	✗	✗
Resend Messages	✓	✓	✗	✗
View SMS Blacklist	✓	✗	✗	✗
Edit SMS Blacklist	✓	✗	✗	✗
Add SMS Blacklist	✓	✗	✗	✗
View Resources	✓	✓	✓	✓
Edit Resources	✓	✗	✗	✗
Create Resources	✓	✗	✗	✗
Create Reports	✓	✗	✓	✓

View Knowledge Base	✓	✓	✓	✓
Edit Knowledge Base	✓	✗	✗	✗
Create Articles	✓	✗	✗	✗
View Logs	✓	✓	✓	✓
View Feedback	✓	✓	✓	✓
Create Feedback	✓	✓	✗	✓
View Learning Experience	✗	✗	✓	✗
Edit Learning Experience	✗	✗	✓	✗
Create Learning Experience	✗	✓	✓	✗

Administrators

Administrators have the highest level of access in the Liberty suite and can manage the entire Liberty Platform.

Create an Administrator

1. Navigate to the **Admins** section from the Administrator Dashboard.
2. Select **Add Admin** in the Admins menu.
3. Fill in the required fields and optional information.
4. Select **Create Admin** on the bottom of the form.

Admin was successfully created!

Edit an Administrator

1. Navigate to the **Admins** section from the Administrator Dashboard.
2. Select **Edit** on the Admin you need to edit in the Admins menu.
3. Fill in the required fields and optional information.
4. Select **Update Admin** on the bottom of the form.

Admin was successfully updated!

Deactivate/Disable an Administrator

1. Navigate to the **Admins** section from the Administrator Dashboard.
2. Select **Edit** on the Admin that you need to edit in the Admins menu.
3. **Uncheck the Active checkbox** on the Admin profile.
4. Select **Update Admin** on the bottom of the form.

Deactivating an Administrator will revoke any further access to your Liberty instance.

Supervisors

Create a Supervisor

Supervisors that also navigate the Agent portal can connect their Agent account to their Supervisor profile.

1. Navigate to the **Supervisors** section from the Administrator Dashboard.
2. Select **Add Supervisor** in the Supervisors menu.
3. Fill in the required fields and optional information.
4. Select **Create Supervisor** on the bottom of the form.

Supervisor was successfully created!

Edit a Supervisor

1. Navigate to the **Supervisors** section from the Supervisor Dashboard.
2. Select **Edit** on the Supervisor you need to edit in the Supervisors menu.
3. Fill in the required fields and optional information.
4. Select **Update Supervisor** on the bottom of the form.

Supervisor was successfully updated!

Deactivate/Disable a Supervisor

1. Navigate to the **Supervisors** section from the Supervisor Dashboard.
2. Select **Edit** on the Supervisor you need to edit in the Supervisors menu.
3. **Uncheck the Active checkbox** on the Supervisor profile.
4. Select **Update Supervisor** on the bottom of the form.

Deactivating a Supervisor will revoke any further access to your Liberty instance.

Agents

Create an Agent

Agents can be associated with a manager (supervisor) overseeing any learning experiences reported to them.

1. Navigate to the **Agents** section from the Administrator Dashboard.
2. Select **Add Agent** in the Agents menu.
3. Fill in the required fields and optional information.
4. Select **Create Agent** on the bottom of the form.

Agent was successfully created!

Edit an Agent

1. Navigate to the **Agents** section from the Agent Dashboard.
2. Select **Edit** on the Agent you need to edit in the Agents menu.
3. Fill in the required fields and optional information.
4. Select **Update Agent** on the bottom of the form.

Agent was successfully updated!

Deactivate/Disable an Agent

1. Navigate to the **Agents** section from the Agent Dashboard.
2. Select **Edit** on the Agent you need to edit in the Agents menu.
3. **Uncheck the Active checkbox** on the Agent profile.
4. Select **Update Agent** on the bottom of the form.

Deactivating an Agent will revoke any further access to your Liberty instance.

Users

Create a User

Users are also created during the account creation process. The initial user created through the wizard is assigned the account's ownership role.

1. Navigate to the **Users** section from the User Dashboard.
2. Select **Add User** in the Users menu.
3. Fill in the required fields and optional information.
4. Select **Create User** on the bottom of the form.

User was successfully created!

Edit a User

1. Navigate to the **Users** section from the User Dashboard.
2. Select **Edit** on the User you need to edit in the Users menu.
3. Fill in the required fields and optional information.
4. Select **Update User** on the bottom of the form.

User was successfully updated!

Deactivate/Disable a User

1. Navigate to the **Users** section from the User Dashboard.
2. Select **Edit** on the User you need to edit in the Users menu.
3. Navigate to the Accounts tab in the User Profile
1. Select Settings (gear icon) on the account you wish to deactivate the user.
4. Toggle the Active status from ON to OFF.

Deactivating a User will revoke any further access to your Liberty instance.

You can also permanently remove a user from an Account by selecting the remove button next to the settings button.

User Membership

Users can be associated with more than one account. This level of access is defined as their 'Membership' to an account. For each account a user has a membership to, they can also be assigned unique access and permissions underneath that account.

Add an Account to a User

1. Navigate to the **Users** section from the Admin Dashboard.
2. Select **Edit** on the User you need to edit in the Users menu.
3. Navigate to the Accounts tab in the User Profile.
4. Select **Add Account**.
1. Type the name or account number you would like to add them to.
5. Select **Add Account**.

Remove a User from an Account

1. Navigate to the **Users** section from the Admin Dashboard.
2. Select **Edit** on the User you need to edit in the Users menu.
3. Navigate to the Accounts tab in the User Profile.

4. Select the remove action (***cross icon***) for the account you would like to remove.
5. Select **OK** on the prompt to confirm the removal.

User Access

Users can be assigned access to different elements of the User Portal of an Account.

Access Type	Description
Billing	Access to the online payment portal
Account Management	Access to the Accounts company information
On-call Calendar Management	Edit access to the On-call Calendar
Referrals Management	Access to the Referral Program

Add/Remove User Access

1. Navigate to the **Users** section from the Admin Dashboard.
2. Select **Edit** on the User you need to edit in the Users menu.
3. Navigate to the Accounts tab in the User Profile.
4. Select the settings action (***gear icon***) for the account you would like to edit access.
5. Navigate to the Access tab in the User Profile.
6. Toggle the Access permissions ON or OFF.

Accounts

Accounts in Liberty contain all of the Phones' information, and accounts can have more than one phone associated with them. In this section, you will find all the information on managing accounts in Liberty.

Account Features

Each account has a unique set of permissions that can be toggled ON or OFF based on their requirements and what you would like them to have access to.

Agent Form Builder

- The agent form builder is used to build agent scripts on accounts that you create. If the Agent Form Builder is disabled and an active script is unavailable, Liberty will use our default script template. The default script template used when the agent form builder is disabled cannot be changed at the moment.

API Access

- This feature enables your Users to access the read-only API available to access and retrieve their account messages. Your users can access their unique API key and documentation under the Application Keys section on their Profile in the portal.

Audit Logs

- This feature allows users and agents to view activity logs on an account. If this feature is disabled, both agents and users will be unable to view activity for the account on which it is disabled.

Caller Passthrough

- This feature passes through the Caller ID that is received to the Phone Number field in the Agent Script. This feature is ineffective on phone systems that only pass through a single caller ID.

Call Recording

- This feature enables Call Recording on the Account. These recordings can be viewed in the Call Recording sections.

Chat

- This feature allows you to enable chat as a service on the account.

Closing Actions

- This feature allows you to create final message delivery instructions after the user or on-call contact has acknowledged a message. For example, a supervisor wants to receive a final copy of the message after it has been delivered to the on-call technician.

Data Dip

- This is a customer database that is stored internally based on Caller ID. If a returning caller is matched based on their Caller ID, Liberty will prompt the agent with their previously stored information to be able to use. Customer Data is not stored globally across all accounts; customer data can only be accessed per account.

Escalation Delay

- This feature will enable a delay function in the Agent portal which will allow Agents to delay messages from being escalated for a period of time.

FAQs

- This feature allows you to enable a FAQ section for your agents to use when handling customer inquiries. Your administrators create the FAQs, which are only accessible per account.

Ignore SMS Timeout

- This feature serves as an SMS whitelist for customers whose carrier is not returning a proper delivery status, causing Liberty to falsely re-send messages through their backup phone numbers and carriers. Enabling this feature will assume that all messages sent are delivered if no status is returned.

Instant Replay

- This feature enables Users to be able to access call recordings. They will be viewable by the client underneath their messages. Call Recordings are only stored for a maximum of 30 days and can no longer be accessed from Liberty after.

Custom Marketing Notifications

- This feature enables the capability to set up a one-way marketing email or text message to customers upon completion of a message. The email and text messages are sent based on the email or phone number that is gathered in the agent script.

Delivery Confirmation

- This feature enables a final notification via email or text message to all recipients of a message created to advise if a pending message has been acknowledged and by whom.

On-call Calendar

- This feature enables the On-call Calendar. The calendar is used to build delivery instructions associated with your scripts.

Online Payment Access

- This feature enables access to Online Payment in the User Portal. The payment feature is an API integration back to TBS. All billing data is matched against the associated account number and billing reference number entered in Liberty.

Scheduled Emails

- This feature enables scheduled message recaps to be sent via email based on a defined schedule frequency. The message recaps will only include all of the messages created on an account as of the last recap sent.

Scheduled Fax

- This feature enables scheduled message recaps to be sent via fax based on a defined schedule frequency. The message recaps will only include all of the messages created on an account as of the last recap sent.

Secure Messaging

- This feature enables HIPAA-compliant encrypted secure message delivery on an account. Users must log in and authenticate before viewing any messages created.

SMS Acknowledgement

- This feature allows any recipients of an SMS message to acknowledge the message via a text message response. Any response received via text message except from blacklisting phrases when this feature is enabled is assumed to be acknowledgment.

Plain Text Emails

- This feature disables any HTML and CSS styling on emails and sends them as plain text.

To Dos

- This features enables To-Do's on the account which will allow you to schedule Email, SMS, or Call reminders to Agents or External Users.

Unlimited Digest Activities

- This feature removes the cap on message activities that can be displayed in a created message.

Use CallerID as DID

- Use the CallerID to identify the DID/Account Number that needs to be popped to begin the call in Liberty.

Resources

Accounts contain Resources that can be linked to an Account to combine Account data into one portal. This is a common practice for situations where you may have an Account with multiple locations and would like a different script for each account or a different DID per location.

Resource Configuration

1. From an Account, go to the Resources tab.
2. Click Add Resource.
3. Select the Resource (DID) number you would like to use.
4. Fill out the form.
5. Click Create Resource.

Only the Company Name and Company Phone are required to create the resource.

Phone Information

The Phone Information tab contains the Company Information and Preferences for a Resource.

Company Name, Number, Address

These fields are used to add the relevant company information for your Agents to reference in the Agent Script.

Skills

These are the skills you would like to associate with the Resource. Any Skills assigned to an Account are used to connect a queued interaction to a skill-matching agent.

Industry

A label to classify the industry of a Resource.

Time Zone

The Time Zone in which the company associated with this Resource is located. This time zone will be used to dynamically set the time of all activities on this resource in that zone.

Holidays

Holidays can be associated with a Resource. See Holiday Scripts for more information.

Website

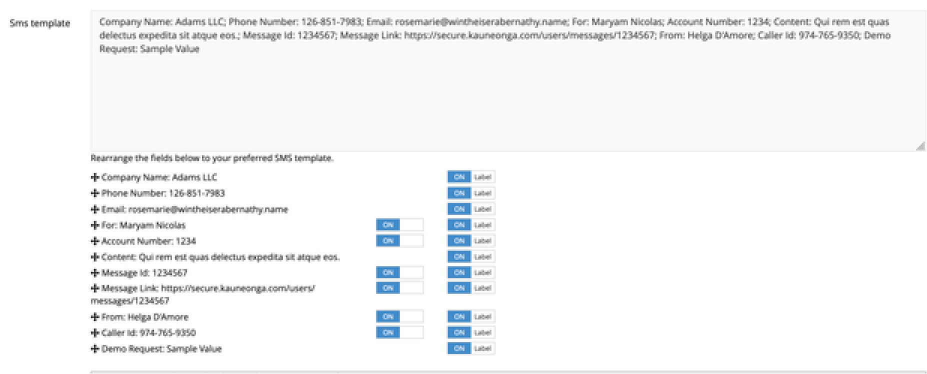
The website you would like to add to a Resource for the agent to use in the Account Information section of a Message Pop.

Email Subject

The default email subject for all messages emailed to a client.
You can use placeholder variables in your email subject. The variables will display the equivalent data associated with your Resource and Agent Script.

SMS Template

The SMS Template designs how you would like SMS messages to appear when sent out on a Resource. The template allows you to rearrange the fields in the order you would like them to be seen. You also have the option to hide labels and fields you don’t want to appear.



Company Information

A rich-text HTML field that can be used to add company information to the Account Information of an Agent Script.

Office Hours

A rich-text HTML field that can be used to add Office Hours to the Account Information of an Agent Script.

Special Instructions

A rich-text HTML field can add special instructions for the Agent to an Agent Script.

Non-Message Escalation Level

The Non-Message Escalation Level will be used for Non-Messages gathered in the Agent Portal. You can use this option if a client would like to receive their non-messages.

SMS Origin Escalation Level

The SMS Origin Escalation Level is used to deliver SMS Replies transcripts.

Chat Origin Escalation Level

The Chat Origin Escalation Level is used to deliver Chat transcripts.

Voicemail notification emails

The Voicemail Notifications Emails are used for new voicemails.

Agent Scripts

Customer service agents use Agent Scripts to ensure consistent, efficient, and accurate responses during customer interactions. You can customize the Agent Scripts to support any workflow of your choice.

Create an Agent Script

1. In the Agent Script tab of an Account Resource, click **Add Agent Script**
2. Type a **Script Name** for the Agent Script
3. Make your changes and click **Save Agent Script**.

Edit an Agent Script

1. In the Agent Script tab of an Account Resource, click **Edit**
2. Make your changes and click **Save Agent Script**.

Actions

- **Set as Active**
    - Sets the selected Script as the currently active script.
        - If you have a scheduled script that is currently active and a script without a schedule that you would also like to make active, then you must either remove the current schedule from the script or add a one-time schedule to this script for the duration it needs to be active. Not doing so will cause the active script to revert back to what was initially scheduled.
- **Set Schedule**
    - A schedule can be assigned as a one-time or recurring schedule, e.g. (Daily at 9:00 AM or ON November 13, 2024 @ 10:00 AM for 9 Hours).
        - One-time schedules take priority over Recurring Schedules. After a schedule is complete, it will fall back to whichever script you have set as your Default script.
- **Set as Default**
    - The default fallback script should be active after the duration of the scheduled script is complete.
- **Set as Holiday Script**
    - A script can be labeled as a Holiday Script for your Holiday workflow. See Holiday Scripts for more information.
- **Preview**

    - Preview a script as an Agent.
- **Delete**
    - Delete an Agent Script.

Deleting an Agent Script is irreversible.

Clone an Agent Script

Clone from Another Account

1. In the Agent Script tab of an Account Resource, click the **Copy Agent Script** dropdown.
2. Search for the Script Name or Account number for the script you need.
3. Click the Script Name you want in the List.

Clone from the Same Account

1. In the Agent Script tab of an Account Resource
2. Click the Clone button

Offices

Offices display the addresses of all business locations. Each location is dynamically linked to a Google Maps page. All Offices added under a Resource are displayed in the Office tab of an Agent Script.

Add an Office

1. In the Offices tab, click **Add Office.**
2. Add in all of the relevant Office information.
3. Click **Create Office**

Billing

The billing tab can store the relevant billing information for a Resource. The Customer Reference Number can be used as the Client ID for billing. This ID typically matches your ID in TBS, Tasbiller, Quickbooks, etc.

Oncall Calendar

Contacts

Add Contacts

1. Navigate to the left-side panel labeled Contacts and select the button.
2. Type the name of your contact and press Save.

Add Delivery Methods

All contacts can be assigned a variety of delivery methods, which our Agents will use to deliver your message notifications.

1. While in the menu of the selected contact click the button
2. Select the Delivery Method of your choice:
   - Call - Verbal Phone Call
     - Phone Number - The phone number you would like our Agents to dial.
     - Phone Type - The type of phone they are dialing
     - Call Instructions
       - Complete Message - Entire message left on voicemail
       - Message for Callback - A voicemail is left to request a return call to the Answering Service for the entire message.
       - Digital Beep - A pager message with either the number to call us back or the caller's number.
   - SMS - Text Message
   - Email
   - Fax
   - External API - Custom Notifications (Speak to your account manager for more information)
3. Add the corresponding contact information and click the button

Rename Contacts

1. Underneath Contacts, select the button next to the contact you wish to rename.
2. Select **Rename** in the bottom right corner of the contact.
3. Enter the new name you wish to rename the contact to and **Save.**

Edit Delivery Methods

1. Underneath Contacts, select the button next to the contact you wish to rename.

2. Select the button next to the delivery method you wish to edit.
3. Edit the information as needed and click the button.

Delete Delivery Methods

1. Underneath Contacts, select the button next to the contact you wish to delete.
2. Select the (red cross) delete button next to the delivery method you want to remove.
3. Press **OK** on the prompt to confirm the removal of that delivery method.
4. ***Note:*** *Deleting a delivery method also removes it from any existing calendar events.* ***This CANNOT be undone.***

Delete Contacts

1. Select the (trash can) icon next to the contact you wish to delete.
2. Press OK on the prompt to confirm the removal of that contact.
3. ***Note:*** *Deleting a contact will remove them from all existing events on the calendars. This CANNOT be undone.*

Merge Contacts

1. Select the merge button.
2. Select all the contacts you want to merge under 'Select Contacts.'
3. Enter the name you want to rename the newly merged contacts under 'New Contact Name.'
4. Press OK on the prompt to confirm the merging of the contacts.
5. ***Note:*** *This CANNOT be undone.*

Calendar Events

Add New Events

1. Navigate to the calendar where you would like to add your new event.
2. Select the **'New Event'** button.
3. Select or enter the duration in which the event will last.
4. **Optional:** Set a schedule for the event (*see recurring schedule for more information*).
5. Select one or more delivery methods to be associated with the event.
6. Select **'Create'** to save the new event.

Edit Existing Events

1. Navigate to the escalation level where you would like to edit your event.

2. Select the event on the calendar.
3. Change the contact, duration, schedule, or delivery methods based on your preference.
4. Select the **'Update'** button to save your changes.
    - Update: This instance - Updates that single instance.
    - Update: All instances - Updates all events associated with the events recurring schedule on that escalation level.

Delete Existing Events

1. Navigate to the escalation level where you would like to delete your event.
2. Select the event on the calendar.
3. Select the **'Delete'** button on the event.
    - Delete This instance - Deletes that single instance.
    - Delete All instances - Deletes all events associated with the events recurring schedule on that escalation level.

Schedule Recurring Events

1. Navigate to the escalation level where you would like to schedule your recurring event.
2. Select the event on the calendar.
3. Select the schedule you would like to activate.
    - **Daily** - Every (*total days*) day(s) - eg. Every 5 days.
    - **Weekly** - Every (*total weeks*) week(s) on: (days) - eg. Every 2 weeks on Monday and Tuesday.
    - **Monthly** - Every (*total months*) month(s):
    - Day of Month - e.g., monthly on the 2nd and 5th days.
    - Day of Week - e.g., Monthly on the 1st Sunday, 2nd Sunday, and 2nd Monday.
    - **Yearly** - Every (*total years*) - eg. Every 2 years.

Clone Events

1. Navigate to and select the event you would like to clone.
2. Select the **'Clone'** button on the event edit menu.
1. Select the escalation level that you would like to clone the event to.

Default Event Times

You can set a default start and end time for all new events added to the calendar. By default, the global start and end times are set to 12:00 AM—11:59 PM (24 hours), but you can change this to your preference.

Escalation Levels

View Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you want to go to.
    - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.

Add Escalation Levels

1. Select the plus sign in the top right corner.
2. Enter a name for the calendar.
3. Add the number of times you want to repeat that escalation level.
4. Add the time we should wait before leaving that escalation level (none required for terminating steps).
5. Add the next escalation level in the rotation or terminate if this is one single escalation level.

Edit Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you would like to go to.
    - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
3. Select the **pencil icon** in the top-right of your calendar.

Clone Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you would like to go to.
    - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
3. Select the **clone icon *(two sheets of paper)*** in the top-right of your calendar.
4. Select the escalation in the drop-down you would like to clone the entire calendar to.

Delete Escalation Levels

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you want to go to.
    - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
3. Select the **trash can icon** in the top-right of your calendar.
4. Press **OK** on the prompt to confirm the removal of that escalation level.
5. ***Note:*** Deleting an escalation level will break any chained escalations and remove any script relay triggers you had in place. When deleting an escalation level, be sure to correct all the places that it was referenced. Also, **deleting an escalation level CANNOT be undone.**

Repeat Escalation Levels

You can repeat escalation levels any specified number of times before moving to the next escalation level in your calendar chain. This can help in instances where the same set of instructions needs to be repeated multiple times.

1. Select the drop-down menu in the middle next to Escalation Levels.
2. Select the escalation level in the drop-down menu you want to go to.
    - You can also navigate back and forth to escalation levels in sequential order using the left and right arrows.
3. Select the **pencil icon** in the top-right of your calendar.
4. Add the number of times you want to repeat the escalation level in the repeat section.
5. Add the number of minutes to wait between each attempt.
6. Save.

Chain Escalation Levels

You can chain escalation levels together to build a flow process. (eg. Step 1, Step 2, Step 3)

1. Create two or more escalation levels.
2. Edit the escalation level, which will be the first step in your process.
3. Link the primary escalation to the secondary escalation in the Next Escalation drop-down.
4. Set a wait time before continuing to the Next Escalation.
5. Repeat for as many steps as needed.

Export to Third-Party Calendar

You can export any escalation level to a third-party calendar for previewing with the custom .ics file provided for all escalation levels. The export will only need to be completed once; all updates will be sent to your calendar in real time.

1. Select the escalation level you wish to export.
2. Select the **calendar icon** in the top right corner of the calendar.
3. Copy the link to the .ics file for that escalation level and import it into your calendar.
   - For more instructions on importing, please see your third-party calendar support documentation.

FAQs

FAQs is a feature that can be enabled on an Account to display an FAQ section for Agents on the Agent Script.

Activate FAQs

Under the Account Features page, turn on the **FAQ feature.**

Create an FAQ

1. Under the Phone Resource, click on the **FAQs tab.**
2. Type in a question in the **Question field.**
3. Type in an answer in the **Answer Field.**
4. Click **Create Phone FAQ.**

Edit an FAQ

1. Under the Phone Resource, click on the **FAQs tab.**
2. Click the **pencil icon** on the FAQ.
3. Type in a question in the **Question field.**
4. Type in an answer in the **Answer Field.**
5. Click **Update Phone FAQ.**

Delete an FAQ

1. Under the Phone Resource, click on the **FAQs tab.**
2. Click the **trash can icon** on the FAQ.
3. Click **Yes** on the confirmation question.

To Dos

Overview of To Dos

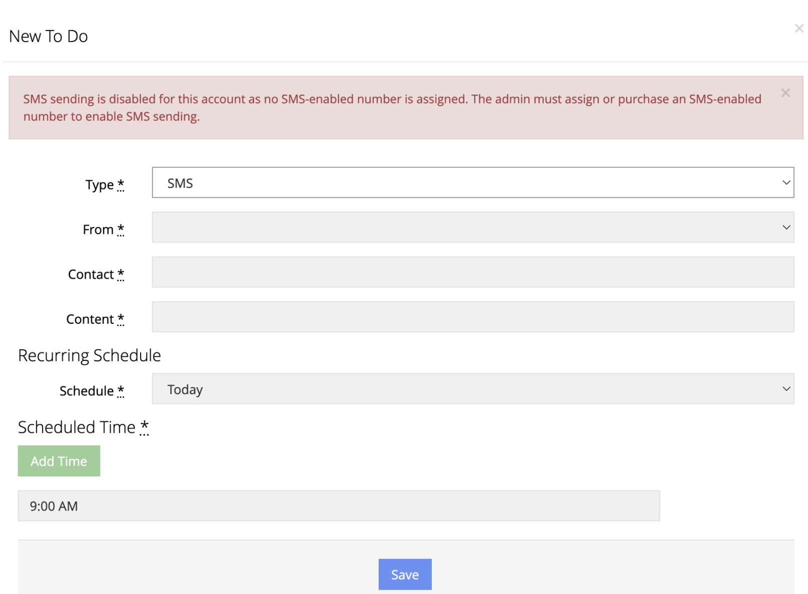
To Dos allows Administrators to build Outbound Call, SMS, Email, and Task Workflows. To Dos are designed to help agents and admins handle scheduled tasks, which can be sent out as automated reminders or actionable items through SMS, email, or even manual phone calls. These tasks can be either scheduled one-time in the future, immediately, or recurring, making it easy to schedule daily, weekly, or monthly reminders.

- **Automated SMS and Email To Dos**: Schedule and send automated reminders or notifications.
- **Manual Calls To Dos**: Schedule manual reminders and calls for agents to complete.
- **API Integration**: All channels are accessible via API for enhanced automation.

Getting Started with To Dos

- **Enable the To Dos Feature**
    - Activate the feature on the account.
- **Navigate to the To Dos Tab**
    - Navigate to the relevant resource on the account.
- **Select the Type of To Do**
    - SMS, Email, or Call

SMS To Dos



- **Creating an SMS To Do, fill in the following fields:**
    i. **Type*:** Choose the To Dos type as SMS.
    ii. **From*:** Select an SMS-enabled number assigned to your account.
    iii. **Contact*:** Enter the recipient's phone number.
    iv. **Content*:** Write the SMS message you want to send.
    v. **Schedule*:** The form allows you to set up a specific schedule. You can choose from pre-set times or add custom times for when the task should be executed. Choose when the call task should be performed:
        1. **Today:** Schedule the To Do for the current day at your chosen times.
        2. **Immediately:** Schedule the To Do immediately after it is created.
        3. **Recurring Schedules:**
            a. **Daily**: Every (total days) day(s) - eg. Every 5 days.
            b. **Weekly**: Every (total weeks) week(s) on: (days) - eg. Every 2 weeks on Monday and Tuesday.
            c. **Monthly**: Every (total months) month(s):
            d. **Day of Month:** e.g., monthly on the 2nd and 5th days.
            e. **Day of Week**: e.g., Monthly on the 1st Sunday, 2nd Sunday, and 2nd Monday.
            f. **Yearly**: Every (total years) - eg. Every 2 years.
- **Important Configurations for SMS:**
    i. **SMS-Enabled Number:**
        1. SMS sending requires an SMS-enabled number to be assigned to the account. Without this, SMS tasks cannot be sent.
        2. If no SMS-enabled number is assigned, the admin must assign or purchase an SMS-enabled number to enable SMS sending.
    ii. **Brand Registration:**
        1. SMS To Dos requires a new brand registration per account.
        2. To register a brand, send a request to numbers@kauneonga.com with the necessary details.
            a. Legal company name
            b. Doing business as (DBA) or brand name
            c. Country of registration
            d. Type of entity (publicly traded, private, nonprofit, government)
            e. Tax ID number/EIN
            f. Company address
            g. Business website

h. Vertical/industry
i. Company size
j. Support e-mail
k. Support phone number

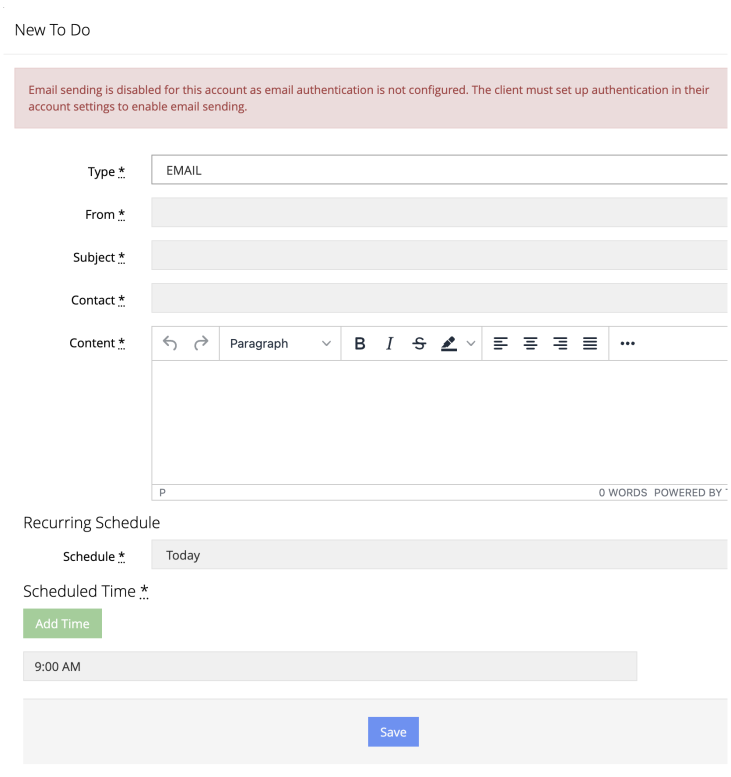
iii. **Campaign Registration:**
1. SMS To Dos requires a new campaign registration per account.
2. To register a campaign, send a request to numbers@kauneonga.com or your SMS provider with the necessary details:
    a. **Texting use case.** Overarching reason for texting. Examples include customer care, marketing, and delivery notifications.
    b. **Message content attributes.** Carriers want to know if you plan to use certain messaging attributes, such as SMS links, age-gated content, or embedded phone numbers.
    c. **Example messages.** Provide message examples or templates to prove your use case is valid and accurate.
    d. **Opt-in information.** This is how you're collecting consent to text your contacts. You are required to obtain consent before texting any contact.

iv. **Compliance:**
1. **Opt-In Consent:**
    a. Evidence of customer consent must be obtained.
    b. Maintain records of consent for compliance purposes.
2. **Privacy Policy:**
    a. A privacy policy detailing consent terms must be published on your website.
3. **Opt-Out Mechanism:**
    a. Campaigns must include opt-out instructions (e.g., "Reply STOP to unsubscribe").
4. **Content Restrictions:**
    a. Prohibited content includes spam, phishing, illegal activities, or misleading offers.
5. **TCPA and DNC:**
    a. Follow TCPA rules, including contacting residential customers only between 8:00 a.m. and 9:00 p.m. in their timezone for SMS sales and marketing.
    b. Calls must comply with the National Do Not Call (DNC) Registry rules:

        i. Compare contact lists against the National DNC Registry.
        ii. Maintain an internal DNC list for customers who opt out of calls.

6. **Emergencies:**
    a. Emergency notifications are exempt from some TCPA and CAN-SPAM requirements.

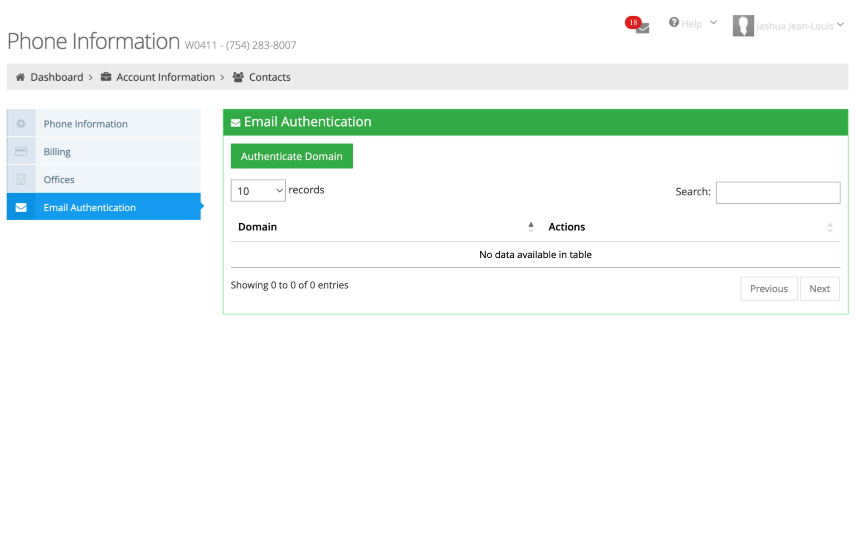
Email To Dos



- **Creating an Email To Do, fill in the following fields:**
    i. **Type***: Select Email as the To Dos type.
    ii. **From***: Select the authenticated email address you wish to send the email from.
    iii. **Subject***: Provide a clear and concise subject line for the email.
    iv. **Contact***: Enter the recipient's email address.
    v. **Content***: Write the body of the email in the text editor provided. You can format the content as needed using the built-in tools.
    vi. **Schedule*:** The form allows you to set up a specific schedule. You can choose from pre-set times or add custom times for when the task should be executed. Choose when the call task should be performed:

1. **Today:** Schedule the To Do for the current day at your chosen times.
2. **Immediately:** Schedule the To Do immediately after it is created.
3. **Recurring Schedules:**
    a. **Daily**: Every (total days) day(s) - eg. Every 5 days.
    b. **Weekly**: Every (total weeks) week(s) on: (days) - eg. Every 2 weeks on Monday and Tuesday.
    c. **Monthly**: Every (total months) month(s):
    d. **Day of Month:** e.g., monthly on the 2nd and 5th days.
    e. **Day of Week**: e.g., Monthly on the 1st Sunday, 2nd Sunday, and 2nd Monday.
    f. **Yearly**: Every (total years) - eg. Every 2 years.

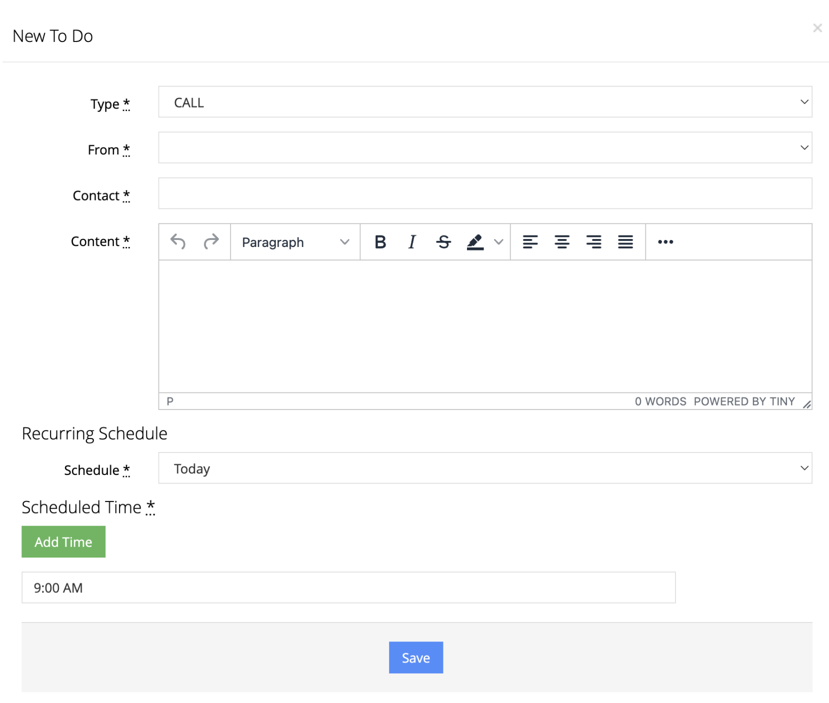
- **Important Configurations for Email:**
    i. Authenticated Email Address
        1. Sending emails requires a User to authenticate through DNS record verification for compliance and deliverability.
        2. This can be completed in the User Profile under Phone Information.



- **Compliance:**
    i. **CAN-SPAM**
        1. **Clear Sender Identification**: Emails must clearly identify the sender.
        2. **Valid Physical Address**: Include a valid physical postal address in the email.

        3. **Opt-Out Mechanism**: Provide an easy and visible way for recipients to opt out of future emails.
        4. **Accurate Subject Lines**: Subject lines must not be misleading or deceptive.
        5. **Prohibited Content**: Emails cannot contain false or misleading header information or fraudulent claims.
    ii. **Contact List Verification:**
        1. Ensure all contact information is accurate and verify contact lists before use.
    iii. **Privacy Policy:**
        1. A privacy policy detailing consent terms must be published on your website.
    iv. **Emergencies:**
        1. Emergency notifications are exempt from some TCPA and CAN-SPAM requirements.

Call To Dos



- **Creating a Call To Do, fill in the following fields:**
    i. **Type***: Select **CALL** as the task type.
    ii. **From***: Enter the number or identifier that the agent should display or use when calling.
    iii. **Contact***: Enter the recipient's phone number.
    iv. **Content***: Provide a script, notes, or instructions for the agent performing the call.

v. **Schedule*:** The form allows you to set up a specific schedule. You can choose from pre-set times or add custom times for when the task should be executed. Choose when the call task should be performed:
   1. **Today:** Schedule the To Do for the current day at your chosen times.
   2. **Immediately:** Schedule the To Do immediately after it is created.
   3. **Recurring Schedules:**
      a. **Daily**: Every (total days) day(s) - eg. Every 5 days.
      b. **Weekly**: Every (total weeks) week(s) on: (days) - eg. Every 2 weeks on Monday and Tuesday.
      c. **Monthly**: Every (total months) month(s):
      d. **Day of Month:** e.g., monthly on the 2nd and 5th days.
      e. **Day of Week**: e.g., Monthly on the 1st Sunday, 2nd Sunday, and 2nd Monday.
      f. **Yearly**: Every (total years) - eg. Every 2 years.

- **Compliance:**
  i. **Opt-In Consent:**
     1. Evidence of customer consent must be obtained.
     2. A privacy policy detailing consent terms must be published on your website.
     3. Maintain records of consent for compliance purposes.
  ii. **Opt-Out Mechanism:**
     1. Campaigns must include opt-out instructions (e.g., "Reply STOP to unsubscribe").
     2. Content Restrictions:
     3. Prohibited content includes spam, phishing, illegal activities, or misleading offers.
  iii. **TCPA and DNC:**
     1. Follow TCPA rules, including calling residential customers only between 8:00 a.m. and 9:00 p.m. in their timezone for sales and marketing.
     2. Calls must comply with the National Do Not Call (DNC) Registry rules:
        a. Compare contact lists against the National DNC Registry.
        b. Maintain an internal DNC list for customers who opt out of calls.
  iv. **Emergencies:**
     1. Emergency notifications are exempt from some TCPA and CAN-SPAM requirements.

IVR

The IVR allows you to control all of an inbound call's behavior. This guide will explain how each field works.

Calls Limit

The Calls Limit allows you to set a threshold for the number of calls an Account Resource can queue into your ACD simultaneously. This tally takes into consideration any call regardless of the state.

For example, if you set your Calls Limit to 3, you have 2 calls waiting for an agent, and have 1 call speaking to an Agent, the fourth call will hear a busy tone or the text-to-speech prompt you add to the Calls Limit Text.

Priority

Allow calls from this Resource to jump ahead of the call queue.

Calls Limit Text

A speech-to-text prompt you would like to play when an Account Resource has reached its threshold of the calls. If this is not set, the caller will hear a busy tone, and the line will automatically hang up.

Rings Number

The number of rings you would like to play in front of a call before it goes pre-recorded greeting and then to the hold music.

When you have rings set, the workflow can be disrupted at any point once an agent is available.

Greeting

The greeting you would like to play in your IVR. This can be pre-recorded or text-to-speech. A default greeting will be played if no greeting is set, stating, “Your call will be answered momentarily.”

Voicemail

A voicemail box that can be accessed in the IVR either in your call options or through a voicemail-only IVR. Voicemail uses speech-to-text throughout the entire duration of each voicemail.

1. **Voicemail Greeting:** The greeting for the voicemail which can be pre-recorded or text-to-speech.
2. **Goodbye Text:** The text-to-speech prompt will play when the customer is done recording their voicemail and ending the call.
3. **Finish on Key:** The key the customer can press to signal that they are finished recording their voicemail.
    - The customer can also end the voicemail by simply hanging up.
4. **Max Length (sec.):** The maximum length in seconds that you're willing to allow for Voicemails.
5. **Timeout (sec.):** The maximum amount of silence you're willing to allow before the voicemail automatically stops recording and ends.
    - **Using this feature will result in additional speech-to-text costs as the timeout feature leverages voice transcription to detect silence.**

Agent's Pre-call Whisper

Text-to-speech audio played only for the agent before being connected to the caller during an inbound call. Text-to-speech is metered and will incur usage costs.

Call Options

DTMF call options that follow various actions.

- **Invalid DTMF text:** The text is played when an inbound caller selects an Invalid Call Option.
- **DTMF:** The number you would like the caller to press to access the Call Option.
- **Account:** The account you would like to Pop based on the Call Option selected.
    - You can also point to a Voicemail box.
- **Recording:** Play an audio recording using a Call Option.
- **Dialout:** Make an outbound call to another number using a Call Option.

Hold Music

You can upload your custom hold music or use the provided hold music on the IVR.

Live Chat

Live Chat allows Users to add a chat widget to external websites to chat with Agents through the Liberty platform. The Chat widget can be customized with pre-chat forms, logos, colored themes, quick responses, and prompts that your agents can use.

Chat Configuration

This contains the Code Snippet, Greeting, and Pre-chat form.

Code Snippet

The HTML script will be placed on the website where the chat widget will go.

It is recommended to place this snippet in the header or footer of the website for best results.

Greeting

This message is displayed to the visitor approximately 2 seconds after opening a chat.

Pre-chat Form

You have the option to add a Name, Number, and Email field to the form displayed at the beginning of a chat.

Chat Plugin Theme

This section allows you to set a Logo and Color to your chat widget.

Quick Responses

Agent can use Quick Responses to quickly reply to the Visitor on the website.

Prompts

Additional prompts that can be added to collect input from the Visitor.

Schedules

Fax and Email schedules are scheduled message digests you can send that will include a recap of messages that were created along with the activities of that message. This article will show you how to set them up.

Enable Scheduled Fax

1. Navigate to the **Accounts** section in the Left sidebar menu from the Administrator portal.
2. Search for the account you wish to enable scheduled fax messages for.
3. Select the **Edit** button under the Actions column.
4. Navigate to the **Features** tab.
5. Turn on the feature labeled **Scheduled Fax.**
6. Refresh your page to reveal the new tab labeled **Schedules.**
7. **Refer to Fax Setup if BYOC customer.**

Create A Scheduled Fax

1. Navigate to the **Accounts** section in the Left sidebar menu from the Administrator portal.
2. Search for the account you wish to enable scheduled fax messages for.
3. Select the **Edit** button under the Actions column.
4. Navigate to the **Schedules** tab.
5. Navigate to the sub-tab labeled **Fax Messages**
6. Select **Edit Schedule** in the Actions column.
7. Add the Fax Number in the Fax Number field.

8. **Select all of the Phones** (Resources) to which you wish to add a fax schedule, and Ctrl-click (Cmd-click on Mac) to select multiple entries.
9. Set a **Recurring Schedule** (Daily, Weekly, Bi-Weekly, etc.)
10. Add a scheduled time. If you would like to send it more than once per scheduled day, you can add more times.

Enable Scheduled Emails

1. Navigate to the **Accounts** section in the Left sidebar menu from the Administrator portal.
2. Search for the account you wish to enable scheduled fax messages for.
3. Select the **Edit** button under the Actions column.
4. Navigate to the **Features** tab.
5. Turn on the feature labeled **Scheduled Emails.**
6. Refresh your page to reveal the new tab labeled **Schedules.**

Create A Scheduled Email

1. Navigate to the **Accounts** section in the Left sidebar menu from the Administrator portal.
2. Search for the account you wish to enable scheduled fax messages for.
3. Select the **Edit** button under the Actions column.
4. Navigate to the **Schedules** tab.
5. Navigate to the sub-tab labeled **Email Digests.**
6. Select **Edit Schedule** in the Actions column for the email to which you wish to add a schedule.
7. **Select all of the Phones** (Resources) to which you wish to add a fax schedule, and Ctrl-click (Cmd-click on Mac) to select multiple entries.
8. Set a **Recurring Schedule** (Daily, Weekly, Bi-Weekly, etc.)
9. Add a scheduled time. If you would like to send it more than once per scheduled day, you can add more times.

10. You can only create scheduled emails for active users on the account. Review user configuration if an email you would like to send emails to is missing.

Skills

Skills are groups that can be assigned to Phones and Agents for distribution. Skills are used when routing a Call, Chat, SMS, or Email to an available agent.

Create a Skill

1. Navigate to the **Skills** section from the Skill Dashboard.
2. Select **Add Skill** in the Skills menu.
3. Fill in the required fields and optional information.
4. Select **Create Skill** at the bottom of the form.

Skill was successfully created!

Edit a Skill

1. Navigate to the **Skills** section from the Skill Dashboard.
1. Select **Edit** on the Skill you need to change in the Skills menu.
2. Fill in the required fields and optional information.
3. Select **Update Skill** at the bottom of the form.

The skill was successfully updated!

Delete a Skill

1. Navigate to the **Skills** section from the Skill Dashboard.
2. Select **Delete** on the Skill you need to remove in the Skills menu.
3. Select **OK** on the confirmation screen.

Deleting a Skill will remove the pre-existing association from all Agents and Accounts.

This cannot be undone.

Assigning a Skill to a Phone

1. From the **Accounts** section in the Admin Portal, select the blue **Manage Phone** button you wish to assign skills.
1. Click the Skills field and select the skill(s) you want to add to the phone.
2. Click **Update Phone.**

Multiple skills can be assigned to a Phone.

add-skill-to-phone.mov

Assigning a Skill to an Agent

1. From the **Agents** section in the Admin Portal, click **Edit** on the agent to whom you wish to assign skills.
1. Select the Skills you wish to assign to the agents in the Skills field.
2. Click **Update Agent.**

add-skills-to-agent.mov

Multiple skills can be assigned to an Agent. If an Agent is not available in a skill group, any available agent who can handle the omnichannel will be selected. If no skill is assigned to the agent, the agent will not be able to receive any traffic. A phone will only route to agents if a skill is assigned to it.

Sheets

Coming soon.

Blacklists

The SMS process in Liberty contains an internal customer opt-out and opt-in process to remain in compliance with SMS regulations. The blacklist includes the list of all customers who have chosen to opt-out of receiving text messages.
Liberty will not send out any SMS text messages to phone numbers located on the blacklist. It is recommended that you check the list frequently and remove any on-call contacts/events if necessary.

SMS Keyword Management

1. Navigate to the **Preferences** section from the Administrator dashboard.
2. Enter a keyword in the **Message to subscribe to SMS updates** field.
3. Enter a keyword in the **message to unsubscribe from the SMS updates** field.

It is recommended to use unique keywords to avoid accidental customer opt-out.

Add Number to Blacklist

1. Navigate to the **Blacklist** section from the Administrator dashboard.
2. Enter the phone number.
3. Select **Create**.

Remove Number from Blacklist

1. Navigate to the **Blacklist** section from the Administrator dashboard.
2. Select the **Remove** action on the phone number.
3. Select **OK** on the confirmation prompt.

Holiday Scripts

Holiday Scripts can be used to activate all holiday agent scripts globally across all your accounts.

Create a Holiday

1. From the Admin Portal, click **Holidays** in the left sidebar.
2. Click **Add Holiday**.
1. Enter a name and date.
3. Click **Create Holiday**.

Edit a Holiday

1. From the Admin Portal, click **Holidays** in the left sidebar.
2. Click **Edit**.
1. Edit the name and date.
3. Click **Update Holiday**.

Delete a Holiday

1. From the Admin Portal, click **Holidays** in the left sidebar.
2. Click **Delete (red trash)**.
1. Click **OK** on the confirmation.

Deleting a Holiday cannot be undone. Upon deletion, all references to any accounts it was added to will be removed.

Assign a Holiday to a Resource

1. From the Admin Portal, click **Accounts** in the left sidebar.
2. Click **Manage Phone** on the Resource you would like to update.
1. Click the **Holiday** field, and select all the Holidays you wish to associate with this Resource.

You can add as many Holidays to a Resource as you need.

Set a Holiday Script

1. From the Admin Portal, click **Accounts** in the left sidebar.
2. Click **Manage Phone** on the Resource you would like to update.
3. Click the **Scripts** tab.
4. Click **Actions** on the preferred Agent Script and click **Set as Holiday Script**.

Any Scripts labeled as Holiday scripts will automatically activate at 12:00 AM in the Time Zone of the Resource they are on. By default, all scripts run 24 hours and deactivate at 11:59:59 PM.

You can only have one holiday script per account.

Fax Setup

This article will walk you through how to configure Fax in your Liberty environment for BYOC Customers. Cloud Communications customers will have fax pre-configured.

Sign Up for SignalWire

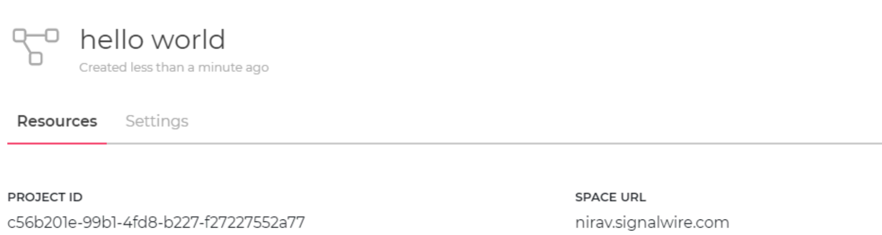
To get access to the SignalWire APIs, you'll have to sign in to the SignalWire website. You can **sign up** in trial mode, which comes with a $5 credit. There will be plenty to follow along to this guide.

Once you've signed up and verified your email, create a new project, otherwise you can use the Main project that is automatically created.

During the setup you will be asked to define a Site URL, be sure to pick one you would like to use permanently as this will define the URL of your SignalWire application.

Obtaining your API key and Project ID

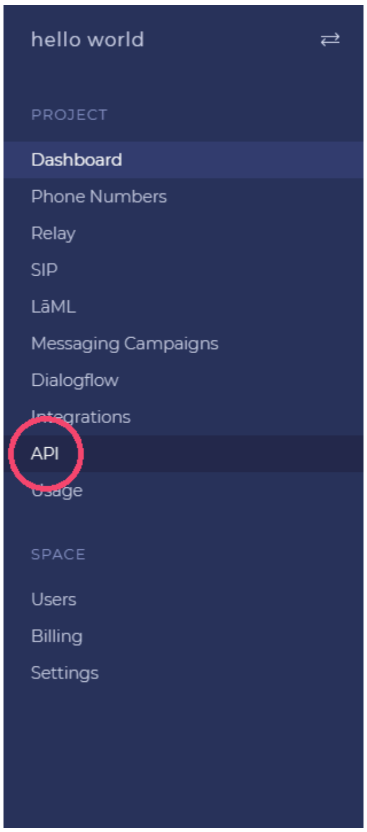
After the project has been created, you'll be taken to that project's page.



Two important pieces of information about our project are displayed there:

- **Space URL:** You'll use this URL to access SignalWire APIs
- **Project ID:** You'll use this UUID to specify your project to the API

There is one more piece of information that we want to note down from our new project. We need to generate an **API token** to access SignalWire's APIs from our own code. We can do that by navigating to the "API" page from the sidebar:



Once you have navigated to the API page, click on "Create Token". Give it a name so that you can identify it later, and make sure that the "Fax" scope is enabled. Then hit "Save". After the token is created, you will see it listed in the table.

Name	Token	Last Used	
test2	P[redacted]731c	Never	...

API Tokens are confidential

It is important that the API tokens are kept confidential. They can be used to make API requests on your behalf.

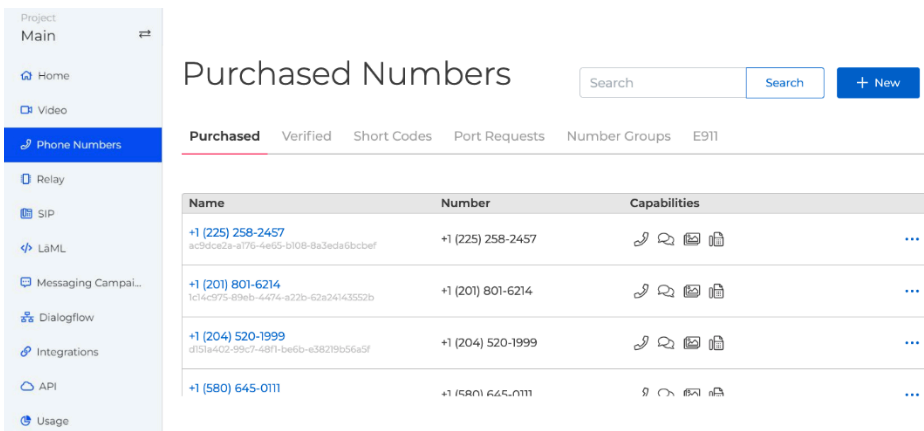
We will use this API token to authenticate with SignalWire APIs.

With this, we have collected all the pieces of information that we need to access SignalWire Fax API for our *getting started* app. In particular, we have collected:

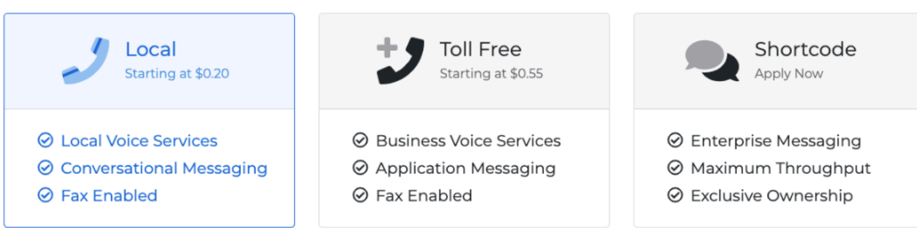
1. The Project ID (xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx)
2. The space URL (xxxxxxxxx.signalwire.com)
3. The API token (PTxxxxxxxxxxx...)

Purchase A Phone Number

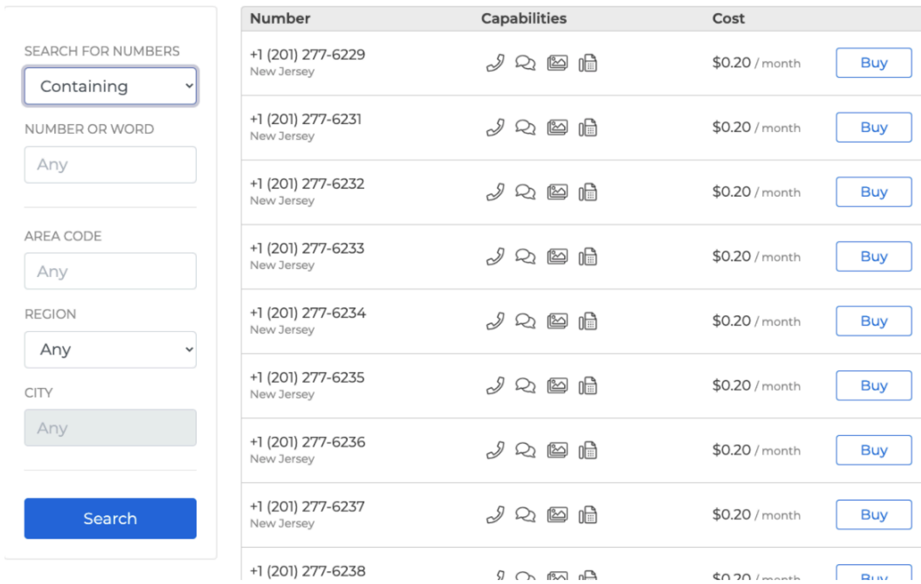
On the left hand sidebar of your space, click the tab labeled **Phone Numbers**. This will take you to the phone numbers section of your portal where you can see your purchased numbers.



To purchase a new number, click the blue New button in the upper right-hand corner. This will navigate you to our phone numbers purchasing page! There are three different types of numbers that you can purchase - local long codes (214, 682, 817, etc) , toll-free numbers (800 numbers), and short codes (5- or 6-digit numbers).



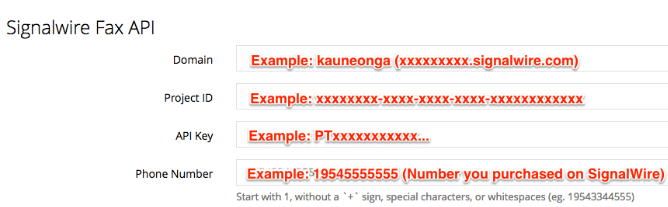
You can purchase a local or toll-free number easily in seconds. Select the type of number you'd like to purchase, and we can now move on to other distinguishing search factors.



You can narrow down your search by including area code, region, or region & city. You can also tell the search to return all numbers that contain, start with, or end with a certain sequence of numbers or even a word. Once you find the number you want, simply select **Buy** and go back to your **Phone Numbers** tab in order to see your newly purchased number.

Add your SignalWire Fax API to Liberty Preferences

Coordinate with the Kauneonga Support Team to update your backend Admin Preferences section and add the SignalWire API information you've gathered above to the respective fields.



Resources

Resources are the DID(s) you would like to assign in your Liberty environment.

Add a Resource

1. Navigate to the **Resources** section from the Administrator dashboard.
2. Select **Add Resource**.
1. Enter the required information:
    a. Number: Telephone Number or DID

   b. Account number: The account identifier you would like to use for the number.
   c. City
   d. State
   e. Available On: The date and time you want to make a DID available for use. Leave this field blank for any resources you need to utilize immediately.
   f. Active: Checked
3. Select **Create**.

DID was successfully created!

Edit a Resource

1. Navigate to the **Resources** section from the Administrator dashboard.
2. Select the **Edit** action on the resource.
3. Update the necessary fields.
4. Select **Update Resource**.

DID was successfully updated!

Deactivate a Resource

1. Navigate to the **Resources** section from the Administrator dashboard.
2. Select the **Edit** action on the resource.
3. **Uncheck the Active** checkbox.
4. Select **Update Resource**.

Deactivating a resource disables access for all agents and users.

Reports

Canned Reports

- **Usage Report** - A report detailing all of the usage on your accounts. This is typically the report you would use to import for billing purposes.
  - **Account Number** - The account number assigned to the Resource in Liberty
  - **Customer Reference #** - The billing reference number you can assign to a Phone
  - **Active Users** - The number of Users on an Account
  - **API Access -** Access to the API is enabled
  - **Caller ID Passthrough -** Liberty passes through the Caller ID to the Phone field

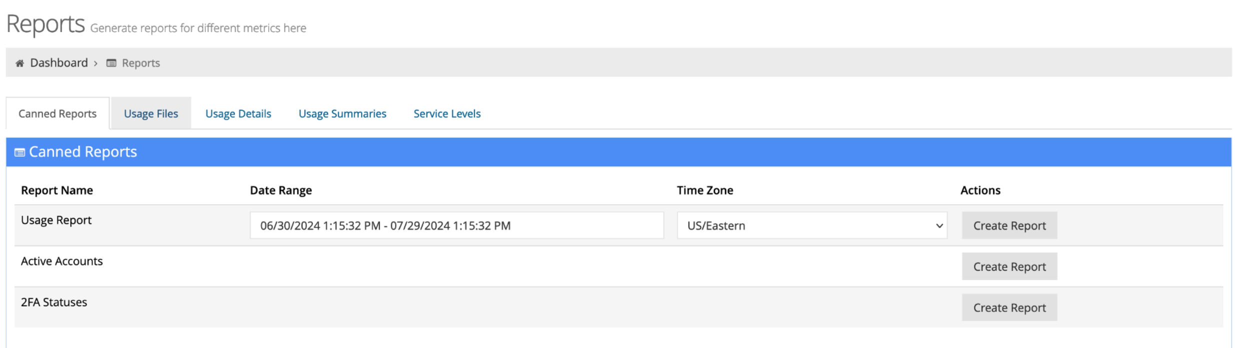
- **Data Dip -** Liberty will display any saved contact information based on Caller ID
- **FAQs -** FAQs enabled on te account
- **Instant Replay -** Call Recording access
- **Customer Notifications -** Custom email or text messaging notifications enabled
- **Delivery Confirmation -** Message confirmation notifications enabled
- **Oncall Calendar -** Oncall Calendar enabled
- **Online Payment -** Online Payment access enabled
- **Email Recap -** Email Recap is enabled on the account
- **Fax Recap -** Fax Recap is enabled
- **Secure Messaging -** HIPAA compliant messaging is enabled
- **SMS Acknowledgement -** SMS Acknowledgement is enabled
- **Plain Text Emails -** Plain Text Emails with no HTML is enabled
- **Unlimited Recap -** Unlimited Activities is enabled
- **Total Customer Notifications -** Total amount of messages sent using the SMS or Email marketing feature to external customers.
- **Total Email Recaps** - Total Scheduled Emails sent
- **Total Fax Recaps** - Total Scheduled Faxes sent
- **Total Messages** - Total messages created
- **Total SMS Notifications** - Total SMS messages sent
- **Total Email Notifications** - Total Email messages sent
- **Total Fax Notifications** - Total Fax messages sent
- **Total Calls** - Total Calls (Inbound + Outbound) made
- **Total Call Transfers** - Total number of Transfers made
- **Total Call Sec** - Total seconds in Call Volume
- **Total Call Units** - Total Units in Call Volume
- **Total Call Min** - Total Mins in Call Volume
- **Total IVR Sec** - Total seconds in IVR.
- **Total IVR Units** - Total units in IVR
- **Total IVR Min** - Total mins in IVR
- **Total Wait Sec** - Total seconds waiting for an agent.
- **Total Wait Units** - Total units waiting for an agent.
- **Total Wait Min** - Total mins waiting for an agent.
- **Talk Sec** - Total seconds with an agent
- **Talk Units** - Total units with an agent
- **Talk Min** - Total minutes with an agent
- **Total Hold Sec** - Total seconds spent on hold
- **Total Hold Units** - Total units spent on hold
- **Total Hold Min** - Total minutes spent on hold
- **Total Transfer Sec** - Total seconds spent on a transferred line
- **Total Transfer Units** - Total units on a transferred line
- **Total Transfer Mins** - Total minutes on a transferred line
- **Total Conference Sec** - Total minutes on a conference

- **Total Conference Units** - Total units on a conference
- **Total Conference Mins** - Total minutes on a conference
- **Total Work Sec** - Total seconds of agent work (wrap) time
- **Total Work Units** - Total units of agent work (wrap) time
- **Total Work Mins** - Total minutes of agent work (wrap) time
- **Total Sec** - Total seconds of connection time & wrap time
- **Total Units** - Total units of connection time & wrap time
- **Total Min** - Total minutes of connection time & wrap time
- **Total Bot Chats** - Total amount of chats that started but did not make it to an agent
- **Total Live Chats** - Total amount of chats that made it to a live agent
- **Total Chats** - Total amount of bot chats and live chats
- **Total Live Chat Sec** - Total seconds in chat with an agent
- **Total Live Chat Unit** - Total units in chat with an agent
- **Total Live Chat Min** - Total minutes in chat with an agent
- **Total Chat Sec** - Total seconds in chat (both bot chat + live chat)
- **Total Chat Unit** - Total units in chat (both bot chat + live chat)
- **Total Chat Min** - Total minutes in chat (both bot chat + live chat)
- **Total Bot SMS** - Total amount of SMS messages that did not make it to an agent
- **Total Live SMS** - Coming Soon
- **Total SMS -** Coming Soon
- **Total Live SMS Sec** - Coming Soon
- **Total Live SMS Unit -** Coming Soon
- **Total Live SMS Min -** Coming Soon
- **Total SMS Sec** - Coming Soon
- **Total SMS Unit** - Coming Soon
- **Total SMS Min** - Coming Soon
- **Total Admin Jobs** -Total amount of Admin tasks completed
- **Total Admin Sec** - Total seconds of Admin time spent on a Phone.
- **Total Admin Unit** - Total units of Admin time spent on a Phone.
- **Total Admin Min** - Total minutes of Admin time spent on a Phone.
- **Total Call To Dos** - Total Call To Dos completed by Agents.
- **Total Call Conferences** - Total number of calls conferenced
- **Total Email To Dos** - Total Email To Do's sent
- **Total SMS To Dos** - Total SMS To Do's sent
- **Total To Dos** - Total amount of To Dos completed
- **Total Bot Calls** - Coming Soon
- **Total Bot Calls Sec** - Coming Soon
- **Total Bot Calls Unit** - Coming Soon
- **Total Bot Calls Min** - Coming Soon
- **Total Spam Calls** - Coming Soon
- **Total Spam Calls Sec** - Coming Soon
- **Total Spam Calls Unit** - Coming Soon

- **Total Spam Calls Min** - Coming Soon
- **Total Inbound Calls** - Total number of calls that were inbound
- **Total Outbound Calls** - Total number of calls that were outbound
- **Total Bot SMS Parts** - Coming Soon
- **Total Live SMS Parts** - Coming Soon
- **Total SMS Parts** - Coming Soon
- **Total SMS Replies** - Total amount of SMS Replies received
- **Total SMS Replies Parts** - Total number of SMS parts processed
- **Total SMS Replies Sec** - Total seconds of time spent in SMS replies
- **Total SMS Replies Unit** - Total units of time spent in SMS replies
- **Total SMS Replies Min** - Total minutes of time spent in SMS replies
- **Total Bot Emails** - Coming Soon
- **Total Live Emails** - Coming Soon
- **Total Emails** -Coming Soon
- **Total Live Email Sec** - Coming Soon
- **Total Live Email Unit** - Coming Soon
- **Total Live Email Min** - Coming Soon
- **Total Email Sec** - Coming Soon
- **Total Email Unit** - Coming Soon
- **Total Email Min** - Coming Soon
- **Total User Outbound Calls** - Coming Soon
- **Total User Outbound Sec** - Coming Soon
- **Total User Outbound Unit** - Coming Soon
- **Total User Outbound Min** - Coming Soon
- **Supervisor Listen Sec** - Total seconds a supervisor listed to a call
- **Supervisor Listen Units** - Total units a supervisor listed to a call
- **Supervisor Listen Min** - Total minutes a supervisor listed to a call
- **Total Supervisor Listens** - Total amount of times a supervisor listened
- **Supervisor Coach Sec** - Coming Soon
- **Supervisor Coach Units** - Coming Soon
- **Supervisor Coach Min** - Coming Soon
- **Total Supervisor Coaches** - Coming Soon
- **Supervisor Join Sec** - Coming Soon
- **Supervisor Join Units** - Coming Soon
- **Supervisor Join Min** - Coming Soon
- **Total Supervisor Joins** - Coming Soon
- **Supervisor Barge Sec** - Coming Soon
- **Supervisor Barge Units** - Coming Soon
- **Supervisor Barge Min** - Coming Soon
- **Total Supervisor Barges** - Coming Soon
- **Total Inbound Sec** - Total seconds of Inbound Calls minus Transfer Time
- **Total Inbound Units** - Total units of Inbound Calls minus Transfer Time
- **Total Inbound Min** - Total minutes of Inbound Calls minus Transfer Time

- **Total Outbound Sec** - Total seconds of Outbound Calls minus Transfer Time
- **Total Outbound Units** - Total seconds of Outbound Calls minus Transfer Time
- **Total Outbound Min** - Total seconds of Outbound Calls minus Transfer Time
- **Total User SMS** - Coming Soon - Total number of text messages sent from a User

- **Active Accounts** - A report of all active accounts in your Liberty instance.
- **2FA Statuses** - A report of all of the Admins, Supervisors, Agents, and Users in Liberty and their current two factor authentication status.



Usage Details

- Call Usage Details Records
  - Your CDR report for all call traffic. All of the data in this report is in the raw unrounded format
    - **Unique Call** - The Call ID.
    - **Start Time** - Time when the call started.
    - **Call Type** - Inbound or Outbound.
    - **Start Client** - The account the call started on.
    - **End Client** - The account the call ended on.
    - **Caller ID** - The Caller ID of the caller.
    - **Number Dialed** - The number the caller dialed.
    - **DID** - The DID number for the Start Client.
    - **Agent Name** - The name of the agent involved on the Call if any.
    - **Skill Name** - The name of the skill the call was routed to.

- **Connection Sec** - The total number of seconds the call was connected to Liberty.
- **IVR Sec** - The total number of seconds the caller spent in the IVR.
- **Wait Sec** - The total number of seconds the caller spent waiting to be routed to an Agent.
- **Talk Sec** - The total number of seconds the caller spent talking to an Agent.
- **Hold Sec** - The total number of seconds the caller spent on hold.
- **Transfer Sec** - The total number of seconds the call spent in the transfer/patched state.
- **Wrap Sec** - The total number of seconds the agent took to create a message or close the account tab post-call.
- **Agent Answer Time** - The timestamp for when the agent answered the call.
- **End Time** - The final timestamp for the end of the call.
- **Hang Up Time** - The timestamp for when the call was hung up
- **Who Hung Up** - Caller or Agent.

Call Usage Detail Records

06/09/2024 12:52:50 PM - 07/08/2024 12:52:50 PM | 10 records | Search Builder | US/Eastern | Export

Unique Call	Start Time	Call Type	Start Client	End Client	Callerid	Number Dialed	DID	Agent Name	Skill Name	Connection Sec	IVR Sec	Wait Sec	Talk Sec	Hold Sec	Transfer Sec	Wı Se
3000002458	2024-07-06 23:38:59.0 US/Eastern	Inbound	VM002	VM002	917-539-5694	7543101719	754-310-1719		Legal	3	3	0	0	0	0	0
3000002457	2024-07-04 13:21:01.9 US/Eastern	Inbound	VM002	VM002	954-803-2302	7543101719	754-310-1719		Legal	10	9	1	0	0	0	0
3000002456	2024-07-03 16:03:33.9 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007		Legal	2	2	0	0	0	0	0
3000002454	2024-07-03 14:19:01.7 US/Eastern	Outbound	W0411	W0411	754-283-8007	9549696241	754-283-8007	jashuaj	Legal	60	0	0	15	46	0	0
3000002452	2024-07-03 14:17:59.5 US/Eastern	Outbound	W0411	W0411	754-283-8007	9548326297	754-283-8007	jashuaj	Legal	11	0	0	11	0	0	73
3000002450	2024-07-03 14:16:50.0 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007	jashuaj	Legal	60	6	6	51	13	9	0
3000002449	2024-07-03 14:14:26.7 US/Eastern	Outbound	W0411	W0411	754-283-8007	9548326297	754-283-8007	jashuaj	Legal	0	0	0	40	14	0	0
3000002448	2024-07-03 14:14:09.8 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007	jashuaj	Legal	128	4	7	67	0	0	0
3000002447	2024-07-03 13:55:06.9 US/Eastern	Outbound	W0411	W0411	754-283-8007	9548326297	754-283-8007	jashuaj	Legal	82	0	0	53	13	0	0
3000002446	2024-07-03 13:54:49.1 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007	jashuaj	Legal	126	6	9	32	0	0	0

Showing 1 to 10 of 77 entries

Previous 1 2 3 4 5 ... 8 Next

- Chat Usage Detail Records
    - Your CDR report for all chat traffic. All of the data in this report is in the raw un-rounded format.
        - **ID** - The unique ID for the Chat

- **Start Time** - When the chat started
- **Client** - The Account number the chat came in on
- **Skill Name** - The name of the skill queue the chat was routed to
- **Agent Name** - The name of the agent the chat was routed to
- **Contact Name** - The name of the contact gathered on the Chat
- **Queue Sec** - The total number of seconds spent waiting for an available agent to start the chat
- **Operator Sec** - The total number of seconds spend chatting with an Agent
- **End Time** - The final timestamp for the the end of the chat
- **Who Ended** - The description of who ended the chat session
- **Disposition** - The final action taken on the chat session
- **Page Visits Count** - The number of pages visited during the chat session by the visitor
- **Bot Sec** - The total number of seconds spent interacting with all non-agent prompts.

Chat Usage Detail Records

06/09/2024 12:52:50 PM - 07/08/2024 12:52:50 PM | 10 records | Search Builder | US/Eastern | Export

Id	Start Time	Client	Skill Name	Agent Name	Contact Name	Queue Sec	Operator Sec	End Time	Who Ended	Disposition	Page Visits Count	Bot Sec
1433	2024-06-12 10:47:07.6	W1	medical	Jose A.	Visitor	4	11	2024-06-12 10:47:19.2		closed_tab	1	
1422		W1	medical		Visitor	3	0	2024-06-12 10:32:04.3	Visitor	visitor_closed	1	
1425	2024-06-12 10:37:44.7	W1	medical	Jose A.	Visitor	7	16	2024-06-12 10:38:01.0		create_message	1	
1424		W1	medical		Visitor	0	0	2024-06-12 10:35:41.4	Visitor	visitor_closed	1	
1432		W1	medical		Visitor	0	0	2024-06-12 10:46:57.4	Visitor	visitor_closed	1	
1478	2024-06-12 16:32:26.9	P0000	Plumbing	Rafael	Rafael	66	7	2024-06-12 16:32:34.1	Rafael	create_message	1	
1463	2024-06-12 16:22:38.4	P0000	Plumbing	Rafael	rafael	41	31	2024-06-12 16:23:09.0	Rafael	create_message	1	
1461	2024-06-12 16:18:08.5	P0000	Plumbing	Rafael	Gio	38	35	2024-06-12 16:18:43.7	Gio	visitor_closed	1	
1464	2024-06-12 16:25:53.3	P0000	Plumbing	Jashua	Gio	41	12	2024-06-12 16:26:05.7	Gio	visitor_closed	1	
1423		W1	medical		Visitor	0	0	2024-06-12 10:35:32.4	Visitor	visitor_closed	1	

Showing 1 to 10 of 107 entries

Previous 1 2 3 4 5 ... 11 Next

Usage Summaries

- Call Usage Summary Report
  - A summary of your rounded call traffic that can be broken down into different categories. This report also allows you to view your data in various rounding metrics.

Call Usage Summary Report

06/11/2024 5:30:19 PM - 07/10/2024 5:30:19 PM | By Client | By Month | Round: Default (60.0) | Export

Client	Month	Call Count	Minutes	Connection Sec	Connection Units	Connection Min	Connection Plus Wrap Sec	Connection Plus Wrap Units	Connection Plus Wrap Min	IVR Sec	IVR Units	IVR Min	Wait Sec	Wait Units	Wait Min	Talk Sec	Talk Units
VM002	Jul 2024	6	9.0	243	9	9.0	243	9	9.0	241	9	9.0	2	2	2.0	0	0
W0411	Jun 2024	34	53.0	1788	47	47.0	2143	53	53.0	337	21	21.0	360	16	16.0	1036	31
W0411	Jul 2024	42	79.0	3505	77	77.0	3601	79	79.0	551	29	29.0	173	18	18.0	1966	50
W1	Jun 2024	1	1.0	28	1	1.0	28	1	1.0	6	1	1.0	6	1	1.0	16	1

Showing 1 to 4 of 4 entries

- Chat Usage Summary Report
  - A summary of your rounded chat traffic that can be broken down into different categories. This report also allows you to view your data in various rounding metrics.

Chat Usage Summary Report

06/11/2024 5:30:19 PM - 07/10/2024 5:30:19 PM | By Client | By Month | Round: Default (60.0) | Export

Client	Month	Chat Count	Bot Count	Live Count	Queue Sec	Queue Units	Queue Min	Bot Sec	Bot Units	Bot Min	Operator Sec	Operator Units	Operator Min	Duration Sec	Duration Units	Duration Min
2478	Jun 2024	2	0	0	0	0	0.0	1159	20	20.0	0	0	0.0	0	0	0.0
2478	Jul 2024	1	0	0	0	0	0.0	468	8	8.0	0	0	0.0	0	0	0.0
B7777	Jun 2024	1	0	0	0	0	0.0	552	10	10.0	0	0	0.0	0	0	0.0
CB1998	Jun 2024	3	0	0	0	0	0.0	2412	42	42.0	0	0	0.0	0	0	0.0
CB1998	Jul 2024	1	0	0	0	0	0.0	678	12	12.0	0	0	0.0	0	0	0.0
P0000	Jun 2024	30	0	10	342	11	11.0	9695	177	177.0	312	12	12.0	654	18	18.0
P0814202301	Jun 2024	1	0	0	0	0	0.0	111	2	2.0	0	0	0.0	0	0	0.0
p8696	Jul 2024	19	0	7	263	8	8.0	6897	124	124.0	254	9	9.0	517	14	14.0
S7130	Jun 2024	6	0	0	467	8	8.0	2224	40	40.0	0	0	0.0	467	8	8.0
S7130	Jul 2024	1	0	0	0	0	0.0	494	9	9.0	0	0	0.0	0	0	0.0
W0411	Jun 2024	6	0	0	0	0	0.0	3501	61	61.0	0	0	0.0	0	0	0.0
W1	Jun 2024	36	0	8	137	9	9.0	11135	205	205.0	216	9	9.0	353	11	11.0
W1	Jul 2024	18	0	4	134	5	5.0	7005	124	124.0	67	4	4.0	201	6	6.0
W198712	Jun 2024	1	0	0	0	0	0.0	773	13	13.0	0	0	0.0	0	0	0.0
W3	Jun 2024	1	0	0	0	0	0.0	330	6	6.0	0	0	0.0	0	0	0.0

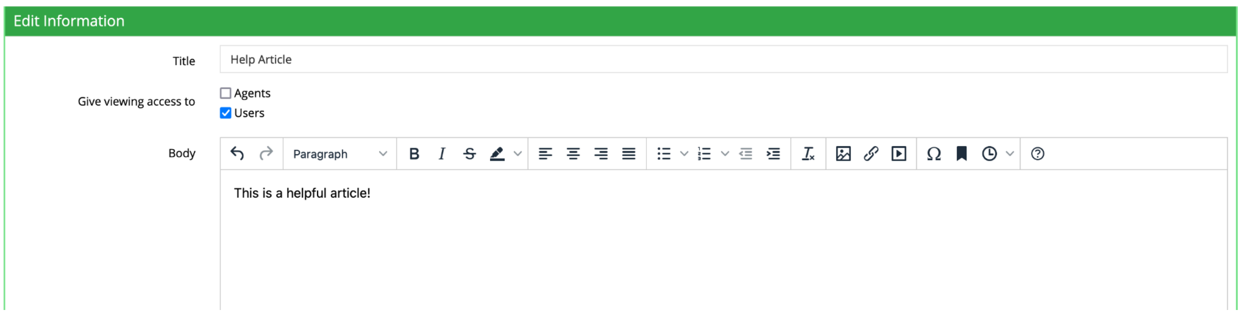
Showing 1 to 10 of 15 entries

Service Level Report

- The Service Level Report is designed to provide a comprehensive analysis of call handling performance within a specified period. This report focuses on various metrics that offer insights into the efficiency and effectiveness of your call handling processes.
  - **Skill Name:** This indicates the specific skill or service category associated with the calls.
  - **Average Wait Time:** The average time callers wait before being attended to, measured in seconds.
  - **Average Talk Time:** The average duration of conversations between agents and callers.
  - **Average Hold Time:** The average time callers are placed on hold during interactions.
  - **Number of Calls:** The total number of distinct calls handled within the reporting period.
  - **Abandoned Calls:**The total number of calls where the caller hung up before speaking to an agent.
  - **Abandoned Percentage:** The percentage of calls abandoned out of the total calls received.
  - **Wait Over 60 Seconds:** The number of calls where the wait time exceeded the specified threshold (default is 60 seconds).

Knowledge Base

The knowledge base allows you to publish documents to share with your Agents and Users. In the settings for the knowledge base you can toggle between which user group you would like to allow access to the article.



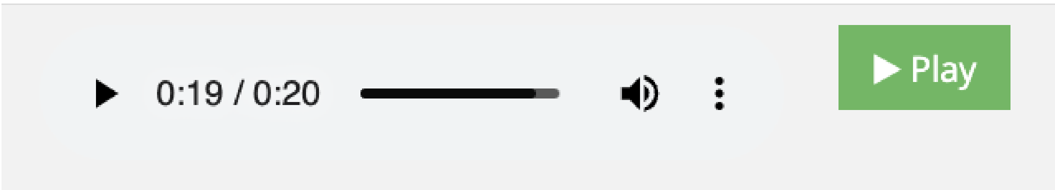
Logs

The Logs page provides you an overview of all recent application activities for Admins, Users, and Supervisors. You also have the ability to to review any failed message delivery attempts and resend them from this menu.

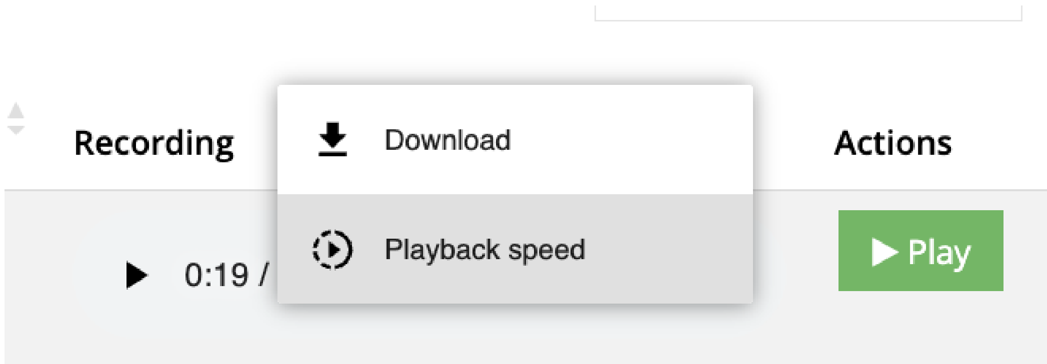
Call Recordings

Call Recording will display all call recordings from accounts with the call recording feature enabled for up to 90 days. These recordings can be listened to or downloaded.

- **ID** - Recording ID
- **Account Number** - Account Number of terminating DID
- **Call UUID** - Unique Call ID of associated recording
- **Agent Username** - Agent active during call
- **Date and Time** - End timestamp of recording
- **DID** - Terminating number dialed on recording
- **From** - Originating caller on recording
- **Recording** - Button to listen to or download recording



- **Actions** - Button to play recording



Preferences

Name

- The name of your Organization to be displayed on all pages.

Max. Escalations Delay In Hours

- The maximum number of hours allowed to delay all messages on an account.

Max. To Do Inactivity In Seconds

- The maximum number of seconds an agent can remain inactive on a To-Do before it gets routed to another agent

Admins Mobile Numbers

- The mobile number for all Admins you would like to receive SMS alerts for various issues.

Email Recipients

- Contacts you would like to receive various emails.
    - New Accounts - An email detailing information from New Accounts that get created
    - User Feedback - An email for whenever Users (Clients) submit Message feedback.

        - Agent Feedback - An email for whenever Agents submit Account feedback.
        - User Registration Request - An email for Users that do not have credentials to the portal who would like an account.
        - Blacklist - An email report of all users who would like to opt-out of receiving SMS notifications.
        - Missing Escalation Event - A alert for whenever a message gets created with no event on the triggered calendar.
        - Landline SMS Warning - An alert for whenever you send an SMS email to a mobile number detected as a landline.
        - Void Learning Experience - An email alert for whenever a learning experience gets voided by a Supervisor in the portal.

Email Senders

- Emails you would like to appear when sending out various emails in Liberty.

Google Services

- The API keys entered to configure your Google Maps and Google Translation services in Liberty.

Logo

- Your preferred logo to show up across Liberty.

Login Screen Background Color

- The custom color theme you would like to set to your login page in Liberty.

Recaptcha enabled/disabled

- This option allows you to enable Google Recaptcha on your login pages. This will prompt users to answer a Robot challenge question prior to logging in.

Blacklist

- The option phrases you would like Users to use if they wish to opt-in or opt-out of receiving SMS in Liberty.

Non-message dispositions

- Custom dispositions to add to your non-message category in the Agent portal

Max Wrap Seconds

- The maximum number of seconds of Wrap time an agent can have after a call.

Chat Preferences

- Idle Threshold Seconds - The number of seconds of inactivity a chat can have before it is considered idle.
- Stale Threshold Minutes - The number of minutes of inactivity a chat can have before it is considered stale.
- Unavailable Message - The message response a visitor receives when no agents are available to answer their chat request

SMS Acknowledgement Phrase

- The phrase Users can use to Acknowledge a message from their mobile device via SMS.

SMS Session Preferences

- Idle Threshold Seconds - The number of seconds of inactivity a SMS can have before it is considered idle.
- Idle Check Interval Seconds - The number of seconds to wait to check if an SMS session has gone idle.

Agent logout reasons

- This allows you to create a set of reasons an agent must select when logging out of Liberty.

Require Customer Reference Number

- This preference allows you to make a customer reference or billing ID required when creating an account in Liberty.

API Documentation and Integrations

This is a read-only API for your account messages. This reference helps you implement the RESTful Liberty API v2. This API uses a JSON format for output. It is stateless—all requests are validated against an API token, which can be obtained through the Liberty Platform.

Messages API v2

Messages are created by agents and stored on your account. Each message consists of standard data fields but can also contain several custom fields. The custom fields can be recognized as `content_with_additional_details_table__{labelName}`.

Integrate using our V2 APIs

API Documentation

Request Header

```
Accept: application/json
```

```
Content-Type: application/json
Authorization: Bearer {AUTH_TOKEN}
```

Messages

Messages are created by agents and stored on your account. Each message consists of standard data fields but can also contain a number of custom fields.

List messages

GET `/api/v2/messages`

`{baseURL}/v2/messages`

Returns a summary of all the messages.

Get all messages in a specific date range

GET
`/api/v2/messages?from_date=<MM-DD-YYYY>&to_date=<MM-DD-YYYY>`

`{baseURL}/v2/messages?from_date=<MM-DD-YYYY>&to_date=<MM-DD-YYYY>`

Returns a summary of all the messages in the specified date range.

Get a single message

GET `/api/v2/messages/<message_id>`

`{baseURL}/v2/messages/<message_id>`

Example Response Format:

200 OK

JavaScript

```javascript
{
  "data": {
    "id": 939,
    "read": true,
    "pbx_name": "tascom",
```

```
    "phone_number": "",
    "extension": "",
    "caller_id": "9548326297",
    "first_name": "",
    "last_name": "",
    "company_name": "",
    "content": "This is a test message",
    "status": "delivered",
    "account_id": 4,
    "agent_id": 3,
    "user_id": null,
    "created_at": "2025-01-21T22:08:20.671Z",
    "updated_at": "2025-01-21T22:08:20.858Z",
    "ivr": "",
    "pickup_date": null,
    "pickup_user_id": null,
    "contact_id": 541,
    "delivered_at": "2025-01-21T22:08:20.855Z",
    "delivered_by": 3,
    "delivered_to": null,
    "phone": "",
    "email": "",
    "call_ref_id": "",
    "sale_id": null,
    "note": "",
    "did_id": 5,
    "address": "",
    "address2": "",
    "city": "",
    "state": "",
    "zip": "",
    "how_you_hear_about_us": "",
    "is_emergency": false,
    "alt_phone": "",
    "positive_data_dip": false,
    "answers": {
        "recent_changes": "",
        "additional_information": "",
        "other_parties": "",
        "meeting_preference": "Virtual",
        "urgent": "Yes",
        "content": "This is a test message",
        "zip": "",
        "city": "",
```

```
        "state": "",
        "user_id": ""
    },
    "escalation_level_id": 7,
    "next_escalation_at": "2025-01-21T22:09:20.783Z",
    "receiver_name": "John Doe",
    "non_message_type": "",
    "activities_count": 6,
    "closing_action_group_id": 1,
    "email_subject": "",
    "escalation_counter": 0,
    "origin": null,
    "message_received_date": null,
    "disposition": null,
    "call_id": null,
    "chat_session_id": null,
    "to_do_task_id": null,
    "from_to_do": false,
    "send_at": null,
    "uuid": "8895c21e-8c3a-48e2-80dd-03acf32705fd",
    "klass_names": ""
}
}
```

200 OK

404 Not Found

- Invalid API Token

```
{
"success": false,
"info": "Invalid token",
"data": {}
}
```

Create a To Do

POST /api/v2/to_dos

Example Payload:

```javascript
{
  "account_number": "W0411",
  "delivery_type": "sms",
  "contact": "jose@kauneonga.com",
  "from": "+17542838007",
  "message_text": "Latest code: This should be an active todo",
  "schedule": {
            "frequency": "weekly",
            "times": ["9:00 AM"],
            "days": ["Tuesday", "Thursday", "Saturday"],
            "interval": 2
  }
}
```

Example Response:

```javascript
{
  "data": {
            "to_do": {
            "id": 157,
            "phone_id": 5,
            "delivery_type": "sms",
            "instructions": null,
            "contact": "jose@kauneonga.com",
            "created_at": "2024-11-28T17:28:12.723Z",
            "updated_at": "2024-11-28T17:28:12.723Z",
            "message_text": "Latest code: This should be an active todo",
            "times": null,
            "is_sending": false,
            "run_at": null,
            "from": "7542838007",
            "subject": null,
            "from_email": null,
            "sendgrid_authenticated_domain_id": null,
            "sender_name": null
            },
```

```
        "schedule": {
        "id": 76,
        "schedulable_id": 157,
        "schedulable_type": "ToDo",
        "rule": {
        "rule_type": "IceCube::WeeklyRule",
        "interval": 2,
        "validations": {
        "day": [2, 4, 6]
        }
        },
        "times": ["9:00 AM"],
        "previous_occurrence": null,
        "next_occurrence": "2024-11-30T14:00:00.000Z",
        "created_at": "2024-11-28T17:28:12.727Z",
        "updated_at": "2024-11-28T17:28:12.743Z"
        }
 }
}
```


List of To Dos

GET /api/v2/to_dos

Example Payload:

JavaScript


```
{
  "account_number": "W0411",
  "delivery_type": "sms",
  "contact": "jose@kauneonga.com",
  "from": "+17542838007",
  "message_text": "Latest code: This should be an active todo",
  "schedule": {
        "frequency": "weekly",
        "times": ["9:00 AM"],
        "days": ["Tuesday", "Thursday", "Saturday"],
        "interval": 2
  }
}
```

Example Response:

```JavaScript
{
  "data": {
        "to_do": {
        "id": 157,
        "phone_id": 5,
        "delivery_type": "sms",
        "instructions": null,
        "contact": "jose@kauneonga.com",
        "created_at": "2024-11-28T17:28:12.723Z",
        "updated_at": "2024-11-28T17:28:12.723Z",
        "message_text": "Latest code: This should be an active todo",
        "times": null,
        "is_sending": false,
        "run_at": null,
        "from": "7542838007",
        "subject": null,
        "from_email": null,
        "sendgrid_authenticated_domain_id": null,
        "sender_name": null
        },
        "schedule": {
        "id": 76,
        "schedulable_id": 157,
        "schedulable_type": "ToDo",
        "rule": {
        "rule_type": "IceCube::WeeklyRule",
        "interval": 2,
        "validations": {
        "day": [2, 4, 6]
        }
        },
        "times": ["9:00 AM"],
        "previous_occurrence": null,
        "next_occurrence": "2024-11-30T14:00:00.000Z",
        "created_at": "2024-11-28T17:28:12.727Z",
        "updated_at": "2024-11-28T17:28:12.743Z"
        }
  }
}
```

List Call Recordings

GET /api/v2/call-recordings

Example Payload:

```JavaScript
{
  "data": [
       {
       "id": 36,
       "call_id": 266805,
       "call_sid": "4f1c7b5e-744b-11ef-9bdd-02420a1f2070",
       "account_number": "JoseDev",
       "did_number": "5617819977",
       "from": "529841275287",
       "agent_username": "jose",
       "started_at": "2024-09-16T16:47:21.169Z",
       "recording": "https://yourdomain.com/recording.mp3",
       "cdr": {
       "id": 247298,
       "unique_call_id": 1000266805,
       "start_time": "2024-09-16T16:47:07.002Z",
       "call_type": "InboundCall",
       "start_client": "JoseDev",
       "end_client": "JoseDev",
       "callerid": "529841275287",
       "number_dialed": "5617819977",
       "did": "5617819977",
       "agent_name": "jose",
       "agent_id": 11,
       "skill_name": "Spanish",
       "skill_id": "1",
       "connection_sec": 18,
       "ivr_sec": 0,
       "wait_sec": 11,
       "talk_sec": 6,
       "hold_sec": 0,
       "transfer_sec": 0,
       "wrap_sec": 0,
       "agent_answer_time": "2024-09-16T16:47:19.326Z",
       "end_time": "2024-09-16T16:47:25.171Z",
       "hang_up_time": "2024-09-16T16:47:25.068Z",
       "who_hung_up": "agent",
       "original_call_id": 266805,
       "call_created_at": "2024-09-16T16:47:07.478Z",
       "is_orphaned": false,
```

```
        "conference_sec": 0,
        "conference_talk_sec": 0
        }
        }
    ]
}
```

To Dos API

Create a To Do

Endpoint: `/api/v2/to-dos`

Method: `POST`

Description: Allows the creation of a new To Do with customizable delivery type and scheduling options.

Request Parameters

Parameter	Type	Required	Description
`From`	String	No	Sender phone number for SMS To Dos.
`account_number`	String	Yes	Account number linked to the To Do.
`delivery_type`	String	Yes	Delivery method for the To Do. Accepted values are `sms`, `email`, and `call`.
`instructions`	String	No	Instructions for phone call To Dos only.
`contact`	String	No	Contact information for the To Do (email for `email` To Doss, phone number for `sms`).
`message_text`	String	No	Message content for `sms` or `email` To Do's.
`schedule`	Hash	Yes	Scheduling details. Must include rule. See below for structure.

`sender_name`	String	No	Email sender name for Email To Dos.
`from_email`	String	No	Email sender address for Email To Dos.
`subject`	String	No	Email subject line for Email To Dos.

Schedule Sub-Parameters:

Parameter	Type	Required	Description
`rule`	String	Yes	Rule of the To Do (supports `immediately`, `today`, or `recurring`).
`frequency`	String	Yes	Frequency of the To Do (supports `daily`, `weekly`, `monthly`, `and yearly`).
`times`	Array	Yes	Array of times (in `HH:MM AM/PM` format) indicating when the To Do should trigger.
`interval`	Int	No	Optional interval in days/weeks/months/years, specifying how often the To Do should recur.
`day`	Array	No	Array of days (e.g., `["Monday", "Wednesday"]`) if frequency is `weekly`. Array of days of month (e.g., `["1", "18"]`) if frequency is `monthly.`

Request Example

To create a weekly SMS To Do scheduled for Mondays and Wednesdays at 9:00 AM and 3:00 PM:

```
Unset
POST /api/v2/to-dos
Headers: {
  "Authorization": "Bearer <JWT_TOKEN>",
  "Content-Type": "application/json"
}
```

```
Body:
{
"from": 9549695432
"account_number": "W0422",
"delivery_type": "sms",
"contact": "9876543210",
"message_text": "Reminder: Your appointment is coming up soon.",
"schedule": {
       "frequency": "weekly",
       "interval": 1,
       "times": ["9:00 AM", "3:00 PM"],
       "days": ["monday", "wednesday"]
  }
}
```

Response Example

If the To Do is successfully created, the API will return a response with the created To Do details.

Unset

```
{
  "data": {
       "to_do": {
       "id": 1,
       "phone_id": 18,
       "delivery_type": "sms",
       "contact": "9876543210",
       "message_text": "Reminder: Your appointment is coming up soon.",
       "instructions": null,
       "schedule_attributes": {
       "times": ["9:00 AM", "3:00 PM"],
       "rule": {
       "rule_type": "IceCube::WeeklyRule",
       "interval": 1,
       "validations": { "day": [1, 3] }  // Monday, Wednesday
       }
       }
       },
       "schedule": {
       "next_occurrence": "2024-11-06 09:00 AM"
```

```
      }
    }
  }
```

Error Responses

Unauthorized (401): When the user is not authorized.

```
Unset
{ "error": "Unauthorized" }
```

Missing Parameter (422): When required parameters are missing or invalid.

```
Unset
{ "error": "Missing parameter: contact" }
```

Invalid Parameter (422): When invalid values are provided.

```
Unset
{ "error": "Invalid parameter: days" }
```

Server Error (400): For unexpected errors during processing.

```
Unset
{ "error": "Error message" }
```

Get All To Dos

Endpoint: `/api/v2/to-dos`

Method: `GET`

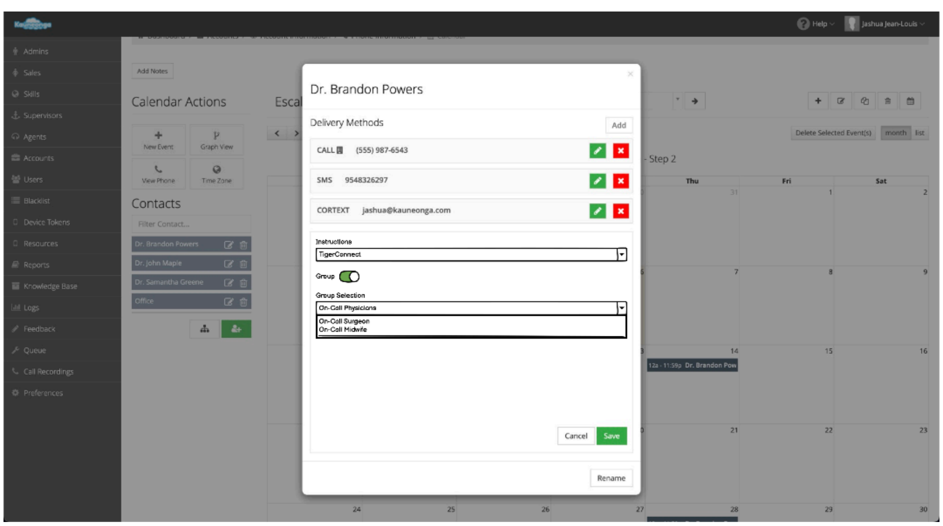
Description: Retrieve a list of all existing To Dos in the system. This endpoint is available only to Admins.

Request Example:

```
Unset
GET /api/v2/to-dos
Headers: {
  "Authorization": "Bearer <JWT_TOKEN>"
}
```

Response Example:

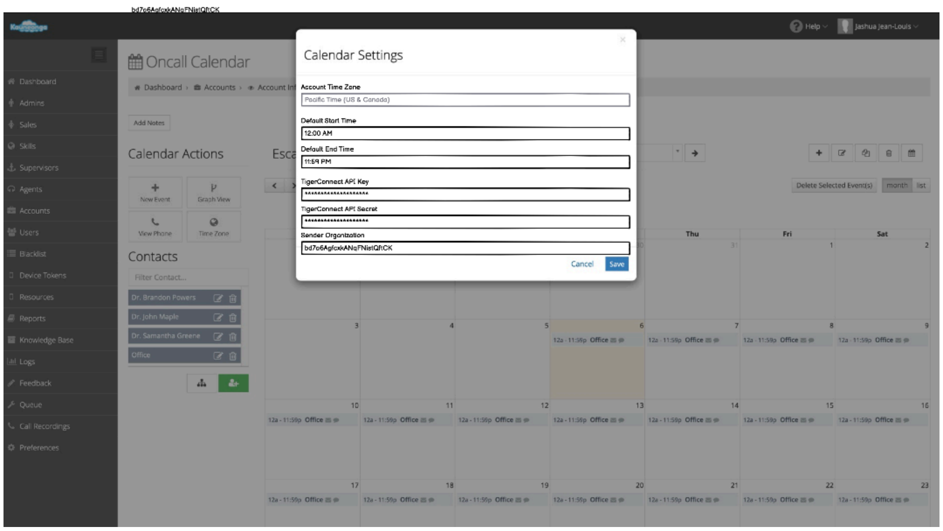
```
Unset
[
  {
       "id": 1,
       "phone_id": 18,
       "delivery_type": "sms",
       "contact": "9876543210",
       "message_text": "Reminder: Your appointment is coming up soon.",
       "schedule": {
       "frequency": "weekly",
       "interval": 1,
       "days": ["monday", "wednesday"],
       "times": ["9:00 AM", "3:00 PM"]
       }
  },
  ...
]
```



TigerConnect Integration

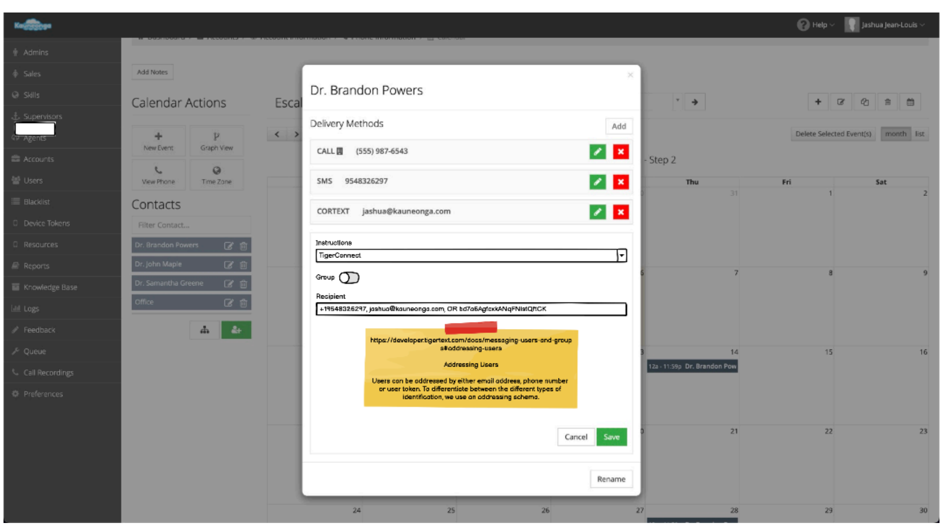
Oncall Administration

- An Admin or Client can update the on-call calendar in Liberty to include a TigerConnect Group



Authorization

- An Admin or Client can set their TigerConnect Basic Authorization credentials in the Calendar Settings to send messages to TigerConnect.



Message Delivery

- A TigerConnect receives a message in the format specified in the account preferences.

Message Redelivery

- An agent can resend a message to a TigerConnect group.

Failed Messages

- The API implementation captures failed message delivery attempts and resends the message.

Troubleshooting

User Not Receiving SMS Messages

Problem

- Customers may report that they're not receiving their messages via text messaging.

Possible Solutions

1. Check the customer's calendar contact and confirm the SMS number entered is correct.
2. Check the Blacklist and confirm that the customer has not opted out of receiving SMS messages.
3. Navigate to the Logs in the Administrator dashboard and check the Failed Jobs for SMS failures.
    a. Search for the Account Number, Company Name, or Phone Number
    b. IF BYOC: Research the failure message on the respective SMS providers support documentation.

        i. Nexmo: Vonage SMS Delivery Error Codes and Descriptions
        ii. Plivo: SMS Error Codes | Plivo Developers
            1. Open a support ticket for errors you're unable to resolve internally.
                a. Nexmo: https://api.support.vonage.com/hc/en-us/requests/new
                b. Plivo: Submit a request – Plivo Support

4. If the customer's mobile device can support MMS and messages sent through SMTP:

    a. Switch the delivery method to email and send the message to the customer's SMS gateway.
    b. If the customer prefers to receive text messages without the HTML, you can enable the Text Email feature to send them as plain text.

The SMS gateway differs by carrier; a list can be found online.

US carriers have implemented new requirements for A2P (application to person) messaging using 10-digit long Codes, also known as 10 DLC. This standard provides many benefits to our customers, including supporting higher messaging speeds and better deliverability.

The regulation is required for **anyone using an application or API** to send SMS or MMS traffic **from a US/CA number (+1 country code LVN) into the US network**. The prerequisite of 10DLC compliance is that organizations register a Brand and the appropriate Campaigns for their messaging use cases to get the approvals and appropriate throughputs to enable their businesses.

- Vonage 10DLC Registration
- Plivo 10DLC Registration

User Not Receiving Email Messages

Problem

- Customers may report that they're not receiving their messages via email.

Possible Solutions

1. Check the customer's calendar contact and confirm the email entered is correct.
2. Navigate to the Logs in the Administrator dashboard and check the Failed Jobs for Email failures.
    a. You can search for the Account Number, Company Name, or Phone Number
    b. Research the failure message, if any, on SendGrid's support documentation.
    c. Open a support ticket for errors you're unable to resolve internally:
        i. https://support.sendgrid.com/hc/en-us
3. Check the Sendgrid Activity log for a breakdown of all email attempts to the email.
    a. https://docs.sendgrid.com/ui/analytics-and-reporting/email-activity-feed
    b. https://docs.sendgrid.com/ui/sending-email/index-suppressions