



Product Release Training

CINNOX Version **V3.7.0**

Tentative Release Date: 6th September 2022



A new way to **humanise** your connections



CONTENTS

01

**V3.7.0
Release Summary**

02

**v3.7.0
External Contact Custom
Field**

03

**V3.7.0
Workflow Automation
(Internal)**

04

**v3.7.0
Enquiry Overview
& Report Enhancement**

05

**v3.7.0
Email Channel & Other
Improvements**

06

**V3.7.0
Open API –
Management P2
(Destination & Tag)**

07

**v3.7.0
Zapier Integration**

08

Demo

09

Q & A

01

V3.7.0 Release Summary

V3.7.0 Release Summary

- **New Features:**

- External Contact Custom Field ([first session](#))
- Automation Workflow (internal) ([first session](#))
- Zapier Integration ([second session](#))
- Open API – Management P2 (Destination & Tag) ([second session](#))

- **Improvements:**

- Enquiry Overview & Report Enhancement ([first session](#))
- Email Channel & Other Improvements ([second session](#))

02

External Contact Custom Field

External Contact Custom Field

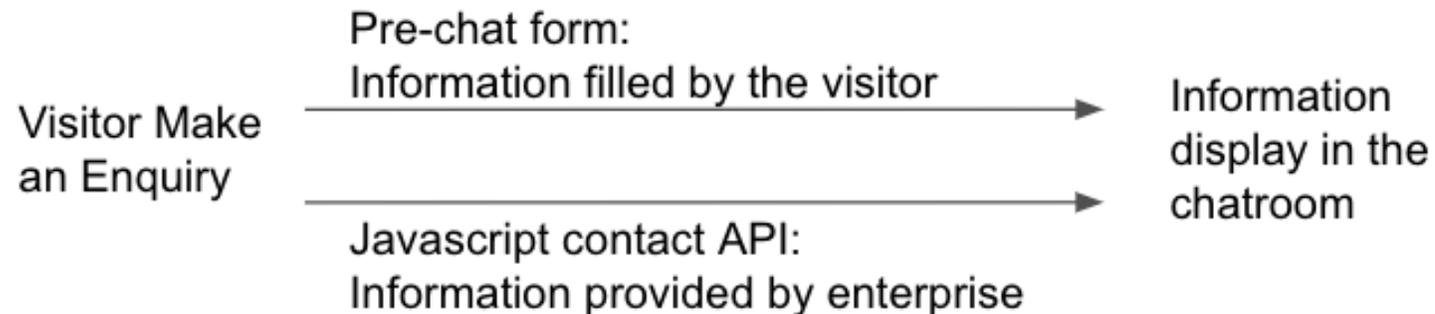
Custom fields for enterprise to manage their own business contact information.

Currently CINNOX provides enterprise basic contact fields to record their visitor information. Ex: first name, last name...etc.

Going forward, enterprise can create, edit and delete new contact fields. Ex: membership ID.

Enterprise can collect the contact details via Visitor Forms or JavaScript Metadata.

This information will be displayed to the agent and can be saved in the visitor's contact profile.



External Contact Custom Field

Scope:

Function	CINNOX Page	Roles	Platform
1. View/Create/Edit/Delete Custom Field	1. External Contacts > Contact Details > Manage Custom Field 2. Admin > Visitor Forms > Manage Custom Field	Admin	Dashboard
2. Add and Collect Custom Field Data from Visitor Forms	Admin > Visitor Forms	Admin	Dashboard
3. Add and Collect Custom Field Data from JS	HTML	NA	Dashboard
4. Bulk Import Custom Field Data	External Contacts	Admin	Dashboard
5. Permission	Admin > Permission	Admin	Dashboard
6. Audit Log	Admin > Audit Log	Admin	Dashboard

External Contact Custom Field

1-1 Create Custom Field – Entrance 1

The screenshot displays the CINNOX CRM interface for a contact named "TestFlight". The top navigation bar includes "Contact Management" and "External Contacts" with a sub-count of "Created Contacts 324 / 10000". A "Get Started 42%" button and various utility icons are also present. The contact's profile is shown with tabs for "Profile", "Activity", "Sharing", and "Change Log". A red box highlights the "External Contacts" menu item in the left sidebar. Another red box highlights the "Manage Custom Field" button in the top right of the contact details view, with a red circle containing the number "3" next to it. A third red box highlights the "Merge Contact" button in the bottom right of the contact details view. The contact information includes a profile picture, name "TestFlight", and title "Primary Lead". Below this, there are sections for "Phone number (0)", "Email address (1)" (with the email "no_reply@email.apple.com" marked as "Work"), and "Other Information" which includes fields for Company, Team, Language, Address, Job title, Birth Date (02/08/2022), and Group.

External Contact Custom Field

1-2 Create Custom Field – Entrance 2

The screenshot displays the CINNOX 'Visitor Forms' configuration interface. On the left sidebar, the 'Visitor Forms' menu item is highlighted with a red box and labeled '1'. In the top right corner, the 'Manage Custom Field' button is highlighted with a red box and labeled '2'. The main configuration area includes sections for 'Greetings', 'Terms' (with a URL input field), and a list of custom fields. The custom fields list contains 'First name' and 'Last name', each with a 'Required' checkbox. A preview pane on the right shows the form layout with input fields for 'First name', 'Last name', 'Email address', 'Phone number', and 'Company name'. At the bottom right, there are 'Cancel' and 'Save' buttons.

External Contact Custom Field

1-3 View Custom Fields

CINNOX

Get Started 42%

Home < Contact Field Management

Default Custom

Search field name

All

Created Date Updated Date

Field Name	Type	Created Date	Created By	Updated Date	Updated By	Actions
Natalie multipppa	cf_na_multi	22/08/2022 16:03:40	Natalie	22/08/2022 16:03:40	Natalie	...
verna_text	cf_verna_text	15/08/2022 11:22:02	admin ZZZ	15/08/2022 11:22:02	admin ZZZ	...
Favorite Season	cf_favorite_season	09/08/2022 11:05:59	Sherry Wei	09/08/2022 11:05:59	Sherry Wei	...
natalie url	cf_na_url	09/08/2022 10:18:18	Natalie	09/08/2022 10:18:18	Natalie	...
Date Custom...	cf_ritadate	09/08/2022 10:12:06	Rita Li	09/08/2022 10:12:06	Rita Li	...
sherry checkbox	sherry_checkbox	05/08/2022 17:22:48	Sherry Wei	05/08/2022 17:22:48	Sherry Wei	...
Family status	family_status	05/08/2022 16:24:24	Dominic Li	05/08/2022 16:24:55	Dominic Li	...
Delete test	mmosue	05/08/2022 11:18:09	招名@##\$專「招名威教授 毒理威廉」發文表示，雖然與病毒共存是共識，可是共存也是有輕重緩急的，...	05/08/2022 16:21:34	Dominic Li	...
test	test	05/08/2022 09:36:59	May Isais	05/08/2022 09:36:59	May Isais	...
Single Select	single	04/08/2022 11:52:06	Jim Chen	04/08/2022 13:25:01	Jim Chen	...

Text

Dropdown List (Single Select...)

Dropdown List (Multiple Sele...)

URL

Date

Time

Checkbox

Create New Field

Records per page 10 1-10 of 20

External Contact Custom Field

1-4 Create Custom Fields

CINNOX

Contact Field Management

Default Custom

Search field name All

Field Name	Field ID	
Natalie multipippa	cf_na_multi	22/08/2022
verna_text	cf_verna_text	15/08/2022
Favorite Season	cf_favorite_season	09/08/2022
natalie url	cf_na_url	09/08/2022
Date Custom...	cf_ritadate	09/08/2022
sherry checkbox	sherry_checkbox	05/08/2022
Family status	family_status	05/08/2022
Delete test	mמוש	05/08/2022
test	test	04/08/2022
Single Select	single	02/08/2022

Create New Field

Type* **2**

Text

Dropdown List (Single Selection)

Dropdown List (Multiple Selection)

URL

Date

Time

List Value* **3**

S X M X L X Enter a value

Create New Field

Field Name* 0/50

Field ID* 0/100

Description 0/100

Type* Text

1 Create New Field

Updated By

Natalie ...

admin ZZZ ...

Sherry Wei ...

Natalie ...

Rita Li ...

Sherry Wei ...

Dominic Li ...

Dominic Li ...

May Isais ...

Jim Chen ...

3 Create

Cancel

1-10 of 20

External Contact Custom Field

1-6 Delete Custom Field

	Updated Date	Updated By	
الي ناتالي  Натали	22/08/2022 16:03:40	Natalie                            	

External Contact Custom Field

2. Add and Collect Custom Field Data from Visitor Forms

The screenshot illustrates the process of adding a custom field to a visitor form in the CINNOX system. The interface is divided into several sections:

- Sidebar:** A dark blue sidebar on the left contains navigation options. The 'Visitor Forms' option is highlighted with a red box and a red circle labeled '1'.
- Configuration Panel:** The main area shows the 'Add New Field' configuration for a 'Pre-Chat Form'. It includes a search bar, checkboxes for 'Department', 'Auto-save', and 'Delete test', and a 'Greetings' section where 'demotest' is selected with a checked box and a red circle labeled '3'.
- Form Preview:** A preview of the 'Tell us about yourself' form is shown on the right. It contains input fields for 'First name', 'Last name', 'Email address', 'Phone number', and 'Company name'. A dropdown menu for the 'demotest' field is highlighted with a red box and a red circle labeled '4'. An orange arrow points from the 'demotest' selection in the configuration panel to this dropdown.
- Buttons:** An 'Add' button is highlighted with a red box and a red circle labeled '4' at the bottom of the configuration panel.

External Contact Custom Field

3. Add and Collect Custom Field Data from JS Forms

Contact API

```
/**
 * Return the available custom field key under current service
 * @returns {Array.<String>} Display available custom form keys
 */
cinnox.contact.availableFormKeys
```

Get list of available contact custom fields

```
/**
 * Display collected form
 * @returns {object} Current collected form
 */
cinnox.contact.collectedForm
```

Get list of current collecting contact custom fields

```
/**
 * Directly update the collected form, will filter with available key when making inc
 * @param {object} accept An object to update current from
 */
```

```
cinnox.contact.setCollectedForm(formData)
```

Set up collecting contact custom fields

```
ie. cinnox.contact.setCollectedForm(cf_favorite_season:"spring", cf_na_url:"123.com")
```

```
> cinnox.contact.setCollectedForm ({fieldkey: 'value'})
```

```
> cinnox.contact.availableFormKeys
< ▼ (2) [{...}, {...}] ⓘ
  ▶ 0: {id: '06009b9b-2524-11ed-9f2b-e6d0e87be775', serviceId: 'mc-00947', name: 'demo membership', fieldKey: 'cf_membership', description: '', ...}
  ▶ 1: {id: 'fc3777c9-2523-11ed-9f2a-e6d0e87be775', serviceId: 'mc-00947', name: 'demo free gift color', fieldKey: 'cf_color', description: '', ...}
```

```
> cinnox.contact.collectedForm
< ▶ {cf_membership: '123456789'}
```

Ref: https://hackmd.io/D1o-_GOTQKCVAXIF7NBUjg?view#Contact-API

External Contact Custom Field

4. Bulk Import Custom Field Data

External Contacts

External Contacts

1

Contact Name

2

Import

3

1. Download the sample CSV file or XLSX file

2. Follow the same format to input contacts

3. Upload below

4

Browse

Custom Fields will show in the sample file

You can drag and drop your file, or click browse.

Contact Name	Contact Owner/Department
<input type="checkbox"/> "TestFlight"	admin บริษัท
<input type="checkbox"/> +__+jimmyli	company
<input type="checkbox"/> +8520963669222	Jimmy Li
<input type="checkbox"/> +886922764336_tf	company
<input type="checkbox"/> +886958119064_tf	Natalie นาดาสินาดาสิ...
<input type="checkbox"/> +anonymous_tf	company
<input type="checkbox"/> 0523	Lisa Chen
<input type="checkbox"/> 0527	company
<input type="checkbox"/> 0530	Jesse 1
<input type="checkbox"/> 0531	company
	Jesse 1
	company
	Justy 客服專員
	QA
	Justy Tseng
	company
	Justy Tseng
	company
	Justy Tseng
	company

Records per page 10 1-10 of 323

External Contact Custom Field

5. Permission

CINNOX

Get Started 42%



Feature Name	View	Edit	Delete	Download	Approve
<input type="checkbox"/> Contact Custom Field Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/> Workflow Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Reporting and Monitoring	Feature Name
<input checked="" type="checkbox"/>	Feature Name
<input checked="" type="checkbox"/>	Enquiry Report
<input checked="" type="checkbox"/>	Enquiry Report
<input checked="" type="checkbox"/>	Chat Report
<input checked="" type="checkbox"/>	SMS Report

- When no permission is enabled:
do not have Contact Field Management page entrance buttons & cannot see Contact Field Management page

- When only View is enabled:
do not have "... " button & "Create" button

- When only View + Edit is enabled:
do not have "Delete" in the "... " button

External Contact Custom Field

6. Audit Log

Audit Log

Time	Staff	IP Address	Action	Element	New/Old Value	Remarks
25/08/2022 16:32:17	mm milky milky	59.120.16.158	Updated	Permission Settings	Show Values	
25/08/2022 15:05:52	SW Sherry Wei	59.120.16.158	Updated	Visitor Forms	Show Values	
25/08/2022 14:50:35	SW Sherry Wei	59.120.16.158	Updated	Visitor Forms	Show Values	
25/08/2022 14:48:26	SW Sherry Wei	59.120.16.158	Updated	Contact Custom Field Management	Show Values	
25/08/2022 14:48:13	SW Sherry Wei	59.120.16.158	Updated	Contact Custom Field Management	Show Values	
25/08/2022 14:46:41	SW Sherry Wei	59.120.16.158	Deleted	Contact Custom Field Management	Show Values	
25/08/2022 14:45:55	SW Sherry Wei	59.120.16.158	Updated	Contact Custom Field Management	Show Values	Update new custom field 'demo free gift color'
25/08/2022 14:45:38	SW Sherry Wei	59.120.16.158	Updated	Contact Custom Field Management	Show Values	Update custom field 'list value' from 'Black,White' to 'Black,Blue,White'
25/08/2022 14:39:02	SW Sherry Wei	59.120.16.158	Deleted	Contact Custom Field Management	Show Values	
25/08/2022 14:39:00	SW Sherry Wei	59.120.16.158	Deleted	Contact Custom Field Management	Show Values	

Records per Page 10 1-10 of 11766

External Contact Custom Field

Other Details

- Custom field name supports all language. Max 50 chars.
- Custom field description supports all language. Max 100 chars.
- Custom field ID will start with prefix:"cf_" and support small case a-z and underscore "_". It must be unique, same field ID cannot be used twice. Max 100 chars. Field ID is not editable.
- Custom field types support Text, Dropdown List (single & multiple selection), Checkbox, URL, Date and Time. Field type is not editable.
- A custom field cannot be deleted if it's used in the visitor form.
- Total custom field number: 20 per service.
- If the same custom field receives both visitor form and JS data, the the JS data will override visitor form data.

03

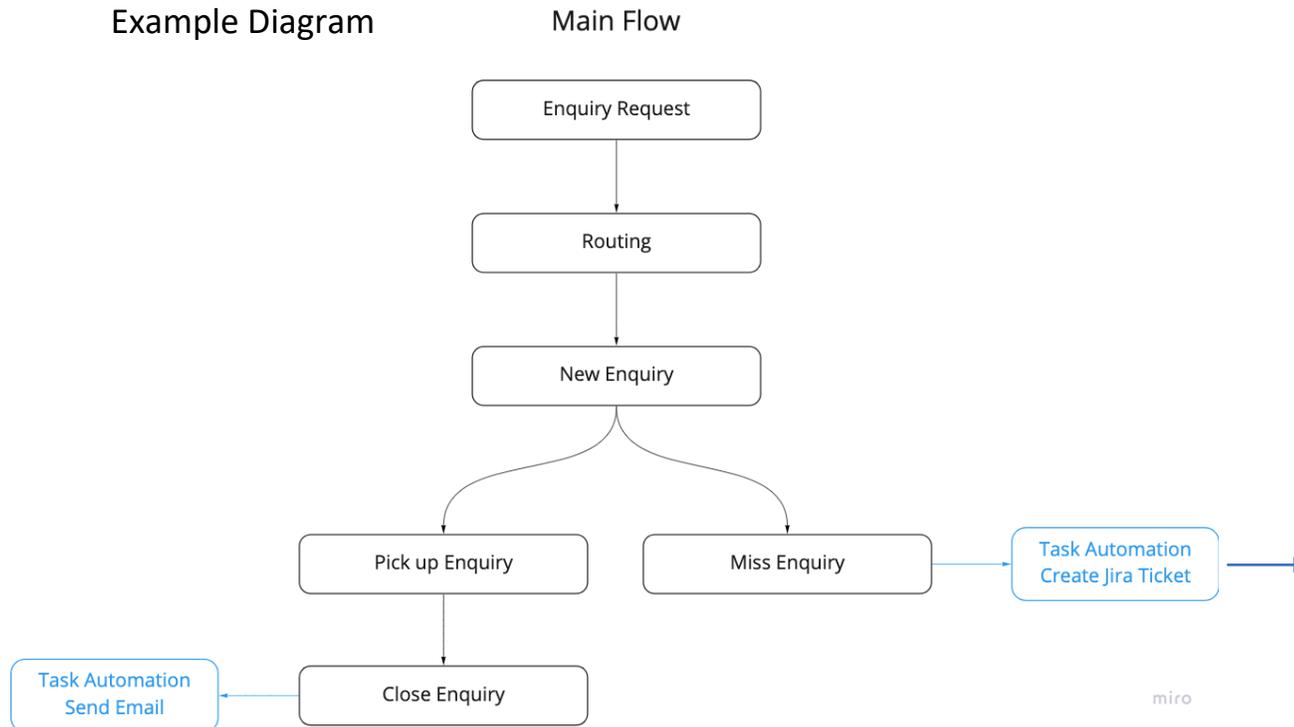
Workflow Automation (Internal)

Workflow Automation (Internal)

A no-code platform for user to create automated workflow

Create workflows with ruled-based logic to automate repetitive tasks that run independently without staff interventions to save time and reduce human errors.

Example Diagram



Workflow Automation

Enable user to automate some workflows on a no-code platform. No impacts on the Main Flow.

Ex:

- send an email to the visitor when enquiry closed,
- create Jira ticket when enquiry missed

Workflow Automation (Internal)

Scope:

Function	CINNOX Page	Roles	Platform
1. Trigger/ Condition/ Task	Admin > Workflow	Admin	Dashboard
2. View/Create/Edit/Delete Workflow	Admin > Workflow	Admin	Dashboard
3. Enable/Disable Workflow	Admin > Workflow	Admin	Dashboard
4. Execution Results Page	Admin > Workflow > Results	Admin	Dashboard
5. Permission	Admin > Permission	Admin	Dashboard
6. Audit Log	Admin > Audit Log	Admin	Dashboard

Workflow Automation (Internal)

1. Triggers, Conditions and Tasks

Trigger: an event for the trigger

Currently support:

- Enquiry, when an enquiry is
- Open
- Handled
- Missed
- Closed

Conditions: conditions to the trigger to perform the task

Currently support:

- Channel, when an enquiry is initiated via
- Directory
- Number
- Social
- Email
- Third-Party Channel

Tasks: perform this action when the set conditions are met

Currently support:

- Send CINNOX message to one public room, sent by CINNOX Bot
- Send Email to one or multiple recipients, sent by registered email (user can choose)
- Send SMS to one or multiple recipients, sent by registered outbound number (user can choose)

Workflow Automation (Internal)

2-1 View Workflow



Get Started 16%

🎧 ? 📄 🗑️ 📶 SW ● Active

Workflow Automation

WORKFLOWS RESULTS

Search workflow name Create Workflow

Workflow Name	Created By	↑ Created Date/Time	Last Updated By	↑ Last Updated Date/Time	Active/Inactive
123 Set up incomplete	Sherry Wei	25/08/2022 18:19:52	Sherry Wei	25/08/2022 18:19:52	<input type="checkbox"/>
0825 Send SMS test	Justy Admin	25/08/2022 18:02:34	Justy Admin	25/08/2022 18:07:48	<input checked="" type="checkbox"/>
Multiple Task Test	Justy Admin	25/08/2022 17:41:59	Justy Admin	25/08/2022 18:07:19	<input type="checkbox"/>
lokalise Set up incomplete	Raynor Lin	25/08/2022 11:45:15	Raynor Lin	25/08/2022 11:45:15	<input type="checkbox"/>
sue test sms Set up incomplete	Justy Admin	23/08/2022 10:21:29	Raynor Lin Agent	24/08/2022 18:23:04	<input type="checkbox"/>
0823-test -email Set up incomplete	Verna qq	23/08/2022 10:14:57	Verna qq	23/08/2022 10:25:32	<input type="checkbox"/>
0823-test-channel-sms	Verna qq	23/08/2022 09:46:02	Verna qq	23/08/2022 13:55:04	<input checked="" type="checkbox"/>
qweqwe Set up incomplete	Sherry Wei	22/08/2022 09:35:31	Verna qq	23/08/2022 10:21:15	<input type="checkbox"/>

Navigation: Administration, Widget, Recording & Transcript, Storage, Organisation, Security, Channel Source, Service Integration, Labels, Auto Close Enquiry, Prompt, Workflow

Workflow Automation (Internal)

2-2 Create Workflow – Input Name

The screenshot shows the CINNOX Workflow Automation interface. On the left is a navigation menu with 'Workflow' highlighted. The main area displays a table of existing workflows. A red circle with the number '1' is placed over the 'Workflow' menu item. A red circle with the number '2' is placed over the 'Create Workflow' button in the top right of the workflow list area.

Workflow Name	Created By	Created Date/Time	Last Updated By	Last Updated Date/Time	Active/Inactive
123 Set up incomplete	Sherry Wei	25/08/2022 18:19:52	Sherry Wei	25/08/2022 18:19:52	Off
0825 Send SMS test	Justy Admin	25/08/2022 18:02:34	Justy Admin	25/08/2022 18:07:48	On
Multiple Task Test	Justy Admin	25/08/2022 17:41:59	Justy Admin	25/08/2022 18:07:19	Off
lokalise Set up incomplete	Raynor Lin	25/08/2022 11:45:15	Raynor Lin	25/08/2022 11:45:15	Off
sue test sms Set up incomplete	Justy Admin	23/08/2022 10:21:29	Raynor Lin Agent	24/08/2022 18:23:04	Off
vozsites-email Set up incomplete	Verna qq	23/08/2022 10:14:57	Verna qq	23/08/2022 10:25:32	Off
es-char...ns	Verna qq	23/08/2022 09:46:02	Verna qq	23/08/2022 13:55:04	On
qweqwe Set up incomplete	Sherry Wei	22/08/2022 09:35:31	Verna qq	23/08/2022 10:21:15	Off

New Workflow

The 'New Workflow' form contains the following elements:

- Workflow Name***: A text input field with a placeholder 'Enter a name for the workflow' and a character count of '0/50'. A red circle with the number '3' is placed over this field.
- Description**: A text area with a placeholder 'Add a description of the workflow' and a character count of '0 / 500'.
- Buttons**: 'Cancel' and 'Create' buttons at the bottom right. A red circle with the number '4' is placed over the 'Create' button.

Workflow Automation (Internal)

2-3 Create Workflow – Select Trigger

Select & complete the workflow

demo_workflow

1 **+**
Click to get started

2 **Trigger**
Enquiry Status
When an enquiry status is updated

3 **Trigger**
Enquiry Status /
Complete the missing info for the workflow rules
Trigger Type: Enquiry Status
Trigger Value*: Please select

4 **Trigger**
Enquiry Status /
Closed: When an enquiry is closed
Handling: When an enquiry is being handled
Missed: When an enquiry is missed
Opened: When an enquiry is open

Cancel Save

Workflow Automation (Internal)

2-4 Create Workflow – Select Condition and Task

demo_workflow

Trigger
Enquiry Status / Missed

+ 1

Select & complete the workflow

Conditions

Channel
When an enquiry is initiated via this channel

Task

http_request http request	Send SMS Send an SMS to the target recipients
Send IM Send an instant message to a public space	Send Email Send an email to the target recipients

Conditions
channel / Directory

You are all set.

Condition Type
channel [Change](#)

Condition Value*

Directory

- Directory
- Number
- Social
- Email
- Third Party

Task
Send SMS

Complete the missing info for the workflow rules

Task Type
Send SMS [Change](#)

SMS Sender*

Select SMS Sender ID

Recipients*

Select SMS recipients

Message*

Enter the content for the SMS

0 Chars / 0 SMS

Workflow Automation (Internal)

2-5 Create Workflow – Input Task Details

Task
Send SMS

⚠ Complete the missing info for the workflow rules

Task Type Change
Send SMS

SMS Sender*
Select SMS Sender

Recipients*
Select SMS recipient

Message*
Enter the content for the SMS

0 Chars /0 SMS

Sender:
- Registered outbound number show in dropdown list

Recipients:
- Enquiry visitor, or
- Input number

SMS content

Task
Send IM

⚠ Complete the missing info for the workflow rules

Task Type Change
Send IM

IM Sender*
Select IM Sender

Recipient*
Select a public group

Message*
Enter the content for the IM

Sender:
- CINNOX Bot

Recipients:
- All public room show in dropdown list

Message content

Task
Send Email

⚠ Complete the missing info for the workflow rules

Task Type Change
Send Email

Email Sender*
Select the email sender

Recipients*
Select email recipient

Email Subject*
Enter email subject

Preview Message*
Enter a preview message for the email

Email Body*
Enter the content for the email body

Sender:
- Email Enquiry Receiver
- Registered email show in dropdown list

Recipients:
- Enquiry visitor, or
- Input email address

Title:
- Email title

Preview:
- Email Preview

Email content

Workflow Automation (Internal)

2-6 Create Workflow – Save

Task
Send IM

⚠ Complete the missing info for the workflow rules

Task Type
Send IM [Change](#)

IM Sender*
CINNOXBot

Recipient*
general

Message*
Enter the content for the IM

Something incomplete

There are some required fields haven't been completed. The toggle will be disabled if the workflow save as incomplete.

Cancel

Save anyway

Save with toggle off (workflow inactive)

1

Cancel

Save

Task
Send IM

✓ You are all set.

Task Type
Send IM [Change](#)

IM Sender*
CINNOXBot

Recipient*
general

Message*
123

Run the workflow

The workflow will start automatically after save and run. You can also start or stop the workflow manually by turn on or off the toggle.

Save Only

Save and Run

Save with toggle off (workflow inactive)

Save with toggle on (workflow inactive)

1

Cancel

Save

Workflow Automation (Internal)

2-7 Edit and Delete Workflow

Workflow Management Interface (Left):

- Buttons: Create Workflow
- Table Headers: d By, Last Updated Date/Time, Active/Inactive
- Row 1: 25/08/2022 18:19:52, [Toggle], ...
- Row 2: 25/08/2022 18:07:48, [Toggle], ... (1)
- Row 3: 25/08/2022 18:07:19, [Toggle], View
- Row 4: 25/08/2022 11:45:15, [Toggle], View
- Row 5: gent, 24/08/2022 18:23:04, [Toggle], Edit (2)
- Row 6: 23/08/2022 10:25:32, [Toggle], Delete
- Row 7: 23/08/2022 13:55:04, [Toggle], ...
- Row 8: 23/08/2022 10:21:15, [Toggle], ...

Go to edit mode

Workflow Management Interface (Right):

- Buttons: Create Workflow
- Table Headers: d By, Last Updated Date/Time, Active/Inactive
- Row 1: 25/08/2022 18:19:52, [Toggle], ...
- Row 2: 25/08/2022 18:07:48, [Toggle], ... (1)
- Row 3: 25/08/2022 18:07:19, [Toggle], View
- Row 4: 25/08/2022 11:45:15, [Toggle], View
- Row 5: gent, 24/08/2022 18:23:04, [Toggle], Edit
- Row 6: 23/08/2022 10:25:32, [Toggle], Delete (2)
- Row 7: 23/08/2022 13:55:04, [Toggle], ...
- Row 8: 23/08/2022 10:21:15, [Toggle], ...

Delete Workflow

Are you sure you want to delete 0826 Test? You cannot undo this action.

Confirmation Dialog:

- Buttons: Cancel, Delete (3)

Workflow Automation (Internal)

3. Enable & Disable Workflow

The screenshot displays the CINNOX Workflow Automation interface. On the left is a navigation sidebar with categories like Administration, Widget, Recording & Transcript, Storage, Organisation, Security, Channel Source, Service Integration, Labels, Auto Close Enquiry, and Prompt. The main area is titled 'Workflow Automation' and contains a 'WORKFLOWS' tab, a search bar, and a 'Create Workflow' button. Below is a table with columns: Workflow Name, Created By, Created Date/Time, Last Updated By, Last Updated Date/Time, and Active/Inactive. A red box highlights the 'Set up incomplete' status for the first workflow. A black box with text explains that a workflow cannot be activated if the setup is incomplete. Another red box highlights the toggle switches for the first three workflows, with a black box explaining that clicking the toggle activates or inactivates a workflow.

Workflow Name	Created By	Created Date/Time	Last Updated By	Last Updated Date/Time	Active/Inactive
123 Set up incomplete	Sherry Wei	25/08/2022 18:19:52	Sherry Wei	25/08/2022 18:19:52	<input type="checkbox"/>
0823 test-channel-sms	Justy Admin	25/08/2022 18:02:34	Justy Admin	25/08/2022 18:07:48	<input checked="" type="checkbox"/>
Mu... Set up incomplete	Justy Admin	25/08/2022 17:41:59	Justy Admin	25/08/2022 18:07:19	<input type="checkbox"/>
lokaiise Set up incomplete	Raynor Lin	25/08/2022 11:45:15	Raynor Lin	25/08/2022 11:45:15	<input type="checkbox"/>
sue test sms Set up incomplete	Justy Admin	23/08/2022 10:21:29	Raynor Lin Agent	24/08/2022 18:23:04	<input type="checkbox"/>
0823-test -email Set up incomplete	Verna qq	23/08/2022 10:14:57	Verna qq	23/08/2022 10:25:32	<input type="checkbox"/>
0823 test-channel-sms	Verna qq	23/08/2022 09:46:02	Verna qq	23/08/2022 13:55:04	<input checked="" type="checkbox"/>
qweqwe Set up incomplete	Sherry Wei	22/08/2022 09:35:31	Verna qq	23/08/2022 10:21:15	<input type="checkbox"/>

Workflow Automation (Internal)

4-1 Results Page

cinnox Get Started 16% 🔊 ? ☰ 🔗 📶 SW ● Active

Workflow Automation 1 **RESULTS**

Search workflow name

Workflow Name	Status	Workflow ID	Execution ID
verna-CINNOXBot-test	Completed successfully	b6c07637-ff93-44df-8ffd-23dd84b64911	a1cb49da-8e35-4e6f-810a-c464...
0823 test-channel-sms	Completed successfully	350eea41-c07a-4093-ad4e-003165af643c	b9605a38-2076-470b-8afb-8f98...
0825 Send SMS test	Completed with failed tasks	c2ceddd7-9c4c-45a3-bff6-c96ead0f4514	f2ab8049-2233-41d7-ae22-79b9...
verna-CINNOXBot-test	Completed successfully	b6c07637-ff93-44df-8ffd-23dd84b64911	471c728c-ad4a-456d-b7c9-da92...
0823 test-channel-sms	Completed successfully	350eea41-c07a-4093-ad4e-003165af643c	e77b5e11-5720-4695-93ff-c531...
Multiple Task Test	Completed with failed tasks	c588efad-ff4f-4799-8619-c2448cb517b3	232b7c1a-3c9a-43a6-b3bb-1d72...
0825 Send SMS test	Completed successfully	f0db48588c8c	25/08/2022 18:06:18
verna-CINNOXBot-test	Completed successfully	ad1256a56ff2	25/08/2022 18:06:18
0823 test-channel-sms	Completed successfully	4209f9154361	25/08/2022 18:06:18

Task Detailed Results

Workflow Name 0825 Send SMS test Execution ID f2ab8049-2233-41d7-ae22-79b92f3cf363
From 25/08/2022 18:07:55 to 25/08/2022 18:07:55 Duration 47ms Status Completed with failed tasks

Seq	Task Name	Execution ID	Start Time	End Time	Duration	Status
1	switch_task	86731c5e-c8be-40f6-bf26-06e637483ce4	25/08/2022 18:07:55	25/08/2022 18:07:55	32ms	FAILED
2	send_email	0cd8a3af-d543-4f8b-8dc9-dda0b583b27c	25/08/2022 18:07:55	25/08/2022 18:07:55	15ms	FAILED

No more data available

Records per Page 10

Workflow Status:

- Completed with failed tasks
- Completed successfully
- In Progress

Task Status:

- Done
- Failed
- In Progress

2

Workflow Automation (Internal)

5. Permission

The screenshot displays the 'Permissions of workflow test' configuration page. The left sidebar contains a 'Roles & Permissions' menu item, highlighted with a red box and a '1' in a red circle. The main content area shows a table of permissions for 'Administration Permissions' and 'Reporting and Monitoring'. The 'Workflow Management' feature is highlighted with a red box. A callout box on the right provides the following information:

- When no permission is enabled: do not see Workflow Management page
- When only View is enabled: do not have "... " button & "Create" button
- When only View + Edit is enabled: do not have "Delete" in the "... " button

Workflow Automation (Internal)

6. Audit Log

Get Started 42% **Active**

Audit Log

[Export](#)

Time	Staff	IP Address	Action	Element	New/Old Value	Remarks
25/08/2022 16:32:17	milky milky	59.120.16.158	Updated	Permission Settings	Show Values	
25/08/2022 15:05:52	Sherry Wei	59.120.16.158	Updated	Visitor Forms	Show Values	
25/08/2022 14:50:35	Sherry Wei	59.120.16.158	Updated	Visitor Forms	Show Values	
25/08/2022 14:48:26	Sherry Wei	59.120.16.158	Updated	Contact Custom Field Management	Show Values	
25/08/2022 14:48:13	Sherry Wei	59.120.16.158	Created	Workflow Management	Show Values	
25/08/2022 14:46:41	Sherry Wei	59.120.16.158	Deleted	Contact Custom Field Management	Show Values	
25/08/2022 14:45:55	Sherry Wei	59.120.16.158	Created	Contact Custom Field Management	Show Values	
25/08/2022 14:45:38	Sherry Wei	59.120.16.158	Created	Contact Custom Field Management	Show Values	
25/08/2022 14:39:02	Sherry Wei	59.120.16.158	Deleted	Contact Custom Field Management	Show Values	
25/08/2022 14:39:00	Sherry Wei	59.120.16.158	Deleted	Contact Custom Field Management	Show Values	

Records per Page **10** 1-10 of 11766

04

Enquiry Overview & Report Enhancement

Enquiry Overview & Report Enhancement

Useful information and tools to allow users to quickly find the enquiry they are looking for.

- Provide **Enquiry Duration** so manager knows how long the enquiry has been handling
- Provide **Agent Idle Time** so manager knows how long the agent has not responded in the room
- Provide **Call Status** so manager knows the enquiry is under a call
- Allow **apply filter to all enquiry** status so user doesn't need to click on each of the status to apply the same condition
- Introduce **enquiry sorting** so user can sort the enquiry by enquiry updated time, created time, agent idle time or duration

Enquiry Overview & Report Enhancement

Scope:

Function	CINNOX Page	Roles	Platform
1. Overview Data Display - Enquiry Duration, Agent Idle Time and Call Status	Overview	All	Dashboard
2. Overview Filter and Sorting	Overview	All	All platform
3. Other Improvements		All	All platform

Enquiry Overview & Report Enhancement

1-1 Overview – Enquiry Duration

Handling (140) Sort

Nataliell 04:10 PM
Via Natalie นาดาลีนาดาลีนาดาลี นก... 2m

The difference between enquiry picks up time and current time.

Natalie Z 04:07 PM
Via Natalie นาดาลีนาดาลีนาดาลี นก... 3m
TW, 中文 (繁體)
By Natalie นาดาลีนาดาลีนาดาลี นก... nali...

customer 02:51 PM
Via Tony TTT 1h 21m
TW, English
By Tony TTT

Closed (3663) Sort

Natalie 2 04:10 PM
Via Natalie นาดาลีนาดาลีนาดาลี นก... 1m

The difference between enquiry picks up time and enquiry closed time.

Twms800qaMail (Tony) 3d 20h
Via Twms800qaMail (Tony) ssdfsdf (sdfsdfsdf@hk01b.cx-tb1.cinnox.com)
By Tony TTT

TWEB-13039
Via Tony for U
TW, English
By Unknown With Tony TTT

- Show 1m, if duration is less than 1 min
- Show mm, if duration is from 1 min to 59 min
- Show hh:mm, if duration is from 1 hr to 23 hr 59 min
- Show dd:hh, if duration is more than 24 hr

Enquiry Overview & Report Enhancement

1-2 Overview – Agent Idle Time

Handling (141) Sort

TW-webDesktop-158 04:34 PM
 Via test_Tag 5m
 TW, English
 By Sherry Wei 🕒 4m

How long the agent did not respond to the visitor's reply.

- Show mm, if duration is from 1 min to 59 min
- Show hh:mm, if duration is from 1 hr to 23 hr 59 min
- Show dd:hh, if duration is more than 24 hr)

Idle time will show when the agent has not responded for more than 1 min and the last message is sent by visitor.

Below actions will stop the idle time counting:

- Agent reply
- The last message is sent by Agent

Below actions will restart the idle time counting:

- Call connect and end
- Room successfully transferred to another agent

Enquiry Overview & Report Enhancement

1-3 Overview – Call Status

Handling (141) Sort

 TW-webDesktop-158 04:34 PM
Via test_Tag 9m
TW, English
By Sherry Wei



On a call

Call Icon will show when a call is initiated by either party
All types of call is included (ex: conf. Call, PSTN call)

Enquiry Overview & Report Enhancement

2-1 Overview – Filter and Display

42%

1

Handled (3665) Sort

TW-webDesktop-158	05:40 PM
Via Clifford Tien	20m
TW, 中文 (繁體)	
By Clifford Tien	
	04:20 PM
Via นาดาลีนาดาลีนาดาลี นก...	1m
TW, 中文 (繁體)	
By Natalie นาดาลีนาดาลีนาดาลี นก...	
Natalie 2	04:10 PM
Via นาดาลีนาดาลีนาดาลี นก...	1m
TW, 中文 (繁體)	
By Natalie นาดาลีนาดาลีนาดาลี นก...	
no-reply@cx-tb.cinnox.com	03:04 PM
Via Twm800qaMail (Tony)	3d 20h
ssdfsdf (sdfsdfsdf@hk01b.cx-tb1.cinnox.com)	
By Tony TTT	

Filter by

Select enquiries for filter: **2** All Open Handling Missed Closed

Match All Enquires

Staff Name	Channel Type
<input type="text"/>	All
Handled Type	Last handled group
Select	Select
Last handled party	
Select	
Duration	Created Date & Time
All	All
Label	
Matches any labels	Select

42%

3 Handling Agent idle time: More than 10 min

Closed (3665) Sort

	TW-webDesktop-158	05:40 PM
Via Clifford Tien		20m
TW, 中文 (繁體)		
By Clifford Tien		
	นาดาลีนาดาลีนาดาลี นก...	04:20 PM
Via นาดาลีนาดาลีนาดาลี นก...		1m
TW, 中文 (繁體)		
By Natalie นาดาลีนาดาลีนาดาลี นก...		
	Natalie 2	04:10 PM
Via นาดาลีนาดาลีนาดาลี นก...		1m
TW, 中文 (繁體)		
By Natalie นาดาลีนาดาลีนาดาลี นก...		
	no-reply@cx-tb.cinnox.com	03:04 PM
Via Twm800qaMail (Tony)		3d 20h
ssdfsdf (sdfsdfsdf@hk01b.cx-tb1.cinnox.com)		
By Tony TTT		

Enquiry Overview & Report Enhancement

2-3 Overview – Sorting

Get Started 42% | ? | ? | ? | ? | ? | ? | Active

Handling (142) **Sort** Missed (1803) Sort Closed (3665) Sort

1

2

- Latest Updated Time (Default)
- Newest Created Time
- Oldest Created Time
- Longest Idle Time
- Shortest Idle Time
- Longest Duration
- Shortest Duration

aaa 莊鼎揚
Via edy2.chuang
cxwc.cx-tb1.cinnox.com
TW, 中文 (繁體)

Hannah TestA
Via Hannah woz whatsapp
Summer_Test (whatsapp-cloud) (+14148144)

verna_0822-09
Via verna_
中文 (繁體)

Lee
Via Greene
Greene (greene@hk01b.cx-tb1.cinnox.com)

no-reply@cx-tb.cinnox.com
Via Twm800aaMail (Tony)

Latest Updated Time (Default)

Newest Created Time

Oldest Created Time

Longest Idle Time ✓

Shortest Idle Time

Longest Duration

Shortest Duration

	Handling Status	Missed Status	Closed Status
Latest Updated Time (Default)	V	V	V
Created Time	V	V	V
Agent Idle Time	V	-	-
Duration	V	-	V

Enquiry Overview & Report Enhancement

Other Improvements

- Exported excel file: update all * and empty columns to NA
- Remove Enquiry handled by information for Open and Missed status enquiry
- Hide Language/Location if no data is detected
- Update IP address icon
- Add more filter condition to Enquiry Overview Filter:
- Add more filter condition to Enquiry Report Filter:

Filter	Type
Search by staff name	Search Bar
Last handled Group	Dropdown List
Created Date & Time	Dropdown List
Agent Idle Time	Dropdown List
Current Activities – On a Call	Check Box
Closed By	Dropdown List
Closed Date & Time	Dropdown List

Filter	Type
Created Date & Time	Dropdown List
Closed Date & Time	Dropdown List
Last Handled Group	Dropdown List
Duration	Dropdown List
Location	Check Box
Language	Dropdown List

CONTENTS

2nd Session

01

V3.7.0
Release Summary

02

v3.7.0
External Contact Custom
Field

03

V3.7.0
Workflow Automation
(Internal)

04

v3.7.0
Enquiry Overview
& Report Enhancement

05

v3.7.0
Email Channel & Other
Improvements

06

V3.7.0
Open API –
Management P2
(Destination & Tag)

07

v3.7.0
Zapier Integration

08

Demo

09

Q & A

05

Email Channel Improvements

Email Channel Improvement

Description

Feature Introduction:

Version	Title	Definition	Available Package
v3.7.0	Email Signature	Allow the staff to set up a personal email signature for their emails.	All plans
V3.7.0	Automatic Bcc	<ol style="list-style-type: none"> 1. Allow the staff to set Bcc recipients for each Email channel, and automatically bcc emails to the recipients when staff send emails or reply to visitors' emails via the Email channel. 2. Add the Bcc field in the email editor. 	All plans, except Sanntsu Chat-ST
V3.7.0	Email Editor UI Improvement	Expand the input field of the email editor when the staff clicks the "Reply" button to write an email in the chatroom.	All plans, except Sanntsu Chat-ST
V3.7.1	Automatic Reply Toggle (Coming soon)	Allow the staff to enable/ disable auto-reply (welcome) email for each Email channel.	All plans, except Sanntsu Chat-ST
V3.7.1	Send Email History (Coming soon)	Include the email history in staff's email responses to visitors, so cc & bcc recipients can also understand the context of the email enquiry.	All plans, except Sanntsu Chat-ST

Email Channel Improvement

Scope:

Function	CINNOX Page	Roles	Platform
1. Email Signature	My Account > Profile > Email Signature	All	Dashboard
2. Automatic Bcc	Channels > Email > Email Details > Automatic Bcc	Admin	Dashboard
3. Email Editor UI Improvement	Chatroom > Reply Email Contact Email > New Email	All	Dashboard
4. Audit Log	Admin > Audit Log	Admin	Dashboard

Email Channel Improvement

Email Signature – Profile Settings

cinnox

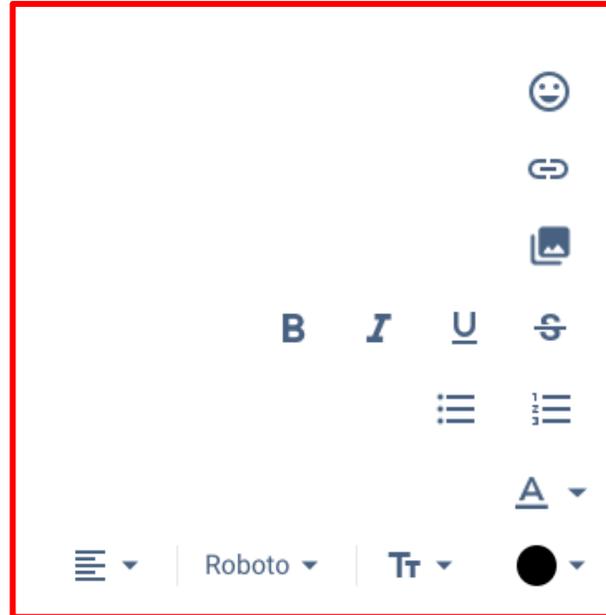
The screenshot displays the 'My Account' settings page in the cinnox system. The left sidebar contains navigation options: My Account, Profile, Manage Devices, Call Settings, and Authentication. The 'Profile' option is highlighted with a red box and a red circle containing the number '1'. The main content area shows user details for 'Administrator' (summerchen@m800.com) and a 'Get Started 47%' button. Below this is the 'Email Signature' section, which includes a text editor with a red box and a red circle containing the number '3'. The editor contains the following signature text: **Summer Chen**, Product Manager | Product Development Department | M800 Limited, with links for SummerAdmin Chen (Call), SummerAdmin Chen (Chat), and Summer Email, and the cinnox logo. Below the editor are fields for 'Direct chat enquiry' and 'Direct call enquiry', each with a URL and 'Preview' and 'Download QR Code' buttons. At the bottom right, there is a 'Save' button highlighted with a red box and a red circle containing the number '4', along with a 'Cancel' button and a toggle for 'For Mainland China (web link ends with .cn)'.

Preview Email Signature

The preview window shows the email signature as it will appear in an email. It includes the email subject, the name 'Summer Chen', the title 'Product Manager | Product Development Department | M800 Limited', and contact information: SummerAdmin Chen (Call), SummerAdmin Chen (Chat), and Summer Email. The cinnox logo is also displayed.

Email Channel Improvement

Email Signature – Editor Functions



Insert emojis

Insert Numbers or Web Link or Other Link

Insert image (from Web or Computer)

Bold, Italic, Underline, Strikethrough

Bullets, Numbering

Font Settings:

- Alignment, Font (11), Size, Color (12)

Email Channel Improvement

Automatic Bcc – Email Channel Settings

The screenshot displays the 'Email Details' configuration page in the CINNOX system. The left sidebar contains navigation options: Channels, Directory, Numbers, Social, Email (highlighted), and Third Party Channel. The main content area is divided into sections: Basic Information, Routing Settings, and Sticky Routing. The 'Automatic Bcc' section is highlighted with a red border and contains the following details:

- Automatic Bcc:** Add email addresses as BCC recipients of emails sent from this email channel. 3 Recipients.
- Recipient List:** Daley as308, SummerAgent1 Chen, ytchen@gmail.com.
- Search Input:** A search field with a red circle containing the number 4, indicating a search function for recipients by name or email address.
- Buttons:** Cancel and Save.

- Search recipients by name or email address
- Add up to 10 bcc recipients

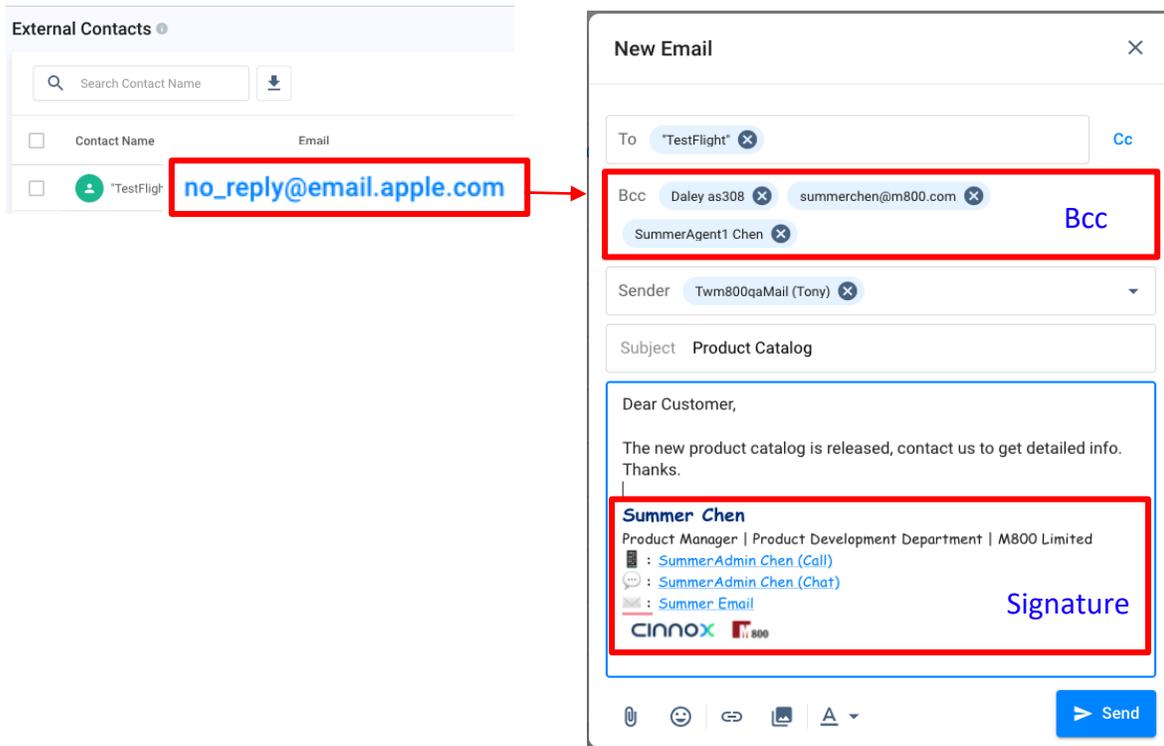
Email Channel Improvement

WEB

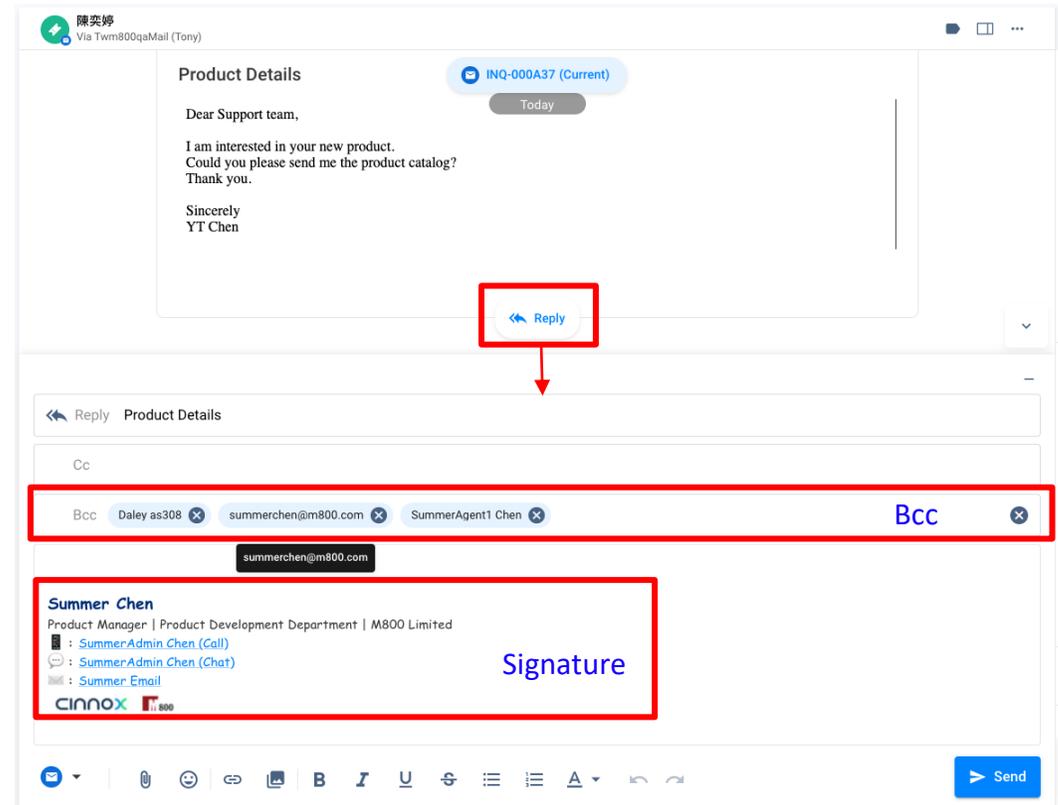
Bcc & Email Signature

Automatically insert the bcc recipients & staff email signature when staff sends/ replies emails via email channels.

New an email to engage visitor



Reply to visitor's email in chatroom



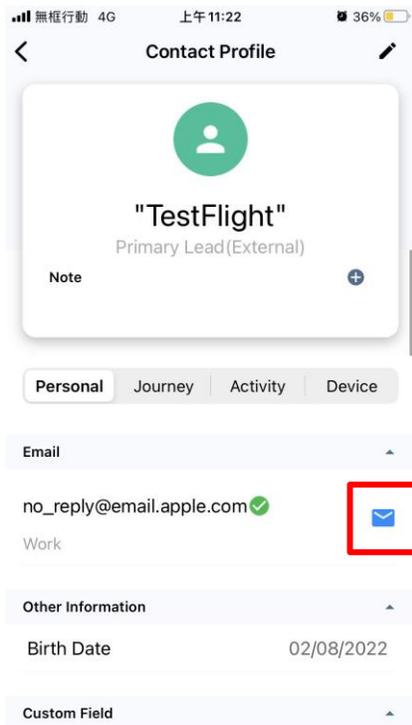
Email Channel Improvement

Mobile

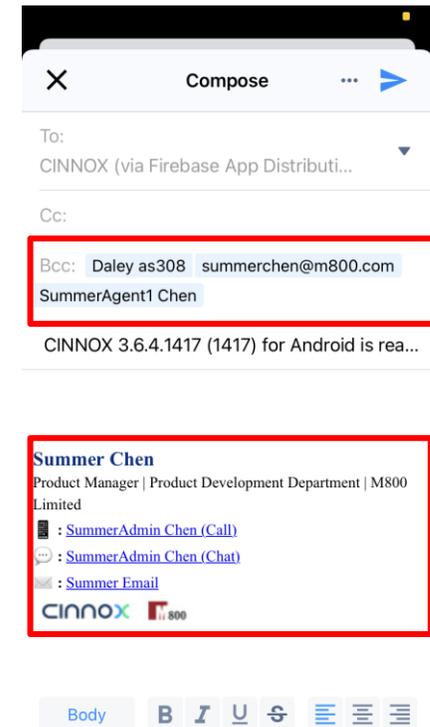
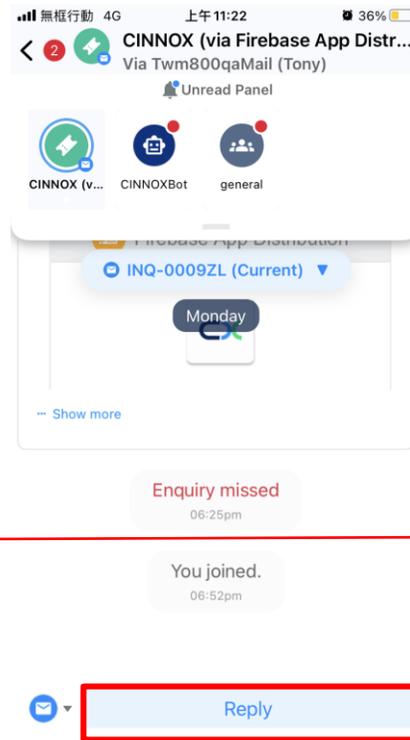
Bcc & Email Signature

Automatically insert the bcc recipients & staff email signature when staff sends/ replies emails via email channels.

New an email to engage visitor



Reply to visitor's email in chatroom



Bcc

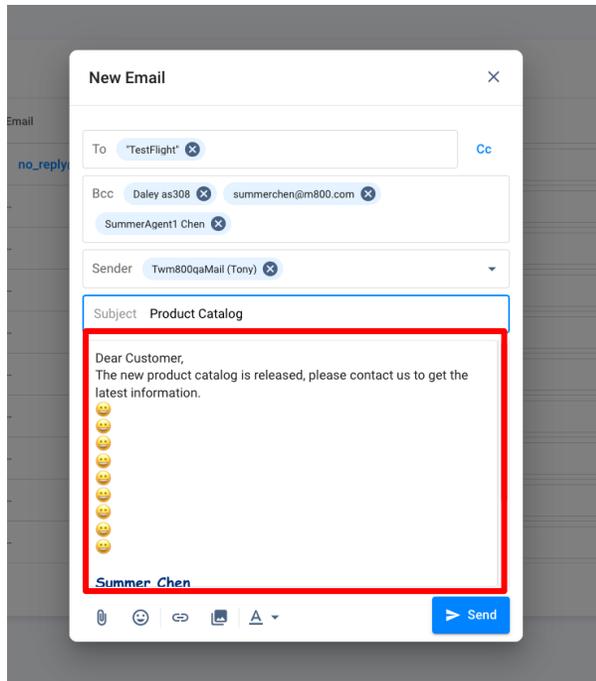
Signature

Email Channel Improvement

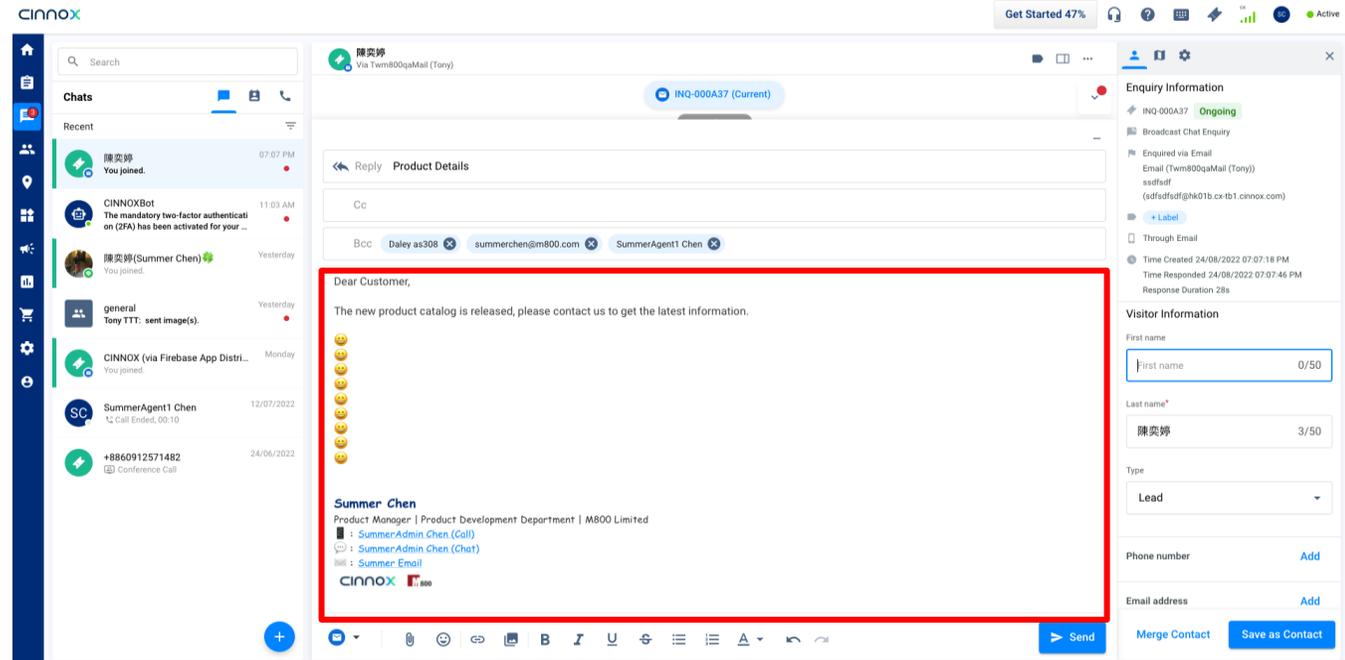
Enlarge the Email Editor

Expand the input field of the email editor to bring a better UX.

New Email



Reply email in chatroom



Email Channel Improvement

Other Details

- The maximum size of Email Signature is 60 KB.
- The Email Signature can only be edited on Web.
- The maximum the recipients for Automatic Bcc is 10.
- The maximum number of recipients included in an email is 50, including Sender, To, Bcc and Cc.
- Only outbound emails sent by the agent through the email channel will automatically send a copy to the bcc recipients, and the To recipient & Cc recipients will not see the bcc recipients.

05

Other Improvements

Weblink – Dynamic Domain (.com and .cn)

.com Weblink

The **Tag and Staff** web links have .com by default, which is best for visitors, customers and others outside Mainland China.

The screenshot displays two panels of the Weblink interface. The top panel is for the .com domain, and the bottom panel is for the .cn domain. Each panel includes a 'QR Code & Web Link' section with a toggle switch for 'For Mainland China (web link ends with .cn)'. In the .com panel, the toggle is turned off. In the .cn panel, the toggle is turned on. Below the toggle, there are two rows of enquiry links: 'Direct chat enquiry' and 'Direct call enquiry'. Each row contains a URL, a copy icon, a 'Preview' button, and a 'Download QR Code' button.

Enquiry Type	URL	Copy Icon	Preview	Download QR Code
Direct chat enquiry	https://cinnox.com/cx/abHf0mvyTf	📄	Preview	Download QR Code
Direct call enquiry	https://cinnox.com/cx/ab4CvRWH09	📄	Preview	Download QR Code

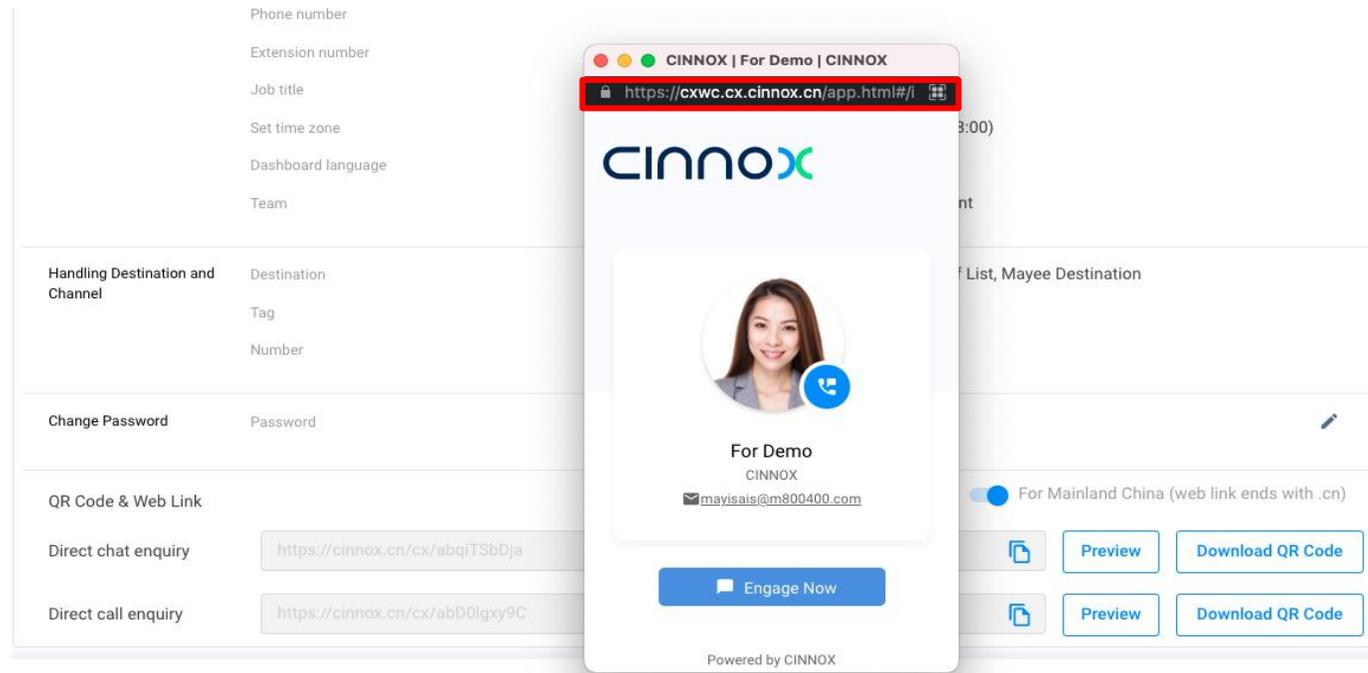
Enquiry Type	URL	Copy Icon	Preview	Download QR Code
Direct chat enquiry	https://cinnox.cn/cx/abHf0mvyTf	📄	Preview	Download QR Code
Direct call enquiry	https://cinnox.cn/cx/ab4CvRWH09	📄	Preview	Download QR Code

Weblink – Dynamic Domain (.com and .cn)

.cn Weblink

The **Tag and Staff** web links with .cn are best for visitors, customers and others inside Mainland China.

- Toggle ON the button for the For Mainland China (web link ends with .cn) to change the weblink domain with .cn.



Reference:

<https://docs.cinnox.com/docs/creating-a-tag#qr-code--web-link-com--cn>

<https://docs.cinnox.com/docs/staff-profile#qr-code--web-link-com-and-cn>

CINNOX Widget – Position & Visibility

Our CINNOX widget can now be repositioned to the website's bottom-left side. And even hide its visibility.

We added attributes in our CINNOX widget API framework using JavaScript (JS) functions for our customers to add after the CINNOX widget has been installed.

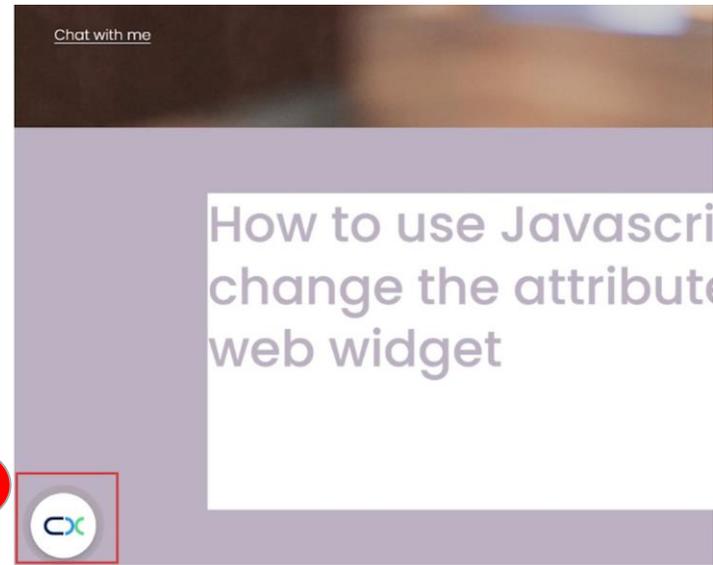
1 CINNOX Javascript Functions

Functions	Description	Supported Value
cinnox.widget.setWidgetPosition(value)	To set the position of the installed widget displayed on the current page.	String - bottom-left - bottom-right
cinnox.widget.setWidgetDisplay(value)	To set the visibility of the installed widget displayed on the current page.	Boolean - true - false

2

```

JavaScript
<script type="text/javascript">
//Your widget installation code first
window.mwcSettings = {
  serviceName: 'YOUR_SERVICE_NAME_HERE'
};
!function(e,t,c){var n,s=e.getElementsByTagName(t)[0];e.getElementById(c)||((n=e.createElement(t),n.id=c),s.appendChild(n));
//After the installation code, you can call the CINNOX widget API framework to customise the experience
window.onCinnoxReady = (cinnox) => {
  //You can call the javascript function below with the expected parameters
  //Example A, this code will set your web widget to the bottom left on the current page
  cinnox.widget.setWidgetPosition('bottom-left');
  //Example B, this code will force your current page to hide the installed web widget
  cinnox.widget.setWidgetDisplay(false);
}
</script>
    
```

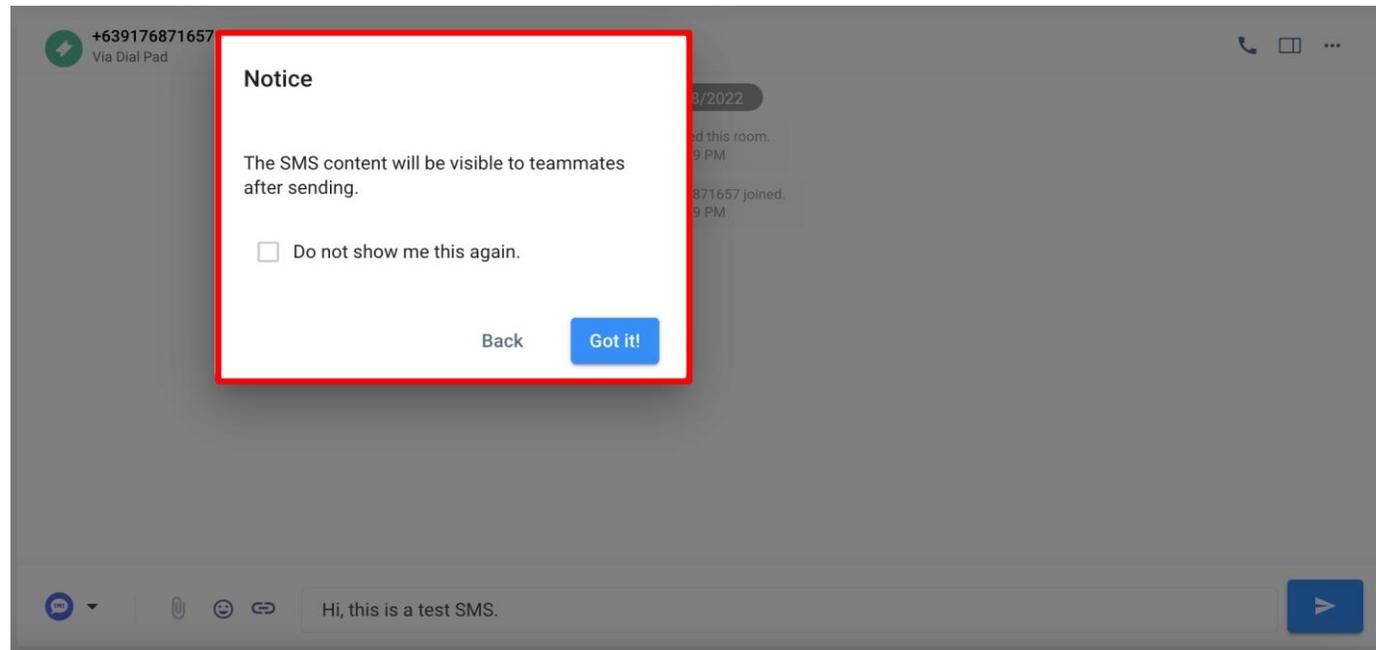


Reference:

<https://docs.cinnox.com/docs/embedding-web-widget>

View SMS Content in the SMS Report

When sending an SMS, a pop-up notification will be displayed to notify the user that the SMS content will be visible to teammates after sending.



View SMS Content in the SMS Report

The SMS sent to the recipient can be viewed in the SMS report. Note that the Verification (OTP) SMS are not included

Navigate to the **CINNOX Dashboard > Reports > SMS Report > Report Details** then click **Details**.

The screenshot displays the 'SMS Report' interface with a table of records. A modal window titled 'Preview' is open, showing details for a specific SMS record. A red arrow points from the 'Details' link in the table to the modal.

SMS Sender ID	Source	Sent By	Destination & Country	Status	Send Date & Time	
Hong Kong +852800931198				Submitted	09/08/2022 15:59:47	
Hong Kong +852800931198				Submitted	09/08/2022 15:54:05	
Hong Kong +852800931198				Submitted	09/08/2022 15:18:51	
Hong Kong +85253985553				Submitted	23/06/2022 17:59:36	Details
Hong Kong +85253985553				Submitted	23/06/2022 17:59:01	Details
Hong Kong +852800931198	Verification	Lucy D. Lui	Hong Kong +85260578655	Submitted	08/02/2022 10:34:46	

Preview [X]

SMS Sender ID: +85253985553 Hong Kong

Sent By: Jacob Huber

Destination & Country: +85269915488 Hong Kong

Content: hi

Reference:

<https://docs.cinnox.com/docs/smsreport#detail-report>

06

**Open API
– Management P2
(Destination & Tag)**

Open API – Management module P2 – Destination & Tag

Introduction

Allow enterprise to manage (Create/Retrieve/Edit/Delete) the Destination or Tag data records from their platform to CXDB to automate some workflow.

Possible use case:

- Allow 3rd party to synchronise & managing the Tag and Destination in CX without accessing CXDB to integrate with their operation flow

E.g. Users can create the Tag through CX Open API and retrieve the direct chat enquiry link / the direct call enquiry link and share it with their customer or attach it in their 3rd party platform.

Reference:

Doc - <https://docs.cinnox.com/docs/open-api>

Spec - <https://docs.cinnox.com/reference/management>

Open API – Management module P2 – Destination & Tag

Scope - Destination:

Function	Description	Remark
1. Get support language	This endpoint allows you to query the list of supported language	
2. Get support location	This endpoint allows you to query the list of supported location	
3. Get destination detail list	This endpoint allows you to query the list of destination details	
4. Create destination	This endpoint allows you to create destination	
5. Update destination	This endpoint allows you to update/edit destination	
6. Delete Destination	This endpoint allows you to delete destination	

Scope - Tag:

Function	Description	Remark
1. Get tag detail list	This endpoint allows you to query the list of tag details	
2. Create tag	This endpoint allows you to create tag	
3. Update tag	This endpoint allows you to update/edit tag	
4. Delete tag	This endpoint allows you to delete tag	

07

Zapier Integration

CINNOX x Zapier Introduction

Introduction

At CINNOX we would like to reduce the development time we spend on actual integration work & look for an easy, powerful & cost-effective automation solution.

Hence, by looking at automation software/platforms, we could create a CINNOX app within their platform that maximises the use of their triggers & actions to automate current CX repetitive tasks & workflows, integrating them into other platform workflows, thus reducing the need for long periods of development time for actual integration

Available package: Business, Enterprise, Omnichannel Contact Centre and The Ultimate CX Hub

Ref: <https://zapier.com/>

Doc: <https://docs.cinnox.com/docs/zapier>

Possible use cases:

1. Send new incoming enquiry alert message to 3rd party channel
2. Insert the missed enquiry details into a spreadsheet so that customer support team can follow up the enquiry with a scheduled time (e.g. by the end of the week)

(CINNOX Trigger) New enquiry → (3rd Party Action) Send the alert message into MS team/ slack/email

(CINNOX Trigger) Missed enquiry → (CINNOX Action) Get enquiry detail → (3rd Party Action) Mark the visitor's name, phone & email address into excel sheet

3. Auto create new contact in 3rd party CRM system

(CINNOX Trigger) New external contact created → (CINNOX Action) Get the external contact detail → (3rd Party Action) Create/update the contact in Hubspot

4. Send welcome message through CINNOX SMS

(3rd Party Trigger) New contact created in Hubspot → (CINNOX Action) Send a welcome message SMS to the customer

Possible use cases x Monday.com:

V3.7.0 Scope supported:

1. Create a new item on Monday.com for the new enquiry with enquiry id for follow up purposes
2. Update Monday.com item status when the CINNOX enquiry status changed
3. Create a new contact in Monday.com when new external contact is created in CINNOX

(CINNOX Trigger) New incoming enquiry → (CINNOX Action) Get enquiry detail (Optional) → (Monday.com Action) Create new item

(CINNOX Trigger) Enquiry status changes (e.g handling) → (Monday.com Action) Update item column value

(CINNOX Trigger) New external contact created → (CINNOX Action) Get the external contact detail → (Monday.com Action) Create/update the contact in Monday.com

Out of V3.7.0 Scope – Improvement on Zapier phase 2:

1. Send a notification message to a specific CINNOX staff/group space when the item status changed to critical
2. Send a notification message to a specific CINNOX staff/group space when a new item is created in a specific board
3. Create a new item when there is a new enquiry together with the enquiry deep link, to allow user to visit CXDB for follow up purposes.
4. Create a new item when a new label created / edited in CXDB

(Monday.com Trigger) Specific Column Value Changed in Board → (CINNOX Action) Send a message to a specific CINNOX staff/group space

(Monday.com Trigger) New Item in Board → (CINNOX Action) Send a message to a specific CINNOX staff/group space

(CINNOX Trigger) Enquiry status changes (e.g. handling/missed) → (CINNOX Action) Get enquiry detail (With enquiry deep link) → (Monday.com Action) Create new item

(CINNOX Trigger) New Label created/edited → (Monday.com Action) Create new item / Update the item value

CINNOX x Zapier phase 1 scope

Scope: Triggers

Function	Description
1. New external contact created	Trigger the contact event when the external contact is created
2. External contact edited	Trigger the contact event when the external contact is edited
3. External contact deleted	Trigger the contact event when the external contact is deleted
4. External contact merged	Trigger the contact event when the external contact is merged
5. New incoming enquiry	Trigger the enquiry event when CX received a new incoming enquiry
6. Enquiry handling by agent	Trigger the enquiry event when the enquiry status changes to Handling
7. Missed enquiry	Trigger the enquiry event when the enquiry status changes to Missed
8. Enquiry closed	Trigger the enquiry event when the enquiry status changes to Closed

Scope: Actions

Function	Description
1. Get enquiry detail	Allow you to query the enquiry detail
2. Get External contact detail	Allow you to query the external contact detail
3. Get Number list	Allow you to query available number list
4. Send SMS	Allow you to send SMS

CXDB Configuration

CXDB > Administration > Service Integration > Third Party Integration > Zapier

1. Add Zapier account
2. Input the Zapier account name and click confirm
3. Once the account created successfully, the Zapier account credentials will be shown

The screenshot shows the Cinnnox dashboard interface. On the left is a navigation sidebar with options like Administration, Widget, Appearance, Visitor Forms, Installation, Recording & Transcript, Storage, Organisation, Security, Channel Source, Service Integration, and API. The main content area is titled 'Service Integration' and contains a 'Zapier Account List' table with one entry: 'Zapier'. Below the table is a 'Setup Zapier Account' form with a text input field for 'Zapier Account Name' (0/50 characters) and 'Cancel' and 'Confirm' buttons.

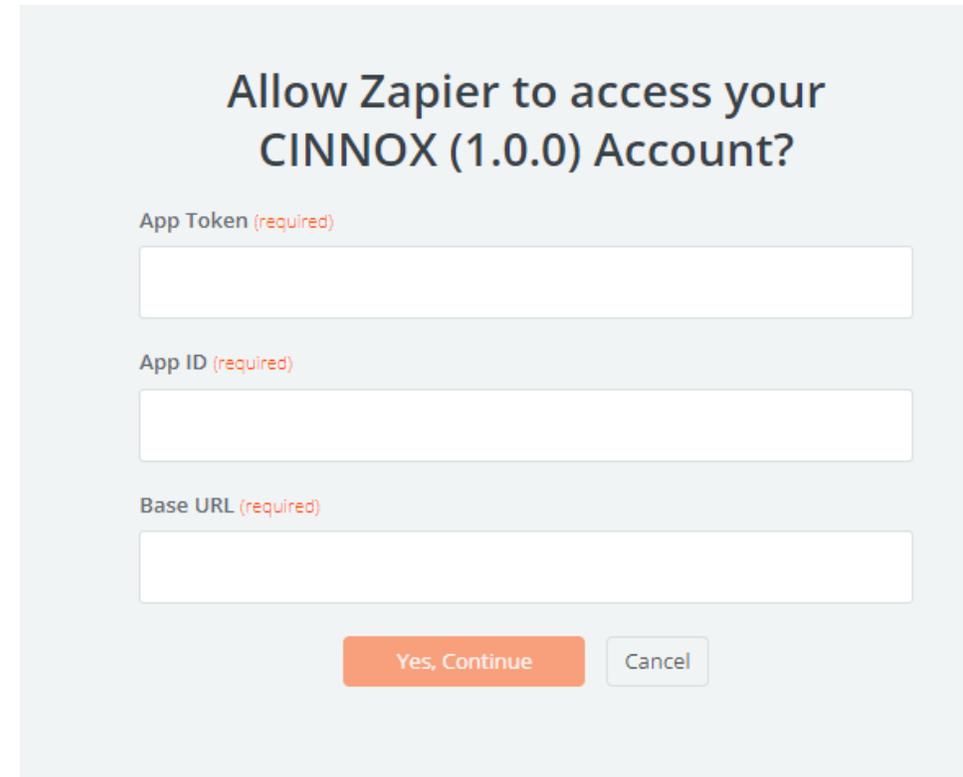
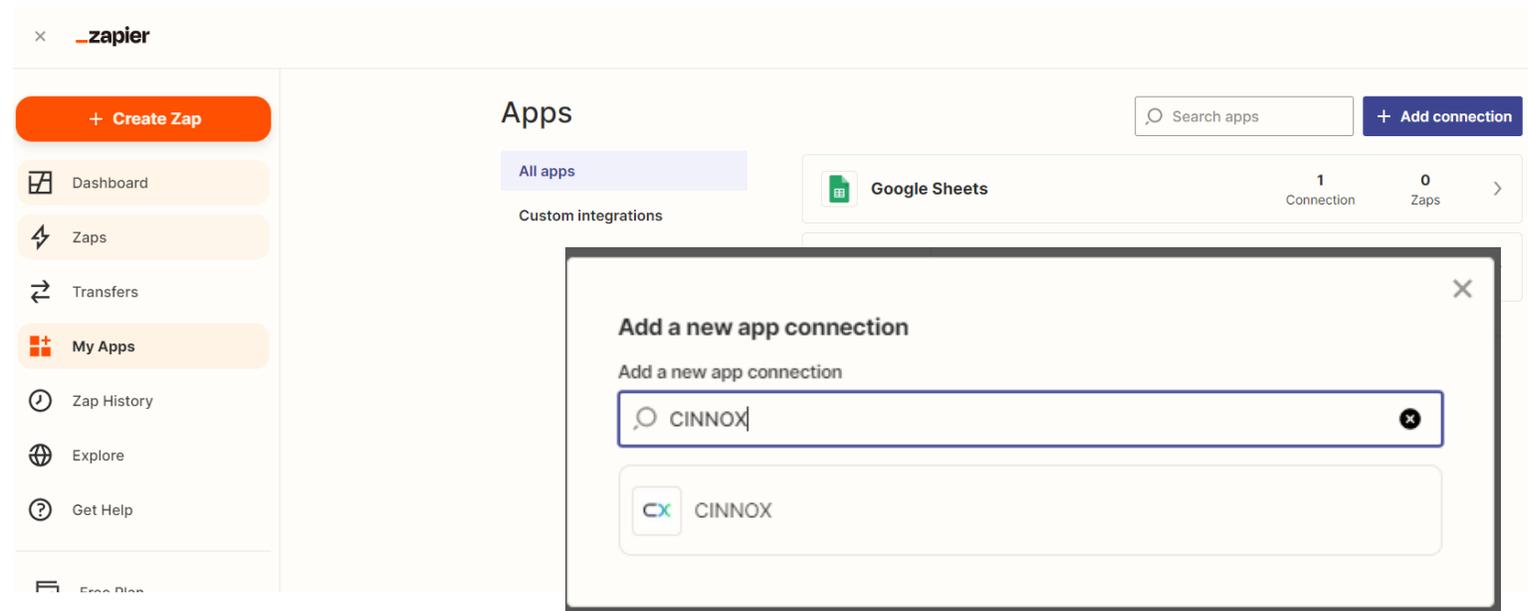
This screenshot shows the 'Zapier Account Credentials' page for an account named 'Barry_test'. It includes instructions on how to complete authentication in Zapier and provides the following details:

Zapier Account	Barry_test	Edit
Zapier Account Credentials		
Create a Zapier Account to generate the App ID and App Token to connect and authenticate between your Zapier and CINNOX service account. Learn more in our Dashboard Guide		
Complete the authentication in Zapier by the following steps. 1. Log in to your Zapier and navigate to "My Apps". 2. Search for "CINNOX" apps and click "Connect App". 3. Fill in the form with the Credentials – App ID, App Token and Base URL and click "Yes, Continue" to complete the authentication.		
App ID	0023dee6-611d-4c43-965d-d6660940b519	
App Token	mct.1.91086.53164.eyJzYWx-1joiQ-FFRed4YWtGMCIslNlcnZpY1VJR	Regenerate
Base URL	https://hktb-wk.cx-tb1.cinnox.com	

Zapier Configuration – Connect with CX

Zapier > My Apps

1. Add connection
2. Search for CINNOX app
3. Select the CX app and fill in the login credentials
4. Click yes to continue and system will run the verification



08

Demo



THANK YOU

 +852 2472 0800

 +852 2472 0800

 productmanagement@cinnox.com