



# Comm100 X2 Post-Upgrade Checklist

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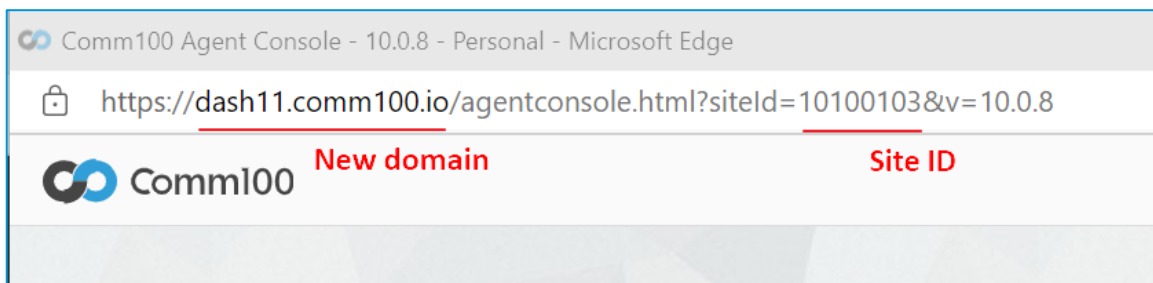
Once your upgrade has successfully completed, your settings and data will be as they were pre-migration. However, some items (including integrations and API calls) may need to be updated, and you'll want to spot check key functionalities for your own peace-of-mind. This document will assist you in completing the above.

If you have any questions, please chat with our support team at [www.comm100.com](http://www.comm100.com) or contact your Customer Success Manager.

### Basic Functionality Checklist

- Log in to your account's Control Panel and confirm access.
- Log in to the new web version Agent Console by navigating to **Live Chat > Get Online & Chat**, confirm access and agent experience. Post-upgrade, the latest version of the Agent Console's web app is available once you log in for the first time.

**Note:** Your domain will change post-upgrade. If you have bookmarked your previous Web Agent Console link, you need to update it.



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In the following examples of the new Agent Console link, you will also need to update the existing siteID with your siteID:

- Post-upgrade, if your Control Panel domain is dash11.comm100.io, the new agent console would be <https://dash11.comm100.io/livechat/agentconsole.aspx?siteid=10100103&v=10.0.8>
  - Post-upgrade, if your Control Panel domain is dash12.comm100.io, the new agent console would be <https://dash12.comm100.io/livechat/agentconsole.aspx?siteid=10100103&v=10.0.8>
  - Post-upgrade, if your Control Panel domain is dash13.comm100.io, the new agent console would be <https://dash13.comm100.io/livechat/agentconsole.aspx?siteid=10100103&v=10.0.8>
  - Post-upgrade, if your Control Panel domain is dash15.comm100.io, the new agent console would be <https://dash15.comm100.io/livechat/agentconsole.aspx?siteid=10100103&v=10.0.8>
  - Post-upgrade, if your Control Panel domain is dash17.comm100.io, the new agent console would be <https://dash17.comm100.io/livechat/agentconsole.aspx?siteid=10100103&v=10.0.8>
- If using Agent Console Desktop App, the upgrade happens automatically from the back end once you log in for the first time. However, if you experience any issue after the upgrade, ensure that you have the latest version installed from the Control Panel: **Live Chat > Dashboard > App Download**.

- Initiate a chat from your visitors' perspective and confirm visitor experience.
- In the Reporting suite, confirm that historical data is available.
- Review agent roles to confirm all agents and permissions are correct.
- Run through common workflows (for example, emailing transcripts, monitoring chats) and make sure your experience and results are correct.

## Advanced Functionality Checklist

- If using Chatbot, initiate a bot chat and confirm visitor experience.
- If using Chatbot to display Knowledge Base (KB) articles, confirm the article links on the relevant chatbot intents can be opened successfully.
- If using Chatbot, a new flow builder is available for you to create or update Intent answers. In addition, new bot features, such as Bot actions, Event Messages, and Sentiment Analysis are also available. To learn more about Chatbot, see [this page](#).
- If using Ticketing & Messaging, confirm Agent experience and Views.
- If using Knowledge Base, confirm article accessibility, and check if your team is sharing the KB links in different places, such as on the website.
- If using custom routing rules, confirm their successful operation.
- If using an integration (for example, [Salesforce](#), [Magento](#), [Cisco](#), [Zapier](#), [WordPress](#)), you must reconnect (re-authenticate) the integration and confirm the successful operation.
- If using a custom integration via the Comm100 RESTful API, ensure API endpoints have been updated and API calls are updated to reflect [v4 schemas](#) (if applicable).
- If activating your chat in a non-standard way (JavaScript API, link directly to the Chat Window), ensure that you update that code to point to the newly updated chat window's new URL.
- If using Canned Messages, ensure that they are available with their corresponding settings under **Global Settings > Canned Messages**.

The screenshot displays the 'Global Settings' interface for Comm100. The left sidebar contains navigation options: Global Settings, Dashboard, People, Canned Messages (highlighted with a red arrow and a '2' in a yellow circle), Security, and Site Profile. The main content area is titled 'Canned Messages' and has two tabs: 'Public' and 'Private'. Below the tabs are three buttons: 'New Canned Message', 'Import', and 'Export'. Under the 'Private' tab, there is a section for 'Private Canned Message Categories' with an 'All' category and a sub-category 'Apology'. A table lists the 'Apology' category with the message 'Dear {!Visitor.Name}, sorry for the...'. A red arrow and a '1' in a yellow circle point to the 'Canned Messages' icon in the sidebar.



You can link Canned Messages to your Campaign from **Live Chat > Campaign > Canned Messages for Campaign.**



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