

RevAgent User Manual

Version 12.0 Revision 10.2022





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MULTI-MEDIA LOGGING SYSTEMS



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MULTI-MEDIA LOGGING SYSTEMS



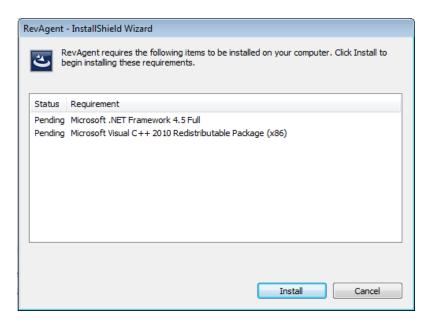
INTRODUCTION – REVAGENT VERSION 1.1

This manual covers the installation, configuration, and software management of Revcord's RevAgent software. RevAgent is a program that runs in the system tray. It gives command and control of screen recording and free seating.

INSTALLATION OF THE SOFTWARE ON THE CLIENT

To install RevAgent on the client workstation, double click on the Setup.exe.

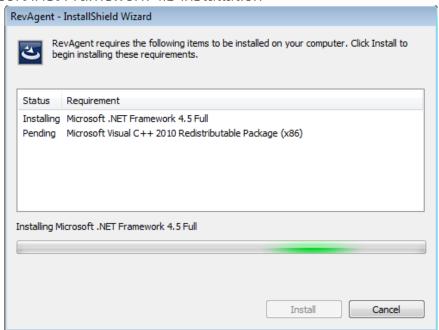
1. RevAgent requires .Net framework 4.5 and Visual C++ 2010 redistributable components installed on the workstation. If they are not already on the workstation, the following screen will appear.



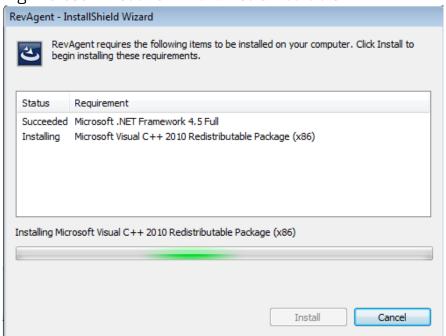
Click on the Install button to start the installation for missing components. Clicking on the install button will begin the installation of Microsoft .Net Framework 4.5.



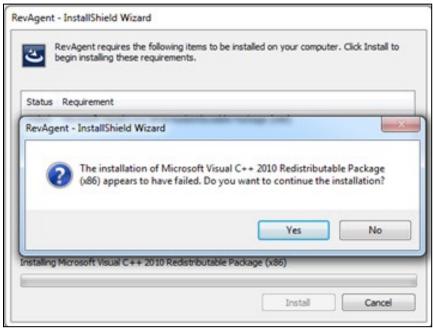
2. Microsoft .Net Framework 4.5 Installation



3. Installing Microsoft Visual C++ 2010 Redistributable



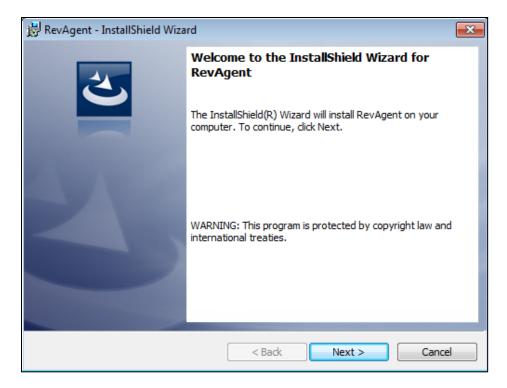




If you see the following screen, simply click the "Yes" button.



4. Once the necessary components are installed, the following welcome screen will appear.

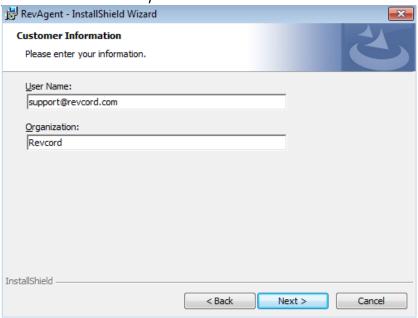


5. Click the Next> button to begin the RevAgent installation. The Revcord license agreement will appear. It is mandatory to accept the Revcord license agreement by selecting "I accept the terms in the license agreement" and clicking on the Next> button.



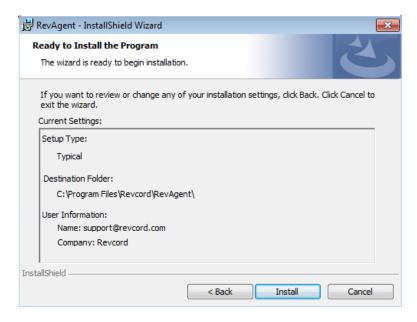


6. The Customer Information dialog will appear. Install kit will hook the customer info automatically. Click the Next> button.

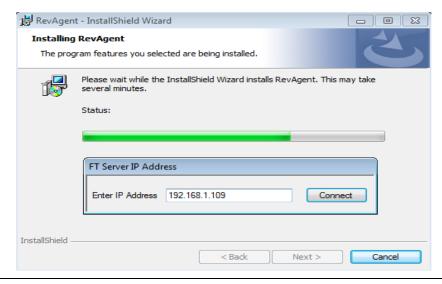




7. The 'Ready to Install the Program' window will appear; click on the install button to finalize the installation process.



8. A window will appear asking for the file transfer server's IP address. Enter the IP address of the Revcord Server and click on the Connect button. If a connection with the file transfer server is successful, the process will continue.

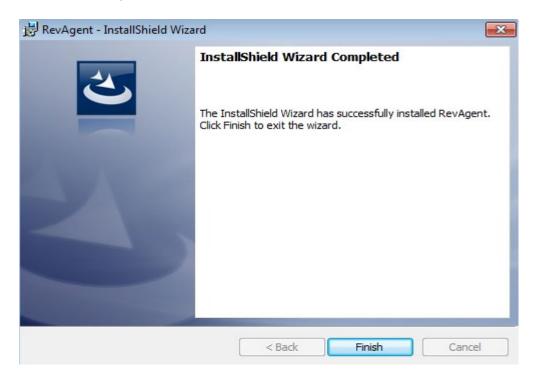




Note: Before clicking the connect button, make sure that software Version 11 or higher is running on the server and the configurations for the file transfer server have been appropriately adjusted.

9. After completing the RevAgent installation, the following message will appear. Click on the Finish button.

Note: You may have to wait for several minutes to finalize the install.





ADMINISTRATIVE CONFIGURATION

This section of the manual goes over the configurations needed for the server and client machines.

Server-Side Configuration

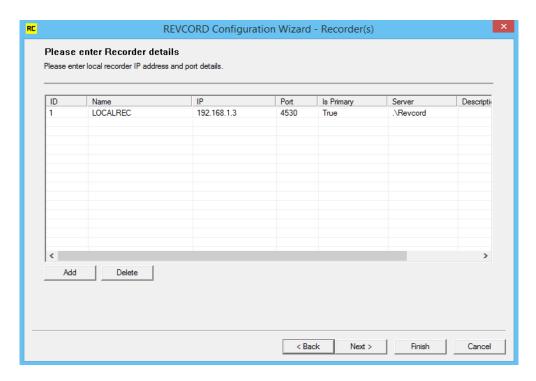
The first step is setting up the server for RevAgent. The following information will be needed for server configuration:

- 1. Revcord Server IP Address.
- 2. Associated Channels with Client PCs.
- 3. SQL Server settings.
- 4. Server settings for file transfer.



Revcord Server IP Address

First, verify your IP address. This can be found using the Revcord Configuration Wizard program and going to the Recorder(s) page. The IP address are listed as shown below.

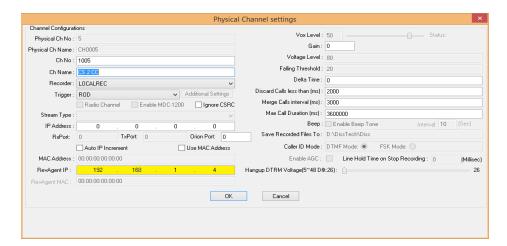


Be sure that the IP address in the Recorder Details is the same as the server's actual IP Address.



Associating Channels with Client PCS

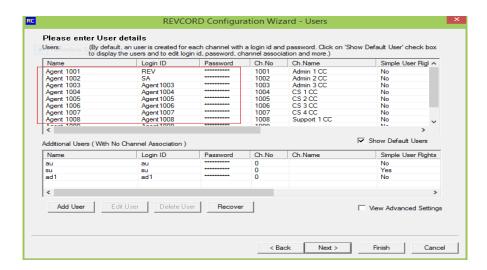
Go to the 'Physical Channel settings' page in the Revconfig program. You will then open each channel and place the IP address of the client workstation that you want to associate in the field as shown below under the RevAgent IP. As an example, the following image shows that an IP address of 192.168.1.4 associated with channel 1005. Client workstation IP address and RevAgent IP address on Physical Channel Settings of Revcord Configuration Wizard should be the same.





Channel Login ID and Password

This is the Login ID and password for the channel/channels associated with the client workstation. To get or update the Login ID, start the Revcord configuration wizard and, go to the User page, and check the "Show Default Users" check box. This Login ID and password will be used as the Channel login for RevAgent on the client workstation.



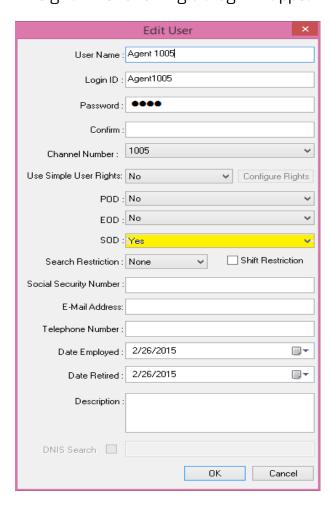
Enabling Phone On Demand

To have a channel be Record on Demand (ROD), chose ROD as the trigger. The RevAgent will know it has a ROD setting when it authenticates the channel and password.



Enabling Privacy

To enable privacy for a channel, set the "SOD" setting of the default user associated with the channel to 'Yes'. In the Revcord configuration wizard, open the Users sheet and check on the show default user's checkbox. Edit the user settings by double-clicking the User from the grid. The following dialog will appear.





SQL Server Settings

The Revcord installation wizard automatically enables the SQL server's 1433 TCP/IP port. To enable the TCP/IP port on the server/recorder, open the **C:/Disstech/Support** directory. You will find the following script files there.

- TCPIPPORT.bat
- TCPIPPORT.vbs

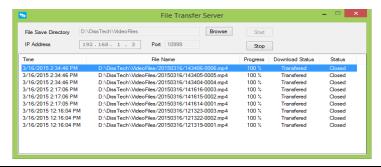
Execute both scripts with administrator privileges; this will enable the 1433 port of the SQL Server for remote database connections. Once these settings are done, the VoiceRec database will be accessible to the remote client ("RevAgent").

File Transfer Server

In addition, the File Transfer Server settings must be checked and written down for later use in the RevAgent. The File Transfer Server must be running on the server. It is used to accept screen recording video files from the client workstation to the server. The default port for file transfer server is 10999. Another TCP/IP port 11000 is also listening for client requests for recorder licensing. If the recorder is properly licensed, it will let the client application to continue the installation; otherwise, the client application installation will terminate.

Note: Since entire server application is running as a service, so you won't be able to access the user interface.

It is mandatory to verify and update the file transfer server configuration file name as FileTransferServer.exe.config located at c:/disstech/bin/ directory.

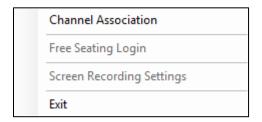




RevAgent Configuration

Channel Association

On startup, the application main menu will appear as seen below:

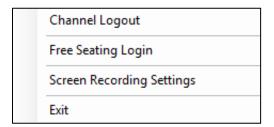


To associate a channel, click on the Channel Association menu option. An admin username and password are required to access the channel association dialog. The system will authenticate the database connection based on the IP address of the server used during the installation of the RevAgent software.

Once the connection is established, you can enter the Username and Password for the channel to be associated.

Logging Out Of A Channel

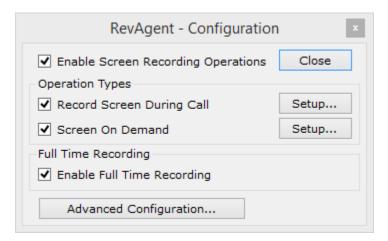
Once a channel has been associated, the main menu shows the "Channel Logout" option. Clicking on the "Channel Logout" menu option will require you to enter admin credentials. After successfully logging out the channel will be disjoined. To use Free Seating and/or Screen Recording, you must have the client logged into the Revcord recorder via a Channel Association.





Configuring Screen Recording

Clicking the "Screen Recording Settings" will open an admin authentication dialog box. After authentication, main configurations of RevAgent will appear in a popup menu.



Enable Screen Recording Operations

This feature gives the Administrator the ability to enable/disable screen recording while maintenance is performed or for other types of reasons.



Record Screen During Call

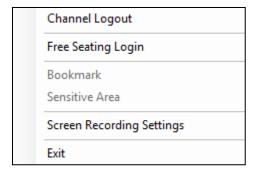
The settings/configuration entered during the "Record Screen During Call" will work for automatic non-ROD triggers. Select the checkbox and then click on the setup button to configure all the attached screens. Clicking on the setup button will open a popup menu for screen configuration.



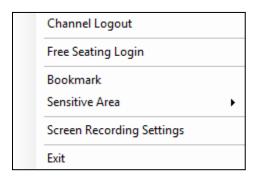
Based on the number of attached screens with the system, the respective number of screens will be enabled and can be selected on this menu. E.g., if three screens are attached, then Screen1, Screen2, Screen3 can be configured, and the fourth screen will be grayed out. Here you can enable screen for recording, select custom recording region, view custom recording region, select blocking region, and view selected blocking region. In addition to blocking areas, you can enable privacy for each screen. The privacy function will stop the audio recording when your mouse pointer moves inside the blocking area.



Bookmark and Sensitive Area options will be available in the main menu when there is an automatically triggered call. The menu options are available when the extension has been tied to the Revcord server, and there is no call.



The menu options when the extension has been tied to the Revcord server and the agent is attending a call. Users will have the option to add bookmarks and select sensitive area to hide information.

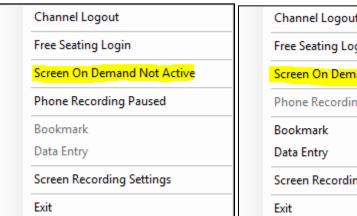




Screen On Demand

The settings/configuration set on the "Screen on Demand" menu will only work for manual ROD triggers. Mark the checkbox and then click on the setup button to make configurations for all the attached screens. If the "Screen on Demand" option is enabled, the User will find the option "Screen on Demand Not Active" in the application main menu. Clicking on this option will start the screen recording and the menu option will change to "Screen on Demand Active." Clicking "Screen on Demand Active" menu item will stop the screen recording. As soon as the screen recording stops, the respective record will be available on WebUI for playback.

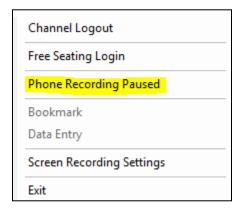
Note: Screen Recording is independent of phone/audio recording. It only records screens.

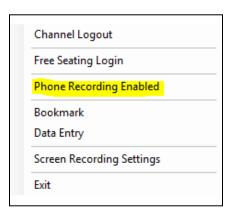




Phone On Demand

If you just wish to record the channel only, the ability to record the phone on demand is pre-configured. If your channel trigger is set to ROD and you login to RevAgent, you will find "Phone Recording Paused" option on the main menu of RevAgent. This option will allow the User to start channel audio recording only, and no screen data will be captured. To start phone recording, click on the option "Phone Recording Paused." This will change the menu option to "Phone Recording Enabled." To stop the phone recording, click the "Phone Recording Enabled" menu option.





When phone on-demand recording is in progress, you will observe that "Bookmark" and "Data Entry" menu items are available for further use.

Fulltime Screen Recording

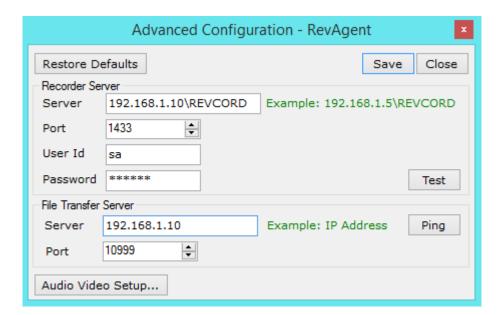
By default, full-time screen recording is enabled. It records the screen for the User's entire session. The maximum duration for each recording is 60 minutes. After 60 minutes, a new recording will begin. It records user sessions and continues recording until the computer is locked. After unlocking the system, full-time screen recording will start again.

To disable full-time screen recording, go to RevAgent Configuration dialog and uncheck the option "Enable Full-Time Recording."



Advanced Configurations

Typically, the default setting in Advanced options will work. To configure the advanced options, click on the "Advanced Configurations" button to open the menu. The entire configuration related to the database connection, file transfer, and internal application settings is set here.





Recorder Server Settings

This is the area where you configure the database server settings. To communicate with the server, proper configurations are required in setup before using the application.

- a. <u>Server:</u> Here you will need to enter the server information in the following format. IP\Instance Name. REVCORD is the default instance name.
- b. <u>Port:</u> This is the TCP/IP port that has been configured for remote database connections on the server. The value for the default port is 1433.
- c. <u>User ID:</u> Here you will enter the database user id. Default user id is sa. This should not be changed without contacting Revcord.
- d. <u>Password:</u> You need to enter the system administrator (sa) password here. Default password is poi098. This should not be changed without contacting Revcord.
- e. <u>Test:</u> Once you have entered all the settings, click the test button to test the connection with the database server. Make sure the test connection is successful. If it is unsuccessful, you cannot save the settings.



File Transfer Settings

To transmit recorded screens from the client (RevAgent) to Server, it is necessary to establish a proper connection with the file transfer server. Since these settings are required for file transfer from client (RevAgent) to server.

- <u>Server</u>: Enter the server IP address where the file transfer server is running.
- <u>Port</u>: Enter the port number on which the file transfer server is listening; the default value for the file transfer port is 10999.
- <u>Ping:</u> Once you enter the proper server IP and port number, click the ping button to test if the connection with the file transfer server is successful or not.

Audio/Video Settings

For the screen recording to be functional, RevAgent audio and video recording settings are pre-configured. So, no need to do anything for the Audio/Video setting.

Note: RevAgent is pre-configured to record MP4.

Recording Region Configurations

'Screen recording region' is the region that will be recorded during a call, no matter if it is ROD based or non-ROD. The screen recording region can be set for one of two ways.

Entire Screen Region

This is the default region of recording. On the "Record During Call" menu, when you select a screen, say screen 1, screen 2, screen 3, or screen 4. Then entire screen region will be captured.

Custom Screen Region

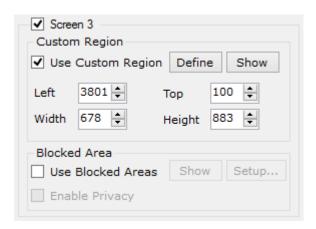
If you want to record a custom region on any of the available attached screens; open the "Record during Call" menu and select the "Use Custom Region" checkbox of the coresponding screen.





Setup Custom Screen Region

To set up a custom region for a specific screen, click on the "Define" button. It will open the snipping tool on the corresponding screen. To select a region of your own choice, click, drag, and release the section you want defined. The selected coordinates will be updated in the dialog box. See the screenshot below.



View Custom Selected Region

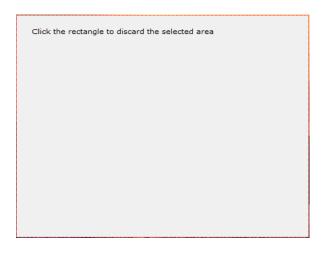
To view the custom selected area, click on the "Show" button under the "Custom Region" group box.

Clear Custom Selected Region

To clear the custom selected region, click on the "Show" button under the custom region. It will highlight the custom region on the corresponding screen. The



highlighted region will be visible for two seconds; quickly click on the highlighted region to discard the custom selected region.



Once you have clicked the rectangle, all the coordinates will be removed from the menu.

Blocked Area

Blocking an area is the option that will hide sensitive information from recording. On one screen, you can set only one blocking area. If a blocking area is not setup, then the entire area will be recorded.

Setup Blocked Area

To setup a blocked area, click the "Use Blocked Area" checkbox and then click on the "Setup" button. Clicking the setup button will open the snipping tool on the corresponding screen—select the blocking area using the snipping tool.

View Blocking Area

To view the selected blocked area for a particular screen, verify that the "Use Blocked Area" checkbox is selected and then click on the "Show" button under the "Blocked Area" group box. The selected blocked area will become highlighted on the corresponding screen for two seconds.



Enable Privacy

This feature gives the User the ability to pause audio and screen recording when mouse movement enters the defined blocked area. Once the mouse is moved away from the Blocked Area, recording for both audio and screens will resume.



USER SECTION - REVAGENT

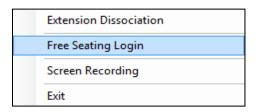
Revcord as part of its 9.4 software release introduces a new application "RevAgent" for free seating and screen recording.

Free Seating

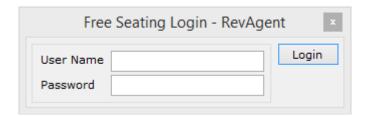
Free Seating gives the client the ability to tie phone channels and associate them to desktops and users. Screen Recording can now be enabled and associated with calls and channels /channels as well.

Free Seating Login

The Extension Login association must be completed before Free Seating will be available. By default, the User on the recorder side will be the Windows Login Name. To have specific Users based on Revcord Users, right click on the RevAgent icon in the system tray and select the "Free Seating Login" option as shown below.



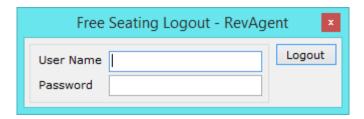
The Free Seating login menu will appear. Enter the Username and Password here then click on the login button. If the agent's name and password is successfully validated, then Free Seating is enabled on the client.





Free Seating Logout

Once the Free Seating login has been accessed, the application main menu shows "Free Seating Logout." If you want to logout, right-click on the RevAgent icon in the system tray and click on "Free Seating Logout" menu option. Enter the same Username and Password which was used during the time of free seating login into the popup menu.



Screen Recording

Multi-Monitor

With RevAgent you can take full advantage of having multiple monitors on your computer and record across multiple monitors. You can capture the agent activity on any monitor. Each screen will be captured in a separate video file and transferred to the server upon termination.

Protected Startup and Shutdown

RevAgent Channel Association/Logout, Screen Recording Settings, and exit, depend upon Administrator rights. Only admin users have access rights to configure, start, or exit.

Custom Regions, Blocked Regions, and Privacy Regions

RevAgent can record the entire screen region, custom screen regions, block areas not to be recorded, and create privacy areas which will stop all recording when the mouse is in that defined region. In addition, the User will have the ability to dynamically block regions over multiple monitors.



Call Commenting & Bookmarking

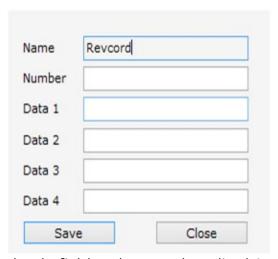
RevAgent allows call commenting and bookmarking during call. Users can enter multiple bookmarks and add comments as well. The logged-in channel trigger respective options are available under the RevAgent main menu in the system tray.

Snipping Tool

RevAgent introduces a custom-made snipping tool for the selection of regions on screen. Using the snipping tool the user can select a custom region, blocking area and on the fly sensitive region. This custom-made snipping tool can select any region on any of the attached screens. When using the snipping tool, a crosshair appears on the screen.

Data Entry

Clicking on the "Data Entry" menu option will bring up the following window where a user can enter alphanumeric data into six different fields. These fields can be configured on the server and are the same fields under the Monitor section. Clicking on the "Save" button will update the database.

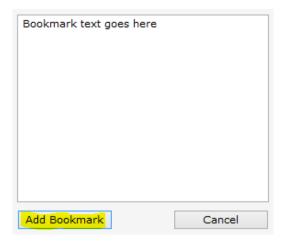


Note: Name field is a read-only field and cannot be edited. It will automatically load the Free Seating login id.



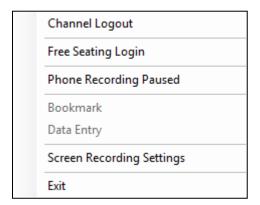
Bookmark A Call

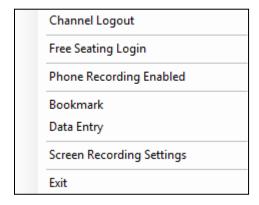
When the call is in progress, right-click the screen icon in the system tray. During an in-progress call, an option of "Bookmark" is available on the application main menu. Clicking that option will open the bookmark dialog. Enter your desired bookmark text and click on the "Add Bookmark" button. The User can enter multiple bookmarks during a recording session. Bookmark text cannot be more than 300 characters.



Rod Trigger

ROD is a manual on-demand trigger. Once the channel with ROD trigger has successfully associated/logged in, the User will have the option to start phone recording on demand. In addition, during the phone recording, the User will be able to tag the calls and add bookmarks as well.







Clicking on "Phone Recording Paused" will start the phone recording. To stop phone recording, click "Phone Recording Enabled" in the main menu.

Using ROD trigger, the User can record on-demand screens. This is in addition to the "Phone on Demand" feature. The "Screen on Demand" feature is required to enable from the RevAgent configuration window, whereas the "Phone on Demand" feature is pre-configured.

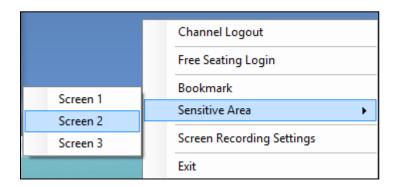
Auto Timer

For all types of on-demand recordings, an auto timer will be initiated with each recording. The default interval for this on-demand timer has been set to 60 minutes. As soon as 60 minutes elapses, the timer will automatically terminate the on-demand recording.



Creating Dynamic Privacy Areas

Whenever there is a call, the channel trigger is set to automatic non-ROD. The record screen during call is enabled, and the sensitive area will become enabled in the application main menu. Clicking the sensitive area will open a submenu, displaying the number of screens. If three screens are configured for recording, you will see the sensitive area options have been enabled upon a start recording event.



Selecting the screen number from the submenu will lead your mouse control to the respective monitor screen, and a mouse pointer will turn to a crosshair. Now you are ready to snip the area of your choice.

Note: The numbers of screens in the submenu are dependent on the number of configured screens from the "Record During Call" dialog.



Selection Of Sensitive Area

Once mouse control has moved to the selected screen, the mouse pointer will turn to a crosshair. Press the left button and drag your mouse towards the left and bottom of your screen. Once the desired area has been selected, release the mouse left button and move the mouse pointer immediately inside the chosen area.

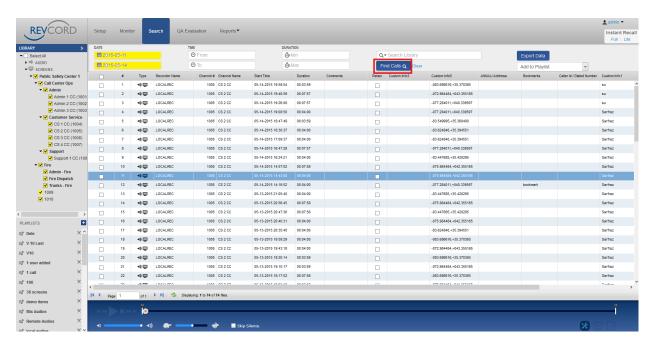


As soon as the mouse leaves the sensitive area, normal audio and video will be recorded and the defined dynamic sensitive area is removed.



SEARCHING SCREENS IN REVCORD WEB GUI

All the recorded screens are displayed by default on the search page (for the current date only), along with audio calls. If you want to find older screens, you can enter search parameters, select screens category in the tree under the library, and perform screen search by clicking the Find Calls button.



You will see the search results and search parameters as shown above.

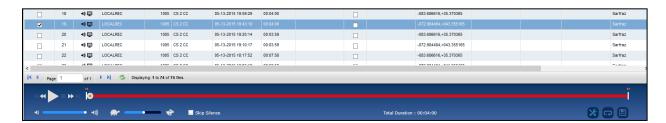
Screens Search Global

You can also find the screens by entering the Free Seating login ID in the search library and clicking on find calls. This will be a global search. In addition to Free Seating ID you can also use an associated channel number, bookmark text, or custom tags to find screens.



Search View Screen Playback

The recorded screens are displayed on the Search page with an audio and screen symbol under the 'type' column. Double-clicking the row will begin to playback audio and screens simultaneously or selecting the screen row and clicking the play button.

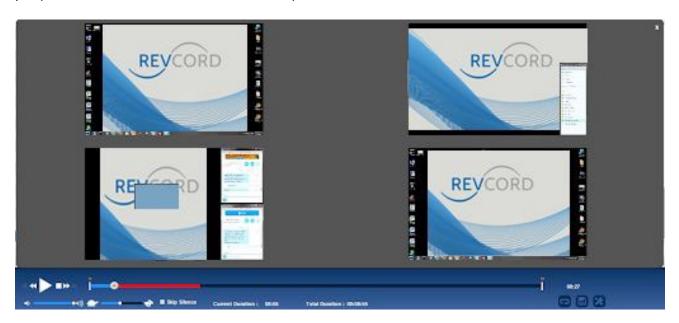


In addition to simultaneous audio and screen playback, Revcord allows users to playback audio or screen individually. Moving the mouse pointer over the audio or screen icon will turn the pointer to a hand sign. By hitting a single click, the respective type will start playback.



Quad Screen Playback

The number of screens is based on the configurations used in the screen recording application (RevAgent). Once the screens have been recorded, then they will be available on the WebUI for instantaneous playback. The users can view up to four screens and listen to audio simultaneously in search view. Revcord also supports playback audio and screen individually.





Quad View Full Screen

By default, when you play a screen, it opens the video player, taking the entire search area (normal view). To move from quad normal screen view to quad full-screen view, double click any of the playing items. The video player will go to full screen in quad mode. To switch from quad full-screen view back to quad normal screen view, press the escape button.

Individual Full Screen

The individual full-screen option is only available when you are playing screens in the quad view full-screen mode. To playback an individual screen in full-screen mode, double click the quadrant which you want to see as full screen. Your quad full-screen view will become an individual full-screen view. To switch from an individual full screen to a quad full screen double click the video playing as an individual full screen.

Pressing the escape button during playing in individual full-screen mode will make the individual full screen to an individual normal screen. A small button named "QView" will become visible in the bottom right corner. Clicking that button will switch the individual screen view to the quad-screen view.

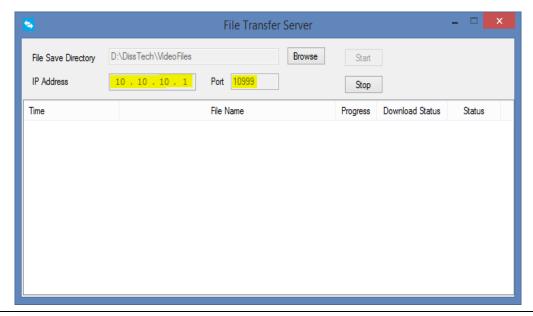


TROUBLESHOOTING REVAGENT

RevAgent – Pre-Installation Guidelines

Please address the following items prior to installing RevAgent on a workstation.

- Ensure that the ports given under the "Firewall Settings" section of this manual are open, listening, and not blocked by a firewall or antivirus program.
- 2. In addition to the port number, make sure that "File Transfer Server" is running on the Revcord Server.
 - a. FT server must have a valid IP address.
 - b. FT server must be running port number 10999.
 - c. FT server must be in running state on Revcord server.
- 3. With the current VSRMS being running as a service, the User will not access the user interface of the File Transfer Server.
 - a. Go to c:/disstech/bin
 - b. Open the file FileTransferServer.exe.config and make sure of the IP address and port number.
 - c. The IP address should be the actual IP of the server, and port number must be 10999.



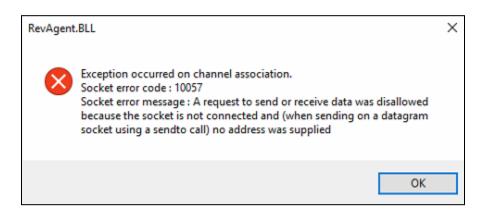


RevAgent – Socket Exception Upon Channel Association

If you receive an exception with the error code 10057 while performing channel association/login. Check the following:

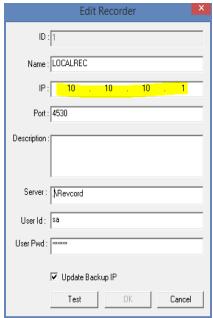
- 1- Ports mentioned in the "Firewall Settings" section of this manual are not blocked.
- 2- CTI Server is running on Revcord Server.
- 3- CTI Server ROD Port is set to 4530.
- 4- Recorder IP is properly configured on the recorder configuration sheet of Revconfig.

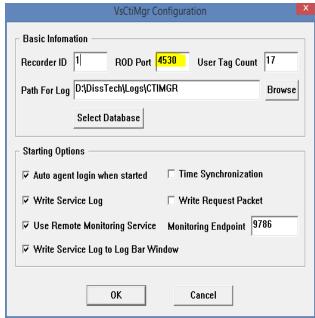
Exception: The following exception will appear in case any of the above points are not met.





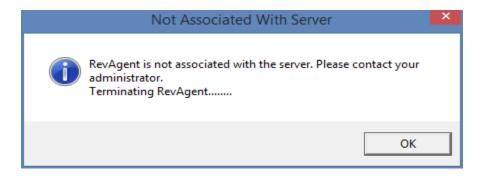
Make sure of Recorder Configurations and CTI ROD Port number.





RevAgent - Server Connection Failed

In order to tie the RevAgent with a Revcord server, a channel is established between RevAgent and the server in the RevConfig. If you see the following error on application startup, please make sure that the RevAgent IP address has been set up on the "Physical Channel Settings" menu of RevConfig.





The Revagent IP Address and Trigger In Revconfig

Make sure that you have entered the correct RevAgent IP address on the physical channel page of the Revcord configuration wizard. If the RevAgent IP address mismatches or there is a duplication of the IP address with some other channel, you will not connect to the Revcord server. The following error will come up upon extension login.



CTIMGR Channel Logged In/Out

Verify the CTI server logs that the remote client has successfully logged in. After a successful login, the CTI manager shows the following log:

```
* 2015-03-20 17:24:48 [Success]Login(Ext:1005 ID:Agent1005 Name:Agent 1005) 2015-03-20 17:24:27 [Success]Recording Stop(Ch:2, Ext:1002) 2015-03-20 17:24:26 [Success]Recording Start(Ch:1, Ext:1001)
```

Firewall Settings

For the RevAgent to successfully communicate with the server, the port numbers 1433, 4530, 10998, 10999, and 11000 should be in a listening state and not blocked by a firewall or antivirus program on both the client and server-side. Here are the details on the ports:



Server-Side Ports

- 1- 4530 Recorder Port
- 2- 1433 SQL Server Database Port
- 3- 10999 FT Server Port for file transfer.
- 4- 11000 FT Server Port for RevAgent Installation Request.

Client-Side Ports

1- 10998 RevAgent Monitoring Service Port for communication between service and RevAgent



CONTACTING SUPPORT

Please refer to your internal support personnel, your dealer, or the installer for Technical Support. If there is an issue that they cannot solve, they will turn the issue over to the REVCORD Technical Support Team.

For essential support and documentation, please refer to our website: http://www.revcord.com

Technical Support

For questions or problems that cannot be resolved, please first go to our website to the Live Chat Support

Other Technical Support Contacts:

Toll Free: 1-866-559-2188 (Option 2) Local: 281-404-7040(Option 2)

Fax: 281-404-5323

Email: support@revcord.com

Address: REVCORD Voice Logging Solutions

1250 Wood Branch Park Dr. Suite #490

Houston, Texas 77079

U.S.A

To better service your needs and questions, please visit the Revcord support system by clicking the link below.

If this is an emergency, please call the main Revcord line at 281-404-7040 and select option 2 for support services. All other inquires and or service requests should be submitted through our support ticking system to better keep track of you and your requests.

Submitting A Ticket

Entering a ticket can be done by simply emailing support@revcord.com

You can also go to <u>www.revcord.com</u> and register with the Revcord Support System.