

InGenius Connector Enterprise Release Notes

June 2019 - Version 6.4



Introduction

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

Software Version

InGenius Release 6.4

Salesforce APEX Release 1.52

Upgrades

To upgrade to the latest version, please contact support at support@ingenius.com. We will request logs from your active system to determine your install requirements, including any workflow integrations you may have. Once your configuration has been verified, a member of our deployment team will contact you to coordinate the upgrade.

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 support@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 6.4.

Features for Salesforce:

1. Escalate to an agent from an Einstein Bot.
2. Salesforce Preview Dialer support for outbound calls with Omni-Channel.
3. Pop Out Support.
4. High Velocity Sales.

5. Financial Services Cloud.

Features for Microsoft:

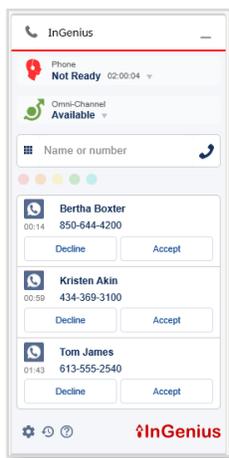
6. Unified Service Desk for Microsoft Dynamics 365.

Features for Salesforce and Microsoft:

7. Runtime Admin UI Enhancements.

Features for Salesforce

1. Escalate to an Agent from an Einstein Bot

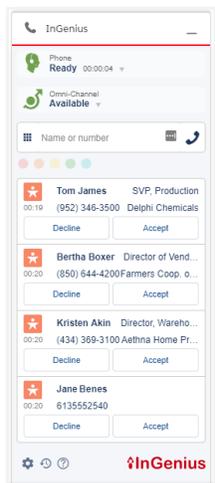


InGenius enables seamless integration with Einstein Bot allowing agents to convert chats to a phone agent with InGenius. A customer using Einstein Bot can chat with an agent and if more help is required, the customer has the option to "have someone call me".

InGenius uses Omni-Channel and routes the customer request to an available agent as a Contact Me work item. The agent immediately sees the request within their InGenius UI and can quickly help a customer with a resolution.

Agents can call customers using the accept and dial feature, reducing the number of clicks to process a customer request. The overall result of Contact Me integration with Einstein Bots is efficient agents and excellent customer service.

2. Salesforce Preview Dialer for Outbound Calls

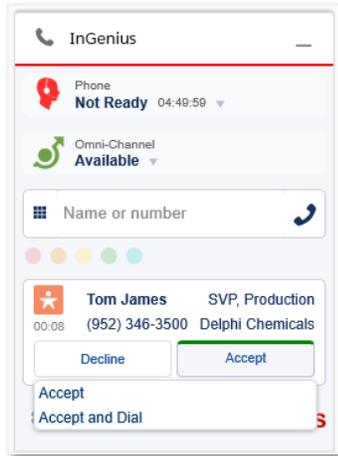


Salesforce customers can use preview dialer to allow their outbound sales team to receive insight about a prospect before placing a call.

The prospect list is imported into Salesforce by the Salesforce Admin and pushed to the end users who have the option to Decline or Accept the call out to the prospect.

When a preview call is received by an agent, InGenius pops the matching Salesforce record. The agent reviews the information and can choose to Decline or Accept the prospect.

If Decline is selected, the preview record is returned to the campaign queue and can be processed by other agents.



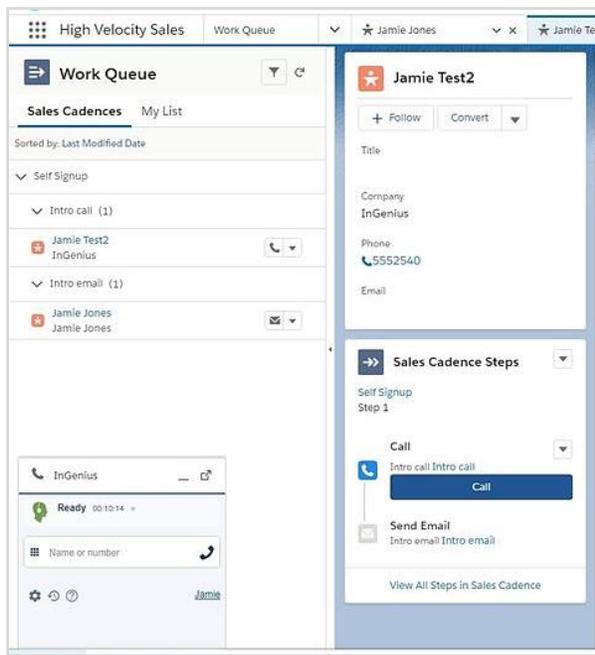
Agents can immediately begin a conversation that is specific to their needs, leading to more productive interactions.

The agent has the option to Accept or Accept and Dial the preview record immediately.

3. Pop Out Support

InGenius supports the Salesforce Pop Out feature allowing users to pop out their InGenius UI from a window. Users can complete their work within the pop out allowing users to multitask across multiple windows and screens. The pop out can be returned to the original window when the task is completed.

4. High Velocity Sales (HVS)



Salesforce HVS enables agents to efficiently contact and convert leads, as well as create new opportunities all within a single Lightning interface.

The InGenius integration with the Salesforce HVS Work Queue API allows agents to selectively advance cadence steps based on call results. Successful calls are automatically moved to the next step when the call is logged.

If a call does not match the business-defined criteria for advancement, the call is logged and remains in the same position in the cadence.

The call attempt can still be logged against the sequence without automatically moving to the next step. This allows agents to be credited for the attempt while providing opportunity to filter the lead as appropriate.

InGenius automatically completes My List click-to-call tasks after the connected call is complete, improving agent efficiency by reducing clicks and automating processes.

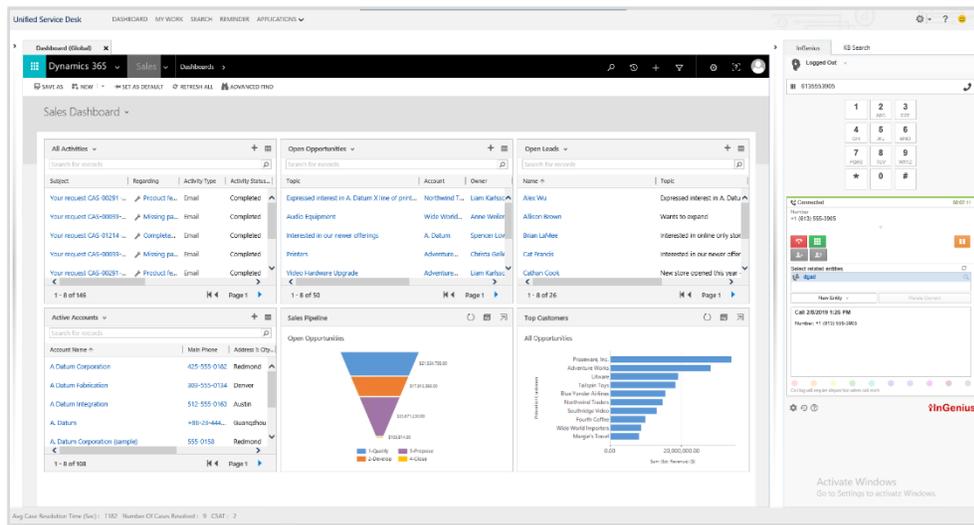
5. Financial Services Cloud (FSC)

Salesforce FSC is an integrated Lightning platform designed for wealth management firms, insurance companies and banks that puts all relevant client data at advisors' fingertips.

InGenius provides advisors relationship building enhancements like Screen Pop to reduce handle time and improve the client experience, Click-to-Dial to increase call efficiency and Call Logging to ensure important call details are captured.

Features for Microsoft

6. Unified Service Desk Integration for Microsoft Dynamics 365



InGenius computer telephony integration with Unified Service Desk for Dynamics 365 provides an infrastructure for call centers to leverage their existing telephony system and infrastructure. Agents can get a complete view of the customer data stored in Dynamics 365 within the InGenius UI.

Agents have complete access to important information so they can quickly engage with customers and address queries and issues. The advantage of Unified Service Desk is reduced call times and superior customer communications.

Supported integrations include Avaya Communication Manager, Cisco Unified Contact Center Enterprise, Cisco Unified Contact Center Express, Cisco Unified Communicator Manager, Cisco Packaged Contact Center Enterprise and Genesys PureEngage.

Features for Salesforce and Microsoft

7. UI Enhancement for Call Results Page in Runtime Administration Console

Call Results (Dispositions)

Call Result Display Options

- Show call results when call is active
- Disable automatic selection of call result

Select and Configure Call Results

General

- None
- Call successful
- Left voicemail
- No answer
- Number out-of-service
- Follow up required

Group title

Title (visible in the UI)

Value (saved in the call log record as a call result)

Wrap-up parameter value (only if you have telephony wrap-up)

Mark call log as completed

Wrap-Up

Link telephony wrap-up code to CRM call results if applicable.

Wrap-up parameter key
CALL_WRAPUP_DATA

The Call Results page in the Runtime Admin has a new look to enable administrators to intuitively configure the call results options available to users.

The options are logically grouped together to allow administrators to quickly determine what features are enabled and visible within the InGenius UI.

Frequently Asked Questions (FAQs)

Q1: I am still using a platform that may be unsupported by InGenius. How can I find out more about the support options available to me?

A1: Please contact your account manager or sales@ingenius.com to discuss options.

Q2: Do I have to do anything to receive these new features and enhancements?

A2: Yes. Simply contact support@ingenius.com to schedule your upgrade. InGenius customer care will take you through the upgrade process.

Q3: Is there a fee associated with this upgrade?

A3: No, as part of the license fee with InGenius, these features and enhancements are at no cost to our clients.

Q4: What is involved in upgrading?

A4: Upgrades are assisted by an InGenius customer care agent. Upgrades may be arranged outside of regular business hours as required. Contact Customer Care for more information.

Contact Us

For any queries about the latest release or to update, please contact your support team at support@ingenius.com. To add additional licenses, please contact our sales team at sales@ingenius.com.