



UNIVERGE BLUE®
ENGAGE

FEATURE	ENGAGE ADVANCED	ENGAGE COMPLETE
INTERFACE		
CC License Type	Concurrent Seats*	Concurrent Seats*
UC Bundling with CONNECT	Sold with CONNECT or standalone	Sold with CONNECT or standalone
Access to Integrated Employee Collaboration and Advanced Call Handling within CONNECT	✓	✓
Agent Desktop App	✓	✓
Multiple audio connection options (desk phone, smartphone, headset, etc)	✓	✓
Web Admin Portal	✓	✓
Extensive knowledgebase, with both readily accessible and more technical articles	✓	✓
Multi-tenant option for Partners - can administer Client accounts	✓	✓
Agent Browser-based App	✓	✓
Virtual agent / telagent option - no software required; phone only	✓	✓
Broadcast messaging (e.g. What's New)	✓	✓
AGENT FUNCTIONS		
Real-time agent status	✓	✓
Inter-agent direct chat	✓	✓
Inter-agent group chat	✓	✓
Desktop notifications for incoming interactions, voice	✓	✓
Desktop notifications for incoming interactions, all types	✓	✓
Customize initial in-call status	✓	✓
Unlimited custom statuses	✓	✓
Option to force status return to available	✓	✓
Conference with context sharing	✓	✓
Transfer with context sharing	✓	✓
Classify interaction	✓	✓
Assign disposition to interaction	✓	✓
Flag interaction to Supervisor	✓	✓
Agent chat nickname	✓	✓
Outbound calls, captured in Contact Center data	✓	✓
Agent-driven task creation (for that agent)	✓	✓
Real time interaction statistical display	✓	✓

*Number of users signed-in



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SUPERVISOR AND ADMIN FUNCTIONS		
Live monitor, call (listen)	✓	✓
Whisper, call (audible only to agent)	✓	✓
Barge, call (audible to customer as well)	✓	✓
Authorized Extensions or users for monitor, whisper, barge	✓	✓
High-level monitoring of cumulative data	✓	✓
Voice prompt management	✓	✓
Group agents by office	✓	✓
Live monitor, chat (observe conversation)	✓	✓
Whisper, chat (visible only to agent)	✓	✓
Barge, chat (visible to customer as well)	✓	✓
Customizable alerts	✓	✓
Manage individual skillsets	✓	✓
Customized event alerting with escalating tiers	✓	✓
Working hours	✓	✓
Manage scheduled telagents / virtual agents	✓	✓
Manage SWAT service (escalations)	✓	✓
CUSTOMER INTERACTIONS - VOICE		
Automatic Call Distribution (ACD)	✓	✓
Position in Queue messages	✓	✓
Estimated Wait Time Messages	✓	✓
Dynamic caller treatment by conditions (e.g. open/closed)	✓	✓
Emergency Bulletins	✓	✓
Caller-Directed Menu Routing	✓	✓
Include queue / skill name in caller ID (note - some networks may overwrite with their own labels)	✓	✓
Multi-language support	✓	✓
Outbound calling - dialpad	✓	✓
Outbound calling - phone book	✓	✓
Ring multiple agents simultaneously, via software	✓	✓
Customizable Interactive Voice Response (IVR)	✓	✓
Ring multiple agents simultaneously, using outside devices	✓	✓
Queued callbacks	✓	✓
Queued voicemails	✓	✓
Call Scripting for Agents	✓	✓
Dynamic interaction prioritization	✓	✓
Dynamic overflow and missed interaction treatment	✓	✓
Skills-based routing	✓	✓
Geo-routing	✓	✓
Preferred Agent Routing	✓	✓
Dialed Number Routing	✓	✓
Text-to-speech prompts & messaging	✓	✓

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Directed dialogue speech recognition	✗	✓
CUSTOMER INTERACTIONS - CHAT		
Customer-agent chat interactions	Add-on (+\$)	✓
Reactive chat mode (visitor-initiated)	Add-on (+\$)	✓
Proactive chat mode	Add-on (+\$)	✓
Proactive chat with visible queue waiting	Add-on (+\$)	✓
Proactive chat with live agent presentation	Add-on (+\$)	✓
Proactive Mode Chat Self-Service (Persona introduction and simulation with message delay, greeting messaging, Informational messages, etc)	Add-on (+\$)	✓
Dynamic overflow treatment	Add-on (+\$)	✓
Chat interaction personalization	Add-on (+\$)	✓
Custom branding & styling	Add-on (+\$)	✓
Customized context gathering from visitors	Add-on (+\$)	✓
Mobile-responsive website visitor chat experience	Add-on (+\$)	✓
Visitor-accessible transcripts	Add-on (+\$)	✓
Position in queue messaging	Add-on (+\$)	✓
Estimated wait time Messaging	Add-on (+\$)	✓
Custom waiting in queue, closed & unattended messaging	Add-on (+\$)	✓
Up to 10 concurrent Chat conversations	✗	✓
Chat response templates	✗	✓
Optional Automatic 'in focus' of chat window for new chat interactions or new incoming message	✗	✓
CUSTOMER INTERACTIONS - E-MAIL		
Agent-initiated composition and sending	✓	✓
Key word or phrase routing	Add-on (+\$)	✓
Default routing	Add-on (+\$)	✓
Last agent routing	Add-on (+\$)	✓
Response templates	Add-on (+\$)	✓
Auto and manual response templates	Add-on (+\$)	✓
Template filters - by Team and by Queue delivery	Add-on (+\$)	✓
Email interaction suspension and resumption	Add-on (+\$)	✓
CUSTOMER INTERACTIONS - SMS		
SMS overall subscription - unlocks the below. Note: also requires Twilio account configuration	Add-on (+\$)	✓
SMS to web service endpoint mapping	Add-on (+\$)	✓
SMS to e-mail address mapping	Add-on (+\$)	✓
SMS number to Chat skill (queue) mapping	Add-on (+\$)	✓
SMS to chat interactions	Add-on (+\$)	✓
SMS recent message context presented to agent	Add-on (+\$)	✓

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CUSTOMER INTERACTIONS - RECORDINGS		
Doubles the storage space included with UNIVERGE BLUE® CONNECT	✗	✗
Voice recordings	✓	✓
Standard 30 days voice interaction recording storage	✓	✓
Recording toggle option (screen recording optional under Advanced)	✓	✓
Screen Recording with % of interaction settings and media merge	Add-on (+\$)	✓
Optional extended voice interaction recording storage	Add-on (+\$)	Add-on (+\$)
'Bring your own storage' option with custom retention and encryption settings	✓	✓
Parameter-enabled interaction recording search and playback (download or streaming)	✓	✓
Custom Call Recording definitions by Inbound / Outbound & transfers	✓	✓
Chat interaction transcript recording	✗	✓
CUSTOMER INTERACTIONS - OUTREACH / FEEDBACK		
Post-call surveys	✓	✓
Survey auto-connect option	✓	✓
Blended outbound, list-based power dialing	✓	✓
Ability to combine voice, SMS, and/or & E-mail notifications (Any combination in a single campaign)	✓	✓
E-mail queues	Add-on (+\$)	✓
Customer can be connected back to the contact center when responding (SMS to queue, email, or web service endpoint responses)	Add-on (+\$)	✓
Voice Notification Text to Speech or Recorded Audio messaging	Add-on (+\$)	✓
Contact import wizard	Add-on (+\$)	✓
Multiple import lists	Add-on (+\$)	✓
Custom contact by contact data-driven messaging	Add-on (+\$)	✓
Segmentation by Campaign	Add-on (+\$)	✓
Campaign Throttling	Add-on (+\$)	✓
"External ID" for contacts (to relate a notification object to other systems' entities)	Add-on (+\$)	✓
Voice notification replays, retries and acknowledgement	Add-on (+\$)	✓
Voice notification return to queue or transfer number	Add-on (+\$)	✓
Filterable campaign contact status and acknowledgement exporting	Add-on (+\$)	✓
Agent-initiated contact entries into campaigns	Add-on (+\$)	✓

FEATURE	ENGAGE ADVANCED	ENGAGE COMPLETE
SKILLS-BASED ROUTING		
Skillssets matched to teams of agents, with competency levels	✓	✓
Dynamic skillssets matched to teams, on schedules (Note: Preview Mode)	✓	✓
Multi-channel, blended interactions	Add-on (+\$)	✓
WORKFORCE MANAGEMENT / OPTIMIZATION		
Schedule Management	Add-on (+\$)	✓
Shift Management	Add-on (+\$)	✓
Shift Trade ability	Add-on (+\$)	✓
Vacation management	Add-on (+\$)	✓
Holiday management	Add-on (+\$)	✓
Adherence tool	Add-on (+\$)	✓
Evaluator: choose voice interaction to evaluate	Add-on (+\$)	✓
Evaluator: choose chat interaction to evaluate	Add-on (+\$)	✓
Evaluator: custom template development	Add-on (+\$)	✓
Evaluator: evaluate external work by agents (outside of customer interactions, e.g. documents)	Add-on (+\$)	✓
Evaluator schedules, with evaluation targets by teams	Add-on (+\$)	✓
Evaluator: Pass/Fail option for each evaluation	Add-on (+\$)	✓
Evaluation collaboration mode	Add-on (+\$)	✓
Evaluator: points scoring option	Add-on (+\$)	✓
Evaluator auto-fail option	Add-on (+\$)	✓
Evaluator N/A scoring (won't count for or against score)	Add-on (+\$)	✓
Evaluator notify agent of evaluation	Add-on (+\$)	✓
Evaluator Agent Acknowledgement	Add-on (+\$)	✓
BUSINESS INTELLIGENCE		
Real-time dashboards	✓	✓
Shareable wallboards	✓	✓
Executive Dashboard	✓	✓
Real-time Metrics	✓	✓
Real-time Reports	✓	✓
Historical Reports	✓	✓
AI - Powered Interaction Analytics	Add-on (+\$)	✓
RTD highlights current service conditions (color-coded)	✓	✓
Report Scheduling	✓	✓
Multiple-format Report Exporting	✓	✓
Library w/hundreds of pre-built reports	✓	✓

FEATURE	ENGAGE ADVANCED	ENGAGE COMPLETE
EXTENSIBILITY		
Pre-built Integrations: Dynamics	✓	✓
Pre-built Integrations: Salesforce.com	✓	✓
Pre-built Integrations: Zendesk	✓	✓
IVR Studio tool (note: access must be granted)	✓	✓
Slack integration	✓	✓
Callflow-driven Integration into Salesforce.com	✓	✓
Salesforce.com case searching from IVR	✓	✓
Salesforce.com contact and account search	✓	✓
Salesforce.com agent screen pop	✓	✓
Salesforce.com click-to-dial	✓	✓
Salesforce.com posting of recording links to contacts, opps, or cases	✓	✓
Salesforce.com activity logging	✓	✓
Callflow-Driven Integration into Zendesk	✓	✓
Zendesk ticket searching from IVR	✓	✓
Zendesk agent screen pop of tickets (existing or new)	✓	✓
Zendesk agent screen pop of customer records	✓	✓
Zendesk screen pop with call recording links	✓	✓
Historical Data Retrieval via REST API	✓	✓
Real-time statistics data retrieval	✓	✓
Daily agent & queue statistics data retrieval	✓	✓
Extensible Call Recording Retrieval	✓	✓
Local host Desktop Agent API for controlling agent status and interactions	✓	✓
Point-and-click integration into Twilio for SMS messaging (note: assumes SMS subscription)	Add-on (+\$)	✓
Point-and-click SFTP export for call recordings and interaction detail records	✓	✓
Bring your own Recording Storage Account - prebuilt integration into Amazon S3 and Azure Blob storage	✓	✓
Agent Related Events webhook	✓	✓
Cloud Notification engine providing for Agent related events to be pushed to published APIs	✓	✓
Option for Prof. Services CRM integration	Add-on (+\$)	Add-on (+\$)
Option for Prof. Services WFM integration	✗	Add-on (+\$)
Option for Prof. Services Custom IVR Integrations & Self-service applications	✗	Add-on (+\$)
Social media e-mail alerts: Facebook	✗	Add-on (+\$)
Social media e-mail alerts: Twitter	✗	Add-on (+\$)
Social media e-mail alerts: Instagram	✗	Add-on (+\$)

FEATURE	ENGAGE ADVANCED	ENGAGE COMPLETE
SECURITY		
SPAM filtering/protection service	✓	✓
Roles-Based Access	✓	✓
'External User' role to allow access interaction recordings by assigned queue	✓	✓
Authorized sign-in phone numbers for agents	✓	✓
Authorized voice live monitoring phone numbers	✓	✓
Custom user Authentication security policies	✓	✓
Voice call recording encryption	✓	✓
PCI secure data collection and transactional Interactive Voice Response (IVR) applications	✗	✓

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