2Ring Gadgets for Cisco Finesse

EXECUTIVE SUMMARY

2Ring Gadgets for Cisco Finesse significantly enhance the experience of agents and supervisors on Cisco contact center platforms (UCCX Express, UCCE Enterprise incl. PCCE and Webex Contact Center Enterprise). The latest v8.4.1 release represents a major evolution, delivering:

- Complete Linux-based infrastructure for all native 2Ring Gadgets components, eliminating Windows dependencies for the Gadgets platform itself (Dashboards & Wallboards can also run from 2Ring Cloud, though an on-prem VM is still required to communicate with Cisco's servers. On-premises deployments remain Windows-based and require Windows VMs; see the Gadgets sizing guide and the DW self-hosted sizing guide for detailed server requirements).
- New Address Books & Quick Actions suite replacing legacy Phone Services
- Enhanced security, workflow automation, and data governance
- Improved reliability, high availability, and performance
- Support for the latest Cisco Finesse 15, with Kubernetes 1.36.2 and Cassandra 5

A self-hosted subscription is available to order from Cisco's Global Price List (CCW). More details can be found at https://www.2ring.com/partners/cisco-solutions-plus/#ordering-2ring-self-hosted-on-premise.

INFRASTRUCTURE & PLATFORM MODERNIZATION

Complete Linux Migration

All native components of 2Ring Gadgets run on Linux, removing the need for Windows servers for the Gadgets platform itself and providing:

- Brand-new deployment application for streamlined onboarding and updates
- Enhanced High Availability (HA) handling with improved failover mechanisms
- More efficient performance management and resource utilization
- Kubernetes support for container orchestration

Cisco Platform Support

- VPN-less Configuration for UCCE 12.6 ES03 and above (UCCX 12.5 SU2 and above also supported)
- Cisco Finesse 15 support

NEW SUITE: CONTACTS, ADDRESS BOOKS & QUICK ACTIONS

Overview

A brand-new suite for address-book and contact management. These apps provide configurable, multi-level address books and workflow-enabled quick actions, with full team-based configuration: every team can decide which address books and quick actions to use.

2Ring Contacts & Address Books App

Three address-book scopes are available:

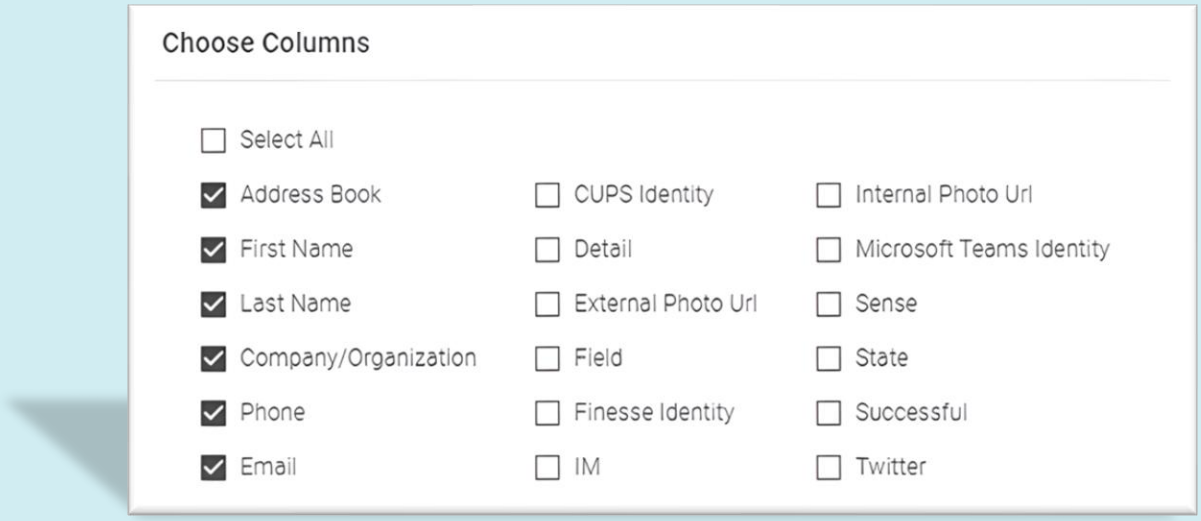
- Global: available to all teams
- Team: available to a team only
- Personal: each user manages their own contacts. Availability is set at the team level, so the app is visible to all users in a team or to none, and can be limited to agents, supervisors, or both.

Key Features:

- Import/Export contacts from/to address books
- Displayed columns configurable per user
- Shared address books across teams
- Flexible search and filter capabilities

Synchronization Sources

- LDAP or Active Directory for shared address books
- CSV import for private address books
- Selected connectors and custom connectors can sync data to Contacts and Address Books



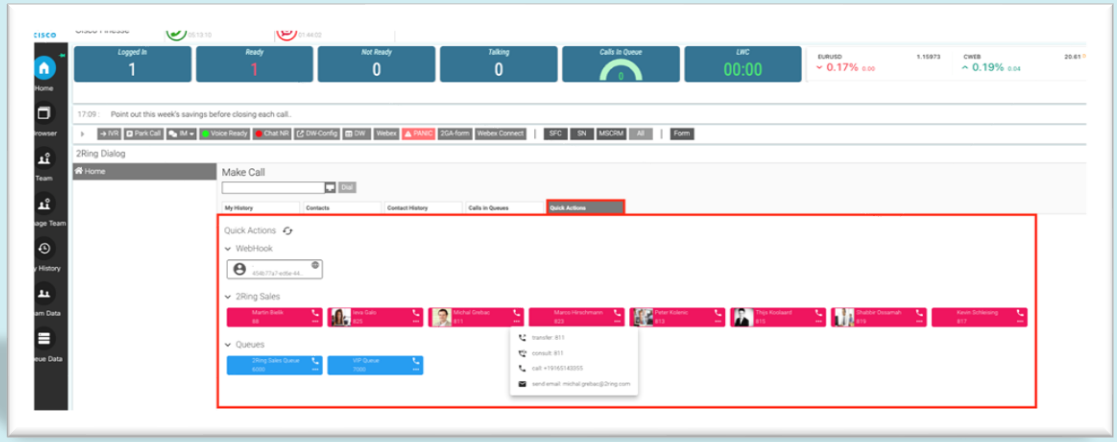
2Ring Quick Actions

Quick Actions replace traditional “speed dials” and extend beyond call-related actions to include manually triggered workflow actions. Three quick-action list scopes are available:

- Global: available to all teams
- Team: available to a team
- Personal: each user manages their own quick actions. Availability is set at the team level, so the app is visible to all users in a team or to none, and can be limited to agents, supervisors, or both.

Functionality:

- Single-click workflow automation (multiple actions per button)
- State- and call-variable-aware execution
- Trigger custom workflow actions beyond dialing (CRM updates, screen-pops, external API calls)
- Configurable global, team, and personal quick-action lists
- Tooltip placeholders include global fields



DIALOG GADGET

Multi-Column Contacts Display

The Contacts app displays multiple configured columns in the search results list, presenting significantly more information upfront than the standard Finesse search results, which is especially helpful when the same phone number is associated with multiple accounts or customer records.

Automatic Variable Save

The Dialog variable section automatically saves variables without requiring agents to press Save after each change. This reduces clicks, minimizes errors, and improves workflow efficiency.

Interaction Export to PDF

Agents can export all dialog types (voice, chat, email) to PDF documents:

- Call interaction details with full context
- Chat conversations with timestamps
- Email threads with attachments
- All relevant metadata and notes preserved

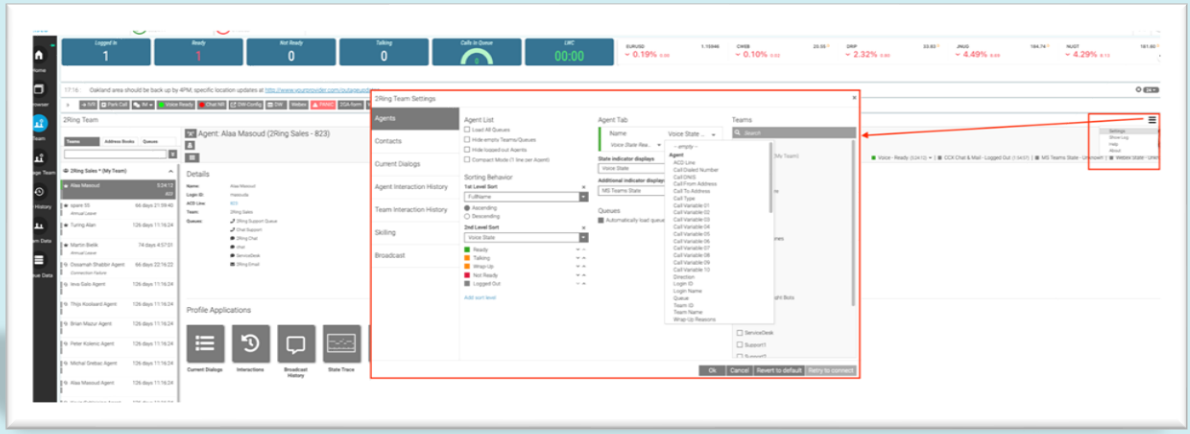
Softphone UI Improvements

The calling context section in softphones can be collapsed and expanded instead of showing data only on hover. This provides more flexible UI behavior and better screen real estate management.

Improvements:

- Improved Softphone UI in all CRM integrations (Salesforce, Microsoft Dynamics, ServiceNow)

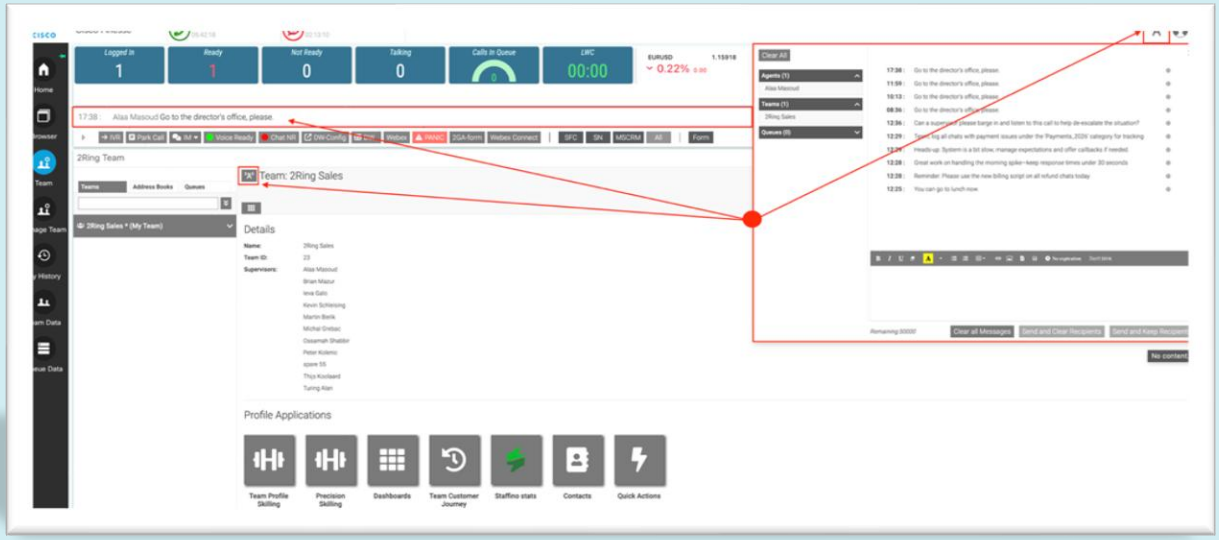
TEAM GADGET ENHANCEMENTS



Agent State Display & Live Updates

- Clear display of agent states in the Team Gadget
- Live updates in open apps when a profile is focused in the Team Gadget

Team Chat Notifications



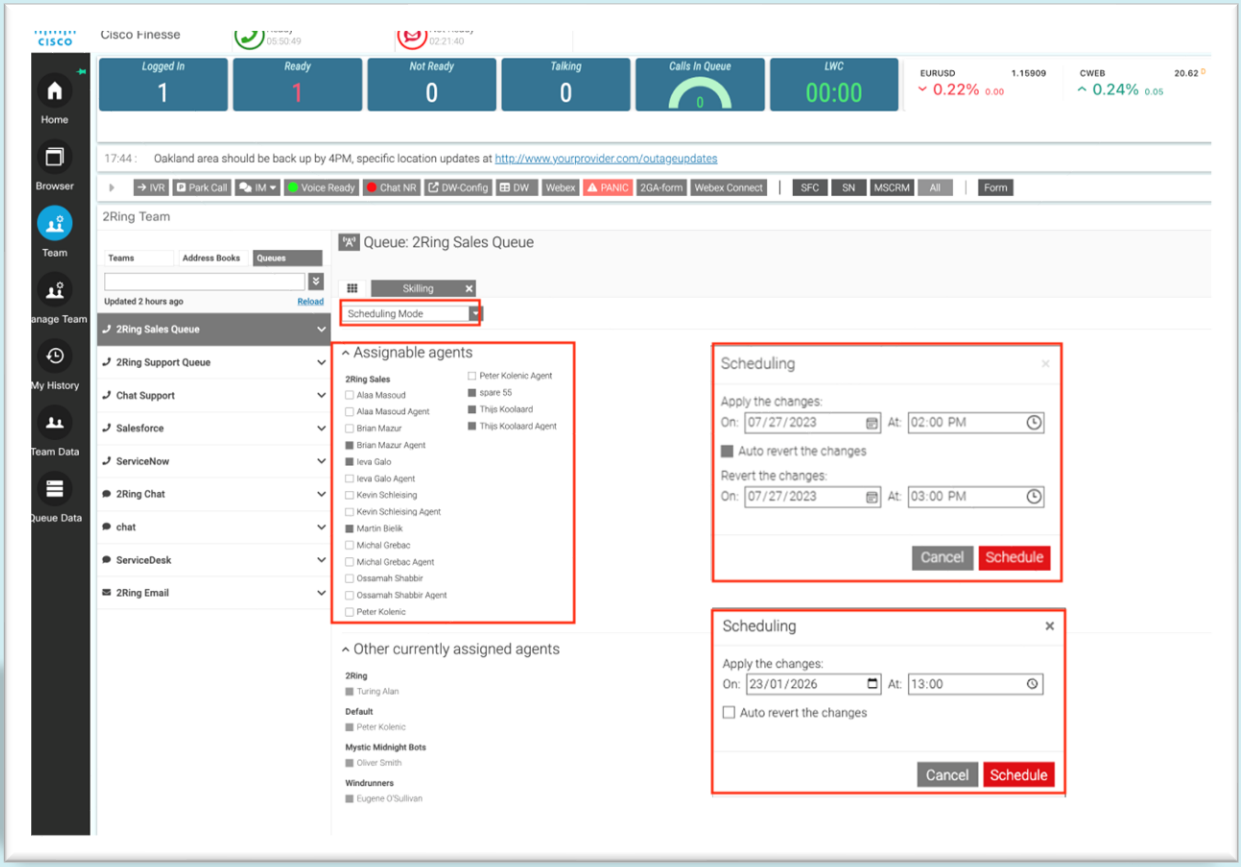
Team chat notifications appear in the Ticker to alert supervisors and agents of team messages.

Sorting Configuration

Enhanced sorting labels on the Team Gadget configuration page ensure consistent behavior.

Agent Queue Skilling

The enhanced Agent Queue Skilling app shows changes for different agents in the currently open agent profile.



CALL PICKING (UCCX Only)

Fully Colored Tabs and Rows

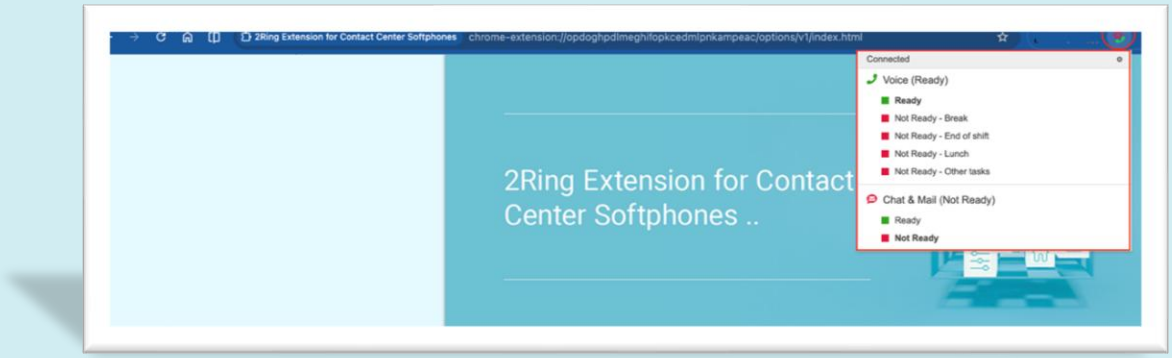
With 2Ring Gadgets, the Call Picking gadget in UCCX gives agents a clear, color-coded view of queued and parked calls so they can instantly see which interactions need attention first. Fully colored tabs and rows highlight call status and queue membership, reducing mistakes and speeding up response times.

To see Call Picking and cherry-picking in action, watch the short demo video on our 2Ring YouTube channel: https://youtu.be/TjH9Dwq5Jm0

BROWSER EXTENSION & CONNECTIVITY

The 2Ring Browser Extension (for Chrome, Edge, and Firefox) lets agents see and change their state, use click-to-call from Salesforce, Microsoft Dynamics, and ServiceNow, and run cross-tab workflow automation without leaving their CRM. Standard Finesse offers none of this on its own.

2Ring Added Value | 2Ring Gadgets v8.4.1



Firefox Manifest V3 Support

The Firefox version of the 2Ring Extension for Contact Center Softphones implements Manifest V3, ensuring compliance with modern browser security standards.

SECURITY & DATA PROTECTION

Response Header Filtering

Response headers returned via the Proxy service can be filtered to prevent leaking sensitive data to clients. This prevents exposure of sensitive information in proxy communications.

Microsoft Teams Presence Integration

Integration with Microsoft Teams presence uses application credentials instead of a dedicated Entra ID user. This simplifies administration and improves security posture.

WORKFLOW AUTOMATION & INTEGRATION

Selective Customer Journey Storage

A new workflow action allows administrators to decide, based on conditions, whether a call is saved to Customer Journey. This provides:

- Enhanced control over data volume
- Privacy compliance for sensitive calls
- Reduced storage overhead
- Compliance with data retention policies

Web App Notifications

Web applications hosted inside Dialog and Team Gadgets can send notifications to the gadgets' notification panel/popup, enabling better integration of external web-based systems.

Webex Integration

User synchronization in "Address Books & Contacts" and presence display in the 2Ring Team Gadget are supported via Webex integration, enabling seamless visibility of remote collaboration status.

TEAM-BASED CONFIGURATION & CUSTOMIZATION

Team-based configuration remains a cornerstone of 2Ring Gadgets. Every team can decide which gadgets they want to use and what each gadget's configuration should be. 2Ring continues to bring more configuration options to the user level, allowing:

- Admins to set boundaries (e.g., in the 2Ring Team Gadget, which teams/contacts agents can see in the roster using whitelist or blacklist)
- Users to personalize Cisco Finesse further within those boundaries (e.g., checkboxes to pick which teams to show and which address books to include)

AGENT & SUPERVISOR TOOLS

Continuous State Monitoring & Coaching

Supervisors can use Continuous Silent Monitoring with optional alerts notifying agents that they are being monitored. Supervisors can also Whisper Coach agents once a Silent Monitor session has been initiated.

Note: Whisper Coaching requires the use of a physical (hard) phone.

Internal Chat with History

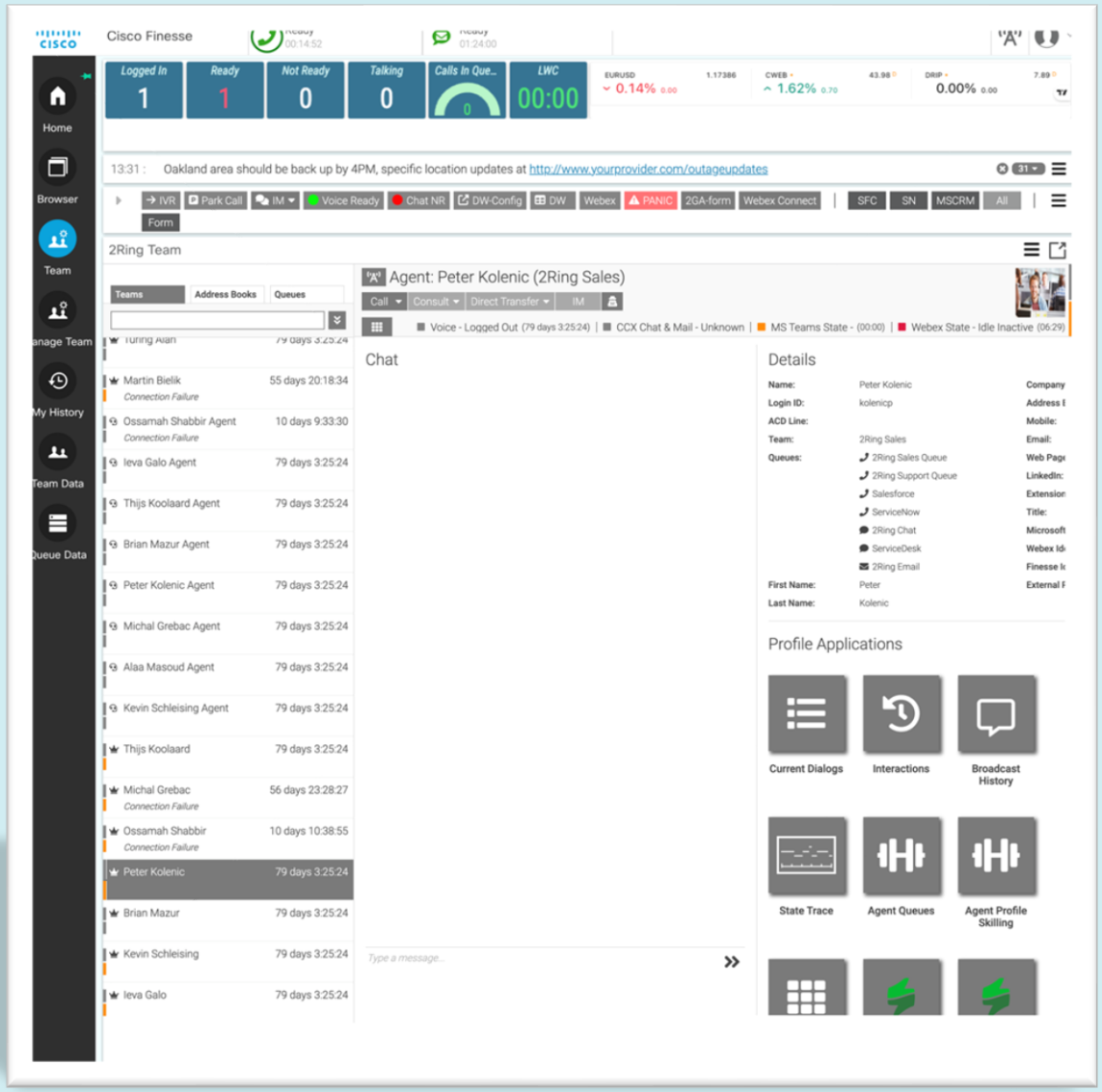
2Ring provides Internal Chat with full history (default 1 year, extendable) available in four modes:

- Agent to Agent
- Supervisor to Agent only

- Agent to Supervisor only (so fellow agents cannot chat among themselves)
- Disabled (with IM buttons as alternative)

Instant Messaging Integration

Availability of supervisors and agents can be displayed (from the agent's team or from multiple teams). Action buttons include Call, Conference, Blind Transfer, Barge, and IM Client (Jabber, Slack, Microsoft Teams, etc.) to open new chat windows using the user's default IM application installed on the workstation.



External Contact Management

Address Books can be synced from LDAP, and private address books can be populated from CSV. Contacts show Microsoft Teams and CUPS (Cisco Unified Presence Server) status (online, offline, DND, in a meeting), allowing agents to immediately see if a back-office worker is available and the best way to reach them.

BROADCAST & NOTIFICATION SYSTEM

Supervisor Broadcasting

Supervisors can send messages to any group (call center teams, queues, skill groups) or subgroup of agents (individual selection available). Broadcast messages support:

- Rich text formatting
- Hyperlinks
- Pictures and tables
- Time-based blinking
- Sound announcements
- Integration with 2Ring Toast Alerts/Notifications

Agents can review all previous broadcasts via the Broadcast History app, and supervisors can check whether agents received specific messages.

Toast Alerts & Notifications

2Ring Toast Alerts/Notifications are displayed on top of all windows regardless of the active application:

- Advanced caller identification (VIP caller, special language needs, business vs residential)
- RONA alerts (Received Offered No Answer)
- Real-Time Adherence (RTA) notifications with Calabrio WFM
- Long-call warnings and talk-time guidance
- Wrap-up code reminders
- Priority/Severity alerts for emergency calls
- Icons and pictures configurable by notification type

Notifications stay displayed until the trigger is no longer valid and can trigger actions or sets of actions.

SKILLING & CAPABILITY MANAGEMENT

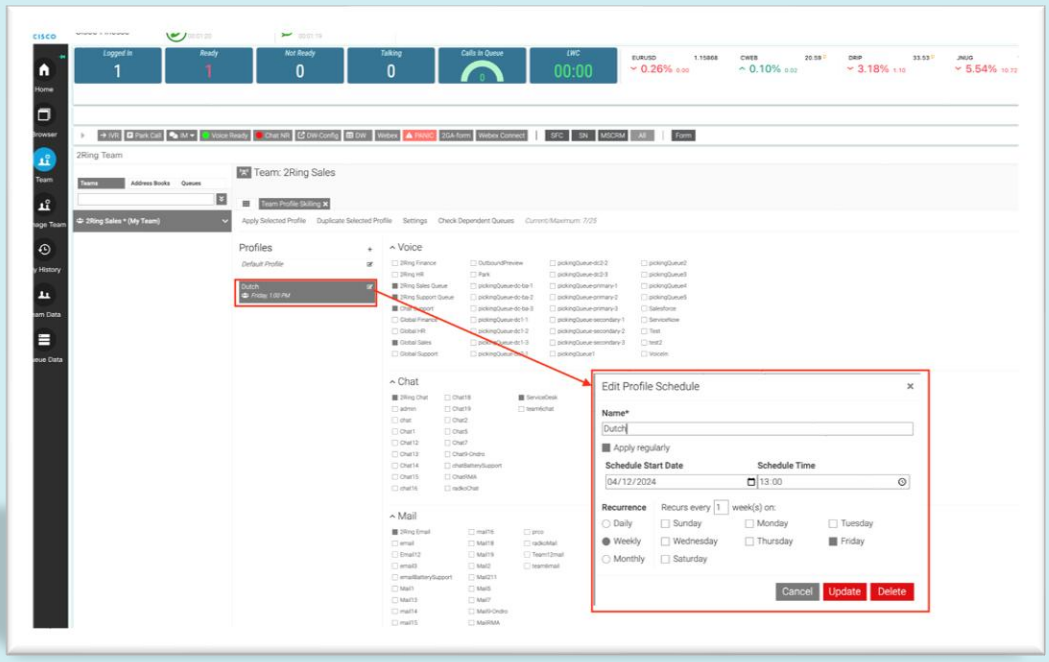
Four Reskilling Methods

Supervisors have four different ways to reskill agents, with optional agent self-skilling capability:

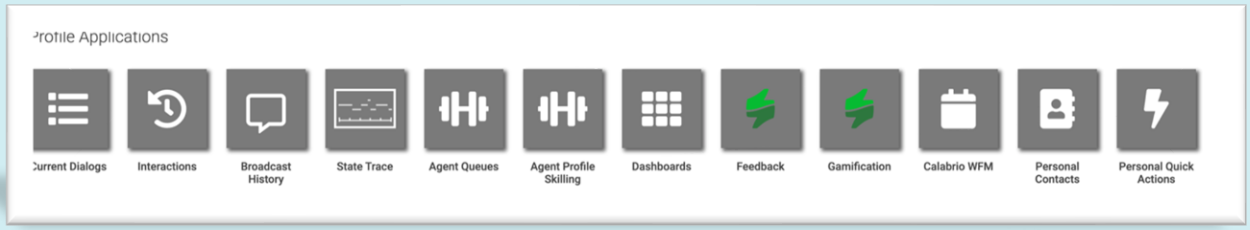
1. Queue-Based Skilling: select which agents will be added to particular queues (bulk, immediate, or scheduled changes with optional reversion)
2. Team-Based Skilling: apply skill profiles to entire teams with auto-apply on specific days/times
3. Agent Queue Skilling: reskill individual agents to single or multiple queues with bulk, immediate, or scheduled options
4. Precision Skilling: reskill agent or team attributes/competency levels with the ability to search for agents by competency level

Skilling Audit & Reporting

- Supervisors can download audit logs of skilling changes in .csv format
- Filterable by time period, agent skilled, and supervisor making the change
- Recurring skilling changes per agent with manual or scheduled application



AGENT & SUPERVISOR PROFILE APPS (Team Gadget)



Calabrio Workforce Management Integration

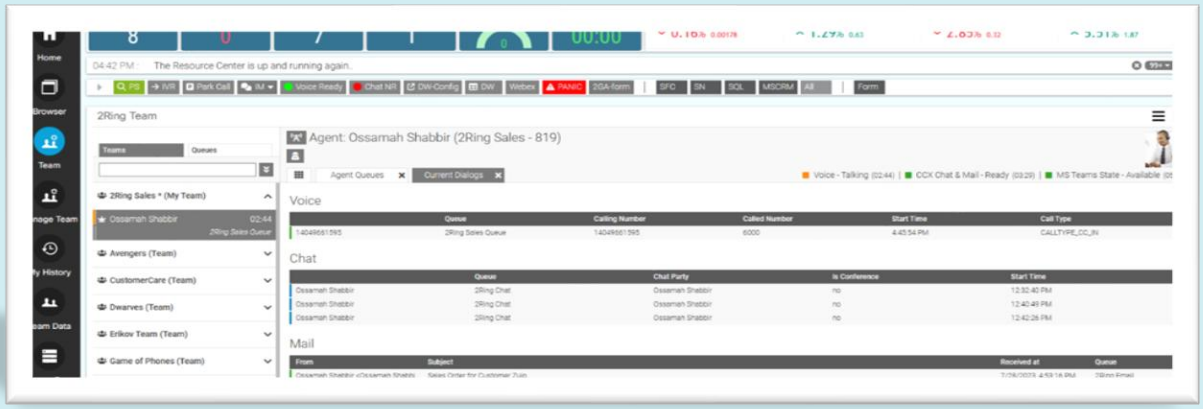
Agents and supervisors receive Real-Time Adherence alerts from Calabrio WFM as 2Ring Toast Notifications, so they know immediately when an agent falls out of adherence.

Following Calabrio's move from its own Workforce Management API to the Teleopti WFM API, the 2Ring Team Gadget scheduling profile app that displayed agent schedules is no longer available.

Current Dialog App

Supervisors can view what every agent is currently working on (voice, chat, email interactions). The view includes:

- Current call length and status
- Call Trace with full details (caller ID, IVR selections, queue, wait time, holds, transfers, call variables, wrap-up)
- Real-time chat conversation overview with agent responses



- Email status with received mail and draft responses

Agent State History

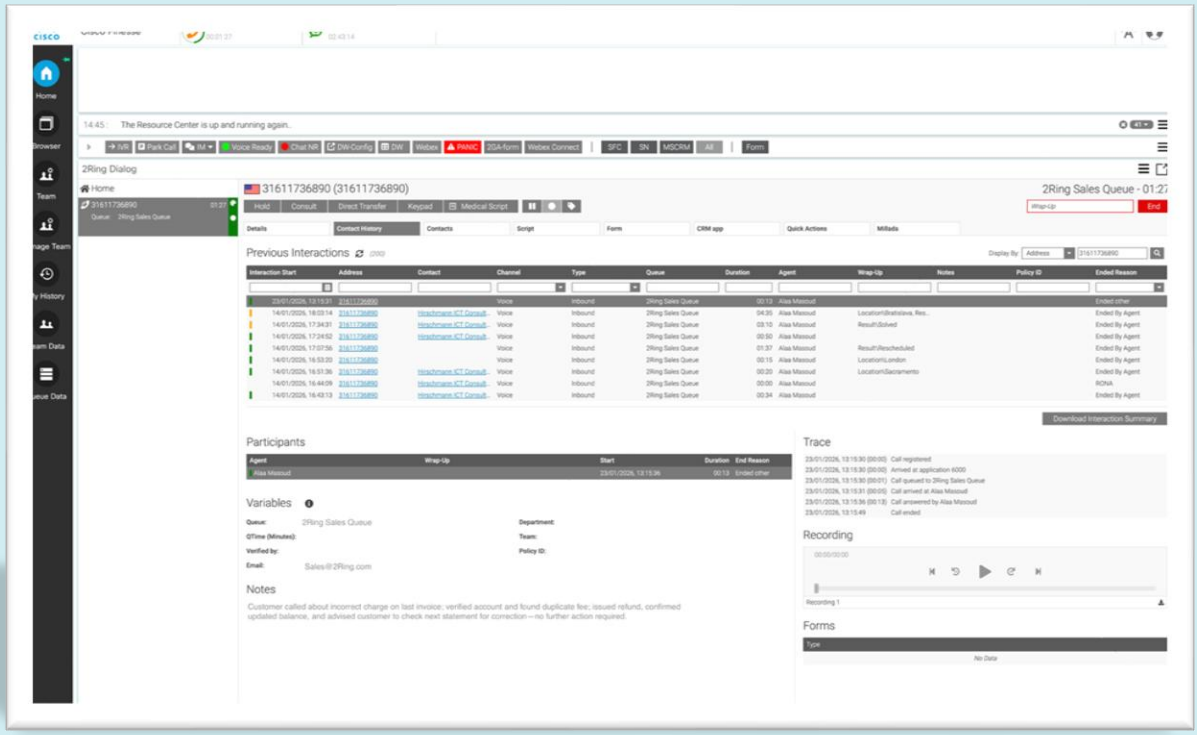
Display of agent state history for voice and chat/email states (default 45 days, extendable):

- Chronological or grouped by state and reason code
- Today's totals for each state/reason code per agent
- Filtering by states and reason codes
- Cisco limits its built-in agent state trace to 100 named agents. 2Ring has no such limit, covers all agents, and does not require agent state trace to be enabled on agent profiles.

Agent Interaction History

Complete interaction history with:

- Click-to-dial functionality
- Click-to-open associated CRM record
- Search, filter, and sort capabilities
- Detailed call information (participants, call variables, notes, CRM links, Call Trace)
- Recorded call playback (Calabrio & Elevēo integration)
- Forms used and data entered by agent



Agent, Team & Queue-Based Dashboards

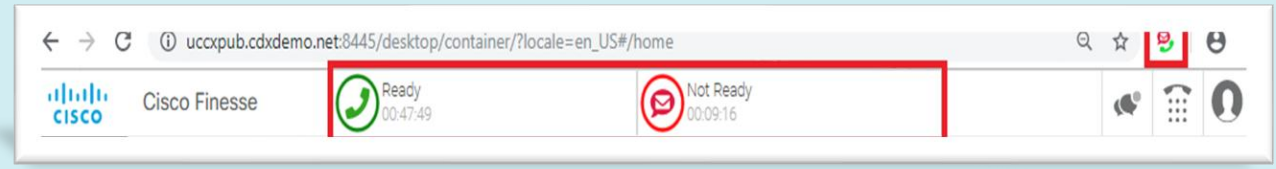
Real-time metrics grids from 2Ring Dashboards & Wallboards that refresh instantly as supervisors switch between teams/agents:

- Team-based listings with configurable metric columns
- Queue-based views with queue and agent grids
- Agent-based performance views
- All metrics configured by the admin with unlimited grid customization options

AGENT STATE CONTROLS & THRESHOLDS

Color-changing state controls that count up or down based on time in state, with configurable thresholds. Threshold announcements can include sound alerts and connection to 2Ring Toast Alerts/Notifications (always on top).

The browser extension displays agent state on all browser tabs outside the Finesse tab, enabling agents to change state from any open web-based application.

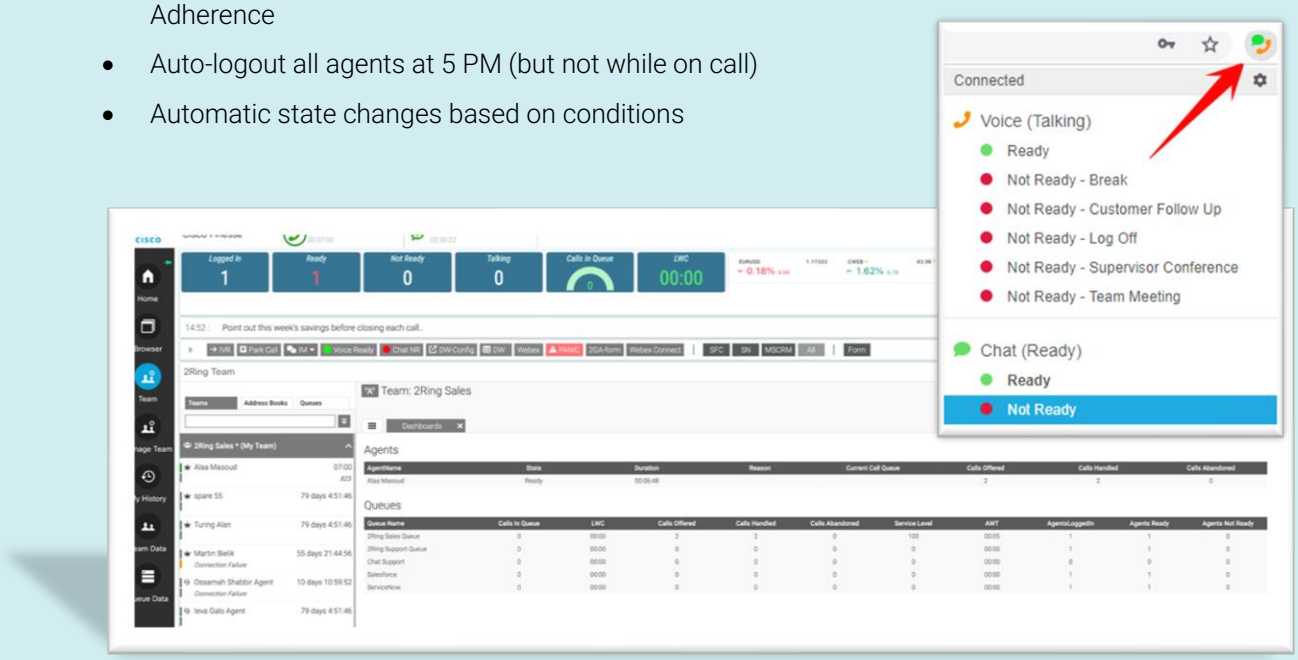


ORCHESTRATOR WORKFLOW ENGINE

2Ring Orchestrator provides a powerful workflow engine that automates both simple and advanced tasks triggered by various event sources:

Agent State Management

- Place an agent in Not Ready status for Break/Lunch once the active call ends to maintain Real-Time Adherence
- Auto-logout all agents at 5 PM (but not while on call)
- Automatic state changes based on conditions



Intelligent Alerts

Audible & Message Alerts triggered by:

- Chat from fellow agent or supervisor
- Agent not selecting a wrap-up code after X minutes
- Incoming call with automatic caller identification & DB lookup
- Long Wait Alert (caller waited longer than X minutes in queue)
- Agent state changes or time-in-state thresholds
- RONA (missed call triggering Not Ready status)
- Calls in queue exceeding defined thresholds

Escalation Alerts notifying supervisors of:

- Agent staying in a particular state too long
- Missed calls
- Calls exceeding talk-time thresholds
- KPI/metric thresholds exceeded
- Chat sessions containing profanity (UCCX)

Screen-Pop & Call Management

- Auto-transfer calls based on call variables
- Screen-pop to appropriate CRM screens
- Default wrap-up code auto-selection before the call ends
- Automated conference calls with DTMF tone entry

TOOLBAR GADGET & QUICK ACTIONS

Automated Task Buttons

Tasks can be automated with single button clicks executing multiple actions:

- Bookmark: opens sites in 2Ring Browser Gadget or external browser tab
- Panic Button: requests supervisor assistance with message/toast
- Agent End of Shift: places the agent in Not Ready, then logs them out
- Ready Button: sets the agent to Ready with a single click instead of several
- Customer Advocate Transfer: single-step transfer based on call variable
- Translation Service: calls service, enters DTMF, initiates conference
- Ad-Hoc Forms: collect input for submissions and requests
- API Integration: connect to external applications (Salesforce, gate software, etc.)
- Button Sets: dropdown sets for organized button grouping

State and call variable awareness enable different actions based on agent context.

BROWSER GADGET & EMBEDDED APPLICATIONS

Multiple websites and applications can be embedded in Cisco Finesse with ease. Admins can add any site or application that runs inside an iFrame, including:

- 2Ring Cherry/Call Picking
- 2Ring Dashboards & Wallboards layouts
- CRM systems
- Business applications

Multiple browser tabs allow agents to work with external applications without losing sight of active interactions. Websites can be opened at login or via Toolbar Gadget buttons.

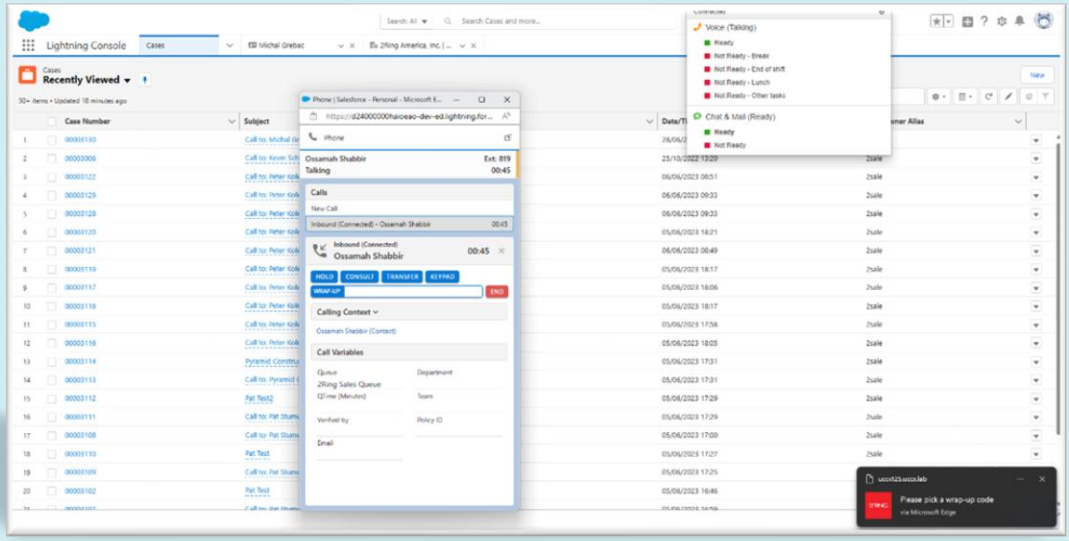
CRM CONNECTORS & INTEGRATIONS

2Ring Dialog Gadget provides comprehensive features for integration with third-party contact data stores.



Customer Lookup & Screen Pop

- Automatic customer lookup on inbound calls using calling number or customer ID
- Preview of customer data in Finesse
- Simultaneous search across multiple connectors
- Native system screen-pop for continued processing



Supported Systems:

- Salesforce (SFDC)
- Microsoft Dynamics (CRM)
- Calabrio (SNOW)
- Custom ERP/CRM via API (Custom Connectors SDK)
- SQL Databases (Generic SQL Connector)

Don't see your CRM or ERP listed above? Through the Custom Connectors SDK, 2Ring can integrate other systems via their API. Let us know which system you use and we will review it with you.

Child Record Display

Display child records (tickets, orders) associated with customer/account records alongside main record, with direct click-through to open or perform actions.

Record Management

- Automatic creation and updates to remote system records
- Background queries for workflow automation
- Transfer of customer identity along with the call to the next agent
- Click-to-call from Finesse or native CRM screen

Custom Actions & Integrations

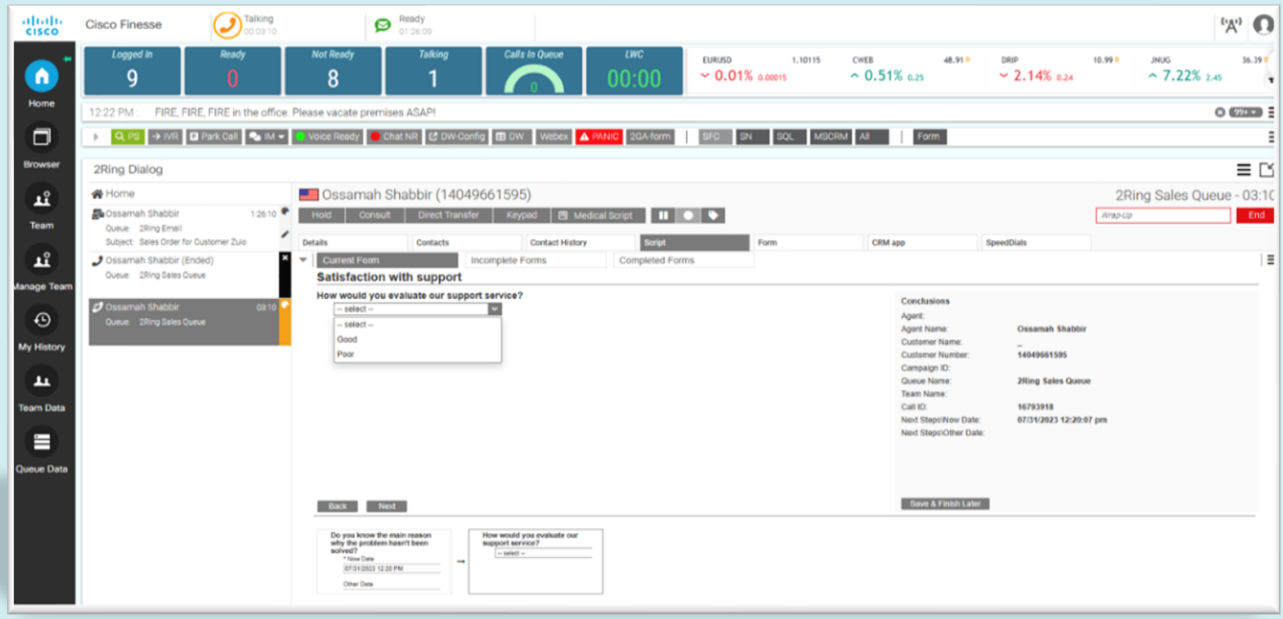
Each connector and record type can define custom actions:

- Custom Connectors SDK for homegrown applications
- Custom Apps SDK for embedded CRM data display
- Generic SQL Connector for relational database access

CHAT & EMAIL HANDLING (UCCX only; requires CCP – Cisco Customer Collaboration Platform)

Unified Dialog Management

Agents handle all interactions (voice, chat, email) in a single Dialog Gadget instead of the separate gadgets used in standard Cisco Finesse.



Interaction List Intelligence

- Unread message indicators (orange bubble)
- Last message preview
- Typing indicators (including bot identification)
- Color labeling (manual or dynamic via Orchestrator logic)

Customer Journey for Chat/Email

- Customer identification with screen-pops
- Interaction history display

- Automatic history record creation with transcripts
- Export UCCX chat transcripts to PDF

Wrap-Up Codes

- Grouped code organization
- Auto-save without explicit confirmation
- Enforced selection requirement

Response Templates

Agents can create personal response templates with:

- Search capability across templates
- Multi-template response composition
- Template management and sharing

Chat-Specific Features

- Conversation starts with full user input from the website
- Intelligent scrolling to last agent message + new customer messages
- Unread message count indicator
- Chat transfer to queue (escalation/expertise routing)
- Private agent-to-agent messages during customer conversation
- Automated message insertion
- Keyword-triggered workflow actions

Email-Specific Features

- Manual CC/BCC editing with auto-rules via Orchestrator
- Automatic email storage with attachment management
- RE/FW label assignment
- Easy attachment addition
- Data retention settings for compliance

END OF LIFE NOTICES

Customers on the following versions should upgrade to the latest release:

- 2Ring Gadgets: everything up to and including 8.1.x has reached end of support. Contact 2Ring to upgrade to the latest release. See https://www.2ring.com/end-of-life-announcement-for-2ring-gadgets-for-cisco-finesse-8-1-x-releases/ and https://www.2ring.com/end-of-life-announcement-for-2ring-gadgets-for-cisco-finesse-7-x-8-0-x-releases/
- 2Ring Compact Agent (all versions) has reached end of life. Switch to Cisco Finesse enhanced with 2Ring Gadgets. See https://www.2ring.com/end-of-sale-end-of-life-and-end-of-maintenance-announcement-for-2ring-compact-agent-ca/
- 2Ring Phone Services (all versions/editions) has reached end of life. Move to Cisco Finesse with 2Ring Gadgets, where former Phone Services users gain the new Address Books and Quick Actions apps. See https://www.2ring.com/end-of-sale-end-of-life-and-end-of-maintenance-announcement-for-2ring-phone-services-ipps/

DASHBOARDS & WALLBOARDS

2Ring Dashboards & Wallboards is a complementary, separately subscribed product (like the 2Ring CRM Connectors for Gadgets). The latest version is 9.2.3; everything up to and including 9.1.x has reached end of support (see https://www.2ring.com/end-of-life-announcement-for-2ring-dashboards-wallboards-9-0-x-9-1-x-releases/). For a full overview of its added value, see www.2Ring.com/addedvalue-dw.

2Ring Power Tool

2Ring Power Tool is a lightweight companion application for Dashboards & Wallboards that runs on the agent workstation. It keeps a chosen Dashboards & Wallboards layout, or any web content, in a persistent, always-available window, reacts to events sent from Dashboards & Wallboards, and drives peripherals such as Kuando Busylight for real-time visual and audible cues. A built-in web listener triggers local scripts and hardware; window size, position, and system tray behavior are configurable; and silent, unattended installation supports rollout across large teams. The latest version is Power Tool 2.0.

GETTING STARTED & SUPPORT

Learn More:

- Visit www.2Ring.com/Gadgets for the latest information and resources
- Request a demo at www.2Ring.com/
- Contact sales at www.2Ring.com/Contacts