upland InGenius

Release Notes

Version 6.4

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Introduction

These release notes provide information on the latest features and changes to existing functionality for InGenius® Connector Enterprise. This document details important new features, enhancements and changes to the latest software version of InGenius Connector Enterprise 6.4.

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

The following features have been added to InGenius Connector Enterprise 6.4:

Features for Salesforce

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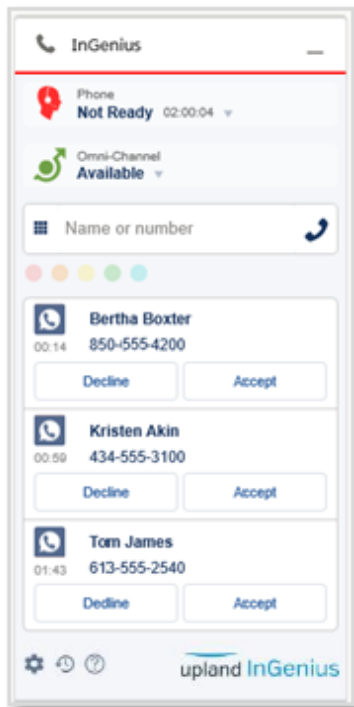
InGenius enables seamless integration with Einstein Bot allowing agents to convert chats to a phone agent with InGenius. A customer using Einstein Bot can chat with an agent and if more help is required, the customer has the option to "have someone call me."

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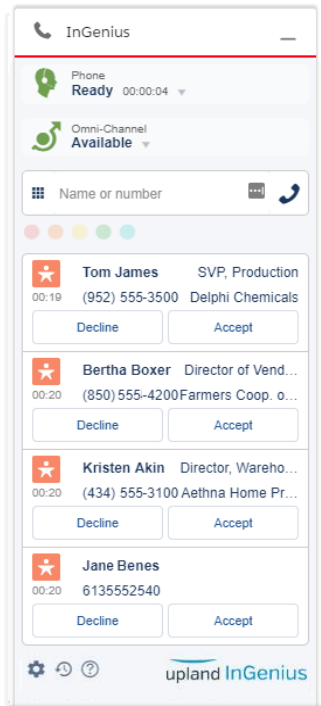
Salesforce customers can use preview dialer to allow their outbound sales team to receive insight about a prospect before placing a call.

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.
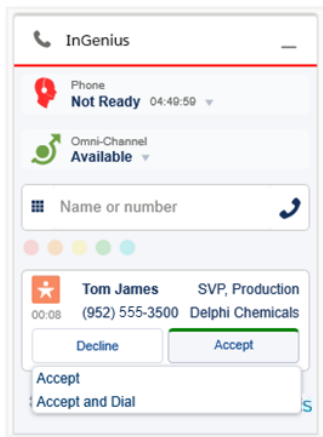
3. Pop Out Support (Lightning)

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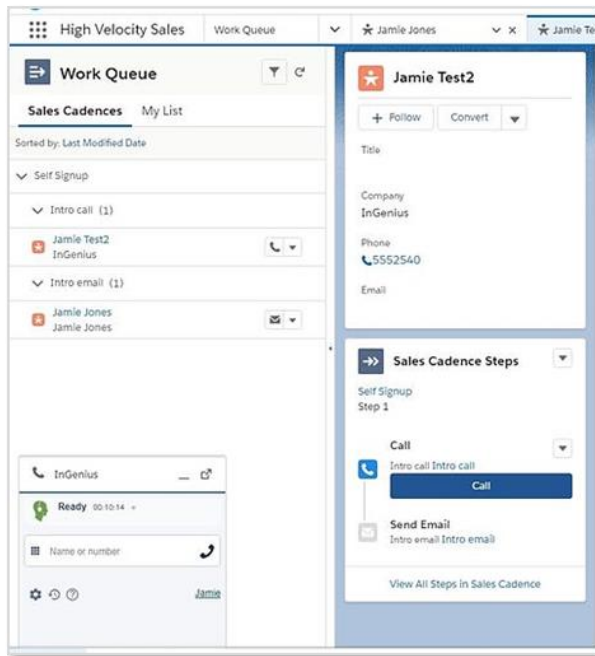
Salesforce HVS enables agents to efficiently contact and convert leads, as well as create new opportunities all within a single Lightning interface.

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.

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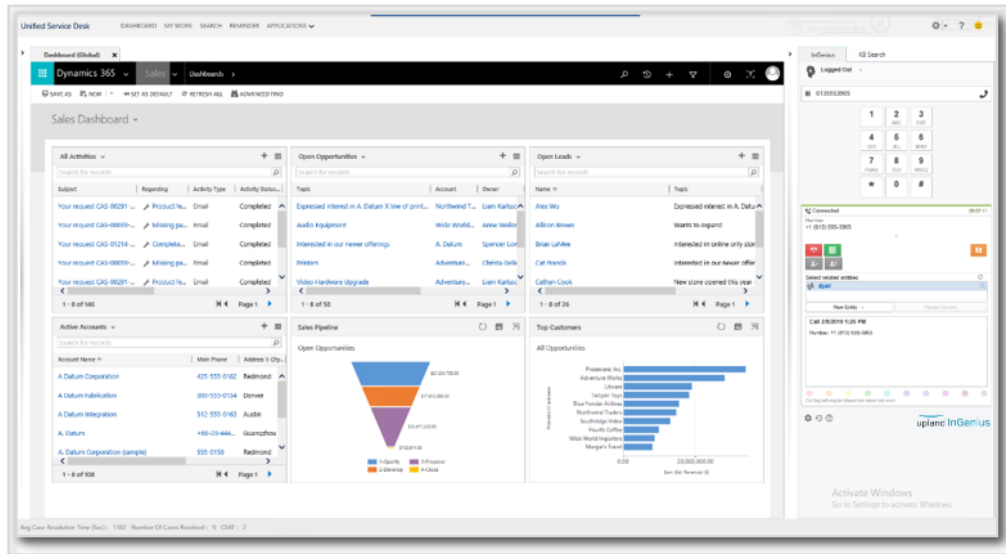
InGenius computer telephony integration with Unified Service Desk for Dynamics 365 provides an infrastructure for call centers to leverage their existing telephony system and infrastructure. Agents can get a complete view of the customer data stored in Dynamics 365 within the InGenius UI.

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 ServiceNow

7. InGenius UI Redesign
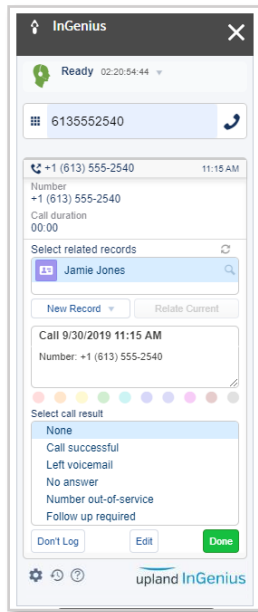
The InGenius UI has been updated for ServiceNow users.

The revamped InGenius UI provides a more intuitive experience for users. Help and other functions such as Cancel and Save are located on the bottom row of the UI panel.

• Agent Panel – streamlined design allows user to quickly to access features. The compact design uses less real estate on the screen.

• Menus – includes new button functions to allow users to increase productivity and shorten workflow processes.

8. More Intuitive Extension Dialing Through Click-to-Dial
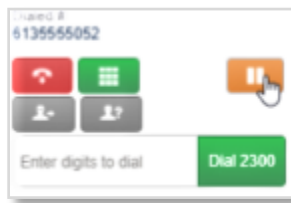
When a call and extension number is entered, the extension digits are displayed separately within the InGenius dual field. Previously, the extension digits displayed as part of the dialed numbers.

9. Relate Current Capability
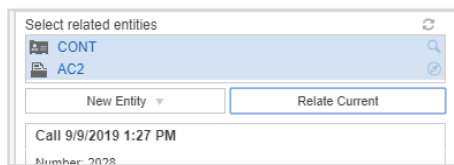
Relate Current is a new feature which allows users to quickly and easily associate any object to a call log, ensuring that call logs are complete and accurate.

Users can select entities from a list of search results or navigated items from within ServiceNow. Multiple records can be associated to one call log and remain visible to the user in the related records list.

An administrator configures the supported objects within the Runtime Admin tool. Additional custom objects can be added and used in the Relate Current function.

10. RTA Option to Enable Screen Pop for Internal Calls
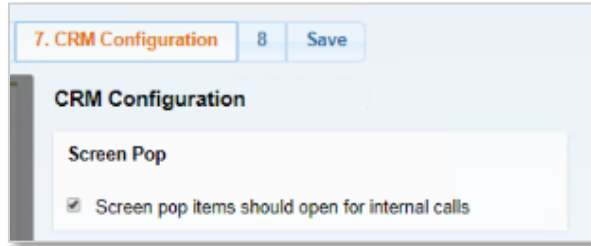
In the InGenius Runtime Administration, a checkbox has been added to toggle whether screen pop items open for internal calls.

11. Agent Workspace Compatibility
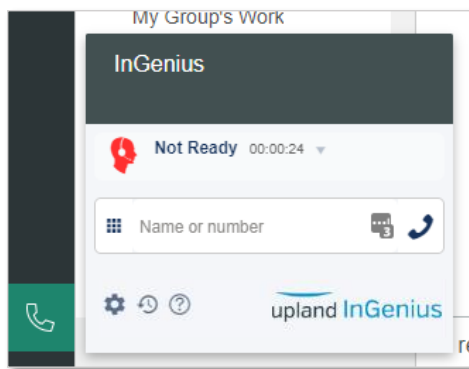
InGenius helps maximize service desk agent efficiency through support of CSM Agent Workspace.

Inbound calls automatically pop an Interaction in Agent Workspace and associate contacts, accounts and other objects with an Interaction number.

Agents can quickly and accurately call customers back with click-to-dial functionality.

Features for Salesforce, Microsoft and ServiceNow

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

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.

13. Improved User Logs

InGenius has enhanced user logging to offer increased scalability and more efficient diagnostics. User specific client-side logs provide additional capacity and logging detail compared to server-side logs. Users can create and download logs within the InGenius application via the Create Logs button located in the Support tab.