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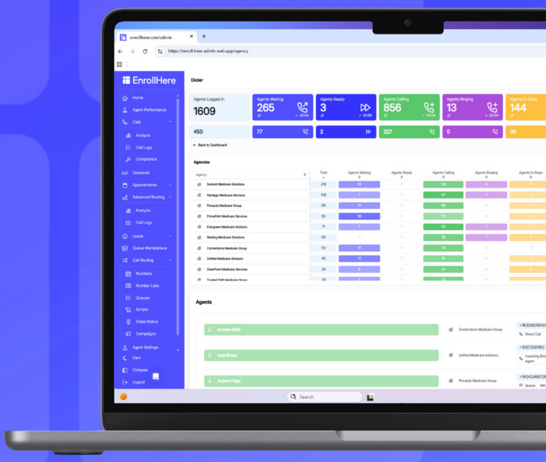

Product Release Notes

Built-in SMS, sales leaderboards, warm transfers, flexible call scripts and expanded agent visibility headline this month's platform enhancements.

August 2026 Edition | 13 New & Improved Features

NEW & IMPROVED

13 updates

SMS

- **Built-in SMS platform:** SMS is integrated as a primary communication channel, alongside email. Messages, permissions, settings, and conversation history can be managed consistently via API. This means SMS can support manual use, automation, and later, AI.
- **Consent and opt-out handling:** SMS opt-outs are separated from voice and email opt-outs - that means "stop texting me" can be honored without automatically blocking calls or email too. Keyword auto-replies and disclosure handling are also fully integrated.
- **Permissions:** Admins have control tools to manage phone lines and access, and automation for registering employees' personal numbers for business texting.
- **Workflow/automation support:** automated sends and reply-triggered workflows have been wired up so SMS can participate in automated journeys, not just manual agent conversations.

Sales Leaderboards

- Newly released configurable sales leaderboards complete with digital badges allowing for customized achievement tracking.
- Agencies can establish performance targets based on custom criteria,such as total compliance scores, gross sales, average talk time, or login duration, while maintaining strict privacy controls so teams can be restricted to seeing only their own members.
- Agencies can also restrict badges based on cross-referenced metrics, ensuring an agent only earns a sales badge if their compliance score or cost-per-acquisition (CPA) stays within set limits.
- Leaderboards include a dedicated "connect to TV" function - offices can enter a streaming app-style pairing code on any smart television to display rotating leaderboard views and custom dashboards directly on the sales floor.

Combining IVR Calls with Task Management

→ Video Demo

- **IVR flows can now create and assign tasks automatically,** connecting customer phone interactions directly to follow-up work for your team.
- **Give callers the option to request a callback instead of waiting on hold.** For example, a caller can press a key to leave the queue and request a callback within 15 minutes.
- **Voicemails can automatically generate follow-up tasks,** helping ensure customer messages don't get overlooked after hours or when agents are unavailable.
- **Customize tasks for different customer needs,** such as sales, customer support, retention, scheduled callbacks, or voicemail follow-ups.
- **Set clear callback deadlines and reminders.** Tasks can have their own due times, assignments, and notifications—including reminders before a callback is due.
- **Route follow-up work to the right people or teams** so responsibility for each customer request is clear from the moment the task is created.
- **Give team members the context they need in one place,** including caller details and access to relevant call recordings or voicemail messages
- **Track task status and ownership in real time,** so teams can see when someone has started working on a callback and avoid duplicate outreach.
- **Managers can easily monitor outstanding and upcoming follow-ups,** providing better visibility into what needs attention and when.

See Page 2 for additional features, fixes and stability improvements. ↓

Warm Transfer

Warm transfer lets agents bring a colleague into an active call before completing the handoff. Agents can search the agency directory, view eligible agent status, and transfer to a selected agent, creating a separate child call and disposition. This prevents call state and reporting from being incorrectly inherited between agents.

Mid-call Switch

Agents can switch scripts mid-call when a customer's product needs change, making conversations more adaptable and improving the likelihood of keeping the customer engaged rather than restarting the process.

Agent-Level Queue Exclusions

Queue assignment now supports explicit agent-level exclusions, which gives admins tighter control over who receives specific call types.

Workflow-Enabled Dialer Buttons

Custom dialer buttons can now trigger internal workflows such as welcome-text automations, reducing manual follow-up work for agents.

Targeted Permissions

Admins can now grant much more targeted user-management permissions, improving security while making it easier to delegate specific admin tasks without giving full access.

Visibility Upgrades

Agent and supervisor visibility upgrades — the platform now shows dialing mode more clearly, provides a day-view timeline for agent activity, adds current-time and call-detail context to that timeline, and improves analysis/export views. This gives leaders a much faster live read on floor performance.

FIXES & STABILITY

- Dialer search navigation: users can move around the dialer much faster with a command-palette style search, reducing time spent hunting through menus and making the interface feel more responsive for experienced users.
- Smarter duplicate-policy detection and cleaner resolution — duplicate policy review is now more robust across executive hierarchies and preserves the correct live status during merges. This reduces operational cleanup and lowers the risk of bad merges.
- More stable call handling and agent state management — several fixes reduce stale call tabs, prevent agents from being kicked offline or incorrectly revived into ready status, and make pause/offline behavior far more reliable. End result: less lost time, fewer confusing state mismatches, and better floor stability.
- Preview dialing now excludes leads without phone numbers, reducing dead-end dialing experiences.

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