



Product Release Training

CINNOX Version **V3.11.0**

Tentative Release Date: 27th April 2023

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01

V3.11.0 Release Summary

V3.11.0 Release Summary

- Feature:
 - Scheduled Conference
 - Chrome Extension (Beta)
- Improvements:
 - Roles & Permissions P2
 - Report Improvement
 - Chat Room Avatar
 - Default Country Code by User IP
 - Open API Improvement

02

Roles and Permissions Improvement - P2

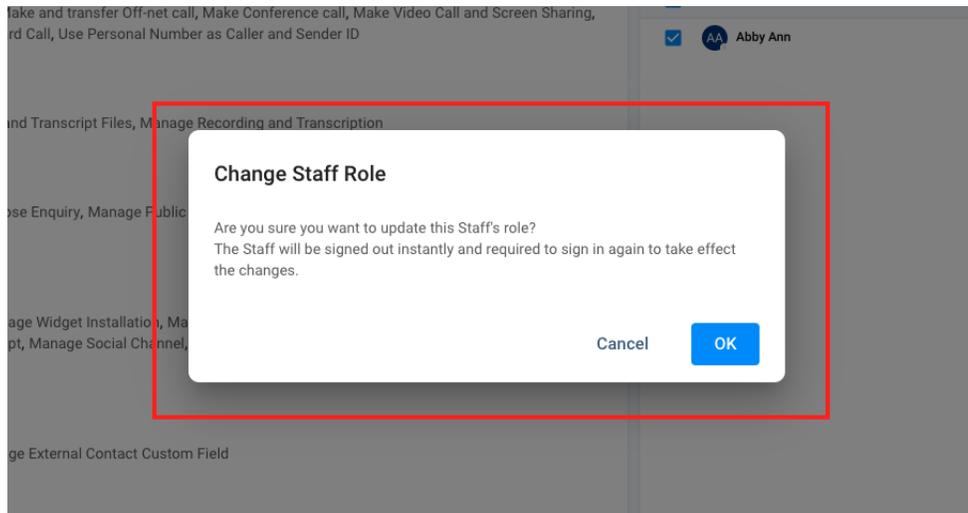
Roles and Permissions Improvement P2

Scope:

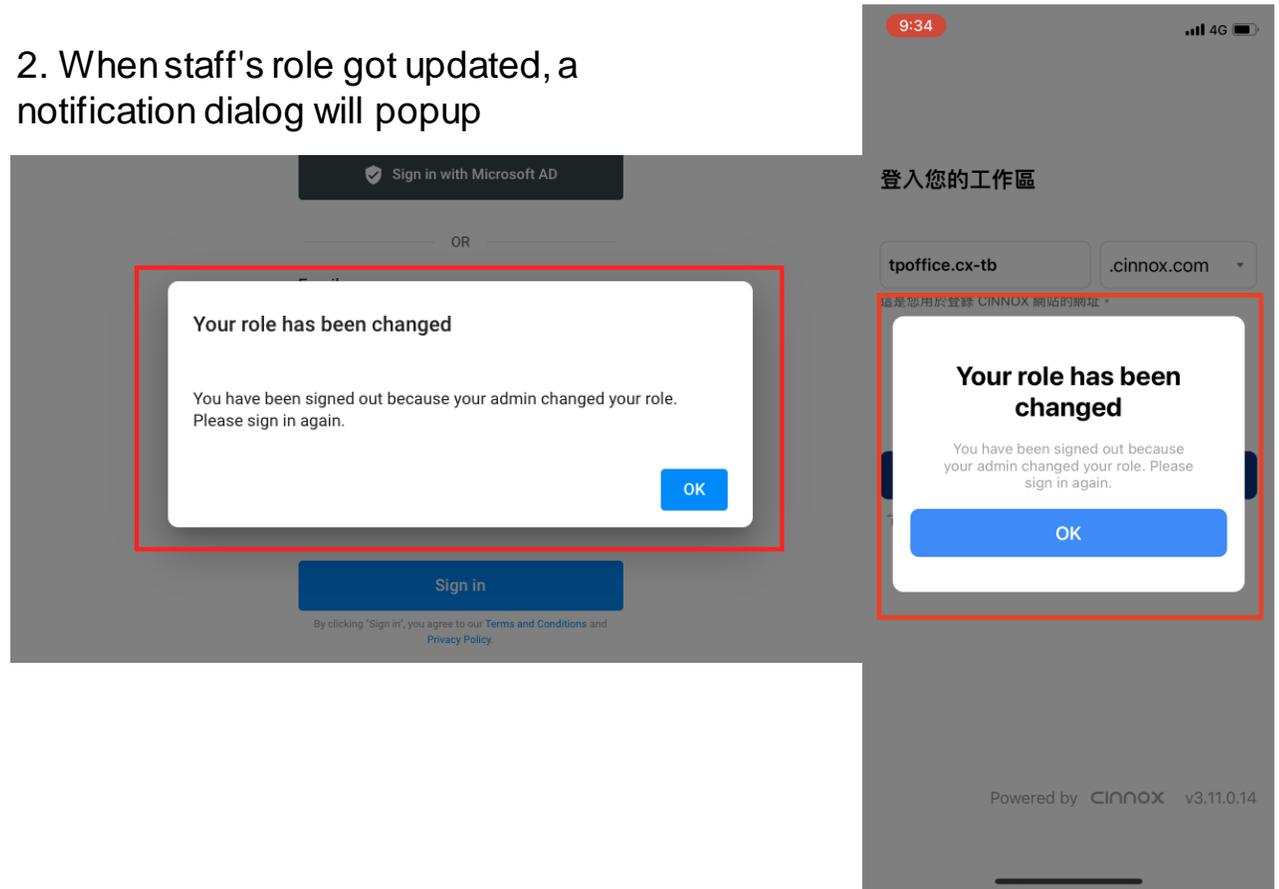
Function	Role	Platform
Change Role Log out Dialog (Admin Side and User Side)	All	CXDB, MA
Remove Contact Action Items from Enquiry Cards	All	CXDB
Refine Failed to Delete/Share Contacts Dialog	All	CXDB
Fix Share Contact List	All	CXDB, MA

Change Role Dialog

1. When Admin update a staff's role, a warning dialog will popup



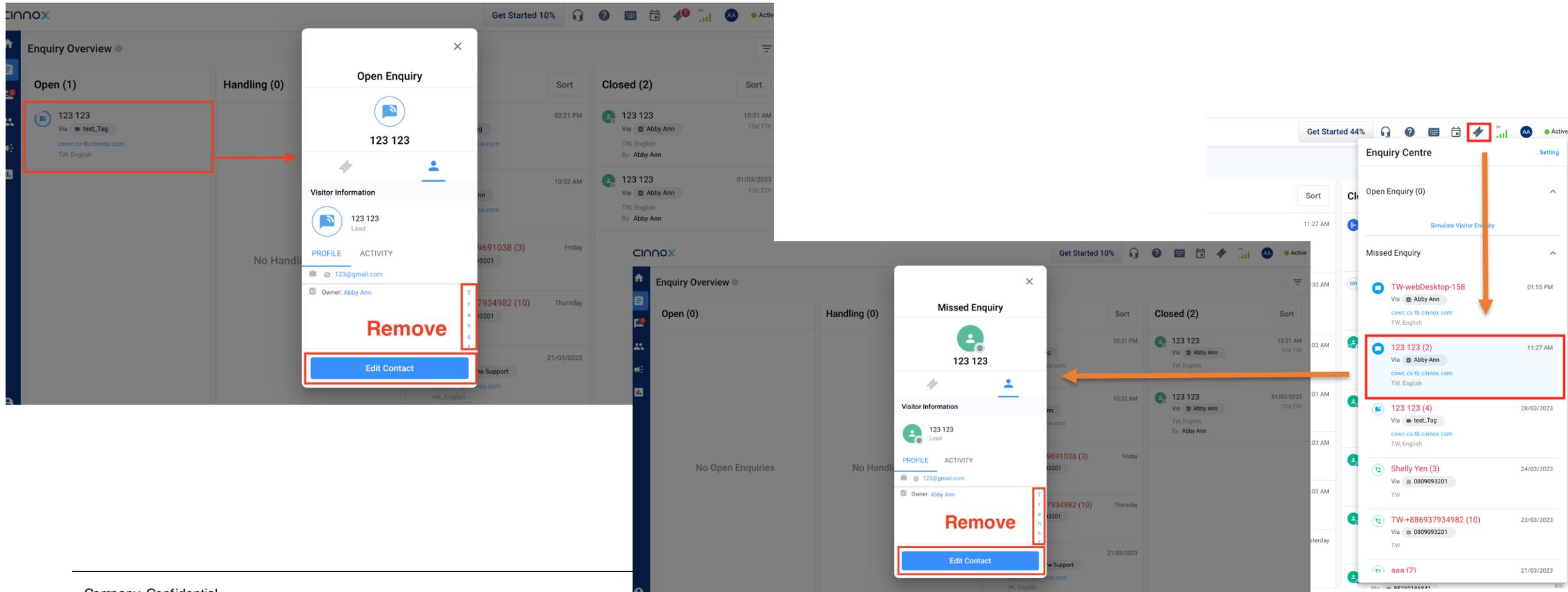
2. When staff's role got updated, a notification dialog will popup



Remove Contact Action Items from Enquiry Card

"Save as Contact", "Edit Contact" and "Transfer Contact" action buttons are removed from Enquiry Card

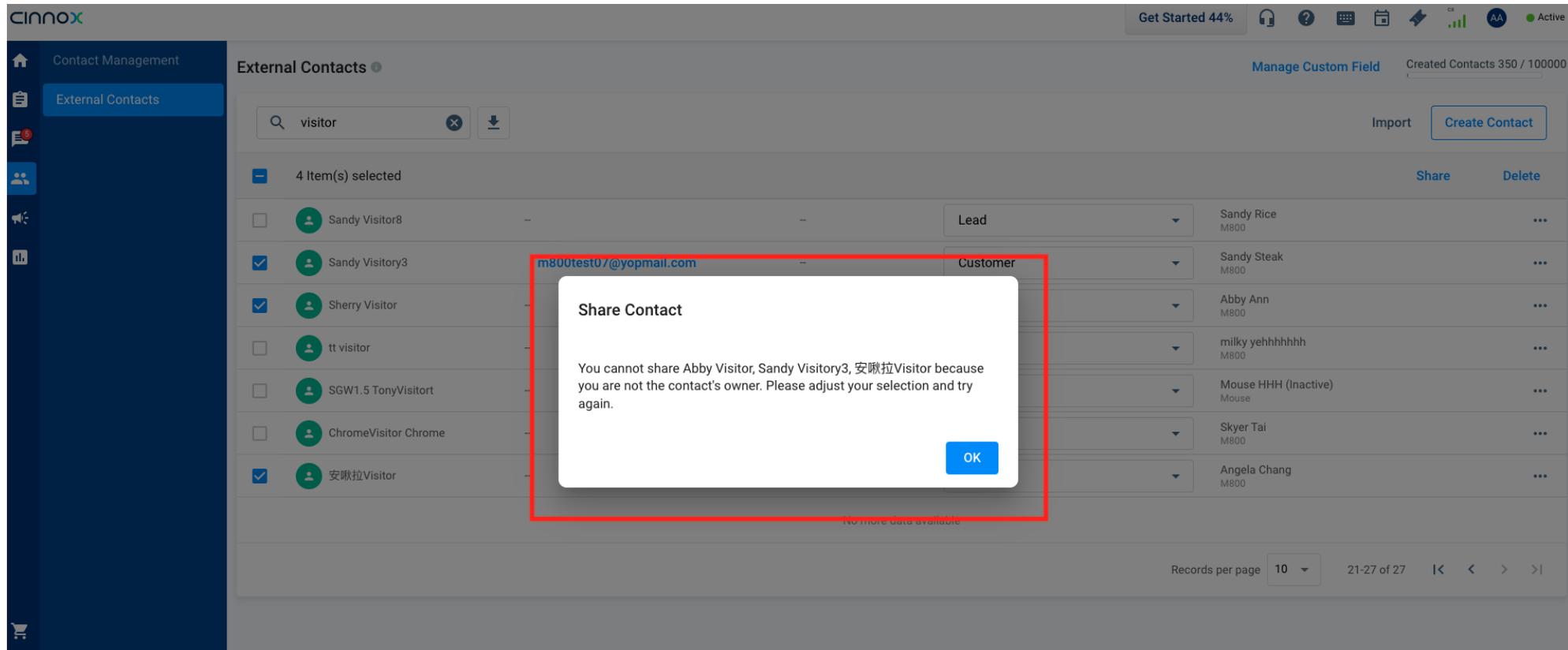
- User can still view contact information on the card



Refine Fail to Delete/Share Dialog

Refine the Fail to Delete/Share Dialog

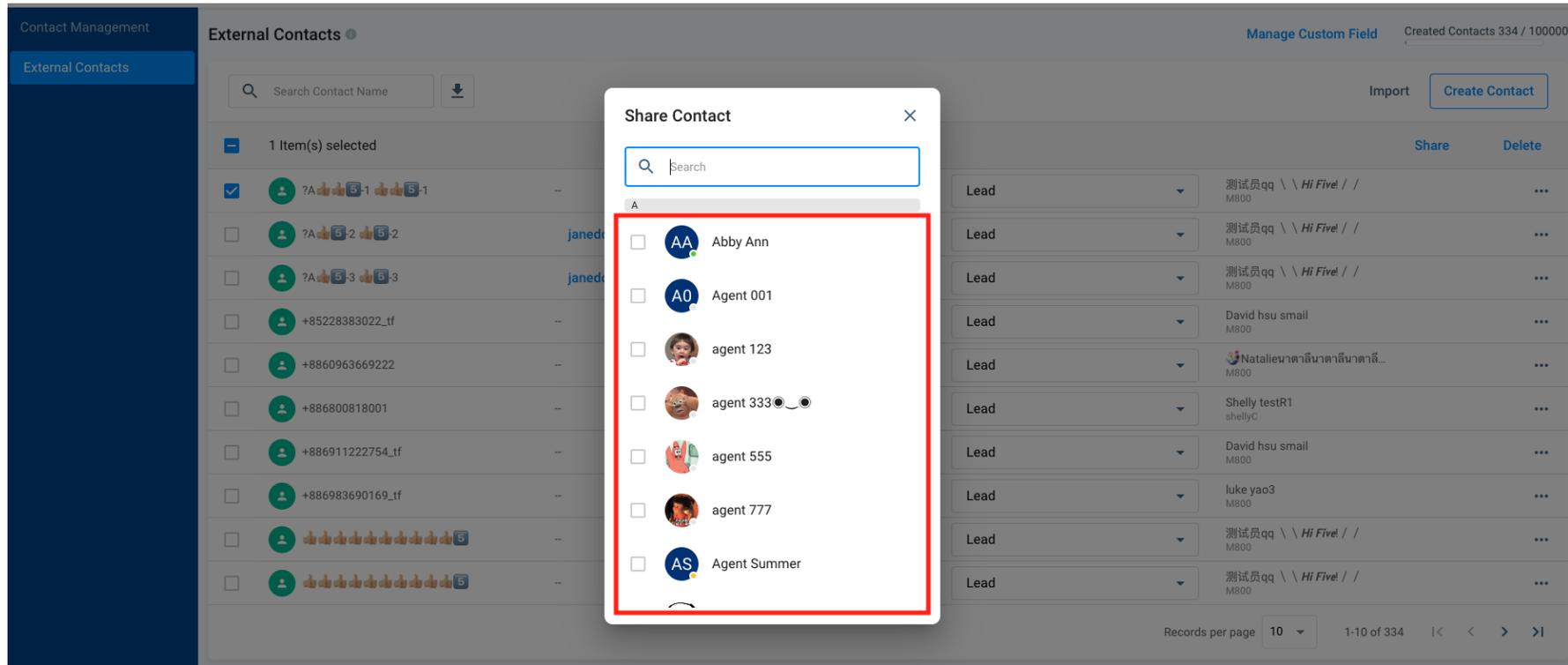
- When deleting or sharing multiple contacts, if the user is not the owner of all selected contacts, a dialog will pop up letting the user know which contacts are not allowed to be deleted or shared.



Fix Contact Share List

Share list will show full list of staffs, excludes the following:

- Admin role staffs
- Contact owner
- Already shared staffs



03

Call Report: Filter and Downloaded File Improvement

Call Report Filter and Downloaded File Improvement

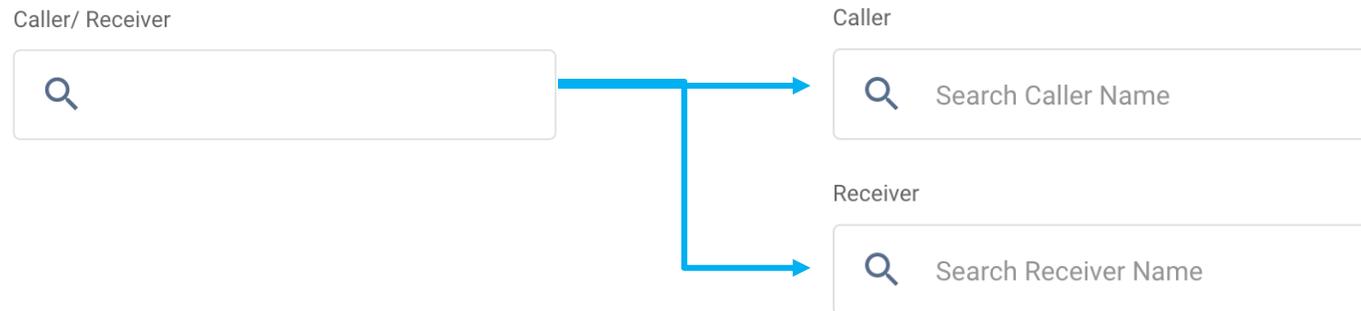
Applicable Package: All plans

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

Platform: CXDB

Improvement Highlights:

1. Filter in CXDB: Separate search "Caller" and "Receiver" in the different filters to provide more precise search result



2. Downloaded excel file:

- Align column title with CXDB by using "Receiver" instead of "Callee"
- Align the file name format with the other reports. Example: Call_Detail_Report_20230421T171347

04

Chat Room Avatar

Chat Room Avatar

Goal:

Strengthen enquiry channels in Workspace, so that staff agents can identify it at a glance.

Scope:

Page	Role	Platform
Enquiry Overview	All	Web Dashboard, Mobile
Workspace – Recent List, Enquiry Panel	All	Web Dashboard, Mobile

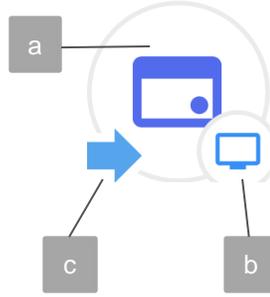
Chat Room Avatar

External Room Internal Room Space



Remaining the same room avatar, no changes.

Enquiry Room

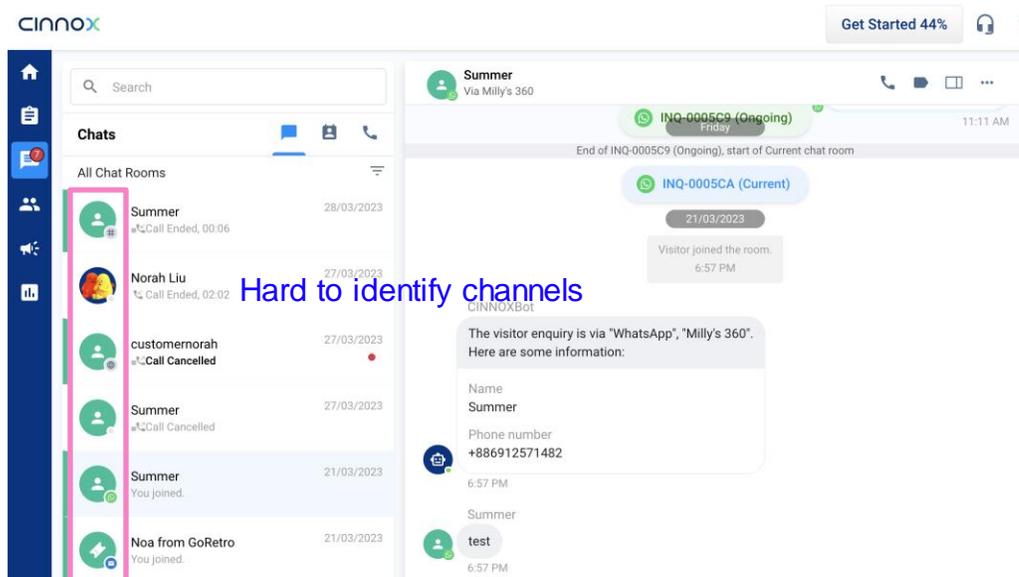


Enquiry has been transferred

a channel	b device
directory	mobile
weblink	desktop
number (off-net/PSTN)	None (no icon display)
each socials	
email	

No WOZTELL room avatar!
Changed to WhatsApp, Instagram or Messenger icon

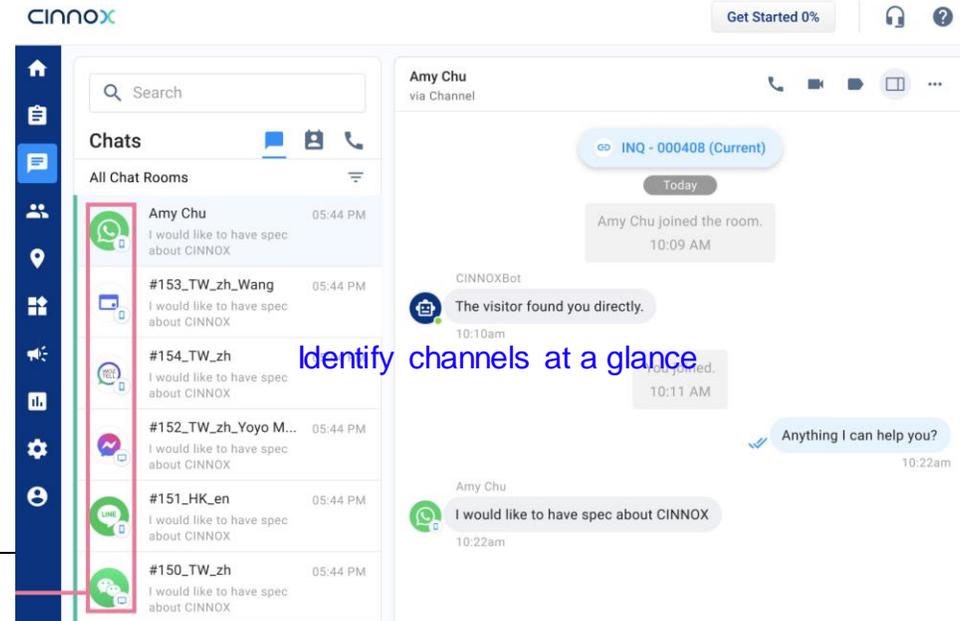
Old enquiry room avatar



Hard to identify channels

Company Confidential

New enquiry room avatar



Identify channels at a glance

05

Default Country Code by User IP

Default Country Code by User IP

Value: To improve the UX of user to enter the phone number, with auto select the country code base on their IP

Use Case: Staff/visitor enter their phone number with CINNOX, system will auto select the appropriate country code.

Remark: Before this release, which is auto selected by browser Language, (if user using English, will auto select +1 (USA))

Some customers complicated this issue before.

MA/DB (Save phone number)

MCWV/MCWC (Pre-chat)

The image displays two overlapping screenshots of the CINNOX user interface. The foreground screenshot, labeled 'MCWV/MCWC (Pre-chat)', shows a 'Tell us about yourself' form. The form includes fields for First Name, Last Name, Email, and Phone Number. A dropdown menu for the Phone Number field is open, showing '+81' selected, which is highlighted with a red box. The background shows a map of Japan with a red box around 'Japan #551' in the header. The second screenshot, labeled 'MA/DB (Save phone number)', shows a 'Create Contact' form. The 'Mobile' dropdown menu is open, showing 'United Kingdom (+44)' selected, which is also highlighted with a red box. The form includes fields for First name, Last name, Type (set to 'Lead'), Mobile, and Email. The 'Save and create new' checkbox is checked. The 'Create' button is visible at the bottom right.

06

Scheduled Conference

Scheduled Conference

Value: To allow Staff to arrange conference call and retrieve the invitation information (e.g. Access link) prior to the event and share through 3rd party calendar

Use Case: It can be used for online sales pitch, virtual meetings, Scheduled events and online professional consultation services (e.g., lawyers or doctors).

Remark:

v3.8.8 released to internal service and Sanntsu's Services.

v3.11.0 will release to all customers.

v3.8.8 training was hosted on 13 Dec 2022, folder 20221213_cx_388_training

Scheduled Conference Recap

Scope (released in v3.8.8 to internal on Dec 15, 2022):

Function	CINNOX Page	Role	Platform
1. Create a New Scheduled Conference	Scheduled Conference > Create Scheduled Conference	Staff	Dashboard, Mobile App
2. Edit a Scheduled Conference	Scheduled Conference > Find the target item	Staff (Host)	Dashboard, Mobile App
3. Start a Scheduled Conference	Scheduled Conference > Find the target item	Staff (Host)	Dashboard, Mobile App
4. Cancel a New Scheduled Conference	Scheduled Conference > Find the target item	Staff (Host)	Dashboard, Mobile App
5. Copy a Scheduled Conference Info	Scheduled Conference > Find the target item	Staff	Dashboard, Mobile App
6. Decline & Revoke a Scheduled Conference Invitation	Scheduled Conference > Find the target item	Staff (Participant)	Dashboard, Mobile App
7. Notification to Participants when: a) new invitation, b) time changed, c) removed from invitation	CINNOXBot	System	Dashboard, Mobile App

For detail, please see the product training of v3.8.8 hosted on 13 Dec 2022, folder 20221213_cx_388_training

Scheduled Conference

Scope (to be released with v3.11.0):

Function	CINNOX Page	Role	Platform
8a. Auto add event to 3 rd party calendar (Host)	Create/Edit Scheduled Conference Detail Page	Staff (Host)	Dashboard, Mobile App
8b. Manual add event to 3 rd party calendar (All)	View Scheduled Conference Detail Page	Staff	Dashboard, Mobile App
9. New date time picker	Create/Edit Scheduled Conference Detail Page	Staff	Dashboard, Mobile App
10. Select Scheduled Conference Region (Internal ONLY)	Create Scheduled Conference Detail Page	Staff (Host)	Dashboard, Mobile App
11. Create a New Scheduled Conference in Chat Room	Chat Room > More > Create Conference	Staff (Host)	Dashboard, Mobile App
12. View scheduled conference message and actions in Room	Chat Room	Staff	Dashboard, Mobile App, Weblink/Widget

Create/Edit Detail Page

Following new features and improvement are introduced:

- New Date-time picker for Start and End Dates & Times.
- Add to Calendar
 - Outlook
 - Gmail
 - Other Calendars (Download .ics file)
- Select Region of Conference Call (Available in **Internal & for creation** only)
 - Hong Kong
 - Beijing
 - Singapore
 - Japan

Schedule Conference ⓘ

Topic*

Jack Chan's CINNOX conference 29/50

Time follows your device's time zone: UTC+08:00

Start Date & Time* ⓘ

13/04/2023 × 13 : 00

End Date & Time* ⓘ

13/04/2023 × 14 : 00

Add to Calendar

Outlook Google Other Calendars

Participants

Select participants ▼

The max conference participants for your current plan is 80.

Select Region

hk ▼

Description

Add a description of your meeting.

Cancel Create

View Detail Page

Following new features and improvement are introduced:

Add to Calendar

1. Outlook
2. Gmail
3. Other Calendars (Download .ics file)

Scheduled Conference ⓘ

 Gary Ma's CINNOX conference  

Start Date & Time **End Date & Time**
13/04/2023 12:00 13/04/2023 13:00

Time follows your device's time zone: **UTC+08:00**

Add to Calendar

 Outlook  Google Other Calendars

Participants
No Participants

Description
No Description

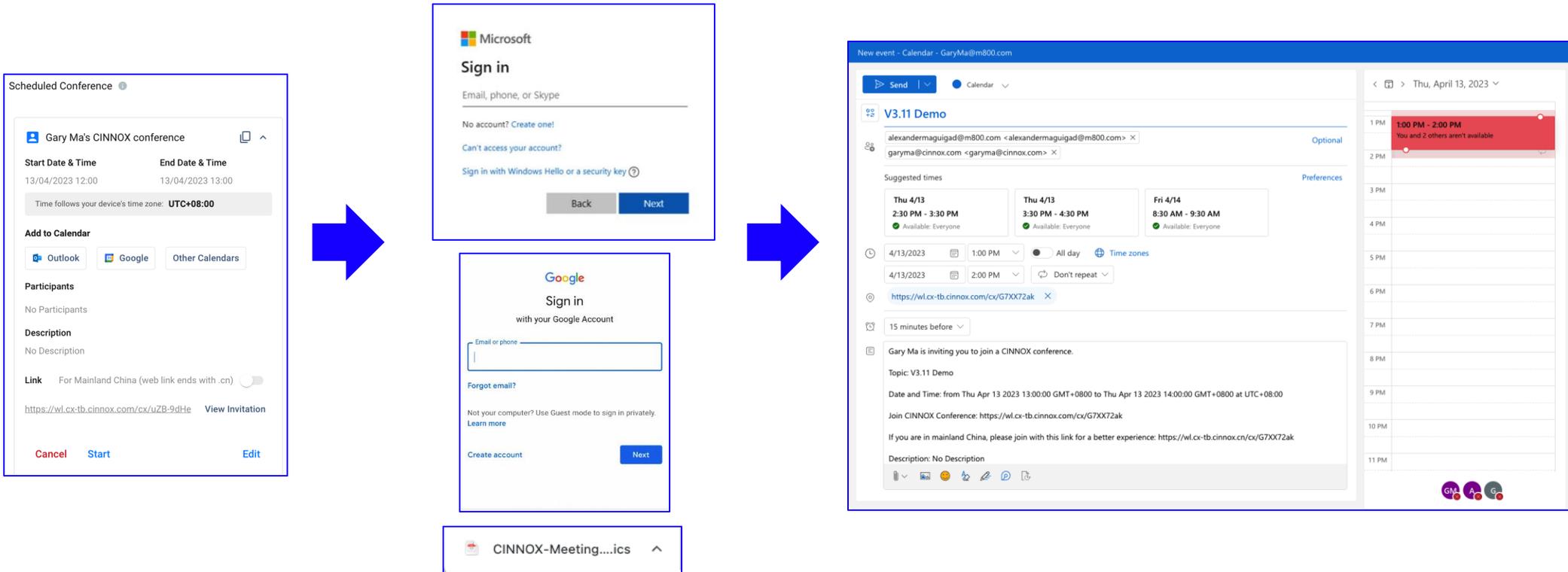
Link For Mainland China (web link ends with .cn)

<https://wl.cx-tb.cinnox.com/cx/uZB-9dHe> [View Invitation](#)

Cancel **Start** **Edit**

3rd party calendar (Dashboard)

Every action is a new and individual request, update in CINNOX side or calendar side will not change each other. **(NOT SYNCHRONISED)**
It is expected that user need to update and inform all participants if any change on the Schedule Conference.



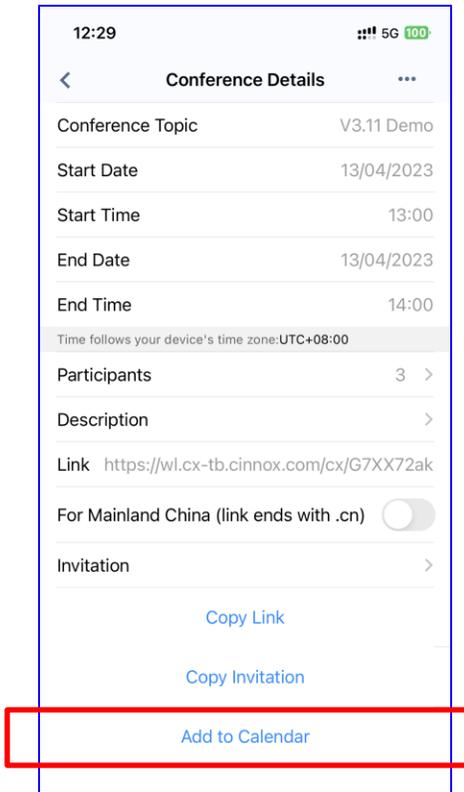
Create/Edit/View

Login 3rd party Account
Or download ics file

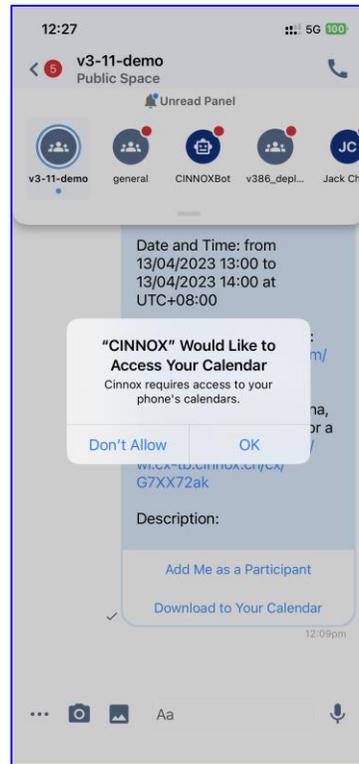
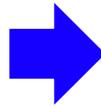
Event Detail Information

3rd party calendar (Local calendar - Mobile APP)

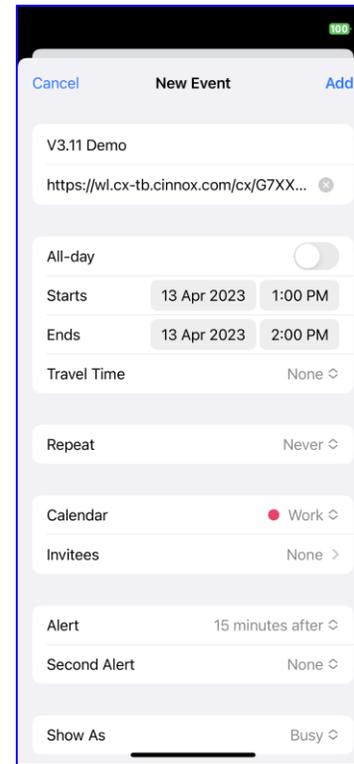
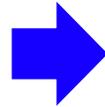
Every action is a new event request, update in CINNOX side or calendar side will not change each other. **(NOT SYNCHRONISED)**
Expected user need to update and inform all participants.



Create/Edit/View



Calendar Permission



With permission

OR



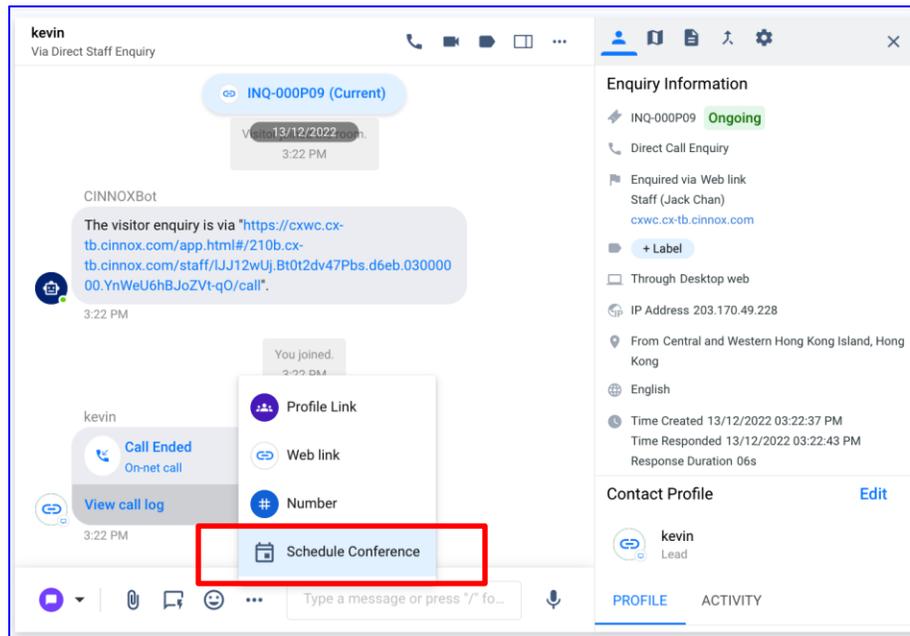
Without permission
Fallback to email

3rd party calendar – mapping table

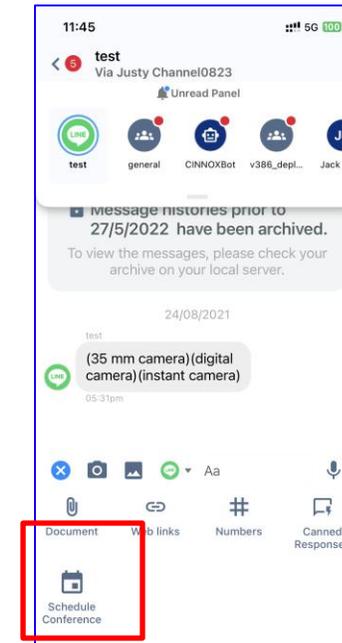
3rd Party Calendar	Detail Content/Data	Example/Remark	ics field (draft)
Title/Summary	{CXSC Topic}	V3.11 Demo	SUMMARY
Location	{CXSC Invitation Link} (.com one)	https://cinnox.com/cx/XWCHI9aH	LOCATION
Date & Time	{CXSC Start Date-time to End Date-time} (Convert to device local timezone)	from: 07/02/2023 20:38 to: 07/02/2023 20:43 Timezone depends on APP show or not show UTC+08:00	DTSTART DTEND
Repeat	N/A - Out of scope. Future development	N/A	N/A
Invitees/Required People	{CXSC All participants' Staff email address} (Excluded host & visitor)	mayisais@m800.com , tonyng@m800.com , barryliu@m800.com	ORGANIZER ATTENDEE
Description/Notes	{CXSC Full Invitation Note}	Gary Ma is inviting you to join a CINNOX conference. Topic: V3.11 Demo Date and Time: from 07/02/2023 20:38 to 07/02/2023 20:43 at UTC+08:00 Join CINNOX Conference: https://cinnox.com/cx/XWCHI9aH If you are in mainland China, please join with this link for a better experience: https://cinnox.cn/cx/XWCHI9aH Description: No Description	DESCRIPTION

Create a new Scheduled Conference in Chat Room

- Staff could create a new scheduled conference in any type of room with any message type.
- It will not invite any member in the room to the conference. It's only sending the Scheduled conference directly to the room.
- Members of the room can decide if to add themselves as a participant or just download the .ics file for reference.



CINNOX Dashboard



CINNOX Mobile APP

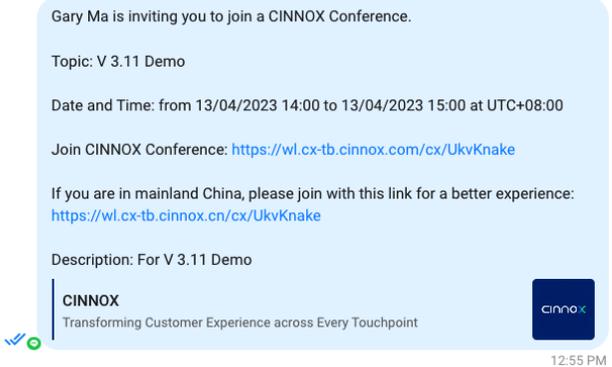
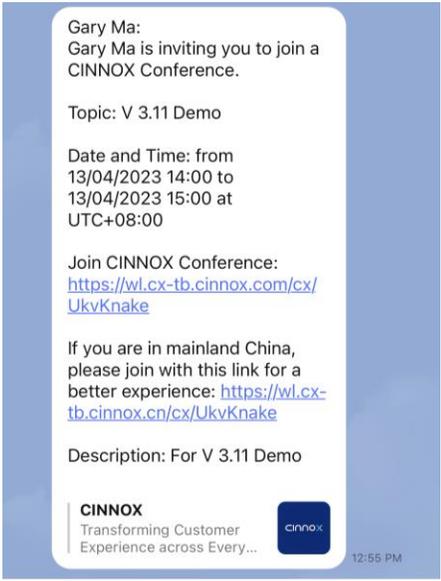
Scheduled Conference Message – IM (CINNOX Internal)

Message Type	Host/Staff	Visitor	Remark
<p>IM – Staff Room / Space (Public & Private)</p>	<ul style="list-style-type: none"> - Invitation Text - Button: Add Me as a participant (It will show in the user's Scheduled Conference list) - Button: Download to Your Calendar (it will download a .ics file) <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Gary Ma</p> <p>Gary Ma is inviting you to join a CINNOX Conference.</p> <p>Topic: V3.11 Demo</p> <p>Date and Time: from 13/04/2023 13:00 to 13/04/2023 14:00 at UTC+08:00</p> <p>Join CINNOX Conference: https://wl.cx-tb.cinnox.com/cx/G7XX72ak</p> <p>If you are in mainland China, please join with this link for a better experience: https://wl.cx-tb.cinnox.cn/cx/G7XX72ak</p> <p>Description:</p> <p style="text-align: center;">Add Me as a Participant</p> <p style="text-align: center;">Download to Your Calendar</p> </div> <div style="display: flex; flex-direction: column; align-items: center;"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Reply</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Copy</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Forward</div> <div style="border: 1px solid #ccc; padding: 5px;">Pin</div> </div>	<p>N/A</p>	<p>It will send automatically when created.</p>

Scheduled Conference Message – IM (CINNOX External)

Message Type	Host/Staff	Visitor	Remark
<p>IM – Enquiry Room (Directory & Weblink)</p>	<ul style="list-style-type: none"> - Invitation Text - Button: Download to Your Calendar (it will download a .ics file) <div data-bbox="512 532 810 1153" style="border: 1px solid #ccc; padding: 10px; background-color: #e6f2ff;"> <p>Gary Ma is inviting you to join a CINNOX Conference.</p> <p>Topic: Gary Ma's CINNOX conference</p> <p>Date and Time: from 14/04/2023 12:00 to 14/04/2023 15:00 at UTC+08:00</p> <p>Join CINNOX Conference: https://wl.cx-tb.cinnox.com/cx/vapWHHhS</p> <p>If you are in mainland China, please join with this link for a better experience: https://wl.cx-tb.cinnox.cn/cx/vapWHHhS</p> <p>Description: Testing ABC</p> <p style="text-align: right;">Download to Your Calendar</p> </div>	<ul style="list-style-type: none"> - Invitation Text - Button: Download to Your Calendar (it will download a .ics file) <div data-bbox="1230 525 1472 1196" style="border: 1px solid #ccc; padding: 10px; background-color: #e6f2ff;"> <p>Gary Ma</p> <p>Gary Ma is inviting you to join a CINNOX Conference.</p> <p>Topic: Gary Ma's CINNOX conference</p> <p>Date and Time: from 14/04/2023 12:00 to 14/04/2023 15:00 at UTC+08:00</p> <p>Join CINNOX Conference: https://wl.cx-tb.cinnox.com/cx/vapWHHhS</p> <p>If you are in mainland China, please join with this link for a better experience: https://wl.cx-tb.cinnox.cn/cx/vapWHHhS</p> <p>Description: Testing ABC</p> <p style="text-align: right;">Download to Your Calendar</p> </div>	<p>It will send automatically when created.</p> <p>If visitor has been saved as a contact with an email address, an email invitation will also be sent automatically.</p>

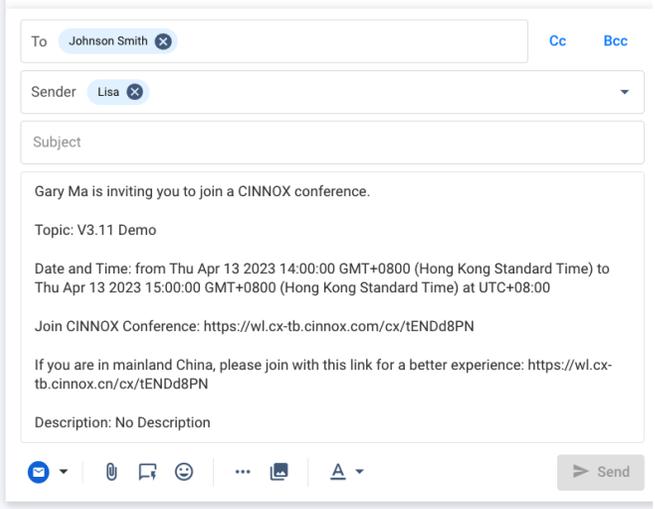
Scheduled Conference Message – IM (3rd party)

Message Type	Host/Staff	Visitor	Remark
<p>IM – Enquiry Room (Social Media, 3rd party Channel)</p>	<p>- Invitation Text</p> 	<p>- Invitation Text</p> 	<p>It will send automatically when created.</p> <p>If visitor has been saved as a contact with an email address, an email invitation will also be sent automatically.</p>

Scheduled Conference Message – SMS

Message Type	Host/Staff	Visitor	Remark
<p>SMS – External Contact Room(SMS), Enquiry Room (Virtual Number)</p>		<p>- Will receive SMS if sent.</p>	<p>It will not send automatically when created, instead it will be in the input field. Staff need to click send manually.</p> <p>If visitor has been saved as a contact with an email address, an email invitation will also be sent automatically.</p> <p>You will need a SMS Sender ID to perform this action.</p>

Scheduled Conference Message – E-mail

Message Type	Host/Staff	Visitor	Remark
<p>Email – External Contact Room (Email), Enquiry Room (Virtual Number)</p>	 <p>The screenshot shows an email composition interface. The 'To' field contains 'Johnson Smith'. The 'Sender' dropdown is set to 'Lisa'. The subject line is empty. The body text reads: 'Gary Ma is inviting you to join a CINNOX conference. Topic: V3.11 Demo. Date and Time: from Thu Apr 13 2023 14:00:00 GMT+0800 (Hong Kong Standard Time) to Thu Apr 13 2023 15:00:00 GMT+0800 (Hong Kong Standard Time) at UTC+08:00. Join CINNOX Conference: https://wl.cx-tb.cinnox.com/cx/tENDd8PN. If you are in mainland China, please join with this link for a better experience: https://wl.cx-tb.cinnox.cn/cx/tENDd8PN. Description: No Description.' The bottom of the window shows a toolbar with icons for attachments, emojis, and a 'Send' button.</p>	<p>- Will receive an email if sent.</p>	<p>It will not send automatically when created, instead it will be in the input field. Staff need to click send manually.</p> <p>If visitor has been saved as a contact with an email address, an email invitation will also be sent automatically.</p> <p>You will need an Email Sender Address to perform this action.</p>

Scheduled Conference Message – Summary

Message Type	Host/Staff	Visitor	Remark
IM – Staff Room / Space (Public & Private)	<ul style="list-style-type: none"> - Invitation Text - Button: Add Me as a participant - Button: Download to Your Calendar 	N/A	Send automatically when created.
IM – Enquiry Room (Directory & Weblink)	<ul style="list-style-type: none"> - Invitation Text - Button: Download to Your Calendar 	<ul style="list-style-type: none"> - Invitation Text - Button: Download to Your Calendar 	It will send automatically when created.
IM – Enquiry Room (Social Media, 3 rd party Channel)	<ul style="list-style-type: none"> - Invitation Text 	<ul style="list-style-type: none"> - Invitation Text 	If visitor has been saved as a contact with an email address, an email invitation will also be sent automatically.
SMS – External Contact Room(SMS), Enquiry Room (Virtual Number)	<ul style="list-style-type: none"> - Invitation Text in input bar 	<ul style="list-style-type: none"> - Will receive SMS if sent. 	It will not send automatically when created, instead it will be in the input field. Staff need to click send manually.
Email – External Contact Room (Email), Enquiry Room (Virtual Number)	<ul style="list-style-type: none"> - Invitation Text in input bar 	<ul style="list-style-type: none"> - Will receive an email if sent. 	<p>If visitor has been saved as a contact with an email address, an email invitation will also be sent automatically.</p> <p>SMS: You will need a SMS Sender ID to perform this action.</p> <p>E-mail: You will need an Email Sender Address to perform this action.</p>
Copy, Reply, Pin, Forward actions	<ul style="list-style-type: none"> - Support 	N/A	It will be a regular message in room. Therefore, except Recall, other message actions are supported in Staff. (Only message not including buttons.)

07

Beta - Chrome Extension

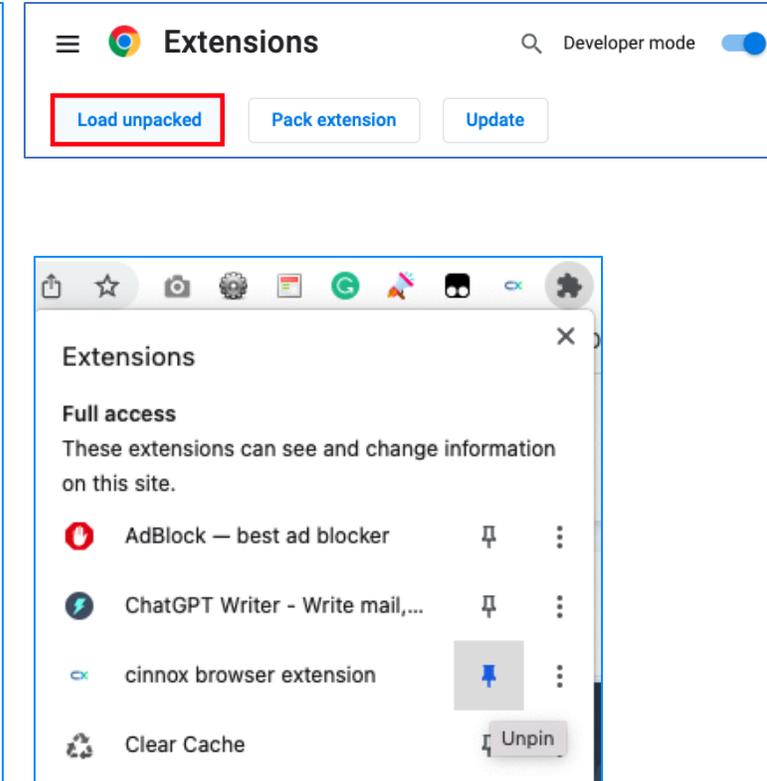
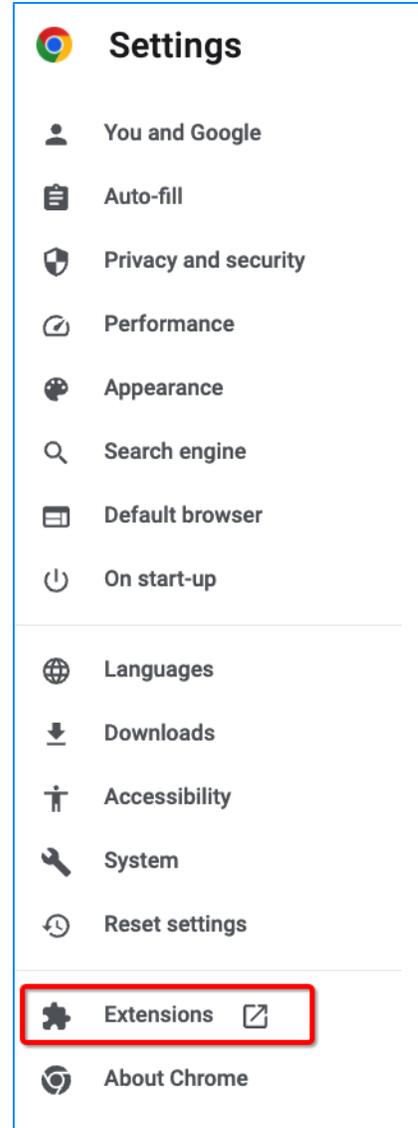
Chrome Extension (Beta)

Scope:

Function	Role	Platform
Installation, login, navigate to sign up and T&C in website.	All	Chrome extension
Auto detect number on pages	All	Chrome extension
Manual select number and right click on pages	All	Chrome extension
Make Outbound PSTN call	All	Chrome extension
Send SMS	All	Chrome extension
Receive inbound call	All	Chrome extension
Support essential call functions	All	Chrome extension

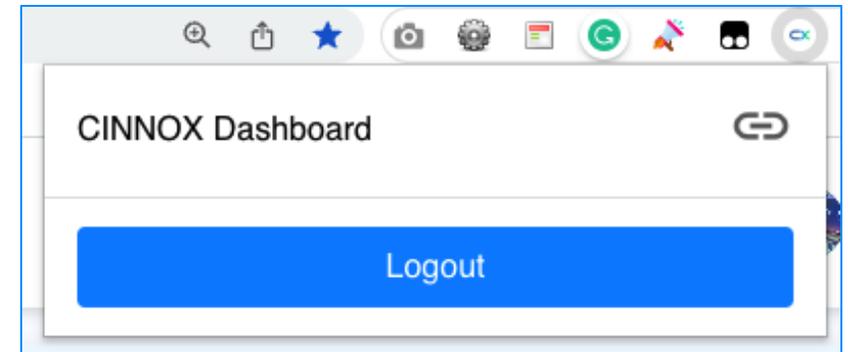
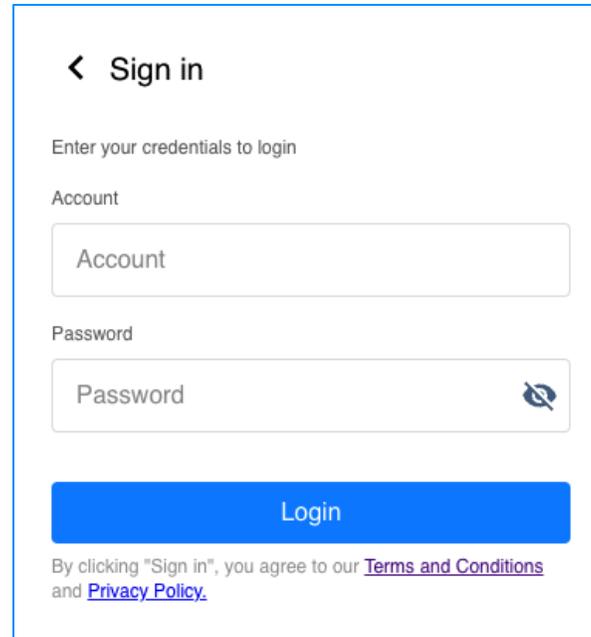
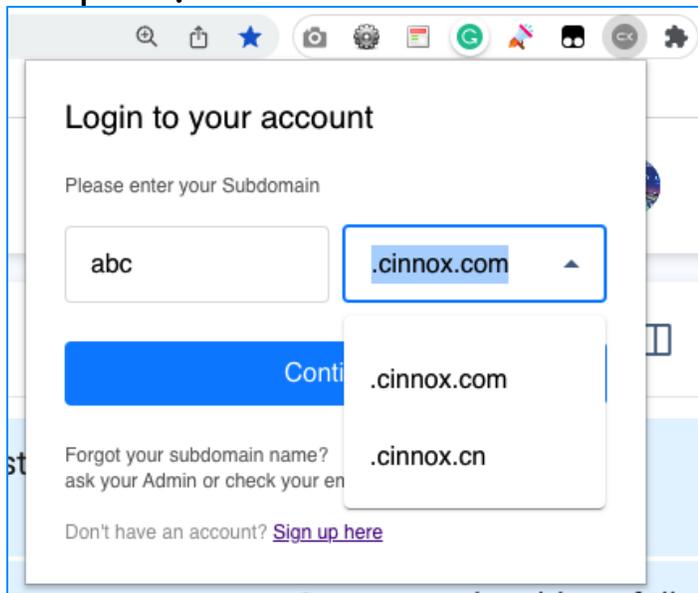
Installation (Beta)

1. Unzip the compressed file(cinnox_extension.zip).
2. Open chrome browser, click Settings, click Extensions
3. The Developer mode must be Toggled ON, then click Load unpacked button.
4. Select the unzipped folder in Step 1.
5. Suggest to pin CINNOX extension to make sure it's installed successfully.



Log in

1. Enter user's service account xxx.cinnox.com (Please choose .cn or .com suffix according to the need)
2. Enter user's account email and password and click Login.

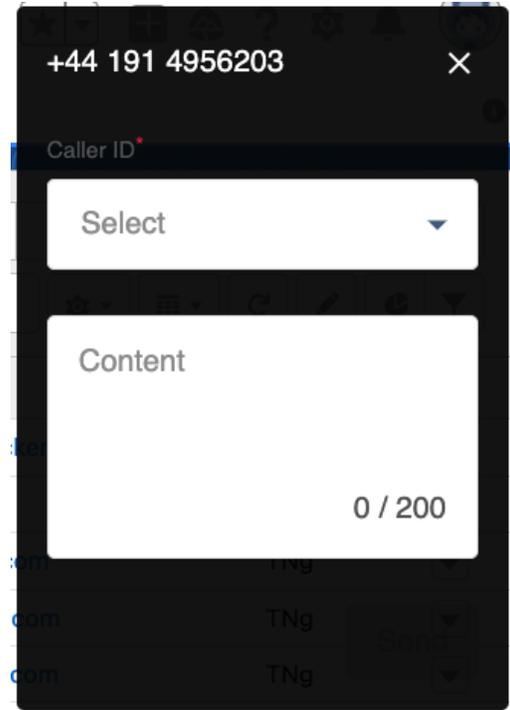
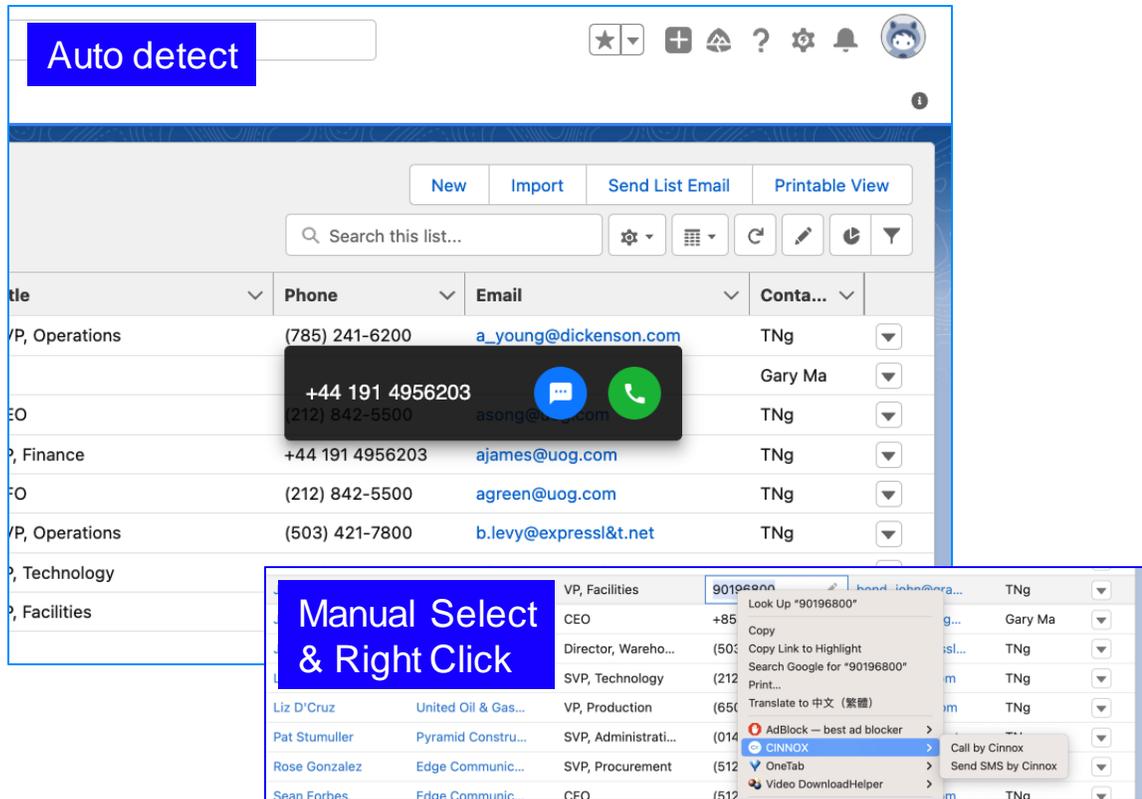


After successful login
You can redirect to CINNOX Dashboard
Or logout the session in Extension

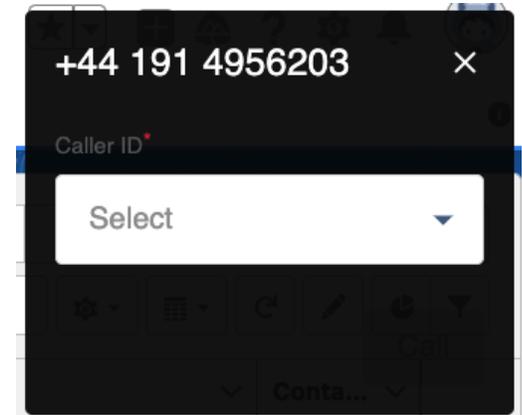
Outbound (Voice or SMS)

1. (Auto) Mouse over the phone number on any webpage
2. (Manual) Select a number and right click
3. CINNOX ext. will display a popup. User can choose to make call or send SMS to this number.

- **MUST: there is valid virtual number in the service account**
- **MUST: the virtual number supported calling & SMS function**
- **MUST: Logged in user has the function permission & permission to use that virtual number.**
- **Currently, only support the numbers with country codes for mouse over auto detection.**



SMS select sender number and the input



Phone selection caller Number

Inbound (Voice)

1. When visitors dial the virtual number, CINNOX ext. will popup incoming call view with information of the virtual number.
2. Users can answer or reject calls.

- **MUST: there is valid virtual number in the service account**
- **MUST: Logged in user has been set as the destination of this number.**
- **Popup will be shown to the user's last focused webpage (the last page used)**

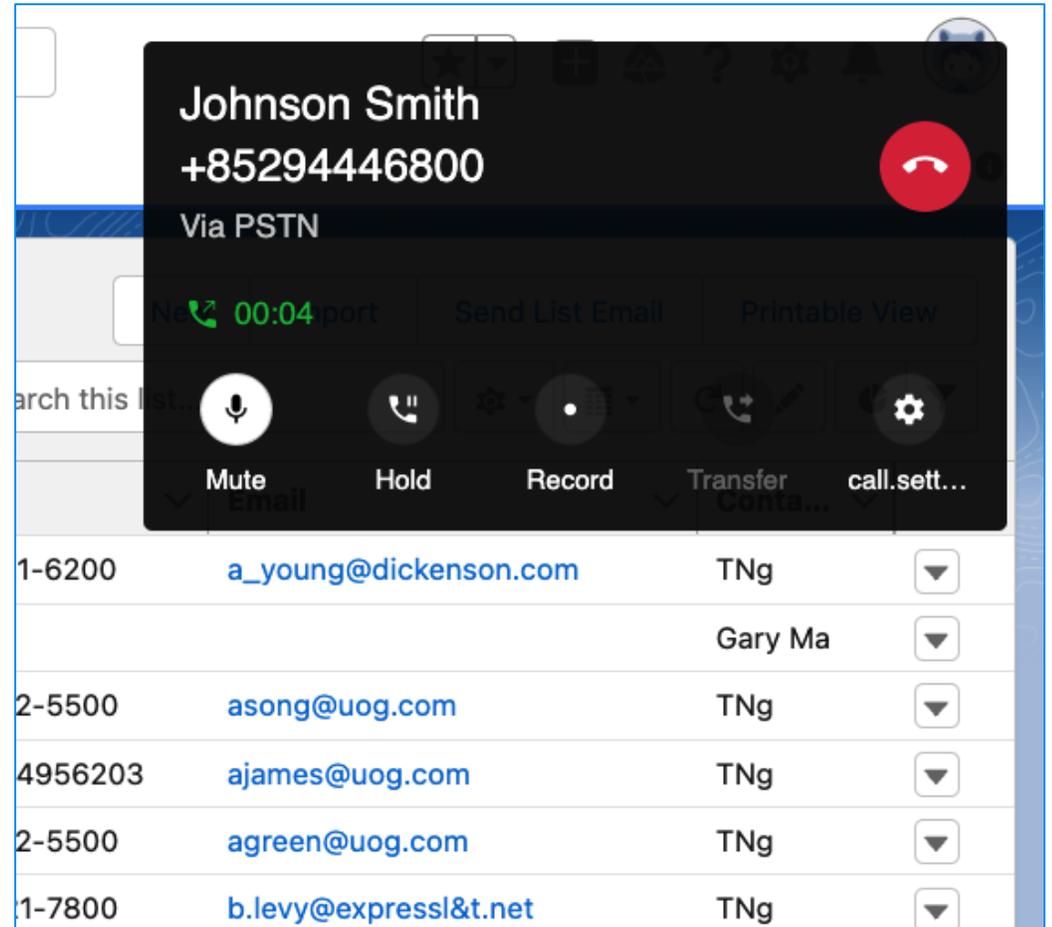
The screenshot shows a web interface with a call popup and a contact list. The call popup is a dark overlay with the following text: "HK-+85294446800", "Via PSTN", and "Details". It also features a green "answer" button and a red "reject" button. Below the popup, a search bar contains the text "Search this list". The main content is a table with columns for "Phone", "Email", and "Conta...".

Phone	Email	Conta...
(785) 241-6200	a_young@dickenson.com	TNg
		Gary Ma
(212) 842-5500	asong@uog.com	TNg
+44 191 4956203	ajames@uog.com	TNg
(212) 842-5500	agreen@uog.com	TNg
(503) 421-7800	b.levy@expressl&t.net	TNg

Call functions

CINNOX Chrome Extension Voice Call now supports:

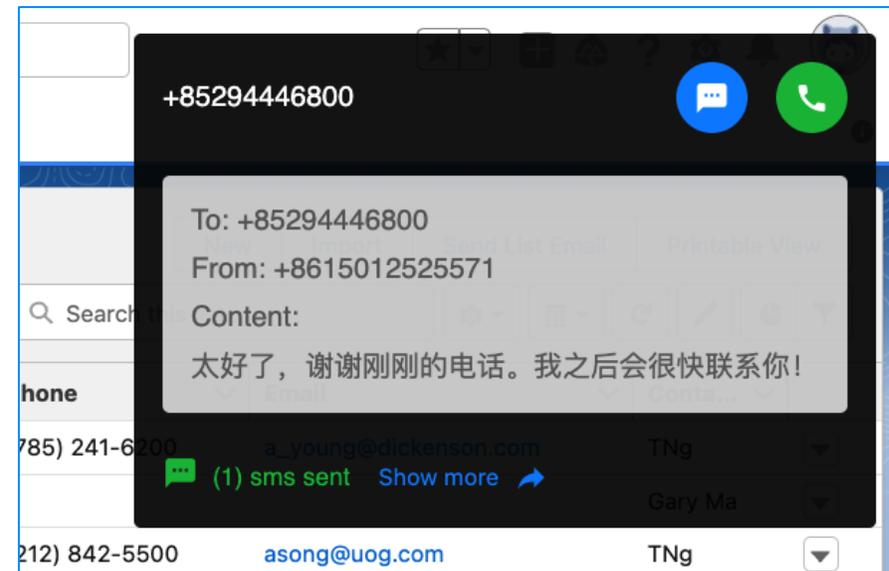
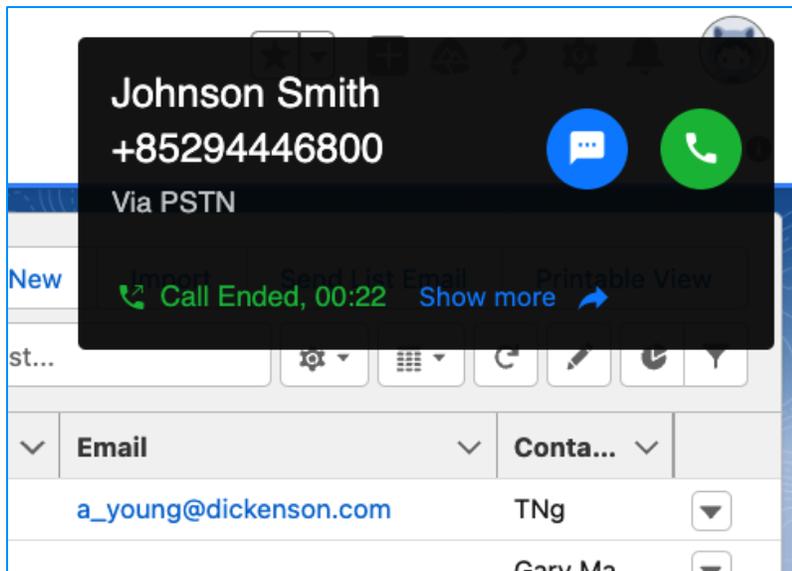
1. Answer
2. Reject
3. Mute
4. Hold
5. Recording (if the system is set to manual recording)
6. Device settings (Microphone and Speaker selection)
7. Hang up
8. Display CINNOX contact name



*Currently does not support video, transfer, and multi-parties' calls

End page

1. Voice or SMS status & summary
2. User can send text messages or make phone calls again
3. User can quickly jump to CINNOX Dashboard to view details (such as recording file).



08

Open API Improvement

Open API Improvement

Goal:

Strengthen the existing Create Tag API functionality. To align the ability in CINNOX dashboard.

Scope:

Function	Description	Platform
Management API > Create Tag API	<ul style="list-style-type: none">To support the Close enquiry message togglingTo support the Close enquiry message (text + attachment)	Open API – Management module

09

Demo

10

Q & A



THANK YOU

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