InGenius Connector Enterprise

September 2018 - Version 6.1

Introduction

These release notes provide information on the latest features and changes to existing functionality for InGenius® Connector Enterprise.

Customer Portal Access

The InGenius Customer Portal is available from the Resources section on www.ingenius.com. The Customer Portal provides customer access to Documentation, Report Packages, and detailed Release Notes. Please contact icesupport@ingenius.com to request access.

New and Updated Features

This document details important new features, enhancements, and changes to the latest software version of InGenius Connector Enterprise 6.1.

Features for Salesforce Customers:

End user productivity enhancements that include:

1. Multi-tab Synchronization.
2. InGenius UI Redesign.
   - Agent Panel - streamlined compact design, less real estate
   - Menus – easy to access drop downs
3. More intuitive extension dialing through Click-to-dial.
4. History Logs.
5. Pop to Flow

Administrative Enhancements

6. Runtime Admin redesign for easier access.

Lightning Overview

End-User Productivity Enhancements

InGenius enhanced some key features to enable users to retrieve information faster and process calls quickly. Less time is spent by the user scrolling through screens or trying to decipher information. With InGenius Connector Enterprise 6.1, InGenius has developed a more intuitive UI design and seamless interaction with the CRM.

1. Browser Tab Synchronization Improvements

InGenius provides a stable framework to allow users to have multiple tabs open in a single browser. Users can quickly access multiple screens of data by selecting the relevant tabs. InGenius renders consistently from one window to the next.
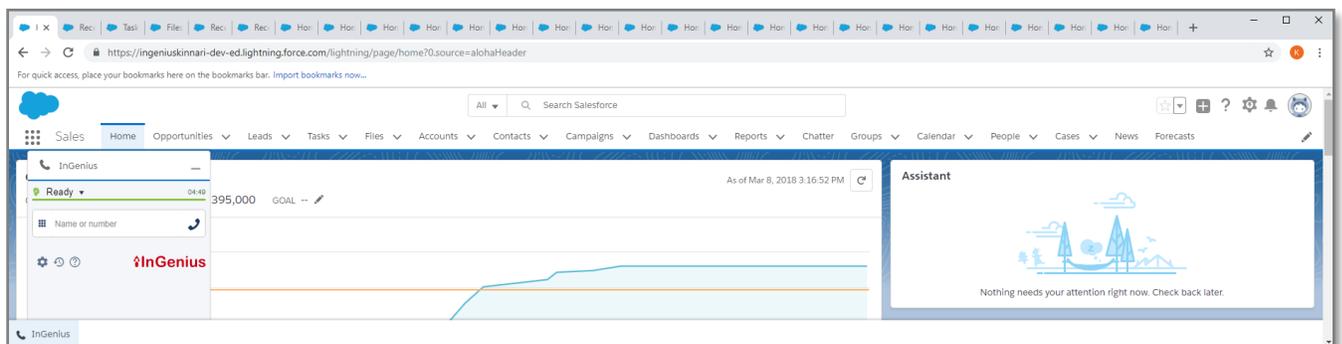

2. InGenius UI Redesign

InGenius revamped the InGenius UI to provide a more intuitive experience for users. The compacted panels are updated with a consistent layout with InGenius branding across the top row. Help and other functions such as Cancel and Save are located on the bottom row of the UI panel.

- Agent Panel – streamline design allows user to quickly to access features. The compact design uses less real estate on the screen.
- Menus – include a new button functions to allow user to increase increase productivity and shorten workflow processes.

3.Intuitive Dialing Extension Function
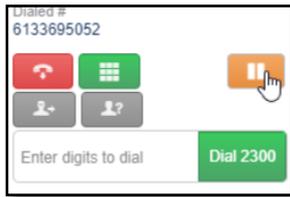
When a call and extension number is entered, the extension digits are displayed separately within the InGenius dial field. Previously, the extension digits displayed as part of the dialed numbers.

4. History Logs
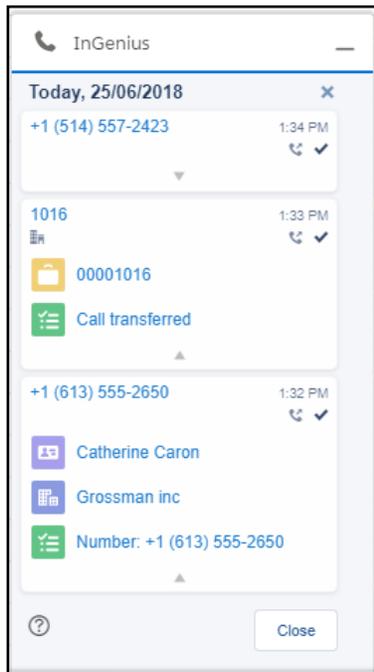
The history logs can be expanded or collapsed to display call history information. Icons shown for each call give the users a visual cue about the call details i.e. contact call, inbound/outbound. The most important call information is available at a glance.
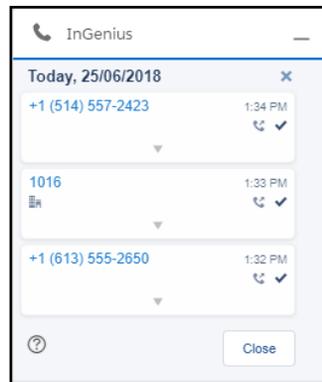
5.Pop to Flow Support

Pop to Flow is supported in the Lightning app and is configured using the Salesforce softphone layouts. This feature integrates seamlessly with InGenius and allows customer information to be popped on an inbound call. The Pop to Flow allows agents to quickly review all related records of the customer. If no results are returned from a search, InGenius pre-fills the form with the customer name and number.
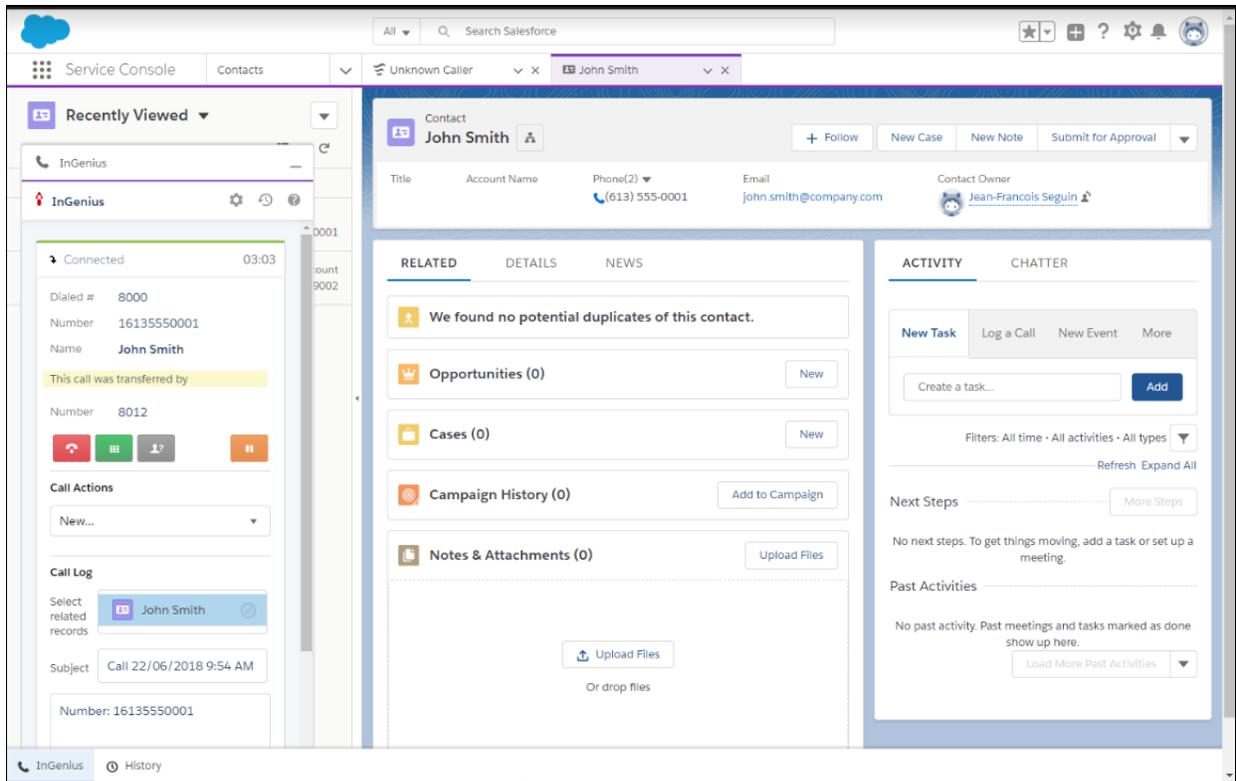

Administrative Enhancements

6 Runtime Admin redesign for easier access

The Runtime Admin enables administrators to view end-user configurations within a more compact view. Extended options, such as call logging and record selection, are now available to improve the end-user experience. These options also extend reporting functions for monitoring the type of calls your organization does.

Lightning Overview

InGenius has made a few minor improvements to the Lightning user interface to minimize scrolling, and to decrease the footprint of the CTI application. The new interface enables users to perform all their tasks without added scrolling. All menus and action items are located in one panel. The extra InGenius branding and padding has been removed.
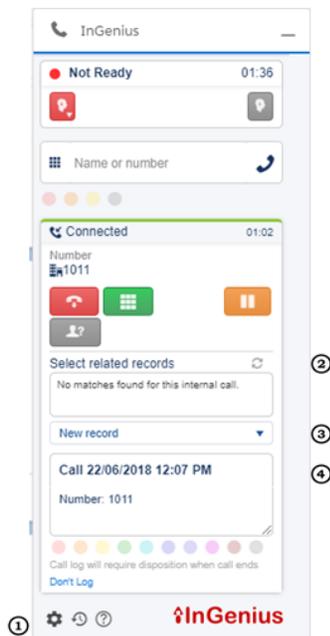
① **Settings**, **History** and **Help** functions moved from upper right corner in a second header bar, to lower left corner to provide more vertical real estate.

② **Refresh Search Results** moved from a subtle icon within the Call Log Notes field to a clearly visible icon above the call panel.

③ Removed the **Call Actions header** to save on vertical real estate. Also relocated the **New Record** list below the Related Records section to improve the flow of call logging.

④ **Subject** and **call** information merged into a single field to save on vertical real estate. In the 6.0 layout, the call subject and comments were located in two separated fields. In the 6.1 layout, this information is stacked into one field.