



COEO Connect Version 8.0

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- AI Voice Connector and Voice Agent
- Call Transcription
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- New Live Transcription Service
- New CRM module
- Scheduled Reports: Support for Extensions and Enhanced Ring Group (ERG) statistics
- New Contacts Module
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Event Publisher

Event Publisher replaces the old Event Manager. This new feature gives more freedom to its users by allowing them to integrate their own backend server, and handle data generated from various events however they wish to. With Event Publisher, we have access to real-time events, meaning that with any change in the call flow a new event will be generated, with various details.

NOTE: Contact your CTA for assistance with Event Publisher.

Concurrent Archiving

Concurrent archiving for call recordings has been implemented along with some additional changes. Upon updating to this version of COEO Connect, folder granularity will be applied. For concurrent archiving to be implemented, the monitor directory structure had to be changed so that recordings are now granulated in the /year/month/day/hour UTC format. Recordings that already existed on the system will be migrated.

Note: While the migration of recording files is in progress, some functionalities such as listening to call recordings, call transcriptions, and archiving/offload will be skipped during this process.

Concurrent archiving uses multiple workers to process call recordings as they are offloaded. Administrators can configure the number of workers they wish to use in the /remote_fs/conf.ini file by adding `max_workers = x` to the [global] section, where x is the preferred number of workers. The default number of workers is 5.

To avoid offloading recordings that are still in progress, the `active_rec_timeout` option has been added to the global section of the archiving configuration file. This option specifies the number of minutes to wait after the recording file is last modified before offloading it. The default value is 5 minutes.



Important Note: With this update, archiving CLIRs will no longer be available. The option has been removed from the Resources dropdown.

AI Hub

AI Hub allows for easy configuration and management of all AI features in COEO Connect. It includes the following features:

- **AI Agent** - where administrators can configure an AI Voice Agent to answer calls and guide callers through a conversation.
- **Live transcription** - a feature that allows admins to configure real-time ERG, Queue and Extension call transcriptions of the conversations.
- **Call Transcriptions** - Enables administrators to configure Call Recording Transcriptions.
- **Text to speech** - where administrators can use AI Providers to generate a sound file from a text.
- **Voicemail Transcription** - Transcribes voicemails using some of the available AI Providers.

AI Voice Agent

This new feature allows for inbound calls to be answered automatically by an AI Voice Agent, with an AI driven experience, in a consistent tone that is configured by the administrator. AI Voice Agent guides callers through the conversation, can transfer calls, and also end calls when the conversation is completed.

In the AI Agent page, a list of created agents can be viewed, managed, edited, and deleted.



Clicking the 'Add Voice Agent' button will open a new screen where the agent can be configured. Please note that prior to this step you should already have some AI Provider configured. It is required for setting up Voice Agents.

A screenshot of the 'AI Voice Agent' configuration window. The window has a title bar 'AI Voice Agent' and a 'General settings' section. It contains three input fields: 'Agent name' with a green checkmark, 'Agent slug', and 'AI provider' with a dropdown menu showing 'Please select...' and a green checkmark. At the bottom right, there are three buttons: 'Save' (blue with a checkmark), 'Reset' (grey with a refresh icon), and 'Go back' (grey with a left arrow).

When first configuring the AI Agent, the Agent name should be entered, and the AI provider needs to be selected. Agent slug (Agent ID) is an optional field. After the AI provider has been selected, the AI Voice Agent window will expand, offering many options for configuring the AI Agent.

Currently supported providers for AI Voice Agents are OpenAI, xAI, and ElevenLabs. The available models depend on the selected provider:

OpenAI

- Voice models: gpt-realtime, gpt-realtime-mini
- Transcription models (optional): whisper-1, gpt-4o-mini-transcribe, gpt-4o-transcribe

xAI

- Model: grok

ElevenLabs

- Models: Multiple voice models are available (22 total) and are configured exclusively on the ElevenLabs platform. In COEO Connect, the administrator copies the Agent/Voice ID from ElevenLabs and pastes it into the provider configuration.

Here, administrators can completely customize the AI Voice Agent, including its behavior.

Model and Transcription model (if transcription is going to be used as well) can be selected. Administrators can also configure and customize the behavior and mannerisms of the AI Agent by populating the Introduction field, and the Prompt box. Within the Prompt text box, more specific settings regarding the AI Voice Agent can be set, such as its objective when answering the calls, the tone, context, personality, etc., as shown in the example. To further modify the AI Agent, a different voice can be selected for it.

The Prompt field now also supports template variables, allowing dynamic call-related information to be inserted directly into the prompt and used during the conversation flow,



including tool usage and interactions between the agent and caller. Currently supported variables include:

- %CALLER_ID%
- %CURRENT_TIME%
- %CURRENT_DATE%
- %CURRENT_DATE_TIME%

This allows administrators to build more context-aware prompts and create more flexible agent behavior based on real-time call information.

Most importantly, the prompt section is used to configure and define the transferring logic for the Voice Agent. Here, it is also possible to configure a prompt which will be used to transfer calls between agents. This is an especially useful feature because all the external knowledge of one AI Agent about the caller is being transferred to the other agent.

Aside from configuring the personality of the AI Agent, further configuration needs to be completed for it to work properly. Dial number of the AI Agent is a required field and must be populated. It is the number which will be dialed to reach it locally, since it also acts as an extension. Later, a DID has to be configured to point to the AI Agent directly so it can be reachable, otherwise it will not be possible to reach it from outside COEO Connect.

Some extra options include toggling the 'Limiting call duration (min)' option and entering the maximum amount of minutes the call can last if it is enabled; call Configurable fallback behavior can be set in case service is not responding within a defined time interval, allowing the call to be transferred to another number or automatically ended. The Fallback timeout is the amount of seconds the call will be transferred or ended, depending on fallback behavior, in case connection is lost.

Note: COEO will configure the AI Agent prompts. Any changes may interfere with AI Agent responses and behavior. If you need changes, contact your CTA for assistance.

MCP Server

A screenshot of the 'MCP Server edit' web interface. The form includes fields for 'Name', 'Type' (set to 'SSE'), and 'URL'. Below these is a 'Headers' section with two input boxes for 'Header Name' and 'Header Value', an 'Add Item' button, and a 'Save mcp server' button. At the bottom, there is a table titled 'MCP Servers' with columns for 'Server Name', 'Server Type', 'URL', 'Header Name', 'Header Value', and 'Actions'. The table currently shows 'No MCP server configurations found.'

An MCP (Model Context Protocol) is configured by COEO in the AI Agent settings. This connects your COEO Connect AI Agent with external services. It helps the AI Agent provide reliable data to the callers when requested.

CDR - AI Voice Agent Call Log

Calls that were handled by an AI Voice Agent are now clearly marked on the CDR page with a purple AI badge next to the agent/extension number. Clicking the agent number opens a right-side panel called AI Voice Agent Call Log, providing quick access to the full call context and agent activity for that specific call.

The AI Voice Agent Call Log side panel contains three tabs:

- **Transcript** – Displays the full conversation between the caller and the selected AI agent, with an option to download the transcript.
- **Events** – Shows a chronological list of agent events captured during the call (for example, tool/function calls, including agent-to-agent transfer events), helping with troubleshooting and validation.
- **Info** – Provides a summarized view of the selected agent's call details (such as whether the call was transferred, which agent received the transfer, and the AI provider used).

If the call involved multiple AI agents (for example, when transferring from one AI agent to another), the panel includes an agent dropdown at the top. This dropdown lists all AI agents

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that participated in the call, allowing you to switch between them and review the corresponding Transcript, Events, and Info for each agent.

Call Transcription

The Call Recording Transcription feature that was implemented earlier has been moved to the AI Hub tab along with all the other AI features. It functions just as before, but the setup is going to be much easier. The administrator needs to select the model and the AI Provider (the AI Provider must be added to the AI Providers page) and save the configuration. Supported providers for Call Recording Transcription are:

Hosted Whisper

- Models: base, base-en, small, small-en, medium, medium.en, large-v1, large-v2, large-v3, tiny, tiny.en

OpenAI

- Model: whisper-1

Optionally, they can add a prompt in the Prompt text box.

A screenshot of the 'Call Transcriptions' configuration page. The page is titled 'Call Transcriptions' and has a 'General' section. In the 'General' section, there are two dropdown menus: 'AI Provider' set to 'OpenAI' and 'Model' set to 'whisper-1'. Both dropdowns have a green checkmark to their right. Below these is a 'Prompt' text box. At the bottom of the 'General' section is an 'Options' section with a toggle for 'Allow Transcription in OSC' set to 'Yes'. At the bottom right of the page are two buttons: a blue 'Save' button with a checkmark and a grey 'Go back' button with a left arrow.

With this new release, it is now also possible to allow transcriptions in Online Self Care (OSC). Users that can access OSC can view transcriptions from their call recordings, or request a transcription to be generated, with 'Allow Transcription in OSC'.



Live Transcription

Live Transcription enables real-time speech-to-text for calls routed through an ERG or Queue. When enabled, COEO Connect captures the call audio and streams it to a supported AI transcription service (AWS Transcribe, Deepgram, Google Speech, or OpenAI). The selected service returns transcription results continuously during the call, and COEO Connect forwards that text in real time to your configured WebSocket Callback endpoint.

To use Live Transcription, Stereo Recording must be enabled, and recording must be enabled on the selected ERG, Queue, or Extension, as the feature relies on stereo call audio for Processing.

Live Transcription is enabled per destination:

- Enhanced Ring Groups (ERG): Navigate to Ring Groups > Enhanced Ring Groups and enable the new Live Transcription option under Record ERG Calls.
- Extensions: Navigate to Extensions → System, click Show Advanced Options, and enable Live Transcription under Recording.
- Queues (Contact Center only): Navigate to Queues, click Show Advanced Options, and enable Live Transcription under Recording.



COEO Connect supports provider-specific request settings (each service exposes a slightly different configuration). In this document we use Deepgram as an example, where options such as Interim Results, Smart Format, Keywords/Keyterms, Punctuation, Profanity Filter, Redaction, and others can be enabled per request, depending on the selected model and provider capabilities.



WebSocket Callback (output)

The WebSocket Callback defines the destination where COEO Connect sends the real-time transcription output. This endpoint must be a customer-provided WebSocket server (custom-built or hosted by the customer) that is reachable from COEO Connect and capable of receiving incoming transcription messages. COEO Connect uses the provided WebSocket URL to push transcription results in real time for live monitoring or further processing.

The optional Metadata field accepts JSON-formatted data that COEO Connect will include with every message sent to the WebSocket server. This is useful for correlating transcripts with call context (who called, which ERG/Queue was dialed, who answered, etc.). Metadata supports placeholders that will be populated automatically per call:

- %CALLER_ID% – Caller ID
- %CHANNEL_ID% – ID of the ERG/Queue that was called
- %CHANNEL_NAME% – Name of the ERG/Queue that was called
- %CALLEE_ID% – Extension that answered in the ERG/Queue
- %CALLEE_NAME% – Name of the extension that answered

Supported Live Transcription providers integrated in COEO Connect are AWS Transcribe, Deepgram, Google Speech, and OpenAI. COEO Connect supports Live Transcription through these providers and supports their currently available models at the time of release, while the available configuration options and model availability depend on the selected provider and may change over time. For more information about configuration steps and supported models, please contact your CTA.

Configuration

This option enables or disables Live Transcription for local calls.

Text to speech

The Text to speech configuration has also been moved to the AI Hub section for easier management. It can now be configured much more easily, and per tenant. All it takes is toggling whether the feature should be enabled and selecting a Provider from the dropdown menu of all available providers on the system/tenant.

A screenshot of a web-based configuration interface for Text to Speech (TTS) functionality. The interface is titled "Text to speech" and has a "General" section. In this section, there is a toggle for "Enable TTS" with "Yes" selected and a green checkmark to its right. Below it, there is a dropdown menu for "Provider" with "OpenAI" selected and a green checkmark to its right. At the bottom right of the form, there are two buttons: a blue "Save" button with a checkmark icon and a grey "Go back" button with a left arrow icon.

Currently supported AI Provider for Text to Speech functionality is OpenAI.

Important Note: Since this has been moved to the AI Hub, it is a **breaking change and will need to be reconfigured in case it was already set up prior to COEO Connect 8.0.**

CRM Integration

COEO Connect 8.0 introduces a new, completely redesigned CRM Module, available in COEO EmpowerUC™ Web and the new COEO EmpowerUC™ Desktop application (8.0). This new module is built on the CRM Connector (crmconnector) backend service and a unified COEO EmpowerUC™ CRM Widget UI layer, providing improved flexibility, stability, and user experience.

Important: The legacy CRM integration module is not being replaced or removed. It will continue to function in COEO Connect 8.0 with the current (legacy) COEO EmpowerUC™ Desktop application, ensuring full backward compatibility.

Key Improvements:

- **Multiple CRM support per tenant/system** – Supports multiple CRM integrations per tenant (Multi-Tenant edition) and per system (Contact Center and Business editions).
- **Unified CRM Widget** – Enables automatic record matching based on phone number, email, or other supported matching criteria (depending on the CRM integration), manual search, record matching/rematching, creation of new CRM records, and adding subject and notes during calls and conversations.
- **Expanded CRM integrations** – Built-in integrations include Salesforce, Zoho CRM, HubSpot, Microsoft Dynamics 365, Odoo (new), Pipedrive, SuiteCRM, Vtiger, Zendesk Sell, and SugarCRM, with enhanced Custom CRM Provider support.



Note: If you require CRM integration, please reach out to your CTA.

CRM Routing

CRM Routing introduces data-driven inbound call routing, allowing incoming calls to be automatically directed based on customer information stored in connected CRM systems. Instead of relying only on static IVR logic, routing decisions can now depend on real CRM data.

Example: If a lead who is identified in the CRM as a CEO calls the company, the system can automatically route the call to their assigned account manager instead of sending them through the standard IVR flow.

Note: If you require CRM integration, please reach out to your CTA.

Contacts

Unified Contacts - Major Enhancement (8.0)

Unified Contacts is now supported across all editions and fully replaces the legacy Central Phonebook. The new Contacts module introduces three structured contact visibility levels:

- **Global** – visible company-wide
- **Department** – visible only to selected departments
- **Private** – visible to the user who created the contact and to the system/tenant administrator

This structured visibility model enables more controlled and flexible contact management across the organization.

Centralized Contact Management (COEO Connect)

Within the Contacts module in COEO Connect, users can:

- Upload CSV files with different contact visibility levels (Global, Department, Private)
- Use smart CSV sync to prevent duplicates — existing contacts are updated and new contacts are added (contacts are not deleted during upload)

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- Filter contacts by visibility level or source
- Manage contact information and visibility settings directly from the Contacts module

Uploading private contacts on extension level is now deprecated. Instead, private contacts are managed centrally within the Contacts module and can be assigned to extensions by administrators.

An additional Department Admin role has been introduced (enabled per extension), allowing users to manage contacts for all departments they belong to.

Contact Center Enhancements (CRM Lite Capability)

For Contact Center users, contacts can include conversation history across channels. With permission-based access and cross-channel history, the Contacts module now provides a CRM Lite-style experience, enabling smaller Contact Center customers to benefit from structured customer context without requiring full CRM licensing.

Business edition users continue to have structured contact management without cross-channel conversation history.

Deprecations & Compatibility Notes

- The legacy Central Phonebook is deprecated and replaced by the new Contacts module.
- Contacts management in OSC will continue to work, but with limited functionality (primarily private contacts only).
- For advanced contact permissions, structured visibility, merging, CSV smart sync, and cross-channel history, users must use COEO EmpowerUC™ Web or the new Desktop application.
- Desk phone-only users may experience reduced contact editing functionality compared to previous behavior.

CC Lite

Contact Center Lite Package

The new Contact Center Lite package is available. The package introduces enhanced monitoring and reporting capabilities.



Contact Center Lite includes:

- Wallboard and additional dashboards for Enhanced Ring Groups (ERG)
- Scheduled Reports for ERG and Extensions statistics
- Enhanced Ring Group – Callback feature

Wallboard & ERG Dashboards

Wallboard and ERG dashboards are available in:

- COEO EmpowerUC™ Web (8.0)
- COEO EmpowerUC™ Desktop (8.0)

Company administrators can enable ERG dashboard access per extension, allowing users and managers to monitor specific or all ERGs.

Scheduled Reports (ERG and Extensions – 8.0)

Scheduled Reports for ERG and Extensions statistics are available across all editions.

Administrators can configure automatic email delivery of ERG or Extension statistics to selected stakeholders.

Reports can be customized by:

- Time period (hourly, monthly, yearly, or specific day(s))
- ERGs
- Members
- Waiting time and talk time
- DIDs
- Customers

ERG Callback

With the release of COEO Connect v8, the Callback feature is available within Enhanced Ring Groups. Callback enables callers to hang up and receive a return call once a member becomes available, eliminating the need to wait in queue. Depending on the Enhanced

Ring Group configuration, the feature can be triggered by a variety of scenarios, from caller-side events such as exiting via a dedicated digit or an abandoned call, to system-side conditions such as a full or empty ERG, among other configurable triggers. Each trigger can be independently enabled or disabled by the administrator.

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