CUSTOMER FAQS:
AI Call Recap

GENERAL OVERVIEW AND BENEFITS

1. What is AI Call Recap?

AI Call Recap automatically analyzes recorded Unified Communications (UC) calls and delivers a post-call package: transcription, sentiment, topic breakdown, and a call summary. This eliminates the need for notetaking or replaying calls and provides clear, AI-powered insights into what was said, how it went, and what matters next.

2. Why is AI Call Recap valuable for your business?

AI Call Recap can help your business:

- **Save Time**: Employees move on to the next call or task instead of worrying about post-call notes.
- **Improve Focus:** Instead of trying to take live manual notes, employees can fully focus on the caller.
- **Ensure Accuracy**: Managers can be assured that they are receiving an accurate account of call conversations, making disputes and follow-ups easier.
- **Mitigate Risk:** Managers can easily access stored AI Call Recaps for better visibility into call conversations and insights.

3. What is included with AI Call Recap?

- **Transcription:** A complete, record of everything said during the call.
- **Sentiment Analysis:** An instant read on the overall tone of the call.
- **Topics:** Key subject groupings from the conversation with sentiment applied.
- **Summary:** A concise recap of the call's main points.

ACCESS & ENABLEMENT

4. How quickly is AI Call Recap available after a call?

AI Call Recap is available within minutes of call completion, located within the UC app or Archiving portal.

5. What licenses support AI Call Recap?

AI Call Recap is available at no charge to the following UC licenses:

- Essentials, Pro, and Enterprise
- UC for Teams Essentials, Pro, and Enterprise

6. What prerequisites are required for AI Call Recap?

- **Archiving** must be enabled at the account level (rolling 30-day default retention, and annual options available).
- **Call Recording** must be enabled at account level. Additional control may be needed at the user and Hunt Group levels.
    - **Automatic Recording:** Enabled per Hunt Group or user. Admin can select users to have automatic recording for inbound, outbound, or all calls.
    - **On-demand Recording:** Enabled per user. Call recording can be initiated by button via the UC Desktop, Web, Mobile, and Teams Embedded app.
- **AI Call Recap** must be enabled per user or Hunt Group.

7. Where can AI Call Recaps be accessed?

AI Call Recap is accessible via:

- **UC Desktop/Web apps:** In the Call recordings and recaps section of the Call History tab, a list of the personal call recordings will appear. The listings with ✦ are the recorded calls with an AI Call Recap.
- **UC Mobile app:** In the Recordings section within the Calls tab in the bottom navigation menu a list of recorded calls will appear. The calls with the recaps will have this icon:✦ Clicking on that call will open the call details, scroll down to view the AI Call recap.
- **Archiving Portal:** In the search section of Archiving, there will be a record of calls/meetings/chats. Set the “Type” drop down menu to “Calls” and filter the three dotted more menu to “transcriptions” to view a listing of recorded calls. Select the row to view the AI Call Recap.

8. How can I set up and access AI Call Recap?

Watch these demos for a step-by-step guide on setup and use of AI Call Recap:

- Admin: Here
- User: Here

9. What UC App versions are required?

AI Call Recap will be available in the following app versions:

- UC Desktop 2.25.87 and later
- UC Web 2.25.92 and later
- UC Mobile 2.35 (iOS), 2.59 (Android) and later
- UC Embedded Teams app

AVAILABILITY & FEATURES

10. What languages does AI Call Recap Support?

AI Call Recap auto-detects the language and provides the Recap in that language.
Here are the languages supported:

- English (United States)
- English (United Kingdom)
- French (Canada)
- French (France)
- German (Germany)
- Italian (Italy)
- Spanish (Latin America)
- Spanish (Spain)
- Dutch (Netherlands)
- Japanese (Japan)

11. Can multiple users be set up at once?

Yes, Admin can enable AI Call Recap for multiple users by selecting "Edit Users in Bulk" in the Control Panel and following the subsequent steps.

12. Can AI Call Recap post my recordings and transcripts in any integrations, i.e. Salesforce, CRMs, etc.?

The ability to push AI Call Recap to CRMs via the integration platform is planned for a future release.

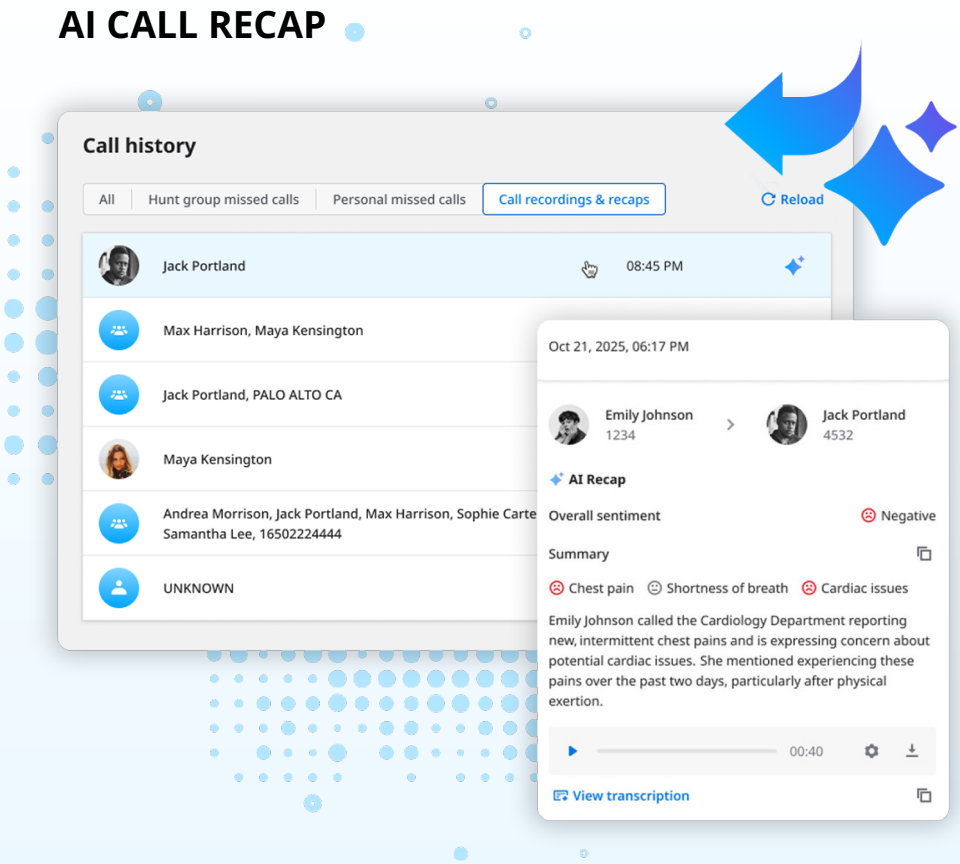
SECURITY & COMPLIANCE

13. How is call data secured?

All data is processed and stored in our secure data centers. AI processing uses Azure OpenAI, and data is encrypted, access-controlled, and managed with retention settings consistent with Archiving standards.

14. Does AI Call Recap meet compliance requirements?

Yes. When used with our recording and Archiving solutions, it supports compliance with regional and national standards, offering retention controls, encryption, and audit-ready access. Usage of AI-related service is subject to the AI Policy and Notifications: Here



QUESTIONS? CONTACT US TODAY!

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