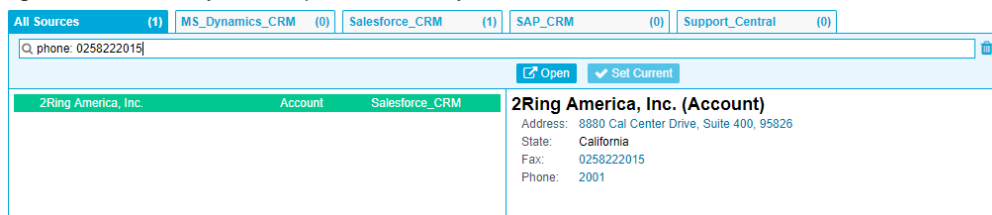


The 2Ring Dialog Gadget provides a comprehensive set of features that enable data stored in 3rd party contact data stores such as ERP or CRM systems for both read and write operations as well as really powerful automation. This includes:

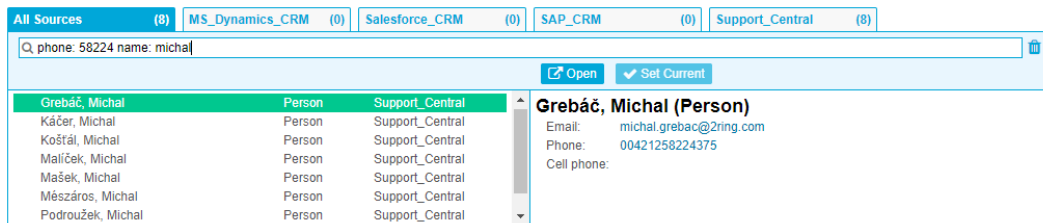
› **Customer Lookup** (a customer data preview in Finesse)

- › In inbound scenarios, an automatic customer lookup can be performed using a calling number or customer id as lookup criteria. The results of the lookup are presented on the screen for the agent to choose from. In case multiple connectors are configured, the lookup may be performed against all remote contact sources. If a single match is found, workflow automation can be used to open a specific customer screen in the remote system.
- › In manual outbound scenarios, agents can manually search for a contact in a remote system(s) using multiple criteria and dial directly from within the gadget.
- › Dialer-invoked outbound calls are similar to inbound calls with the small difference that the customer’s identity is already known. This means that a single match is always expected and the agents are usually not required to verify the caller.



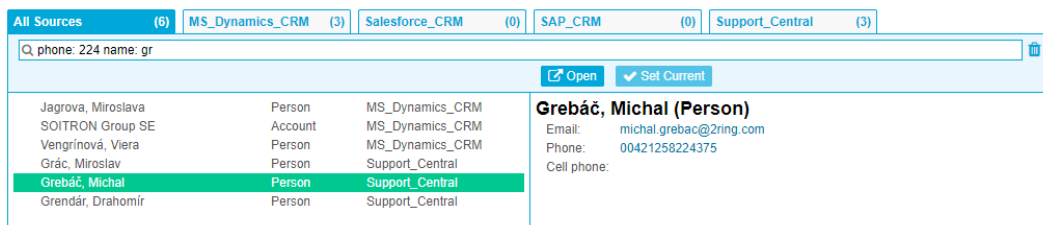
› **Multiple lookup criteria**

A connector may provide any number of criteria to use in lookups. A typical set of columns the criteria may apply to are (but not limited to) ID, name, email, phone number, address, state, zip, and country.



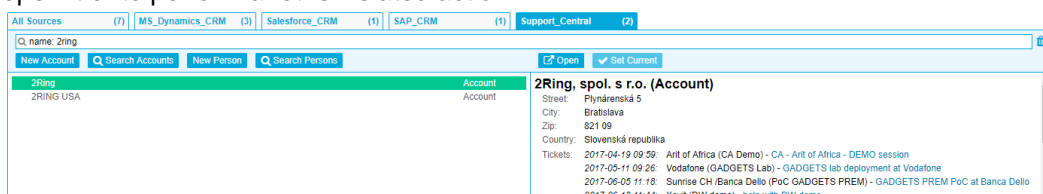
› **Multiple record types**

There are usually many types of records to lookup. A typical CRM system may provide Account, Person, Lead, or Opportunity lookups. Dialog Gadget does not limit the number of record types. Each record type has a specific preview screen.



› **Child record preview**

Some records such as customers/accounts can have child records associated with them. A typical case would be a list of the newest tickets or orders associated with a customer. Dialog Gadget enables these child records to be displayed along with the main record. An agent can click directly on a child record to open it or to perform another related action.



› **Screen Pop** (native page)

Once the customer is identified using the preview built into the gadget, it is often necessary to continue processing the call using the native customer/account page in the remote system. The agent can choose which system to finish the interaction in if multiple remote systems are configured.

Some remote systems such as Salesforce provide their own tabbed interfaces so that multiple screens can be open in the same browser window/tab. If a system has its own tabbed interface and the connector supports it, a native tab within the system can be opened instead of opening a browser tab.

› **Create/Update Records**

A powerful automation engine running in Dialog Gadget can automatically create or update records in the remote system. A typical scenario is to create a new call record when a call comes in, open the record for the agent to modify, to write notes, and finally update it with the final duration once the call ends.

› **Background Queries**

In some situations, it may be necessary to access other call/customer related data for the workflow engine to make a decision. Background queries enable the workflow engine to perform a background query and act on the data returned. This usually happens automatically in the background without the need for agent interaction.

› **Transfer customer identity when transferring a call**

If multiple agents take part in a call, the identity of the customer can be passed along the call to the other agent so that it is not necessary to identify the customer again.

› **Click to call from Finesse**

Agents can find a contact using the Contact section and dial directly from within the finesse environment.

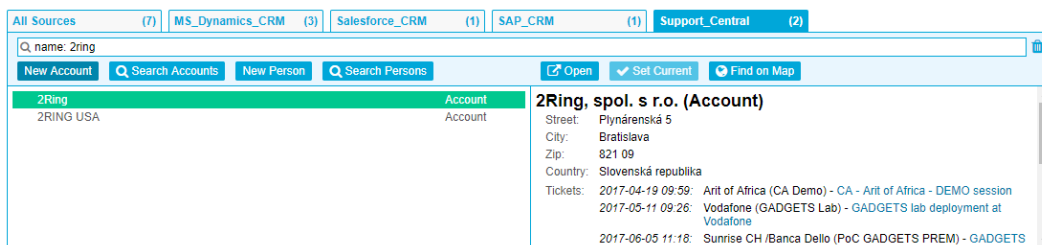
› **Click to call from native screen**

Some connectors enable the agent to dial directly from a native customer screen in the remote system.

› **Custom Actions**

Each connector and each record type can define its own set of actions that an agent can perform.

- › Typical Connector Actions
 - › Create new customer
 - › Open native search
- › Typical Record Actions
 - › Open record screen
 - › Find on map
 - › Create call record



› **Remote Control**

Some remote systems are able to invoke workflow events directly from their own native screens. The workflow events are then handled by the workflow engine running in the Dialog Gadget. These are the most complex scenarios that can orchestrate and simplify work between multiple systems.

› **Sample Scenario**

An agent is working on an account in the ServiceNow application. Clicking the 'Request Consultation' button in the ServiceNow application triggers an event handled in Dialog Gadget. The workflow engine creates a new Task in the Salesforce application requesting a consultation for the customer.



2Ring Dialog Gadget Contact Connectors – 2Ring Connectors

Not all connectors provide all features. To find out if a specific connector supports a requested feature, refer to this table:

	Dynamics CRM	Salesforce	SAP CRM	ServiceNow	Generic SQL
Customer Lookup	x	x	X	x	X
Multiple Lookup Criteria	unlimited	unlimited	fixed list	unlimited	unlimited
Multiple Record Types	account, person	account, person account contact, lead	account, person	unlimited	unlimited
Child Record Preview	x	-	-	x	x
Screen Pop (native)	x	x	X	x	n/a
Create/Update Records	x	x	-	x	n/a
Background Queries	x	x	-	x	x
Transfer Customer Identity	x	x	x	x	x
Click to call from Finesse	x	x	x	x	x
Click to call from native screen	x	x	-	x	n/a
Custom Actions	x	x	x	x	x
Remote Control	x	x	x	x	x