2Ring Gadgets for Cisco Finesse

Significantly enhance the experience of agents and supervisors on all the Cisco® contact center platforms (UCCX – Express, UCCE – Enterprise incl. Packaged). Automate repetitive tasks, provide alerts and notifications (RONA, Calls in Queue, ..), connect agents to back office and remote experts, or even integrate Cisco Finesse® with all the tools that the agents use (including Salesforce®, MS Dynamics CRM, ServiceNow® and other SQL based systems).

Learn now how to create a truly unified workspace and a seamless Cisco agent desktop experience. A self-hosted subscription is available to order from Cisco's Price List (CCW).

Team-based configuration *– Cisco Finesse comes with a team-based configuration. Every team can decide what gadgets they want to use, and what each gadget's configuration should be. In other words, every team can create their own look and feel of Cisco Finesse.*

2Ring brings more and more configuration options to the user level *– the admin can set boundaries (e.g. in 2Ring Team Gadget - what teams/contacts agent can see in the roster – using a whitelist or blacklist), and users personalize Cisco Finesse further within those boundaries (e.g. checkboxes to pick what teams to show and what address books to include).*

2Ring Team Gadget

A roster that groups agents/supervisors by teams and queues. Every user can define their own sorting, and decide what info about agents should be visible (e.g. name, reason code, time, extension, a call type of the current call, ...):

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1. Roster can be configured so agents would only see their own profile to access details on their own performance via a set profile apps (state history, interaction history, self-skilling, real-time dashboards with many KPIs – see more at "2Ring Team Gadget – Profile Apps")

2. Agent profiles can be linked to an external (LDAP/AD) data source to provide a complete overview of each agent:
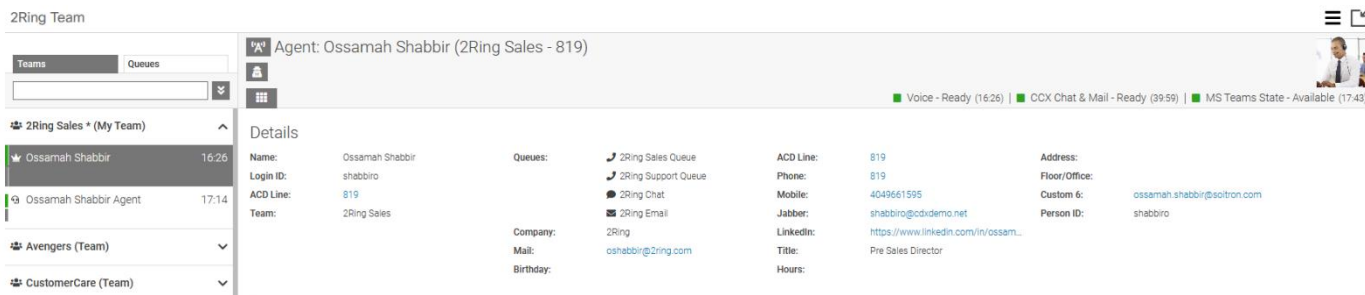
3. Optionally, agents can be allowed to see availability of supervisors and/or fellow agents (from the agent's team or from multiple teams). Once a user is selected, the

view offers configurable action buttons: Call, Conference, Blind Transfer, Barge, IM Client (Jabber, Slack, Microsoft Teams, …). In the screenshot below, the IM button would open a new chat window with Ossamah Shabbir Agent using the user's default IM application installed on the workstation. All the buttons can be removed for agents, supervisors or both and additional buttons can be configured by the administrator as well.
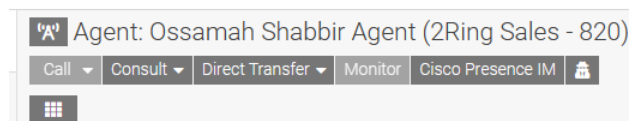
   a. Supervisors can enjoy **Continuous Silent Monitoring** (with *optional* alerts sent to agents that they are being actively silent monitored). This example shows what powerful results buttons bring when connected to *2Ring Orchestrator / Workflow*.

   b. Supervisors also can **Whisper Coach** Agents once they have initiated a Silent Monitor Session. Note: Whisper Coaching does require the use of a physical device or hard phone.

   c. Agent/Supervisor profiles come with **2Ring Internal Chat with history** (default of 1 year but can be extended) that is available in four modes – Agent to Agent, Supervisor to Agent only, Agent to Supervisor only (so fellow agents cannot chat amongst each other), and of course, there is also the option to turn off 2Ring chat completely and only use IM buttons as covered above. Cisco Finesse 12 added Jabber Chat; however, it is not aware of call center teams/queues groupings, and it does not show an agent's or supervisor's contact center state (talking, not-ready - lunch, etc.).

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4. The roster can also include **External Contacts** via the use of Multiple Address Books synced with many external sources such as LDAP, Exchange, Lotus Notes, AD, CUCM, SQL, csv. A contact also shows Microsoft Teams and CUPS (Cisco Unified Presence Server) status (online, offline, DND, in a meeting) and thus the agent immediately sees if a back-office worker from a certain department (address-book) is available and the best way to reach them. Users can search across all available data or in specific field(s):

5. Supervisors can send a message to any group (call center teams, queues, skillgroups) or subgroup of agents (agents can even be picked one by one) + to tickers used in 2Ring Dashboards & Wallboards layouts. **Broadcast Messages** support rich text, hyperlinks, pictures, tables and can be set to blink for certain amount of time. Arrival of a message can be announced with a sound and connected to a *2Ring Toast Alerts / Notifications*.
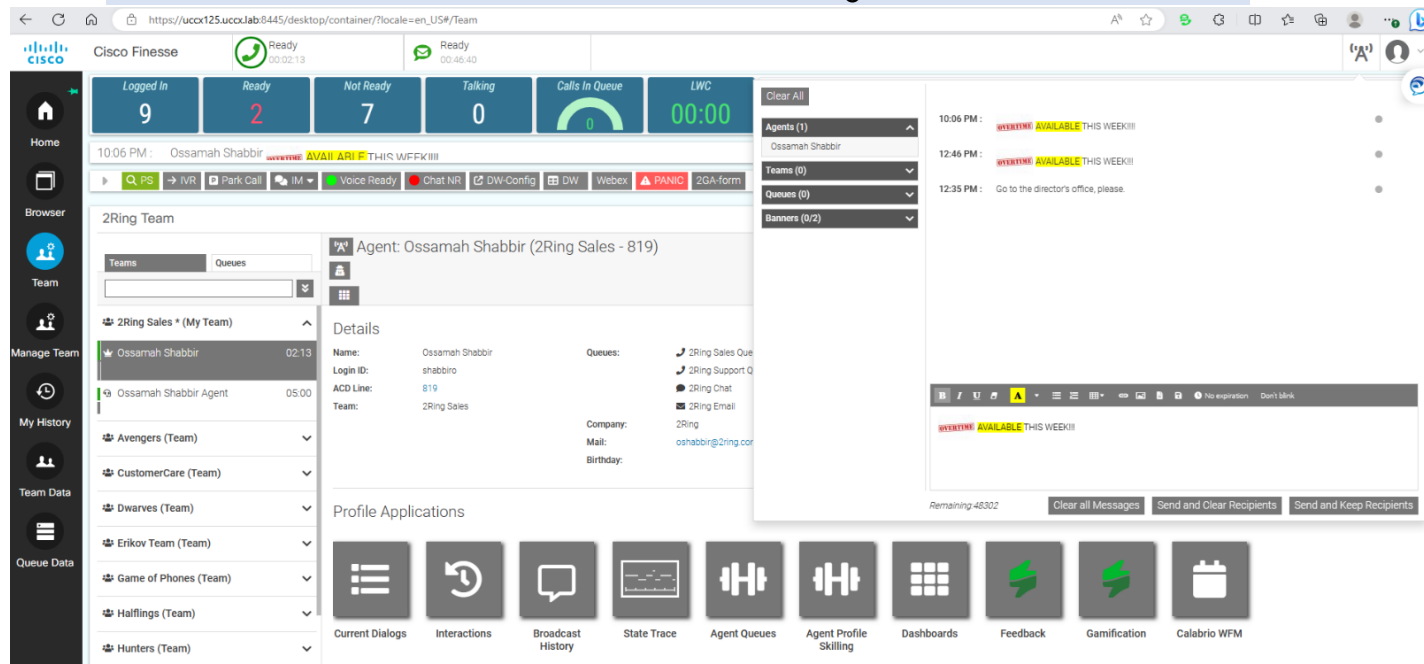
6. It is also possible for agent to go straight from the Ticker Gadget to his/her own profile broadcast history app to see the last and all the previous broadcasts (see Broadcast History button at the bottom right corner of our Ticker Gadget):
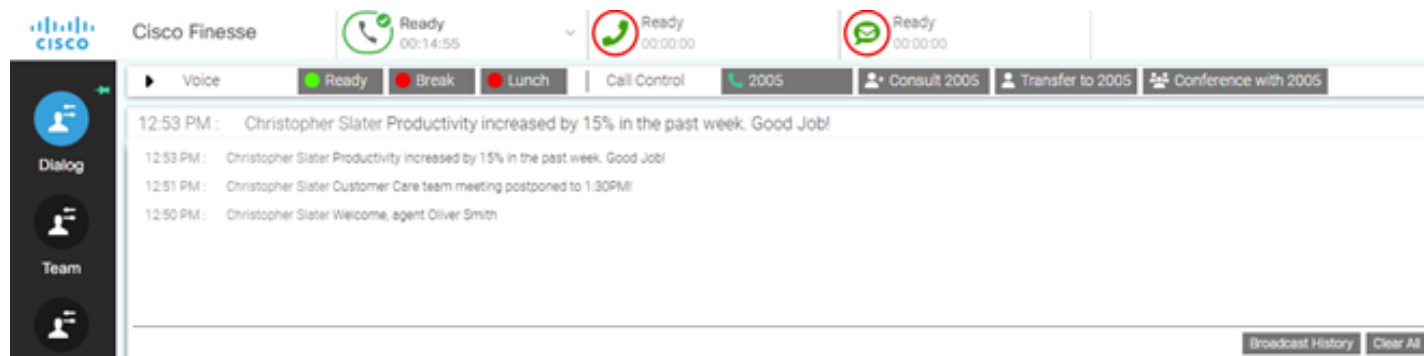
2Ring Team Gadget – Profile Apps

Every contact center team can decide what profile apps will be available for use by agents on their own profile, and/or on fellow agent's profile, and what profile apps will be available to supervisors.

Profile Applications

Current Dialogs | Interactions | State Trace | Skilling | Dashboards | Feedback | Gamification | Calabrio WFM
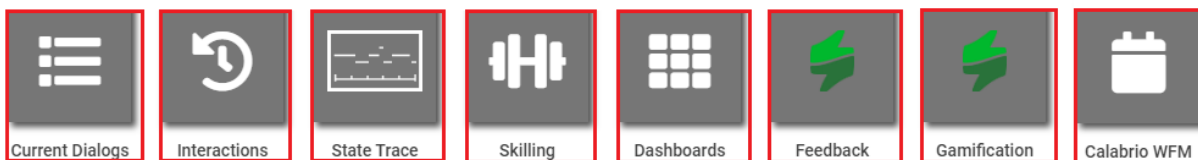
1. **Calabrio Workforce Management** Integration – Agents and Supervisors can view the Agents schedule + receive alerts about upcoming or ending activities and about agents' adherence to the schedule. See more in this video on YouTube.

2. **Reskilling** – 2Ring now has 4 different ways for supervisors reskill an Agent, Team or Queue. *Optionally,* agents can be allowed to reskill themselves.

    a. **2Ring Queue Based Skilling**

    Queue based skilling allows a supervisor to select which Agents will be added to a particular queue. Changes can be made in Bulk, Immediate or Scheduled. Scheduled changes can revert to previous configuration at a predetermined time, if desired.

b. **2Ring Team Based Skilling -** Team based skilling allows a Supervisor to select what Skills to add to an entire Team. Select the Profile you would like to apply and click Apply Selected Profile. Profiles can be set to be auto-apply on certain days/times, giving you Default Profiles.
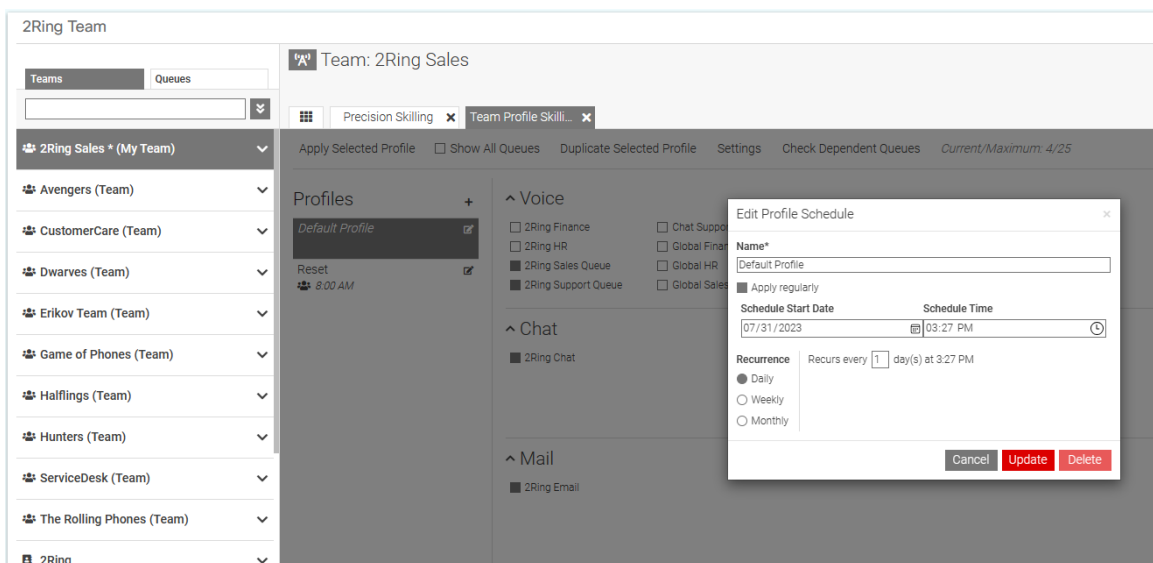
c. **2Ring Agent Queues -** Agent based skilling allows a Supervisor to reskill an individual Agent to a single or multiple Queues. Agents can be allowed to reskill themselves (limits can be set so agents do not un-skill themselves from all queues). Changes can be made in Bulk, Immediate or Scheduled. Schedule changes can revert to previous configuration at a predetermined time, if desired.

d. **2Ring Precision Skilling -** Precision Skilling allows Supervisors to reskill an Agent or an entire Finesse Team's attributes or competency levels. Define what your Teams default Competencies are so you can easily revert to the defaults at a later time. Search capabilities make it easy to locate an Agent(s) with a particular Competencies, such-as 5 or 5 and higher or a particular Agent.

e. **Skilling Audit Log** – Supervisors are now able to download audit logs of skilling changes made or scheduled through the 2Ring Team Gadget. This feature allows supervisors to generate a report in .csv format and is filterable by period of time, agent that was skilled, and supervisor that made the skilling change.
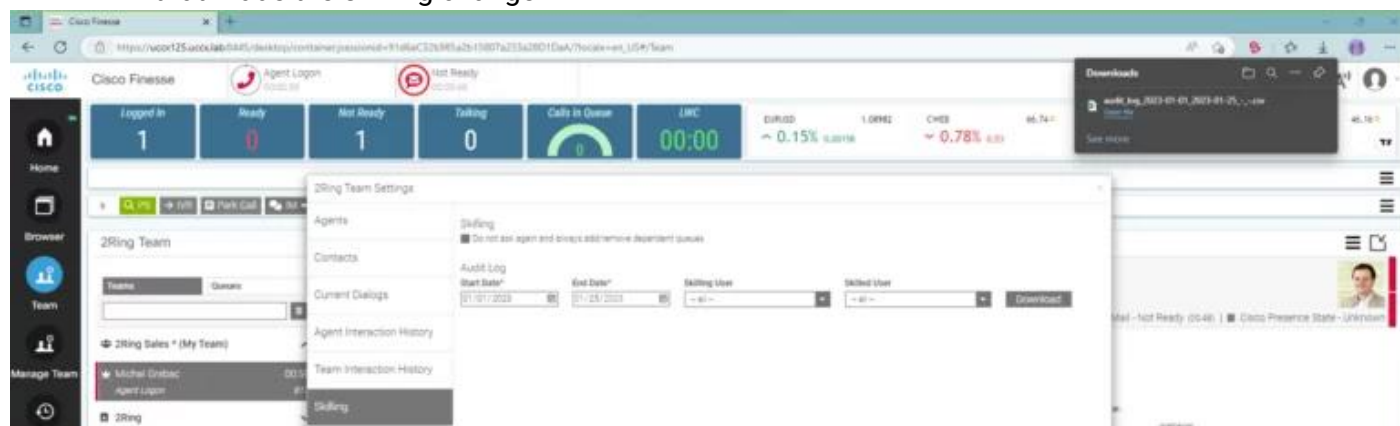
f. **Reoccurring skilling changes for a specific agent.** – Supervisor can go to a profile of a specific agent, and have the profile applied right away manually or define the reoccurring settings.

Team Profile View:

Agent Profile View:

Cisco Finesse 12 comes with a skilling gadget for UCCX only and it does not support agent self-skilling or reoccurring skilling changes.

3. **Current Dialog App** – supervisors can view what every agent is currently working on *(Chat/Email interactions are only supported on UCCX-SocialMiner – or as it is referred now Customer Collaboration Platform)*:

Besides seeing that an Agent is "Talking" and the call's length, supervisors can view **Current Call Details (Call Trace)** with all this information: Number Called by Caller, Options Selected in the IVR, Queue the call came from, Wait Time in Queue, Holds, Transfers, Call Variables, Wrap-Up Selected:

A Supervisor can review details of each interaction in real-time – this is what an overview of customer-agent chat conversation looks like:

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This is what an overview of email response looks like (variables, received mail, agent's response in progress):

4. **Agent State History for Cisco UCCX Voice and Chat&Email states** (default of 45 days, but it can be extended) – Chronological or Grouped by State and Reason Code (today's totals for each agent and state/reason code), additionally, you can filter on states and reason codes.

This is available even on UCCE with more than 100 named agents – 2Ring has no limits on the # of agents covered (no need to enable agent state trace on agents' profiles).

5. **Agent Interaction History** – this comes with click to dial, click to open an associated CRM record (when integrated), search/filter/sort capabilities:

See details about the call, such as Participants, Call Variables, Notes added by the agent, link to CRM record, Call Trace (see details like hold, un-hold, transfers, Queue), be able to play the Recorded Call (Calabrio & Elevēo), view any Forms used and what was entered by the agent.

6. **Agent, Team & Queue Based views from 2Ring Dashboards & Wallboards that refresh & load in a split second** as a supervisor switches from team A to team B or from agent X to agent Y. The below is a team-based listing showing agents belonging to the selected team with a subset of available metrics/columns. The metrics (columns) are configured by the admin, and additional grids can be added to this view (including a queue grid or a grid showing calls waiting in selected queues (UCCX Only), …):

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A queue-based view showing a queue grid with a subset of columns/KPIs and a list of agents assigned to the selected queue:

Agent-based view (showing a subset of available metrics/KPIs):

2Ring Agent State Controls
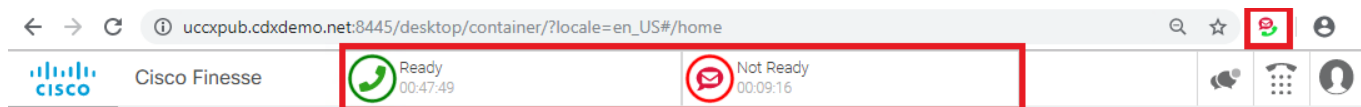
1. State controls change color based on time in state that count up or down. Thresholds can be announced with a sound and connected to be always on top *2Ring Toast Alerts / Notifications*. View more use cases under *2Ring Orchestrator / Workflow*. 2Ring customers with Finesse 10-11.x use state control/ thresholds in the 2Ring Ticker gadget, but those on Finesse 12 can move agent state control (with thresholds) to the Finesse 12 header, leaving more space for displaying broadcast messages in the 2Ring Ticker Gadget.

2Ring Browser Extension (Edge, Chrome, Firefox)

1. **Agent state is visible on all browser tabs** (outside of Finesse tab). This is useful when agents work in additional web-based applications (ERP/ITSM/CRM systems, etc.).
2. Agents can also change their state from the browser itself even when the agent is not on the Cisco Finesse browser tab.
3. Gives 2Ring control over the desktop and browser to deliver **powerful automation** (bring the browser to the front, screen-pop to a specific tab, click2dial from outside of Finesse, ...).
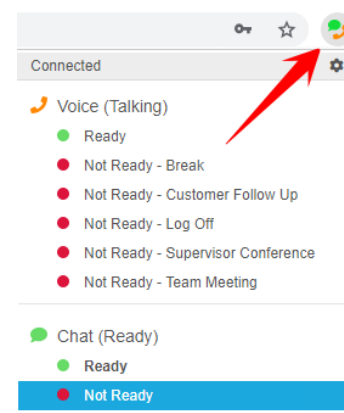
2Ring Toast Alerts / Notifications

1. Alerts (e.g. you missed a call) and notifications
2. (e.g. advanced caller identification) that are **displayed on top of all the windows** regardless of what app is currently in active use.
3. Real Time Adherence (RTA) – Agents & Supervisors can receive a Toast Notification when an Agent is out of Real Time Adherence with Calabrio WFM

4. Icons / pictures can be based on the notification type (e.g. RONA, VIP caller, special language needs – Spanish / French / ... business vs residential customer, message from supervisor, an unusual call type, a possible fraud alert, ...).
5. Clicking on the toast can trigger an action or set of actions (answer call and bring CRM to the front, change agent state to ready, ...) – see more examples under *2Ring Orchestrator / Workflow*.
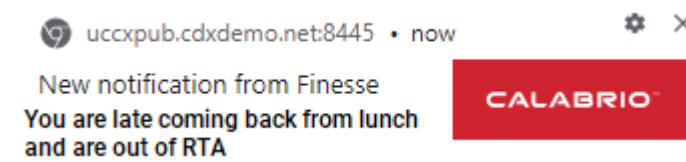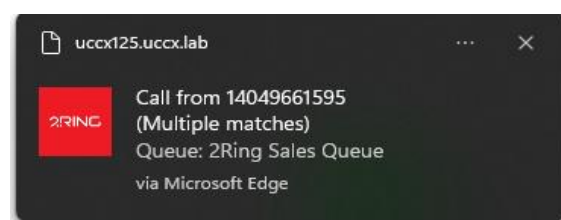
6. Displays browser notification when browser extension disconnects from Cisco Finesse –
   for example, when an agent is logged out from Finesse after a long period of inactivity.
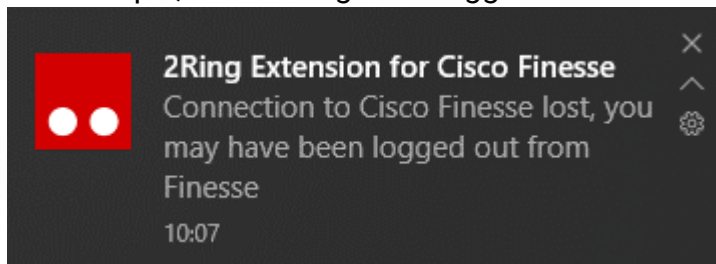
7. Stays displayed until the trigger originating the message is no longer valid (when an agent
   misses a call and is in NotReady – RONA, they can see the alert on top of all their
   application windows until they switch states).

8. Delivers notifications when conditions are met – e.g. calls in queue and LongestWaitTime
   exceed defined thresholds (this scenario requires *2Ring Dashboards & Wallboards*).

9. As a call approaches the target Talk Time an agent can receive a notification to help them
   achieve their target talk time. Further the agent can also receive a notification if they are
   exceeding the average Talk Time for the team for the day. Once a call is considered a long
   call, a notification can be sent to the supervisor.

10. When an agent enters a Not Ready state the agent can receive a notification showing
    Cumulative Not Ready for the day to help agents achieve desired Not Ready targets.

11. Use Toast Notifications for Ready / Not Ready Buttons so the agent always knows their
    state.

12. Pick a Wrap-Up Code Reminders

13. If a call has been in queue too long a notification can be popped to let the agent know to
    offer an apology for the long wait time.

14. Personalized Opening Greetings which can be based on hour, queue, IVR selection, # called,
    agent's name, …

15. When a Priority or Severity 1 (life threatening emergency) call is in queue there can be a
    popup notification. On UCCX, when the agent clicks the toast notification the current caller
    is parked, and the agent can select the Priority or Severity 1 call to answer via our Call
    Picking Application.
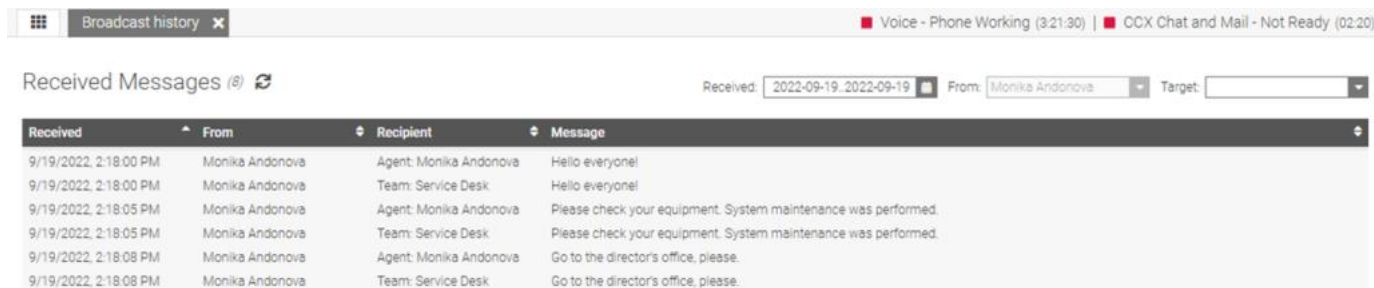
2Ring Ticker Gadget
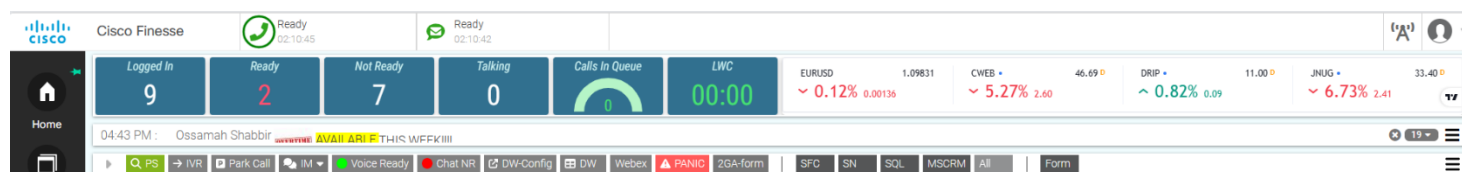
1. **Message Ticker (Marquee)** with message history – Supervisors can send a message to any
   group (call center teams, queues, skillgroups) or subgroup of agents (any set of agents or
   picked one by one) + to a ticker in any of the 2Ring Dashboards & Wallboards layouts.

2. **Broadcast Messages** support rich text, hyperlinks, pictures, tables, etc. and can be set to
   blink for certain amount of time. In addition, arrival of a message can be announced with a

sound and connected to a _2Ring Toast Alerts / Notifications_. All toast alerts are usually also delivered to the Ticker to preserve message history for the agent.

3. **Broadcast History App** allows supervisors to check if agents received a certain message as well as allowing agents to review previous broadcast messages sent to him/her.
4. **Broadcast Recipient List** now pops up automatically as recipients are added, eliminating confusion about where the list is located and what agents are currently selected.
5. **Global Message Expiration Setting** allows the system to conserve disk space and increase performance of the agent desktop by reducing the amount of cached messages being retrieved.

2Ring Orchestrator / Workflow

1. A powerful workflow engine that provides for automation of both simple and advanced tasks. The engine reacts to various events originating from a variety of sources. Below are examples of some of the most often implemented automations:
   a. Place agent in Not Ready status for Break or Lunch once the active call ends to help the agent maintain Realtime Adherence.
   b. Well-targeted **Audible & Message Alerts** (send to Ticker Gadget and/or provided in a form of a Toast Alert) as a result of
      i. Agent receiving a Chat from a fellow Agent or from a Supervisor
      ii. Agent not picking a wrap-up code despite talking for x minutes already
      iii. Agent receiving or initiating a Call
          1. Caller Identification & Overview (DB lookup)
          2. Long Wait Alert – Caller waited longer than X minutes in a queue
      iv. Agent changing state or staying in a state for certain amount of time
          1. Agent misses a call and goes Not Ready RONA
          2. Agent switches state to Not Ready Lunch → Orchestrator looks up how many calls are in queue and notifies the agent to wait until there are less calls (requires 2Ring Dashboards & Wallboards)
      v. KPI / Metric in 2Ring Dashboards & Wallboards reaches defined values so agents in certain state are notified. E.g. # of calls in queue and longest wait time exceed defined thresholds or talk time is exceeding the allotted time.
   c. **Escalation Alerts** – notify supervisors if certain events occur
      i. Agent stays in a particular state for certain amount of time
      ii. Agent misses a call
      iii. Agent talks for longer than a defined threshold
      iv. Certain KPIs/Metrics in 2Ring Dashboards & Wallboards enter bad zone
      v. Agent is on a chat session (UCCX) with a customer who uses profanity

d. Automatic change of Agent's state - Force agent to ready, Do not allow to go NotReady, or Auto-logout all agents at 5PM (but not while on a call)
e. Screen-Pops and taking Agents to appropriate screens
    i. If something is true (Variable), the call can be auto-transferred
f. Perform a default action before a call ends, e.g. set the wrap-up code
g. Automate Conference Calls by auto-entering DTMF tones (call IVR, enter contract number for the agent, ...)

2Ring Toolbar Gadget
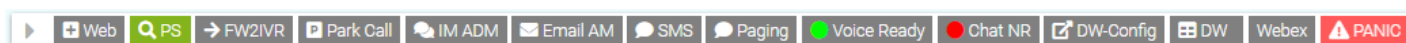
1. Tasks can be automated with a button click (multiple actions delivered via a single button). Buttons are State and Call Variable aware and can perform different actions based on agent's current state and/or variable of the current call. Any of these buttons can be also added to the Dialog Gadget – and thus be only available when interaction is in progress. Here are some examples of commonly used buttons:
   a. **Bookmark** – opens a certain site in 2Ring Browser Gadget or Outside of Finesse (new browser tab)
    b. **Panic Button** – sends a message and toast requesting supervisor assistance. This can be all predefined and performed as a single click action, or the Agent can be taken to a simple form to pick a list of supervisors from his/her team to send a Panic message to. The message can be optionally modified as well. If no supervisors are selected, then the message will be sent to all supervisors listed.
    c. **Agent End of Shift Button** – places agent to not ready, then logout
    d. **Ready Button** – makes the agent Ready with a single click versus 3 in Finesse
    e. **Customer Advocate Button** – based on the Call Variable a call can be transferred with a single step transfer to the customer advocate responsible for the caller.
    f. **Translation Service Button** – calls a translation service, enters DTMF tones, and initiates a conference.
    g. **Ad-Hoc Form / WebText Texting / Paging** - new dialog windows can be displayed prompting the user for input and processing it from 2Ring Orchestrator (Workflow). Such forms can be used by agents to submit data that is not tied to any customer interaction (submit forms that are not tied to any customers' interactions), send a request to a specific supervisor for help, or send a text message (via WebText integration) or a page (via NotePage integration).
    h. **API Integration** – buttons can be used to connect to other applications that use API's. Use a form to pass data to Salesforce, integrate to gate / door software to open doors with a click of a button.
    i. **Button Sets** – It is now possible to create dropdown sets
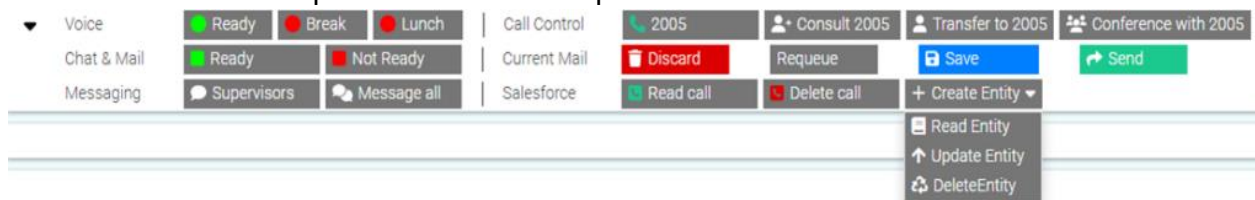
2Ring Call (Cherry) Picking Gadget (UCCX only)
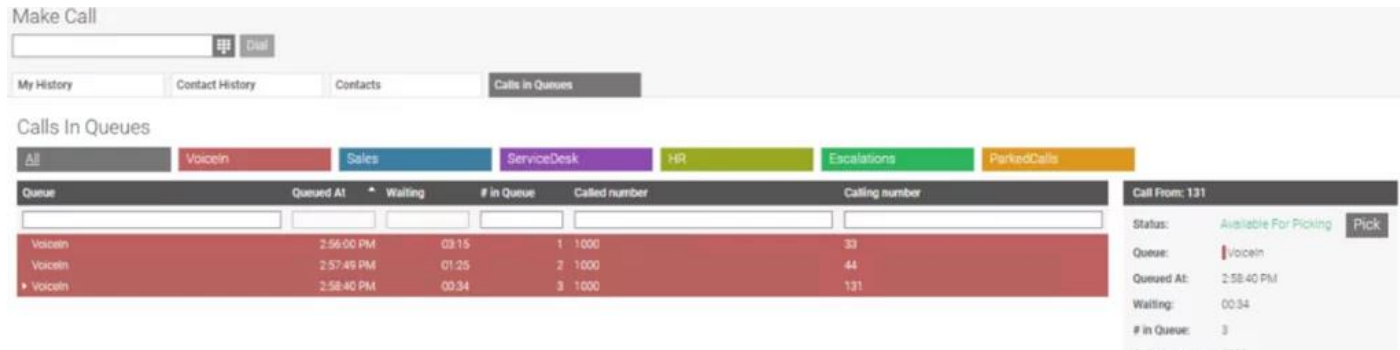
1. Allows agents to select the next call from queue. Agents have the ability to park calls to a parking queue to be handled later or to be taken by another agent who has the necessary expertise to finish the call off.
2. Replace legacy Attendant Console applications using Call Picking and Speed Dials to answer, hold, and transfer calls quickly.
3. Full HA Support for Cherry Picking to the maximum extent permitted by the UCCX platform – please check documentation for details on API limitations
4. Full colored tabs and rows in the list of queued and parked calls

2Ring Browser Gadget

1. Embed multiple websites to Cisco Finesse with ease. Admins can add any site or application that can run inside of an iFrame including *2Ring Cherry/Call Picking* or a layout from 2Ring Dashboards & Wallboards. Agents will be able to use these multiple browser tabs without losing sight of the active interaction.
2. This gadget also enables to load multiple websites for agents right at their login to Cisco Finesse, or websites can be opened using buttons in *2Ring Toolbar Gadget*.

2Ring Dialog Gadget

1. Agents can handle **all interactions (inbound and outbound phone calls, and Cisco UCCX – CCP chat & email) in one Gadget.** UCCX customers please see more on chat/email channels in this section *2Ring Chat & Email (UCCX Only – Requires CCP – Customer Collaboration Platform)*.
   Information available about the call can be enhanced with a **Call Trace/Details section to show** the Number Called, Options Selected in the IVR, Queue, Queue Wait Time, Call Variables, Holds, Transfers, Wrap-Up, … This info can be provided to the agent in advanced caller identification (more in *2Ring Toast Alerts / Notifications*) or can impact what sentence the agent is told to start the call with (e.g. a reminder to apologize for the long wait), …

2. **Customer Journey**
   a. See previous interactions (Voice, Chat, E-Mail*) *chat and e-mail require CCP

     b. Sort / Filter / Search on any Column Heading

     c. Link to previous CRM records

     d. View Call Notes, Wrap-Up Codes, and Agents who handled the call

     e. Details about the call such-as, Participants, Call Variables, Notes, Call Trace (hold, queued, transferred, etc.), Recordings associated with the interaction, and any Form that were used by the Agent.

3. **2Ring enhances Cisco wrap-up codes in many ways**

     a. Codes can be grouped with a heading (e.g. USA/California),

     b. Selected codes can be autosaved (no need for agents to click "Apply" to confirm their selection), and

     c. Selection can be enforced – agents cannot go Ready until selecting at least one wrap-up code

4. It is possible to enable the **Call Variable Editor** to allow agents to **add short open text notes (possibly with data entry validation) and/or additional call classification codes (tags) via a searchable drop-down menu.** All or some of the entered data can be stored in Cisco's databases and thus used in standard CUIC reports (therefore serving as additional wrap-up codes). This section also allows agents to copy info from a CallVariable using a button or copy all Call Details to Clipboard. Lastly, admins can use 2Ring CallVariables to expand the amount of information that agents can see and edit about each call (and/or about UCCX chat/email).

     a. Cisco Finesse 12.5 introduces a CallVar Editor. It is only available for voice, and it is limited to the use of Cisco CallVariables (2Ring adds unlimited number of 2Ring CallVariables to every interaction). Cisco only introduces open text fields for notes and thus eliminating support for dropdowns, and data entry validation.

5. Information and actions available per every interaction listed in the Dialog Gadget can be significantly enhanced with many apps, such as:

     a. **Agent guiding scripts** ensures that agents capture pertinent details / notes on a call. These scripts can also be used to provide agents with easy access to disclaimers that need to be read in certain situations.

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The above and below covered Scripts & Forms can execute a workflow based on selection made or data entered – transfer call to a queue, send an email with detailed info to open a ticket, etc.

b. **Multi-level wrap-up forms** can be used for "CRM Like" functionality:

c. **Searchable speed dial buttons** – each button can also show presence state from Cisco Unified Presence Server (CUPS). The list is auto-built from numbers present in selected address-books. The default action (e.g. blind transfer) is configured by admin who can also

enable additional actions such as dial or consult for buttons. Buttons can also be used to create ad-hoc conference calls by drag-dropping contacts to the Conference List on the right.
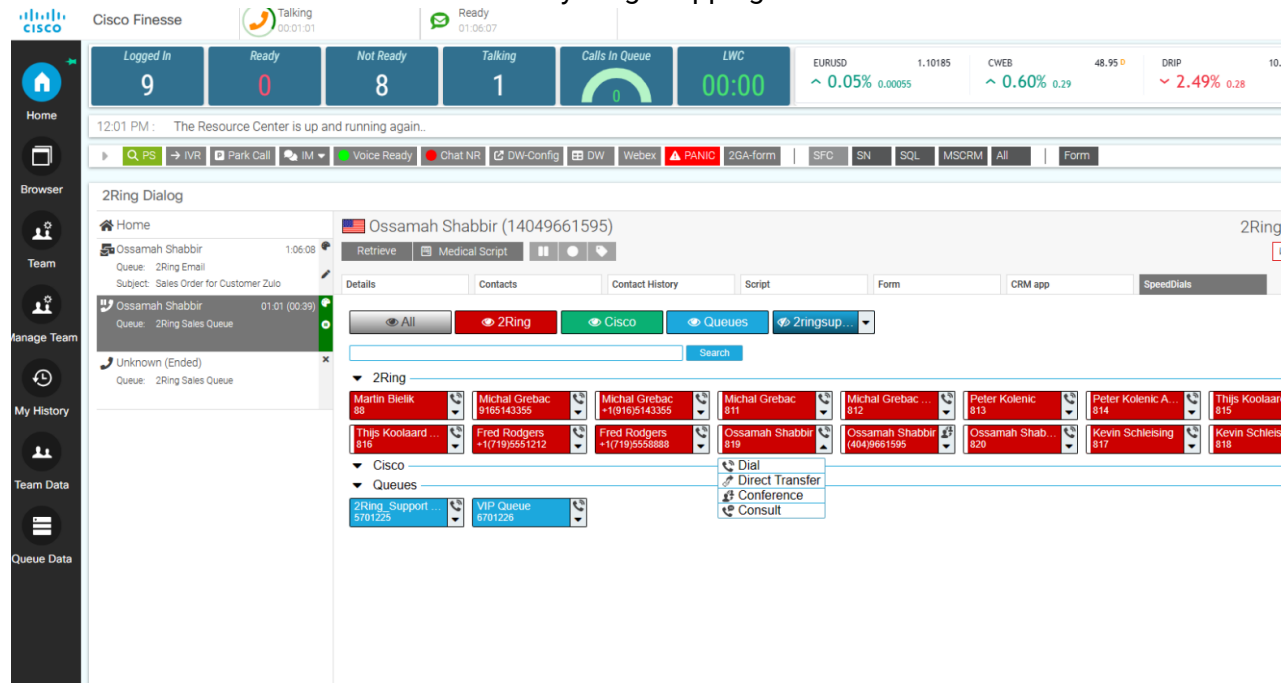
6. **Screen-Pops** - identifying callers and searching contacts from Salesforce (SFDC), MS Dynamics, ServiceNow (SNOW), SugarCRM, or from any system that comes with an appropriate API and or direct SQL database read access. 2Ring's support for Custom Connectors & Custom Apps makes it easy to deliver ad-hoc integrations of market niche apps and homegrown applications. It is now possible to integrate Cisco Finesse with applications that 2Ring doesn't offer an out-of-the-box connector for (learn more on what our connectors can do in this section ***2Ring CRM Connectors (Premium Bundle)***).

    a. A Generic SQL Connector can be used if your contact store uses a relational database and drivers are available:
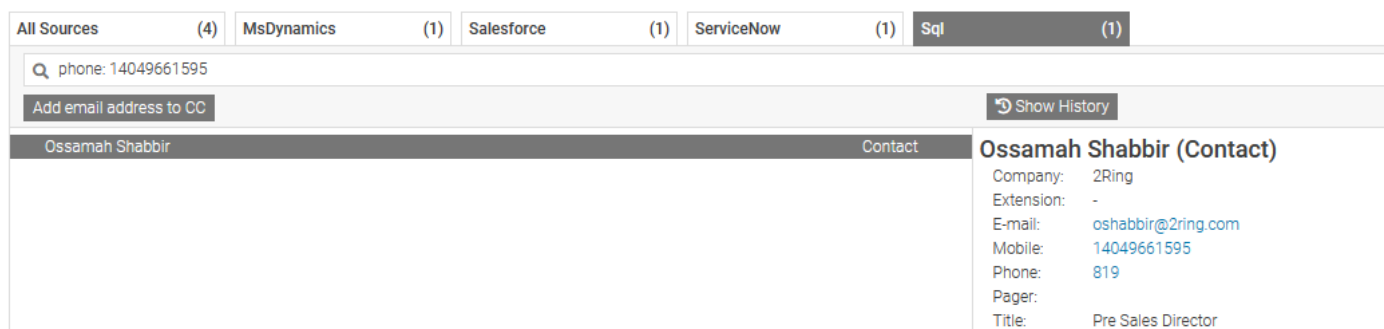
    b. Custom Connectors SDK adds the possibility to access homegrown and market-niche ERP/CRM/ITSM systems for customer lookup via their native APIs.

    c. Custom Apps SDK can be part of *2Ring Dialog Gadget* and display data from the source CRM/Ticketing application. A working sample app for Salesforce (see screenshot below) is available and it can be used as is, or it can be further customized by 2Ring, reseller's or customer's dev teams.

7. **Outbound dialing** - For outbound dialing, agents can do click2dial from any ERP/CRM/Service Desk (ITSM) that 2Ring has integrated into Cisco Finesse, can be allowed to place outbound calls from "Ready" (without the need to manually switch to NotReady and then dial out), and lastly, whatever an agent enters/pastes into the "dial field" can be normalized (remove periods, dashes, prefix numbers required for outbound call to go through).

8. **Multiple Notes per Dialog** - this allows each agent to leave a note about their conversation with the customer. These notes are timestamped with date and time that the participation for the agent ended with the customer allowing for historical tracking of the notes.

9. **Add Notes to Ended Interactions** - this allows agents and supervisors to add notes to an interaction even after it has ended and without having a customer on the interaction

anymore – this can be done from 2Ring Dialog Gadget or from 2Ring Team Gadget.

2Ring CRM Connectors

2Ring Dialog Gadget provides a comprehensive set of features that enable data stored in 3rd party contact data stores such as ITSM, ERP, or CRM systems (**Salesforce, ServiceNow, MS CRM – Dynamics**) for both read and write operations as well as powerful automations:

1. **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. In case multiple connectors are configured, the lookup may be performed against all remote contact sources and displayed within the Dialog Gadget like this:

If a single match is found or once a customer is identified, workflow automation can be used to open a specific customer screen.

   a. In Cisco Finesse using a simplified input form

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b. In the remote system (the below is a Salesforce screen):
    i. Salesforce Softphone displays Phone Number, Queue, ALLOWS the Agent to select a Wrap-up Code, and has transfer buttons allowing the agent to transfer the call to another queue.
    ii. The 2Ring Browser Extension allows the Agent to change States from within the CRM application.
    iii. A Pop-up or Toast notification is presented to the Agent when a new call is offered; by clicking the Toast the Agent can answer the call.

It is possible to live and breathe in the ITSM/CRM/ERP systems if the agent logs into Cisco Finesse first and keeps Finesse running in one of the browser tabs. Then, agents can remain in the CRM user interface, and let 2Ring provide alerts, incoming and outbound call automations, CRM click2dial, and last but not least, view and change call center states via the **2Ring *Browser Extension***.

2. **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. The Dialog Gadget enables these child records to be displayed alongside a main record. An agent can click directly on a child record to open it or to perform another related action.

3. **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.
4. **Create/Update Records** - automatically create or update records in the remote system. A typical scenario is to create a new call record when a call comes in, opens the record for the agent to modify, write notes, and finally update it with the final duration once the call ends.
5. **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 query and act upon the returned data. This usually happens automatically in the background without additional agent interaction.
6. **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 re-identification is not necessary.
7. **Click to call from Finesse** - agents can find a contact using the Contact section and dial directly from within the Finesse environment.
8. **Click to call from native screen** - some connectors enable the agent to dial directly from a native customer screen in the remote system.
9. **Custom Actions** - each connector and each record type can define its own set of actions that an agent can perform.

10. Calling context section in softphone can now be collapsed/expanded instead of showing data on hover'
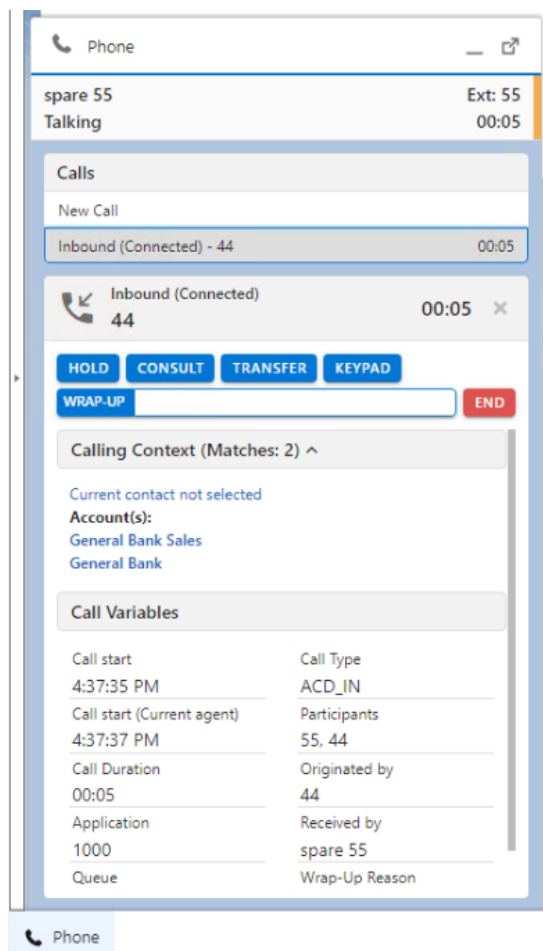
Not all connectors provide all features. To find out if a specific connector supports a requested feature, refer to this table (if in doubt, please review Solution's documentation or contact):

	MS Dynamics	Salesforce	ServiceNow	Sugar CRM	Generic SQL
Customer Lookup	X	X	X	X	X
Multiple Lookup Criteria	unlimited	unlimited	unlimited	unlimited	unlimited
Multiple Record Types	account, person	account, person, contact, lead	unlimited	Unlimited	unlimited
Child Record Preview	X	X	X	X	X
Screen Pop (native)	X	X	X	X	n/a
Create/Update Records	X	X	X	X	n/a
Background Queries	X	X	X	n/a	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	n/a
Custom Actions	X	X	X	X	X
Remote Control	X	X	X	X	X

2Ring Chat & Email (UCCX Only – Requires CCP / Customer Collaboration Platform)

1. Agents use a single gadget (2Ring Dialog) for handling voice, chat, and email interactions.
   a. Cisco Finesse requires UCCX agents to use two separate gadgets – one for handling voice interactions (phone calls), and another one for handling chat/email.

2. The list of current interactions (on the left side of the Dialog Gadget) clearly shows which conversations contain unread messages (orange bubble), provides a short preview of the last message received, has a typing indicator that can also indicate if the conversation is being handled by a bot (e.g. showing that an Amazon Alexa bot is involved). Agents can color label interactions e.g. (red, orange, blue) or color labels can dynamically change based on the logic configured in 2Ring Orchestrator (e.g. red for emails that have not been finished within 2 hours, orange for chat interactions without agent response for more than 1 minute etc.).
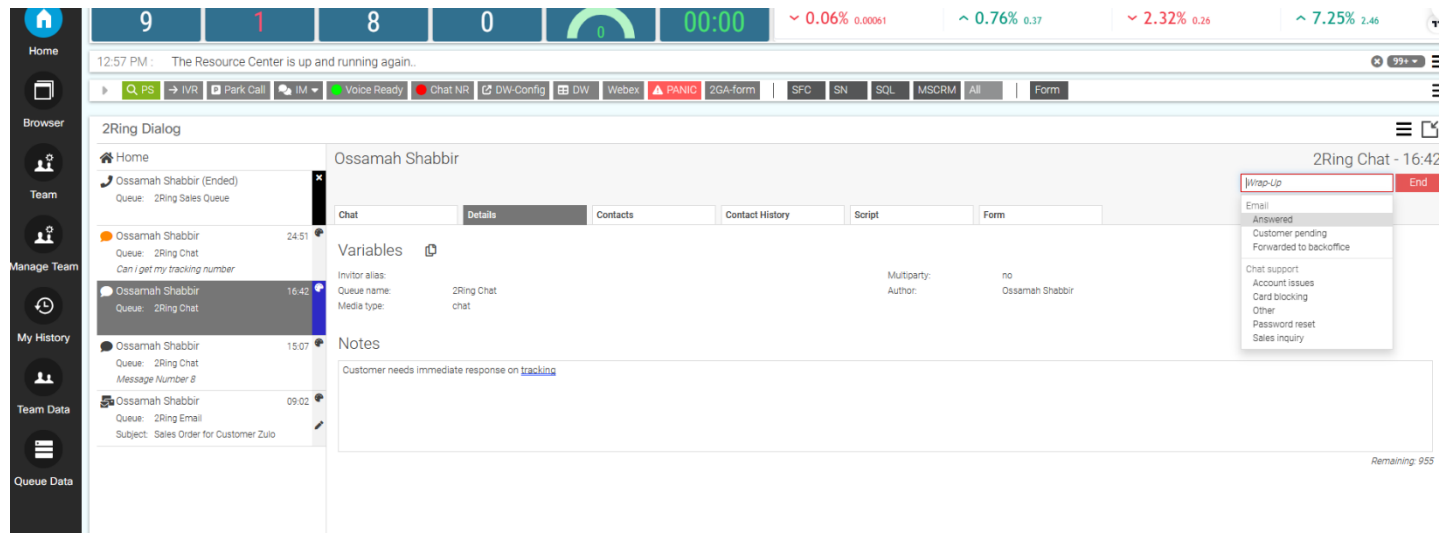
As shown above, Customer Identification is also available for Chat and Email. This comes with screen-pops, view of the customer's interaction history records, and automatic creation of an interaction history record including storing full or partial chat transcripts.

3. Wrap-up code selection is more ergonomic for chat/email interactions just like 2Ring provides for calls: codes can be grouped with a heading (e.g. USA/California), selected codes can be autosaved (no need for agent to click "Apply" to confirm selection), and selection can be enforced – agents cannot go Ready until a wrap-up code has been selected or until wrap-up period time is up.

4. Just like with voice, it is possible to enable the **Call Variable Editor** to allow agents to **add short open text notes (possibly with data entry validation) and/or additional call classification codes (tags) via a searchable drop-down menu.** This section also allows agents to copy info from a CallVariable to a Clipboard. Admins can use 2Ring CallVariables to expand the amount of information that agents can see and edit about each interaction.

5. Agents can create personal response templates (Cisco's gadget only offers global/server-based responses and shows the text of each responses on hover only), search these templates, and even create a single response (for chat or email) from multiple templates.
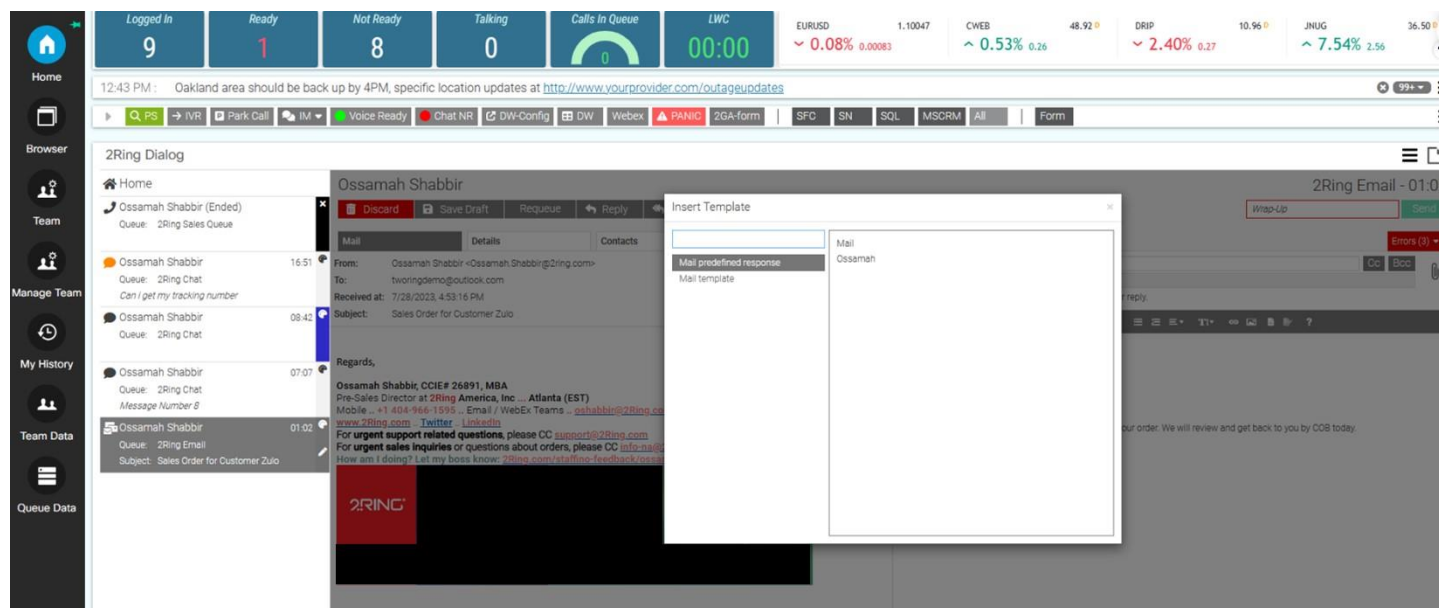
6. Chat Interaction Detail (chat specific benefits)

   a. Conversation can start with ALL the info that a public user enters on web-site – including long opening messages

   b. Intelligent scrolling – conversation detail shows agent the last message sent by him/her and all the new messages from customer. The agent does not need to scroll to get oriented where he/she left off + at the top or bottom of the message detail, the agent sees how many more unread messages were sent by the customer (orange indicator at the top/bottom):
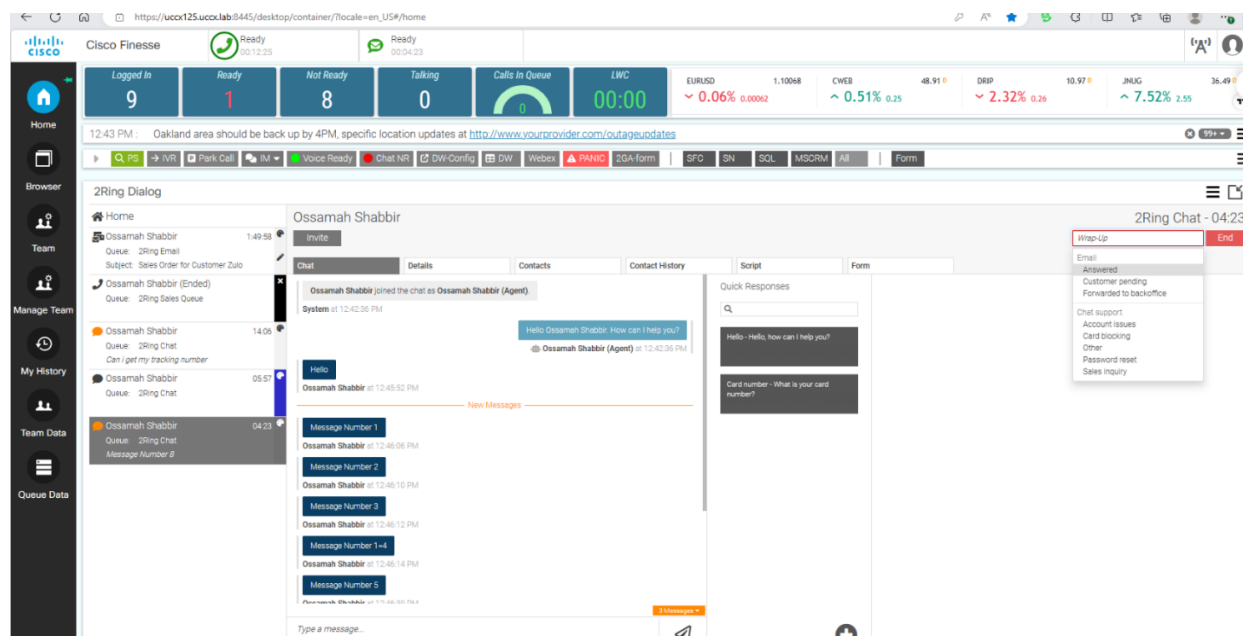
   c. Gives the agent an option to transfer an existing chat to a queue (escalate to an expert or send to a different department).
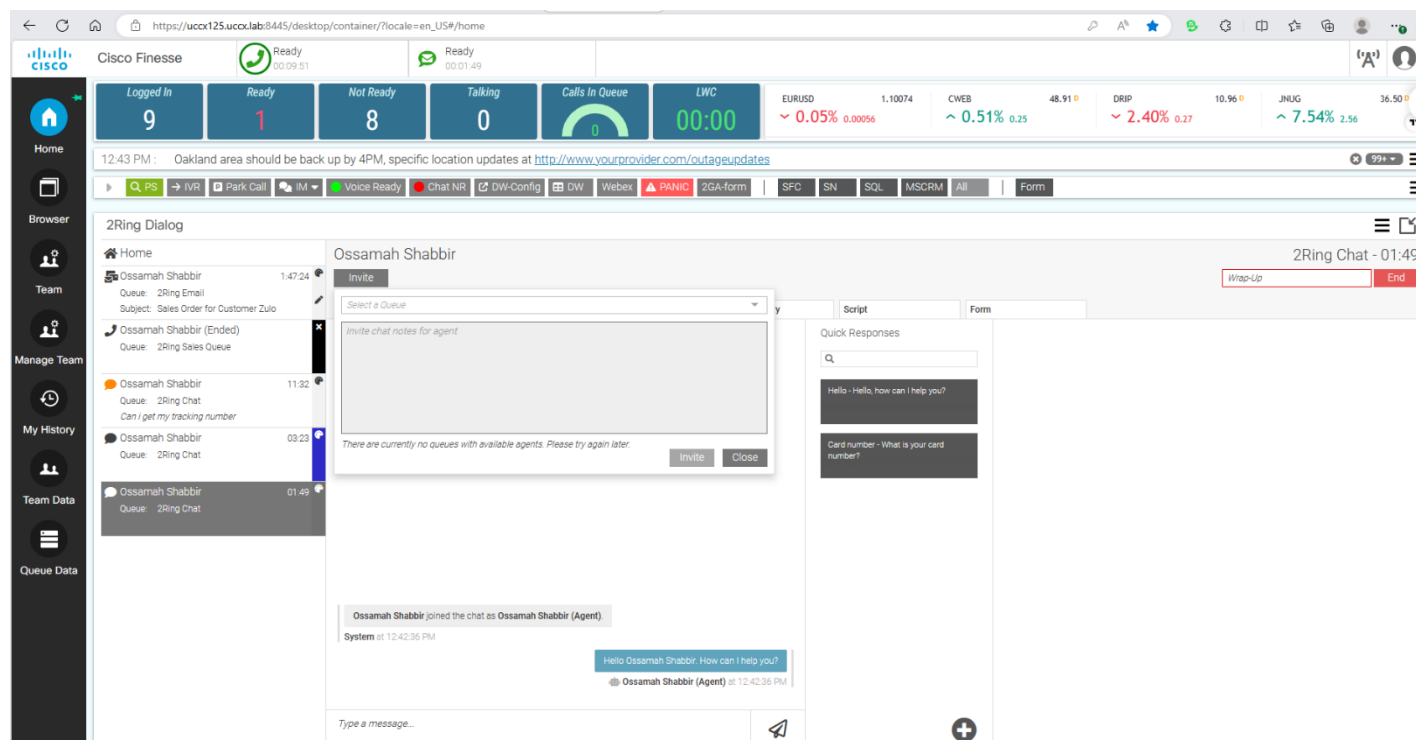
d. Not only brand-new interactions, but also new messages in ongoing conversations can trigger toast alerts.

e. Enables private messages among agents handling a chat conversation while the customer is still part of the conversation

f. 2Ring Orchestrator can be set to notify supervisors about "undesired words", block messages with inappropriate language, add automated messages to chat conversations, invoke workflow actions based on use of certain keywords (e.g. send a text message to the public user – this example would require integration with a texting service such as WebText)

7. Export UCCX Chat Transcripts from Customer Journey to PDF – the ability to review UCCX chat transcripts for interactions in 2Ring Customer Journey has now gotten even better. With this release comes the ability to export chat transcripts from the interactions in Customer Journey to a PDF file.

8. Email Interaction Detail (email specific benefits)

a. Agents can edit CC and BCC fields manually, or emails addresses can be automatically added based on rules configured in 2Ring Orchestrator.

b. Emails received or sent (including attachments) can be automatically stored to a selected data-storage.

c. RE or FW label can be set by the agent for each message.

d. Agents can add attachments to their message with ease.
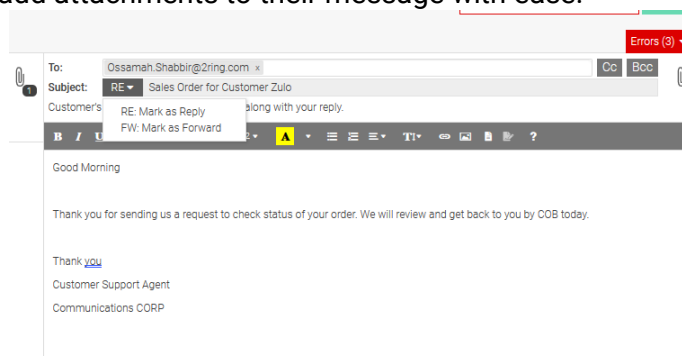
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- Set data retention times on CCX Chat/Mail data (attachments, chat message bodies) – a set of data retention settings have been added to 2Ring Gadgets to help admins stay compliant and conserve disk space.

2Ring Power-App

1. An executable that can be configured to automatically start as an agent logs into their workstation (Windows 7 and later) and displays a specific layout from 2Ring Dashboards & Wallboards that can include a personalized grid (e.g. the agent state grid only shows one row, filtered to a single agent).
2. Remembers the window size and its last position on agent's workstation.
3. Runs in always on top mode, borderless mode, and the application's title and default window size are configurable.
4. Delivers *2Ring Toast Alerts / Notifications* if Cisco Finesse cannot run in Chrome or Firefox.
5. Integrate with kuando Busy Lights

Questions & Comments & Suggestions:

Regarding Sales / Products: *www.2Ring.com/Contacts*

Regarding This Added Value Document: *Michal.Grebac@2Ring.com*