



Product Release Training

CINNOX Version **V3.10.0**

Tentative Release Date: 28rd March 2023

CONTENTS

01

**V3.10.0
Release Summary**

02

**V3.10.0
Launch 360dialog
WhatsApp and WhatsApp
Campaign**

03

**V3.10.0
Navigation Improvement**

04

**V3.10.0
Roles and Permissions
Improvement
(+ UI refinement)**

05

**V3.10.0
Custom Report Table
and View**

06

Demo

07

Q&A

08

09

01

V3.10.0 Release Summary

V3.10.0 Release Summary

- **Feature:**
 - Launch 360dialog WhatsApp and WhatsApp Campaign
- **Improvements:**
 - Navigation Bar
 - Roles and Permissions (+UI Refinements)
 - Custom Report Table / View P1

02

360dialog WhatsApp & Campaign

360dialog WhatsApp & Campaign

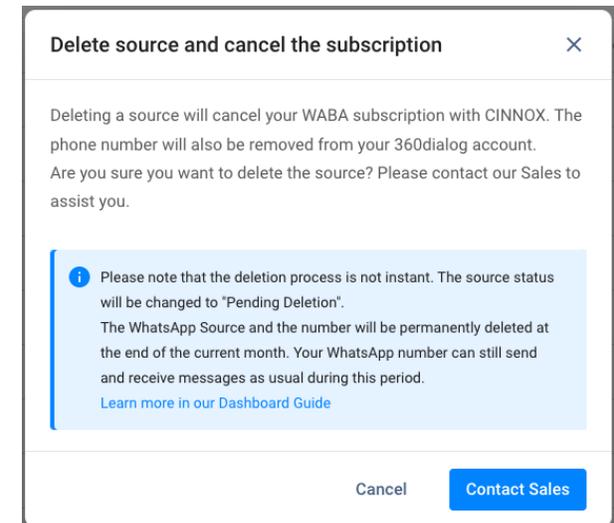
Scope:

Feature Toggles for Packages:

- Enable 360dialog WhatsApp feature for all packages that support WhatsApp Channel feature, except Sanntsu packages
- Enable WhatsApp Campaign feature for packages that have 360dialog WhatsApp and Campaign feature enabled

360dialog WABA Registration and Termination:

- **Daily report** for 360dialog WABA subscription will be sent to all IOD members by email or bot msg to a space in internal service (just like MPS daily report).
- Customers can register a 360dialog account, create a WhatsApp Business Account, and set up a WhatsApp Source on CINNOX by themselves
- In v3.10.0 (March 2023), if customers want to delete a 360dialog WhatsApp Source to terminate the WhatsApp number, they need to contact sales to inform IOD team to unsubscribe the WhatsApp number on CINNOX Partner Hub and set the termination date to complete the termination process.
- In v3.11.0 (April 2023), the termination process will be automated, but only for customers billed through Zuora.



360dialog WhatsApp & Campaign

Feature Toggles Settings for Packages:

Packages		360dialog WhatsApp	WhatsApp Campaign
Old CINNOX	Starter	Yes	Yes
	Essentials (14 days trial)	n/a	n/a
	Essentials (Paid plan)	Yes	n/a
	Business	Yes	Yes
	Enterprise	Yes	Yes
Sanntsu	All packages (7)	n/a	n/a
OLD MC	Pro	n/a	n/a
	Business	Yes	n/a
New CINNOX (Base Packages)	Digital Commerce (14 days trial)	n/a	n/a
	Digital Commerce (Paid plan)	n/a	n/a
	Omni Contact Centre	Yes	Yes
	The Ultimate CX Hub	Yes	Yes

All Sanntsu packages don't have 360dialog WhatsApp & WhatsApp Campaign feature

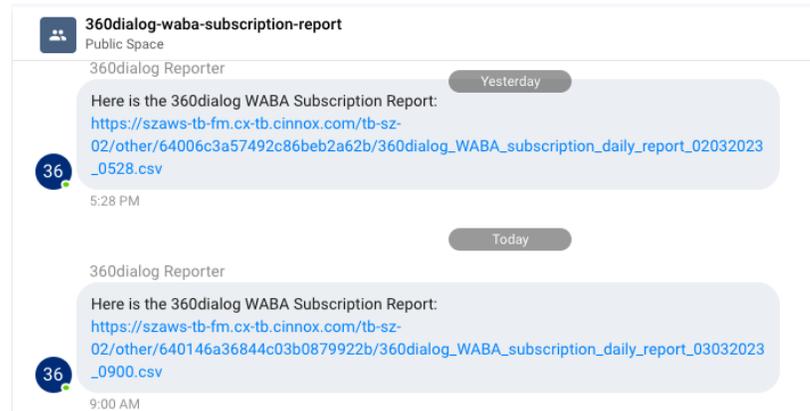
360dialog WhatsApp & Campaign

Daily Report for 360dailog WABA subscription (only for IOD members)

email



"360dialog-waba-subscription-report" space in internal service



Report content (.CSV file format)

360dialog_WABA_subscription_daily_report_03032023_0900

Partner Hub	360Dialog Account	WhatsApp Number	Status	Billing Start Date	Termination Date on 360dialog	Service ID	Domain	Customer Name	Alert Status
M800	angela.cinnox@gmail.com	12085005794	pending_deletion	20/12/2022, 08:00	31/03/2023, 08:53				alert
M800	ritali@m800.com	85230699556	live	20/12/2022, 08:00					alert
M800	miowang@m800.com	886901103408	unregistered	10/02/2023, 10:20	28/02/2023, 03:33				alert
M800	shellyyen@m800.com	85230699563	live	15/11/2022, 04:25					alert
M800	ritali@m800.com	886971609210	moved_out	16/12/2022, 10:08	03/03/2023, 01:00	cx-1000811	tpoffice.cx-tb.cinnox.com	C00701417	alert
M800	angela.cinnox@gmail.com	12173933941	live	20/12/2022, 08:00		cx-1000811	tpoffice.cx-tb.cinnox.com	C00701417	
M800	angela.cinnox@gmail.com	886916768793	live	20/12/2022, 08:00		cx-1000811	tpoffice.cx-tb.cinnox.com	C00701417	
M800	angela.cinnox@gmail.com	13512225730	live	20/12/2022, 08:00		cx-1000811	tpoffice.cx-tb.cinnox.com	C00701417	
M800	shellyyen@m800.com	886910719204	live	31/10/2022, 02:00		cx-1000811	tpoffice.cx-tb.cinnox.com	C00701417	
M800	baabaabaa55688@gmail.com	85230699720	live	28/12/2022, 03:07		cx-1000811	tpoffice.cx-tb.cinnox.com	C00701417	
M800	csdemo321@gmail.com	8613764396007	pending_deletion	14/12/2022, 11:56	31/03/2023, 11:12	S-00000960	zuora_360dialog_ult.cx-tb.cinnox.com	A-00000516	

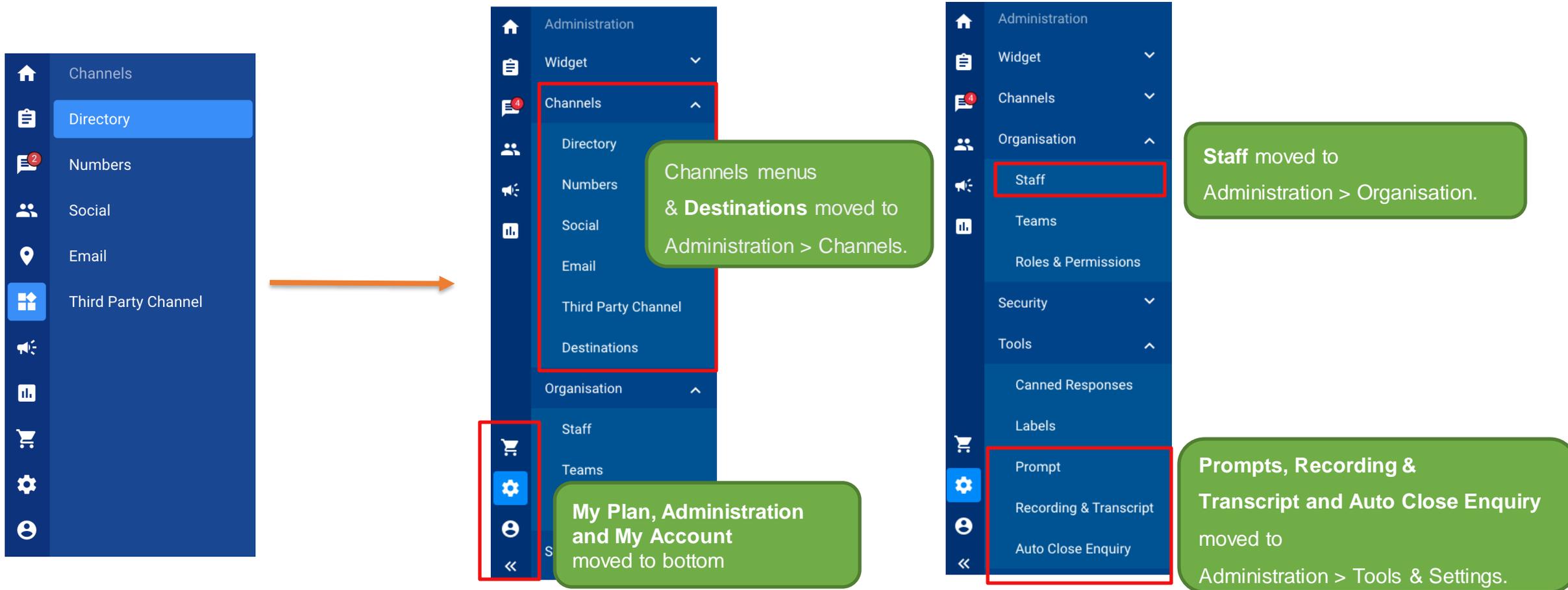
Daily report will be sent to all members in billing@m800.com at 9:00 am every day.

03

Navigation Bar Improvement

Navigation Bar Improvement

Similar features and functions are grouped together on the same menu for easy accessibility



04

Roles and Permissions Improvement

Roles and Permissions Improvement

Scope:

Refinements	CINNOX Page	Role	Platform
Refine Roles & Permissions Structure and Feature Naming	CXDB > Administration > Organisation > Roles & Permissions	Admin	Dashboard
Remove Leader Role and Team Data Access Level	CXDB > Administration > Organisation > Roles & Permissions	NA	NA
Add New Permission Toggles and Merge Permission Toggles	CXDB > Administration > Organisation > Roles & Permissions	Admin	Dashboard
Provide Default Roles Setting as Custom Role Template	CXDB > Administration > Organisation > Roles & Permissions	Admin	Dashboard
View Default Role Permission Details	CXDB > Administration > Organisation > Roles & Permissions	Admin	Dashboard
Block Admin from Editing its Own Role	CXDB > Administration > Organisation > Roles & Permissions	Admin	Dashboard
Align Permission Denied Behavior	CXDB, CXMA	All	Dashboard, MA

Roles and Permissions Improvement

Refine Roles & Permissions Structure and Feature Naming

Current Structure

- Administration Permissions
- Recording & Monitoring
- Communication
- Campaign Permissions
- Contact Permissions
- Plan



New Structure

- Calling & Messaging
- Recording & Transcript
- Enquiry
- Channel
- Contact
- Campaign
- Workflow
- Report
- Storage
- Organisation
- Security
- Plan

Add verbs before each function to clarify the range of influence of the function

Ex:

- **Make** and **Transfer** to On-net Call
- **Access** Enquiry Report
- **Manage** Social Channel

For the full list and detailed permission setting, refer to [Permission Control Feature List](#)

Roles and Permissions Improvement

Deprecate and remove Leader Role and Team Data Access Level

We streamlined the Staff Default Roles and Data Access Levels.

The **Manager** and **Leader** roles changed to **Supervisor** with Department data access level. And **Team Data Access Level** is removed.

Default Roles

Before	After
Admin	Admin
Manager	Supervisor
Leader	--
Agent	Agent

"Leader role" will be migrated to "Supervisor role"

Data Access Level

Before	After
Full	Full
Department	Department
Team	--
Restricted	Restricted

"Team data access level" will be migrated to the "Department data access level"

Roles and Permissions Improvement

Add New Permission Toggles and Merge Permission Toggles

New Permission Toggles and Settings

Function	Admin	Supervisor	Agent
Create Space	v	v	v
Join and Take Over Enquiry	v	v	x
Access Dashboard	v	v	v

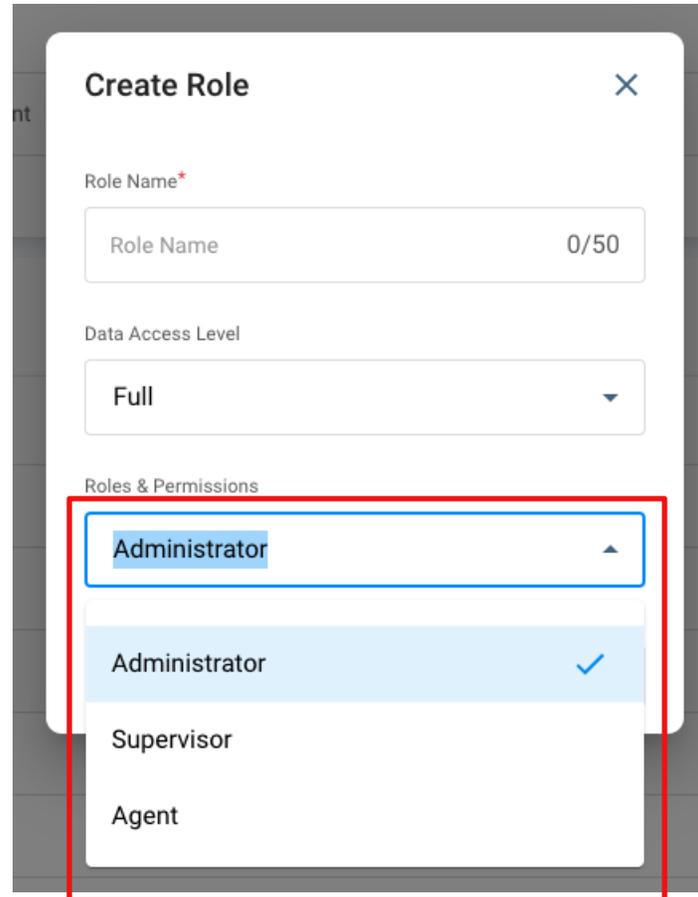
Merge Permission Toggles and Settings

Before	After
Call Recording File & Transcript File Conference Recording File & Transcript File	Access Recording File & Transcript File
Virtual Number Service Number Alphanumeric Sender ID	Manage Numbers

Roles and Permissions Improvement

Provide Default Roles Setting as Custom Role Template

When creating a custom role, Admin can pick permissions of the default role as a template to start with.



The screenshot shows a 'Create Role' dialog box with the following fields:

- Role Name***: A text input field with a character count of 0/50.
- Data Access Level**: A dropdown menu currently set to 'Full'.
- Roles & Permissions**: A dropdown menu with a list of options: Administrator (highlighted in blue), Administrator (with a blue checkmark), Supervisor, and Agent.

Ex: If admin selects Agent role, custom role template will start with Agent permission settings.

Roles and Permissions Improvement

View Default Role Permission Details

- Admin can click on default and view its permission details in a list view (not editable)

The image shows two screenshots of a web application interface. The left screenshot displays a sidebar menu with 'Roles & Permissions' highlighted. A red box around the 'View Permissions' button has an orange arrow pointing to the right screenshot. The right screenshot shows the 'Permissions of ADMIN' page with a list of permissions and their status.

Category	Permission	View	Edit	Delete	Download	Approve
Calling & Messaging	Make and transfer On-net call					
	Make and transfer Off-net call					
	Make Conference call					
	Make Video Call and Screen Sharing					
	Send SMS					
	Create Space					
	Forward Call					
Recording & Transcription	Record Call					
	Access Recording and Transcript Files	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
	Manage Recording and Transcription	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

QUICK ACCESS

- Calling & Messaging
- Recording & Transcription
- Enquiry
- Channel
- Contact
- Campaign
- Workflow
- Report
- Storage
- Organisation
- Security
- Plan

Role Information

Role Name: ADMIN
Data Access Level: Full

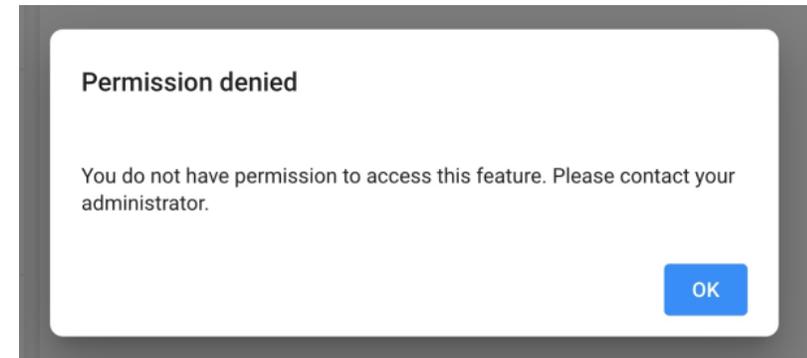
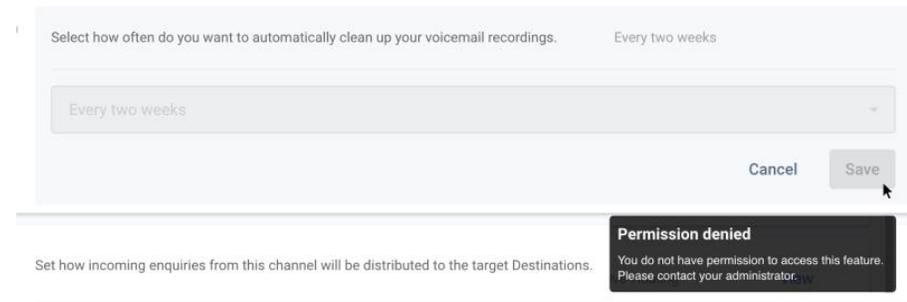
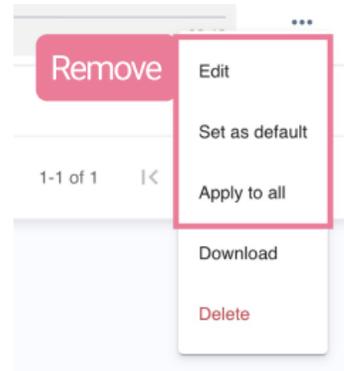
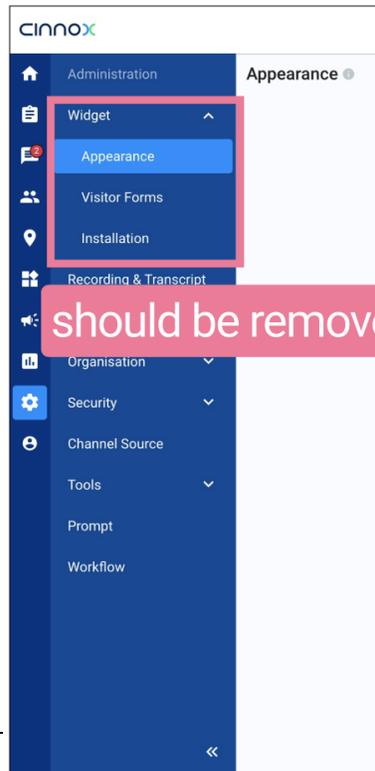
Roles and Permissions Improvement

Permission Denied Behavior Alignment

Permission Denied Golden Rule

If the user doesn't have the permission

- Hide the entrance or the action button
- If the button cannot be hidden, hover to show permission denied tooltip
- Other special case > permission denied dialog



05

Custom Report Table and View for Enquiry Report

Custom Table and View - Definition

Enquiry report contains multiple views.

The purpose is to allow the user to set the different selection of data columns and filters across the different views.

Each view contains a table which is independent from another view.

The screenshot shows the 'Enquiry Report' interface. On the left is a dark blue sidebar with a 'Reports' menu containing 'Enquiry Report', 'Call Report', 'Conference Report', 'Chat Report', 'SMS Report', 'Visitor Report', and 'Staff Report'. The main area is titled 'Enquiry Report' and features a view selector at the top with options: 'My view', 'Visitor view', 'Enquiry view', and '30 days enquiry'. Below this is a search bar for 'Search Enquiry ID' and a download icon. The main content is a table with columns: 'Enquiry ID', 'Enquiry Status', 'Updated Date & Time', 'Channel Type', 'Channel Detail', and 'Direct Staff'. A tooltip is visible over the 'Updated Date & Time' column header, stating 'The date and time the enquiry status was last updated.' with an example value '2023-03-06 17:27:20'. The table contains 10 rows of data with various statuses like 'Missed', 'Ongoing', 'Closed', and 'Followed-up'. On the right side of the table, there are icons for 'Show/hide columns', 'Save', and a plus sign for 'Create new view'. Annotations 1-5 are placed over these features.

1 Switch between multiple views

2 Create new view

3 Show/hide columns

4 • Able to sort & reorder
• Show tooltip

5 Save the adjustment

Enquiry ID	Enquiry Status	Updated Date & Time	Channel Type	Channel Detail	Direct Staff
INQ-000HYE	Missed	2023-03-06 17:27:20	Web Link	--	Direct Staff
INQ-000HYD	Ongoing			--	Direct Staff
INQ-000HYC	Ongoing	2023-03-06 17:09:01	Web Link	--	Direct Staff
INQ-000HYB	Missed	2023-03-06 17:08:15	Web Link	--	Direct Staff
INQ-000HY7	Closed	2023-03-06 17:05:41	Directory	--	Direct Staff
INQ-000HY8	Ongoing	2023-03-06 17:02:57	Web Link	--	Direct Staff
INQ-000HY9	Missed	2023-03-06 17:02:29	Directory	Tag (Luc-test)	Luc Staff
INQ-000HW1	Followed-up	2023-03-06 16:29:46	Email	EdyyyyyyyyyyyyyyyyyyyyTt	edyStaff
INQ-000HY5	Closed	2023-03-06 16:21:26	Directory	--	Direct Staff

Custom Table and View

Purposes:

- To align enquiry report data on CXDB and downloaded excel file.
- To be able to accommodate various user needs to view and utilize data in table format by providing the custom table and view.

Applicable Package: All paid plans

Role: Available for all roles (based on role & permission setting)

Improvement Highlights:

3.9.0	3.10.0
One table contains all 17 data columns	Able to customize the table to show only the required data columns
Unable to save the frequently use filters	Able to save the frequently used filters
Only one table for enquiry report	Able to create up to 10 views to save different tables. Different view can contain different data columns and filters.
Data in CXDB and data in exported excel report show different data period and column title	What user sees in the CXDB table is what user gets in the downloaded excel file.
Unable to select the specific time period under “Date & Time” column	Able to select the specific time period under “Date & Time” column

Custom Table and View

Scope of Column and Filter Adjustment

- **CINNOX Page:** Enquiry Report
- **Platform:** Dashboard

Amendment	Description
1. Add visitor related column	Add visitor related column including IP address, phone number, social messaging, email, company, job title, contact type, and platform
2. Breakdown "Handled By" column	"Handled By" column becomes "Destination Name", "Destination Type" and "Destination Endpoint".
3. Align the data value between CXDB and downloaded file	The improvements: <ul style="list-style-type: none">• Enquiry type: follows the CXDB and filter which are more precise• Channel type: follows the filter options which is more complete
4. Add the columns in CXDB to the download file	Add the columns that were missing: <ul style="list-style-type: none">• Participants• Transferred to

Custom Table and View

Scope of Column and Filter Adjustment

Amendment	Description								
5. Improve filter	<ul style="list-style-type: none"> • Able to define time selection for “Date & Time” filter • Separate Staff and Visitor into different filter • Add visitor platform as a filter • Allow multiple selection and typing to search filter name • Rename the following filters to align with column names <table border="1" data-bbox="858 615 1854 832"> <thead> <tr> <th data-bbox="858 615 1200 671">3.9.0</th> <th data-bbox="1200 615 1854 671">3.10.0</th> </tr> </thead> <tbody> <tr> <td data-bbox="858 671 1200 726">Handle type</td> <td data-bbox="1200 671 1854 726">Destination type</td> </tr> <tr> <td data-bbox="858 726 1200 782">Last Handled Group</td> <td data-bbox="1200 726 1854 782">Last Handled Destination Name</td> </tr> <tr> <td data-bbox="858 782 1200 832">Last Handled Party</td> <td data-bbox="1200 782 1854 832">Last Handled Destination Endpoint</td> </tr> </tbody> </table>	3.9.0	3.10.0	Handle type	Destination type	Last Handled Group	Last Handled Destination Name	Last Handled Party	Last Handled Destination Endpoint
3.9.0	3.10.0								
Handle type	Destination type								
Last Handled Group	Last Handled Destination Name								
Last Handled Party	Last Handled Destination Endpoint								
6. Add tooltip for columns and filters	See tooltip by clicking on tooltip icon for filter or hover over text for filter, column selection and table								
7. Amend file name	New format: ReportName_Detail_Report_yyyymmddTHHMMSS (e.g. Enquiry_Detail_Report_20221110T171347)								

Custom Table and View

Scope of View and Table Functions

Function	Description
1. Show/Hide columns in CXDB table	Select columns to show or hide from the table
2. Reorder columns horizontally	Drag and drop column header to reorder
3. Sort data	Sort data vertically by <ul style="list-style-type: none"> • Updated Date & Time • Closed Date & Time • Created Date & Time • Enquiry ID • Destination endpoint • Visitor Name
4. Manage views	Add/Delete/Duplicate/Rename/Reorder a view
5. Provide predefine views	Predefine views are the examples of different columns and filters adjustment that can support the different requirement of data analysis and reporting. The users can make change and overwrite.
6. Save table and view setting	Manually save the setting of table and view that adjusted by user account
7. Export data based on the current view	Export data based on the current view in to excel file. What user sees in the CXDB table is what user gets in the downloaded excel file.

Custom Table and View: Filter

1. Separate Staff and Visitor into different filter
2. Able to define time selection for "Date & Time" filter

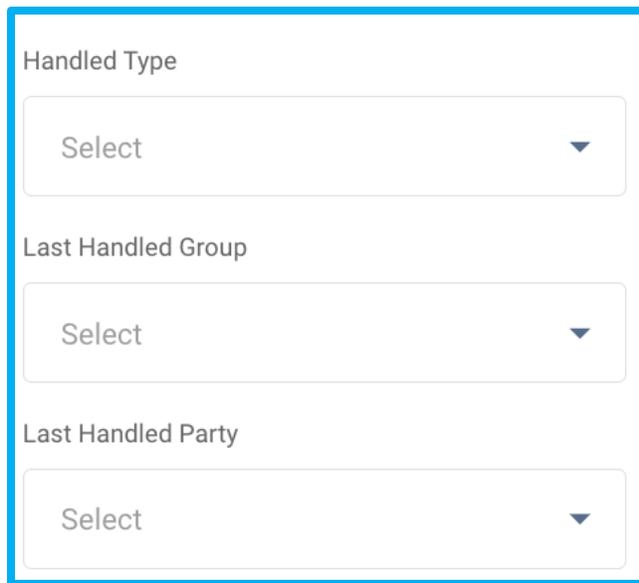
The image shows a filter interface with several sections:

- Filter (0)**: A header with a right-pointing arrow.
- Visitor/Staff**: A search box with a magnifying glass icon.
- Updated Date & Time**: A dropdown menu currently showing "Last 7 Days".
- Created Date & Time**: A section with a dropdown menu set to "All" and a calendar view for March and April 2023. The number "2" is circled in the calendar for March 2nd.
- Closed Date & Time**: A section with a dropdown menu set to "All".
- Staff Name**: A dropdown menu currently showing "All".
- Visitor Name**: A search box with a magnifying glass icon and the text "Search Visitor Name".
- Date & Time Selection**: A detailed view of the date and time selection process. It includes "From" and "To" date pickers with time dropdowns (01:00 and 20:30). Below this is a calendar for March 2023 with the number "6" circled. To the right are "Cancel" and "Confirm" buttons.

Callout 1 (a blue circle with the number "1") points to the "Staff Name" and "Visitor Name" dropdowns. Callout 2 (a blue circle with the number "2") points to the date and time selection fields.

Custom Table and View: Filter

3. **Rename** filter to align with column
4. Add **visitor platform** as a filter
5. Align the operation across the filters by **allowing typing and multiple selection**. The only different is visitor filter remains the same.
6. Filter **will still be applicable** although the related column is hidden (show/hide is not add/remove)

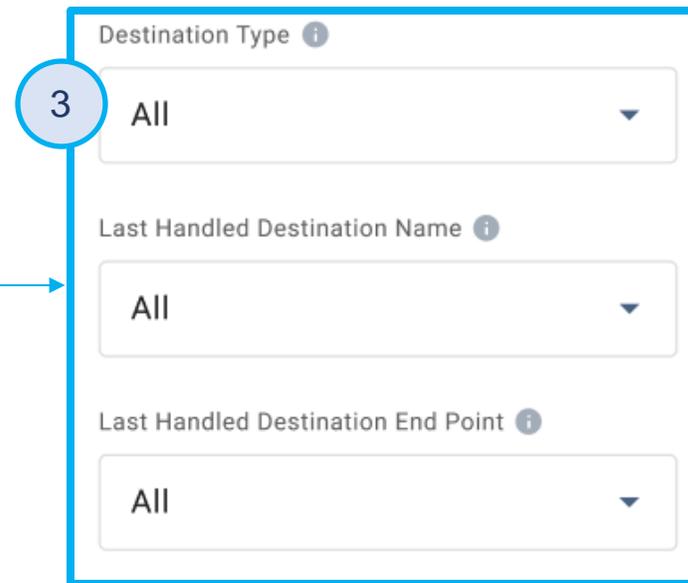


Handled Type
Select

Last Handled Group
Select

Last Handled Party
Select

This panel shows three filter dropdowns: 'Handled Type', 'Last Handled Group', and 'Last Handled Party', each with a 'Select' option.

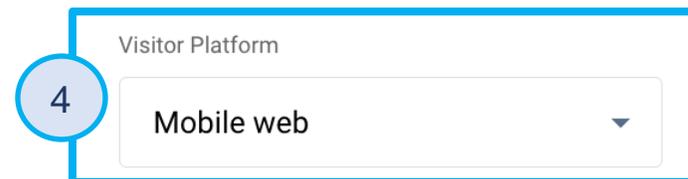


3 Destination Type ⓘ
All

Last Handled Destination Name ⓘ
All

Last Handled Destination End Point ⓘ
All

This panel shows the updated filter configuration after step 3. The 'Handled Type' filter has been replaced by 'Destination Type', 'Last Handled Group' by 'Last Handled Destination Name', and 'Last Handled Party' by 'Last Handled Destination End Point'. All three are now set to 'All'. A blue circle with the number '3' highlights the 'Destination Type' dropdown.



4 Visitor Platform
Mobile web

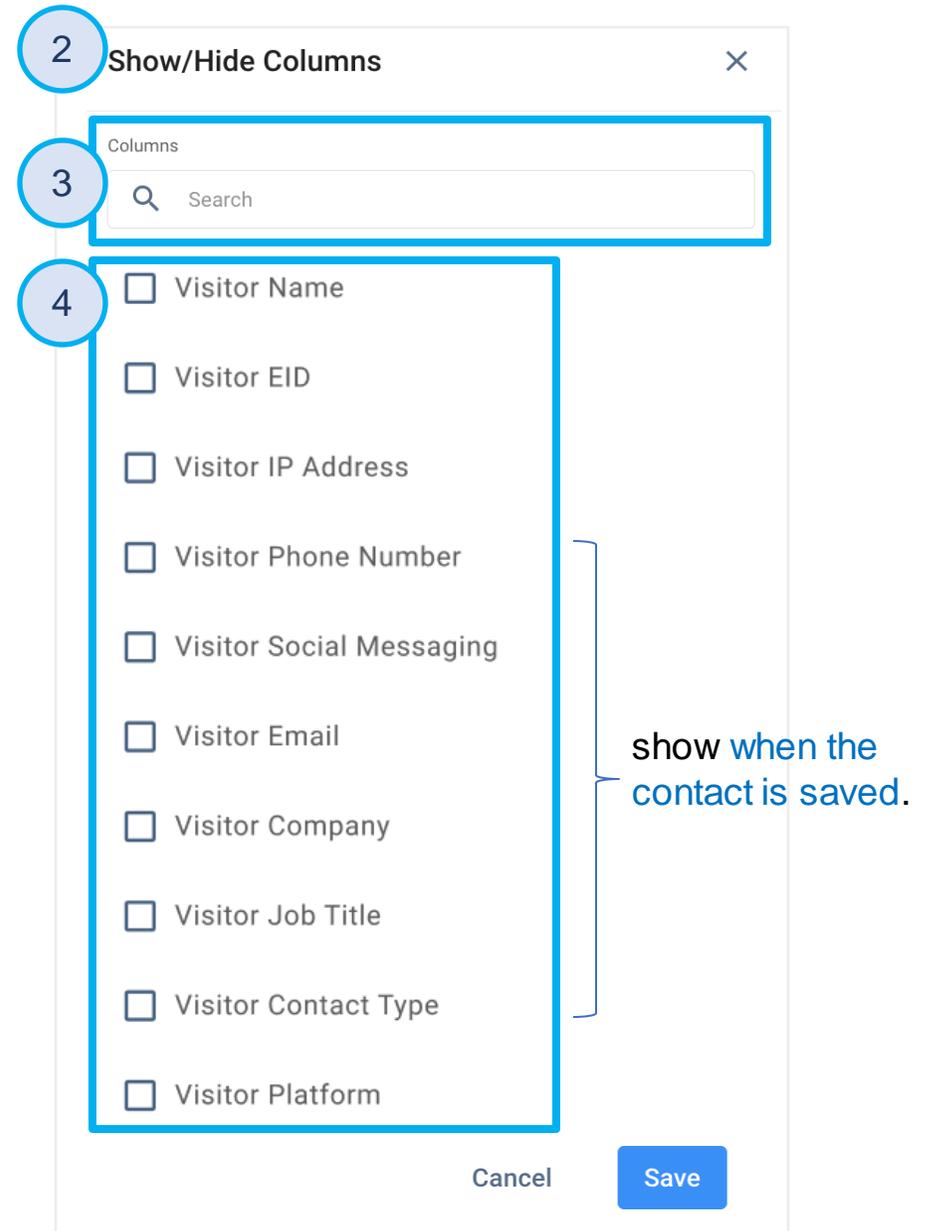
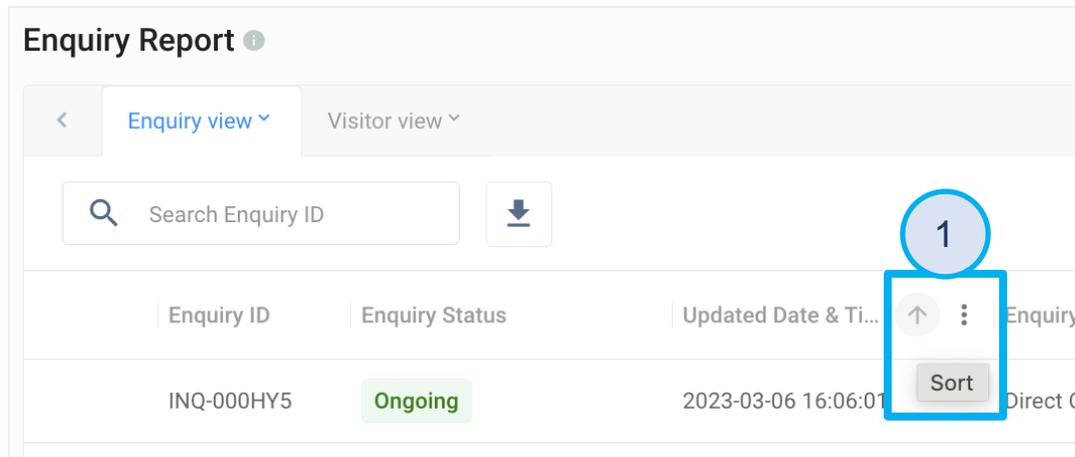
This panel shows the updated filter configuration after step 4. The 'Destination Type' filter has been replaced by 'Visitor Platform', which is now set to 'Mobile web'. A blue circle with the number '4' highlights the 'Visitor Platform' dropdown.

Options:

- Mobile web
- Desktop web
- PSTN
- Social

Custom Table and View: Column

1. Sort by date & time, enquiry ID, staff team and visitor name.
2. Select to show/hide columns.
3. Search the columns name
4. Add visitor-related column including IP address, phone number, social messaging, email, company, job title, and contact type.



Custom Table and View: Table

1. Show/hide **column** selection and **filter** selection in each view are **independent**.
2. The visibility of data is **based on role and permission setting**. Staff can only see his/her enquiry.(similar to v 3.9.0)

The image displays two screenshots of the 'Enquiry Report' interface, illustrating different views and column selections.

Left Screenshot (Enquiry Report - Enquiry view):

Enquiry ID	Enquiry Status	Enquiry Type	Destination Endpoint	Label	Staff Team
INQ-000HYE	Missed	Direct Call Enquiry			Direct Staff
INQ-000HYD	Ongoing	Direct Call Enquiry			Direct Staff
INQ-000HYC	Ongoing	Direct Chat Enquiry			Direct Staff
INQ-000HYB	Missed	Direct Chat Enquiry			Direct Staff
INQ-000HY7	Closed	Direct Chat Enquiry			Direct Staff
INQ-000HY8	Ongoing	Direct Chat Enquiry			Direct Staff

Right Screenshot (Enquiry Report - Visitor view):

Enquiry ID	Updated Date & Time	Created Date & Time	Channel Type	Channel Detail	Channel Additional Info
INQ-000HYE	2023-03-06 17:27:20	2023-03-06 17:25:50	Web Link	--	cxwc.cx-tb1.cinnox.com
INQ-000HYD	2023-03-06 17:23:45	2023-03-06 17:23:27	Directory	--	demo.cx-tb1.cinnox.com
INQ-000HYC	2023-03-06 17:09:01	2023-03-06 17:08:06	Web Link	--	cxwc.cx-tb1.cinnox.com
INQ-000HYB	2023-03-06 17:08:15	2023-03-06 17:07:11	Web Link	--	cxwc.cx-tb1.cinnox.com
INQ-000HY7	2023-03-06 17:05:41	2023-03-06 16:33:13	Directory	--	demo.cx-tb1.cinnox.com
INQ-000HY8	2023-03-06 17:02:57	2023-03-06 16:57:12	Web Link	--	cxwc.cx-tb1.cinnox.com

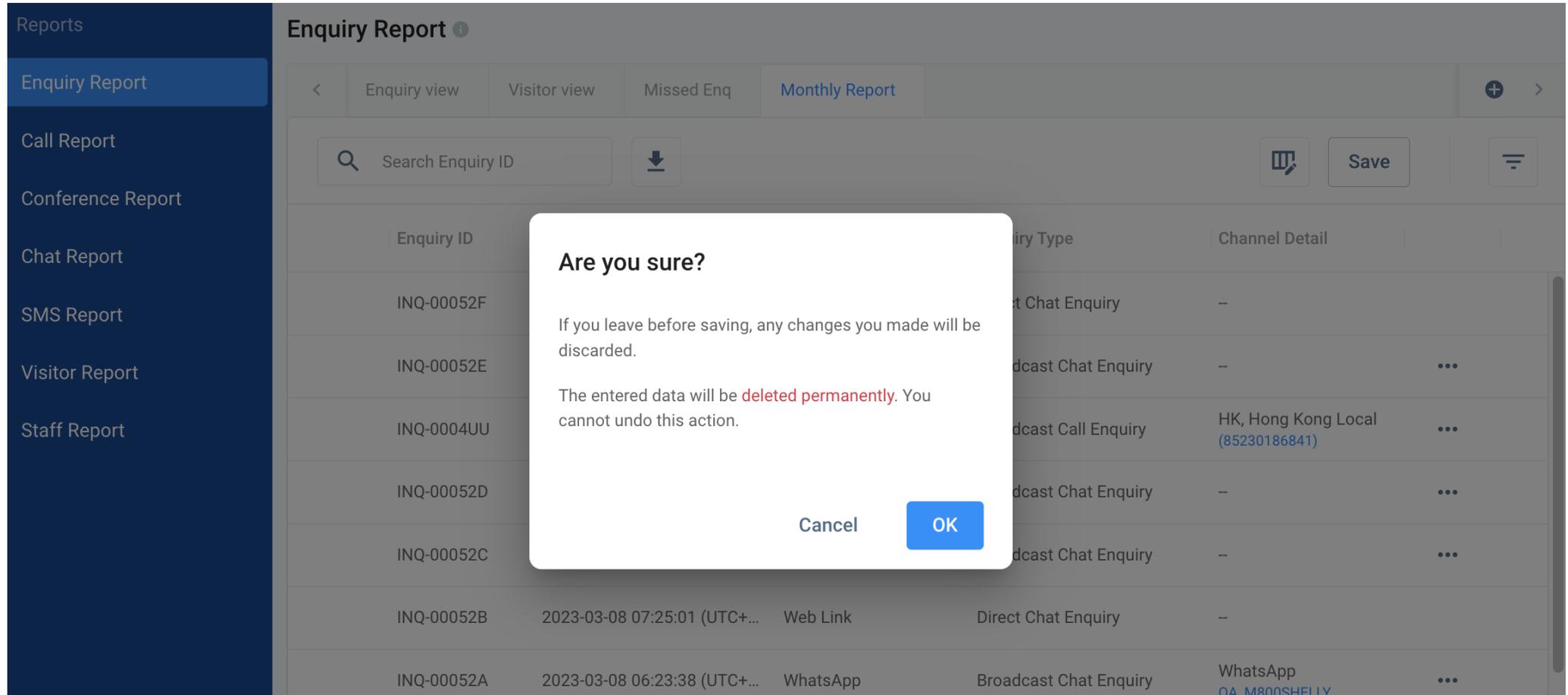
Custom Table and View: Add/Delete/Duplicate/Rename/Reorder View

1. There are 2 predefined views as the examples for every user.
2. User can make changes (add, duplicate, rename, delete) and save (overwrite) the predefined views.
3. Change of views is limited to the individual user. **No sharing across team.** (similar to v 3.9.0)
4. If there is only 1 view, user **cannot delete the last view.**
5. New **name limit is 30 characters.** Each name display limit is 168px. Name cannot be duplicated.

The screenshot displays the 'Enquiry Report' interface. At the top left, there are two view dropdowns: 'Enquiry view' and 'Visitor view'. A blue circle with the number '1' highlights the 'Enquiry view' dropdown, which has a context menu open showing 'Duplicate', 'Rename', and 'Delete' options. A blue circle with the number '2' highlights the 'Save' button. On the far right, a blue square highlights a '+' button. Below the view dropdowns is a search bar and a download icon. The main table has columns for 'Enquiry Status', 'Updated Date & Time', 'Channel Type', and 'Channel Detail'. A row is visible with 'INQ-000HYE' in the 'Enquiry Status' column, 'Missed' in a red box, '2023-03-06 17:27:20' in the 'Updated Date & Time' column, and 'Web Link' in the 'Channel Type' column. To the right of the table is a 'Filter (0)' section with a dropdown menu set to 'Today'.

Custom Table and View: Save

- The setting of view and table can be manually saved with the individual account regardless of the different devices.
- Leave page or leave current view will show the warning dialog.



Custom Table and View

Other details and limitation

- When there are many views that cannot fit within 1 page and user would like to drag view and column for reordering, the user has to drop within the page first, click arrow to see more views, and continue to drag.
- The limit of data rows that user can export is 20,000 at a time. For over 20,000 rows, please select the shorter date range and download again in a smaller batch.
- The longest past date range selection is 500 days (similar to v 3.9.0).
- Visitor and staff data in enquiry report is snapshot data of the time that the enquiry is recorded. The improvement to make dynamic data will be in the upcoming version.
- Save is manual, not automatic.
- Date & Time search will be in implement to the other area in CXDB in the upcoming version.

06

Demo

07

Q & A



THANK YOU

 +852 2472 0800

 +852 2472 0800

 productmanagement@cinnox.com