RELEASE NOTES

PBXware 7.4.0

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Features

PBXware 7.4 carries with it a major improvement to OAuth Apps as more customization will now be available. Users will be able to create and manage multiple credentials per app, which can currently be used for the SMTP and Email To Fax functionalities. These enhancements will help customers make integrations with custom workflows more seamless and reduce the dependency on legacy apps, which will later be phased out completely.

OAuth 2.0 Apps implementation

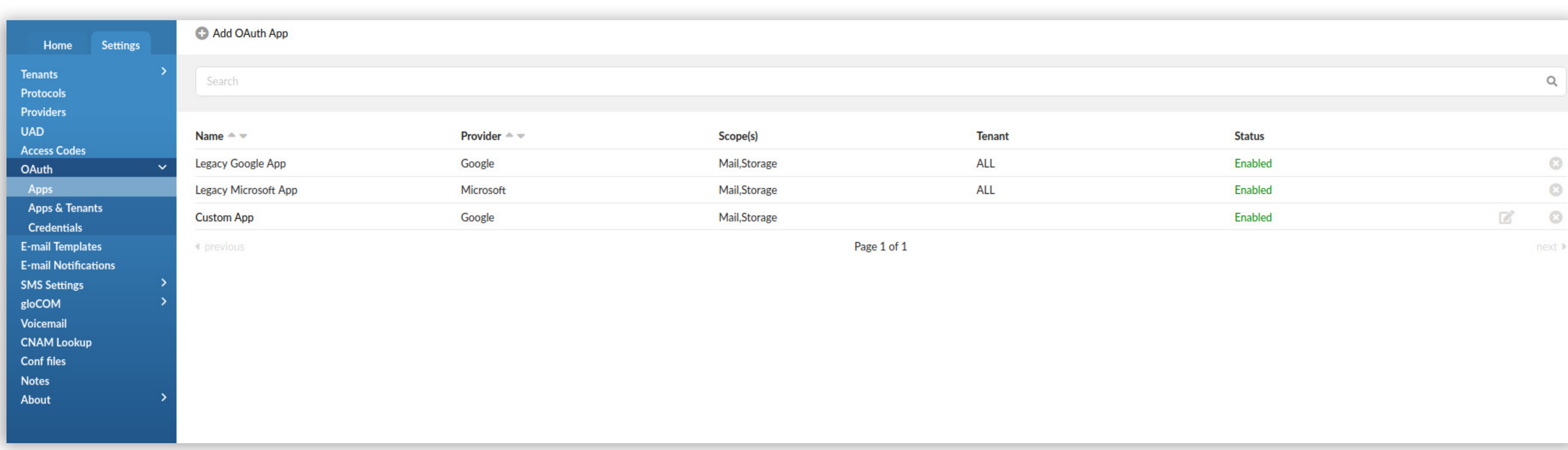
The OAuth 2.0 Apps implementation gives customers the ability to add their own custom OAuth Apps and credentials in addition to using the legacy ones (Google and Microsoft legacy apps, which will be disabled in the future). They can be used for SMTP or Email To Fax configuration, and authorized with OAuth providers.

Within the 'Settings' tab, users can navigate to the OAuth section and refer to either 'Apps' or 'Credentials' for detailed configuration and management of OAuth integrations.

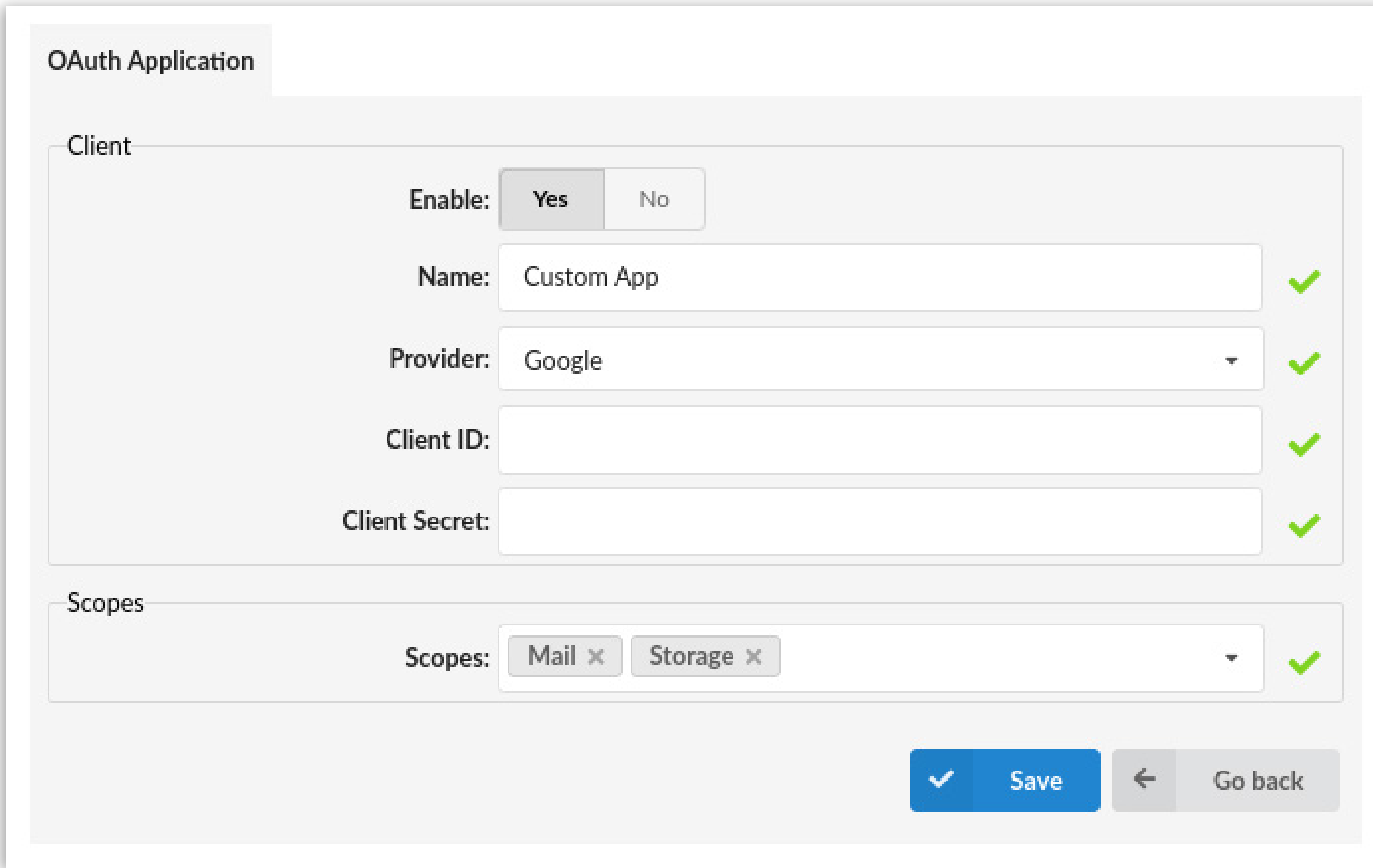
Note: On Multi-Tenant systems, on the Master Tenant level, there is an additional section, 'Apps and Tenants', where users can assign their apps to tenants. Tenants will be able to use only the applications that are assigned to them. Information such as 'Tenant Name', 'Tenant Code', and 'Apps' associated with that tenant are displayed in this section.

Apps

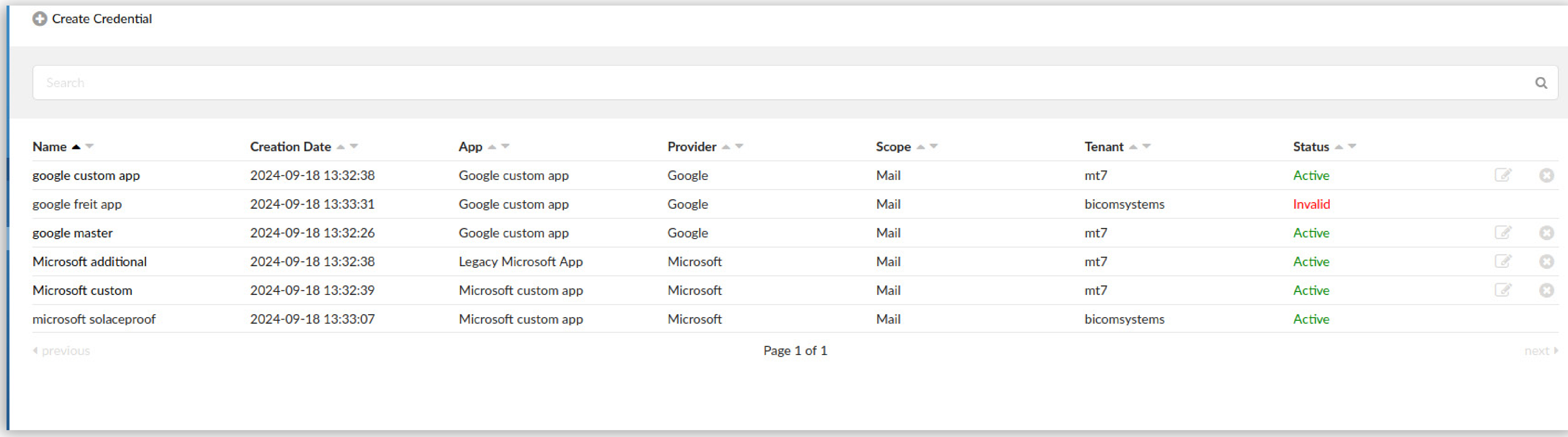
The 'Apps' section allows users to control and manage their custom apps by adding, editing, and deleting them. (NOTE: it is not possible to edit legacy apps, as they can only be removed. Once removed, they cannot be re-created.) Within this section, users can see details such as the name of the app, the provider being used by the app, selected scopes, tenants that are assigned to the app, and status, which indicates whether the app is enabled or disabled.



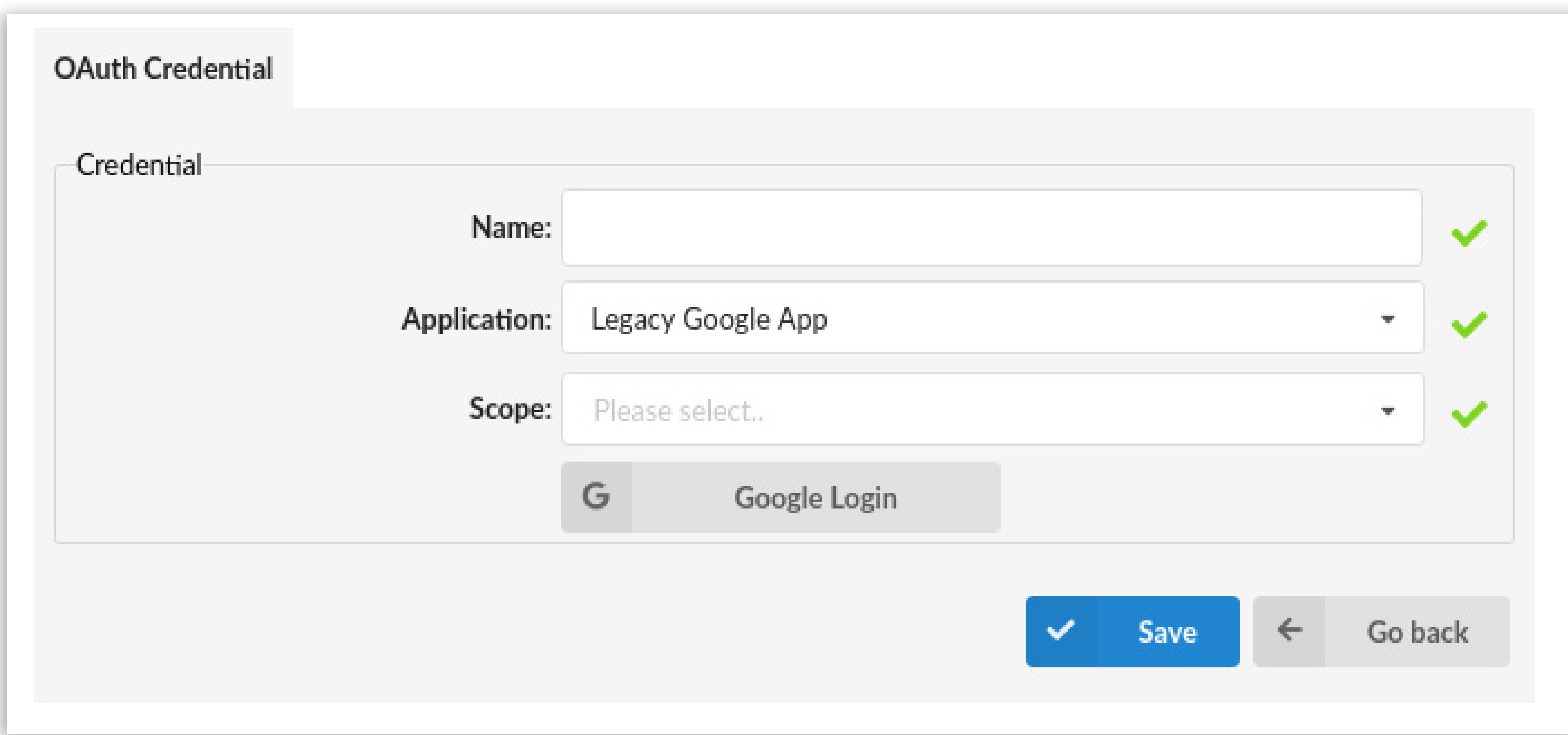
Users will be able to add their custom app by clicking the 'Add OAuth App' button, where they will be prompted to toggle yes or no to enable or disable the app, enter the name for their app, and choose one of the providers from the dropdown menu (currently only Google and Microsoft are available). They will also need to enter the Client ID and Client Secret, which is obtained from the OAuth application created with the provider's service. Users can also select the scopes for their app from the dropdown menu (Currently available options are Mail and Storage).



Credentials



This section allows users to add, edit, and delete credentials for the already created OAuth apps, including the legacy ones. Users will also see a list of already created credentials along with information about them, such as 'Name' (of the credential), 'Creation Date', 'App' (name of the app using those credentials), 'Provider', 'Scope', 'Tenant', and 'Status' which shows if the credential is valid or not. Users can add credentials by clicking the 'Create Credential' button.



Here, users will be prompted to enter the name for their new credential, select their application from the dropdown menu of already existing applications, and scope, which is also a dropdown menu.

New Endpoints

Avaya J139

Cisco CP-7861

Flyingvoice FIP16 Plus

Flyingvoice P10

Flyingvoice P23G

Snom M100

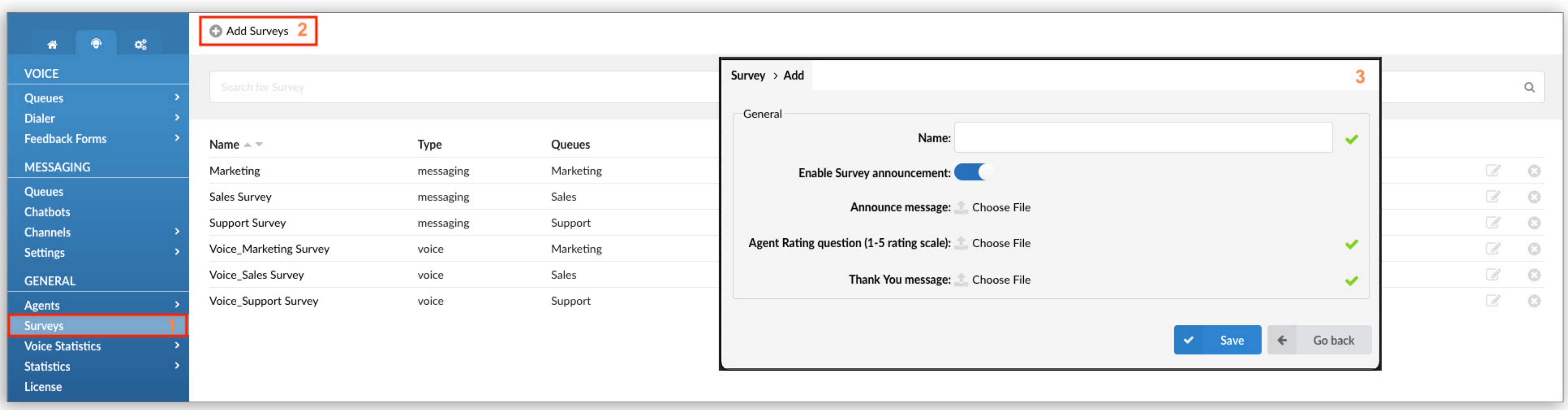
Snom M430

Yealink T64LTE

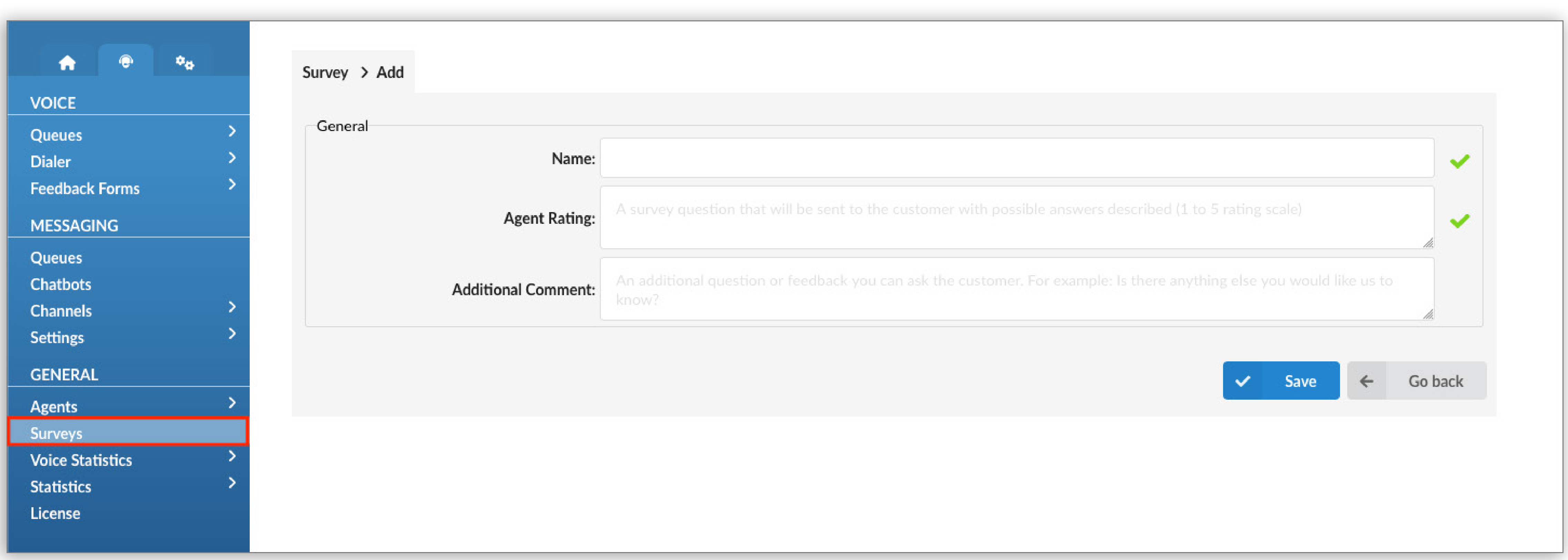
The Customer Satisfaction Survey

The Customer Satisfaction Survey feature allows businesses to collect valuable feedback from customers immediately after a voice or messaging conversation ends. Customers can rate their experience by pressing a number on their phone in response to a prompt or submitting their rating through a messaging conversation. This survey feature is available across all channels, excluding email, helping businesses evaluate and enhance the quality of their voice and messaging support services.

Users can create a Survey via the **Add Survey** button in the Surveys section, choosing between the **Voice** and **Messaging** options. Once configured, the voice survey allows customization of key elements, including a unique survey name, an optional pre-survey announcement message, an agent rating question, and a closing thank-you message.

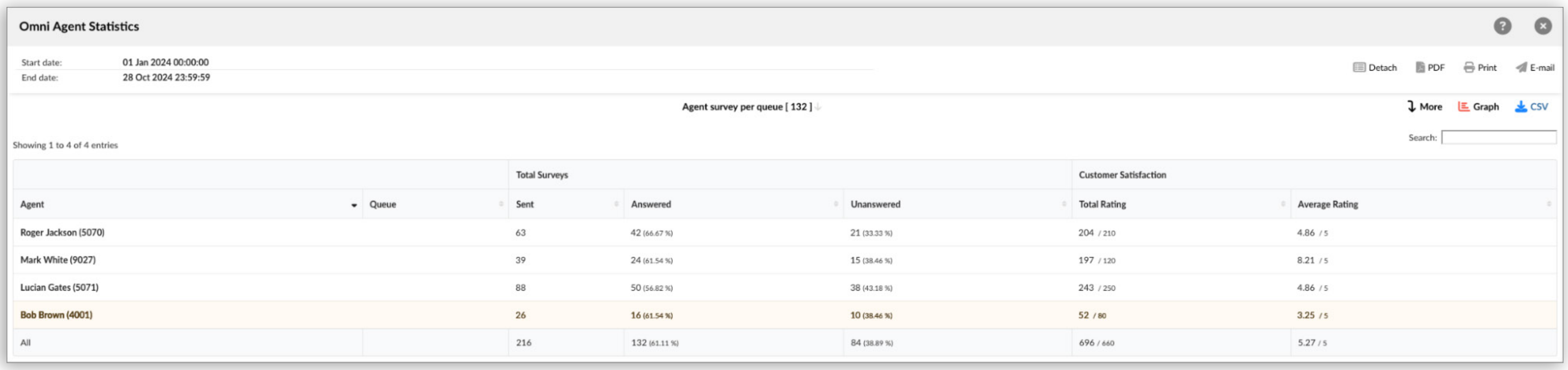


Configuring a messaging survey requires users to provide a survey name, a message to the customer explaining how to rate the agent, and a message inviting additional comments and feedback.



Survey Statistics Reports

Dedicated survey statistics reports, “Agent Survey per Queue” and “Queue Survey per Agent”, were created to offer insights into customer satisfaction across voice and messaging interactions. This report can identify areas where customer support may be less effective, highlighting specific opportunities for improvement to enhance support quality.



Omni Agent Statistics

Start date: 01 Jan 2024 00:00:00
End date: 28 Oct 2024 23:59:59

Detach PDF Print E-mail

Agent survey per queue [132]

More Graph CSV

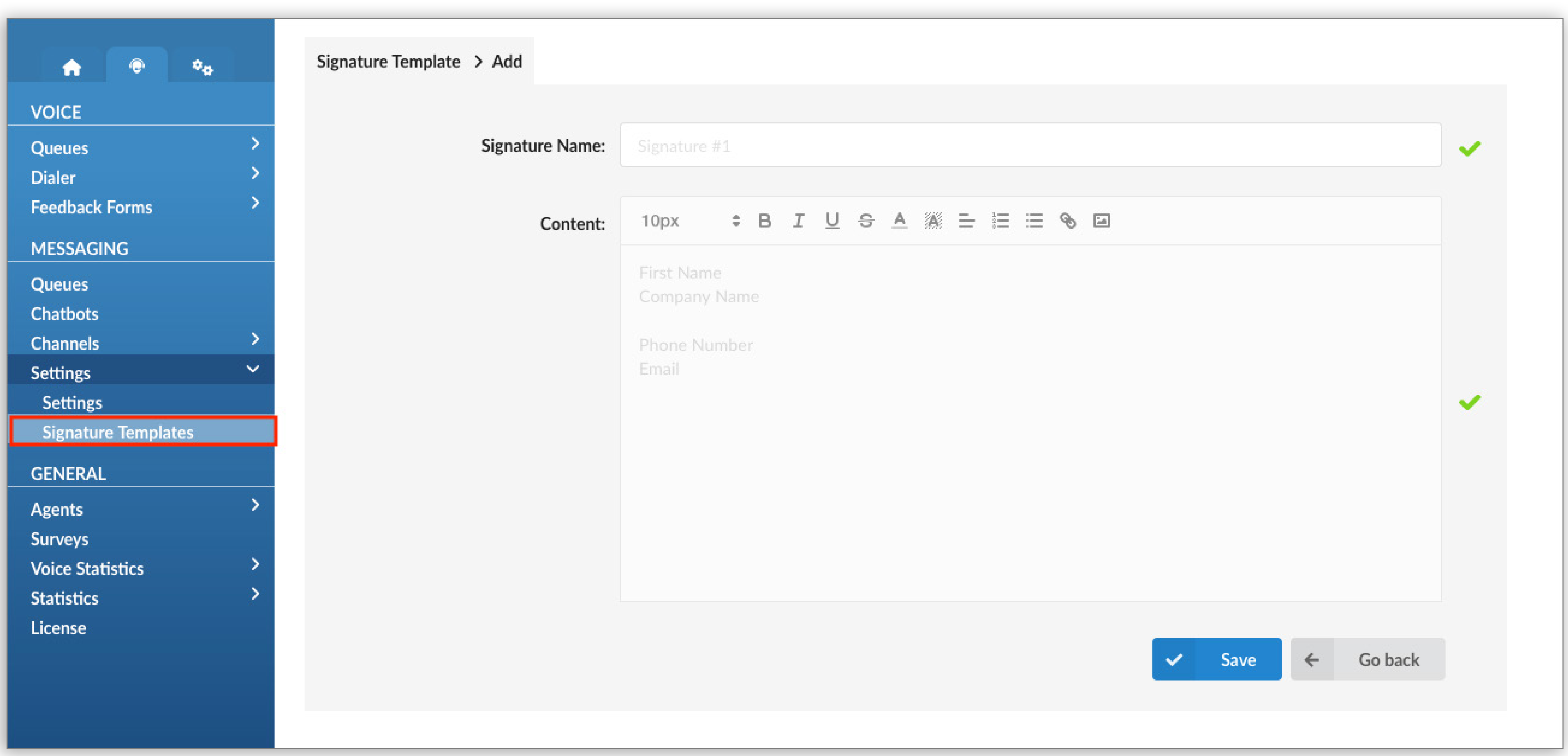
Showing 1 to 4 of 4 entries

Search:

		Total Surveys			Customer Satisfaction	
Agent	Queue	Sent	Answered	Unanswered	Total Rating	Average Rating
Roger Jackson (5070)		63	42 (66.67 %)	21 (33.33 %)	204 / 210	4.86 / 5
Mark White (9027)		39	24 (61.54 %)	15 (38.46 %)	197 / 120	8.21 / 5
Lucian Gates (5071)		88	50 (56.82 %)	38 (43.18 %)	243 / 250	4.86 / 5
Bob Brown (4001)		26	16 (61.54 %)	10 (38.46 %)	52 / 80	3.25 / 5
All		216	132 (61.11 %)	84 (38.89 %)	696 / 660	5.27 / 5

Email Signature Templates

The Email Signature Templates feature allows users to create and manage personalized signature templates directly within the graphical user interface (GUI). Agents can use these templates in the Agent application as ready-to-use signatures or customize them to fit their needs. This feature helps maintain a professional appearance and ensures consistent branding in all communications.

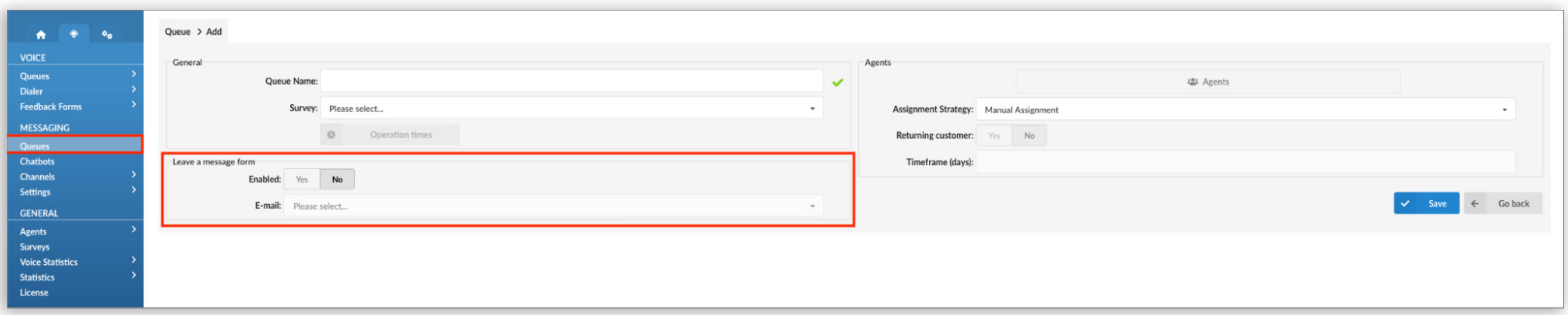


LiveChat Forms

With the purchase of the Omnichannel license, customers gain access to managing "Email Signature Templates" and enhanced LiveChat Forms, including the "Leave a Message Form" and "Pre-Chat Form".

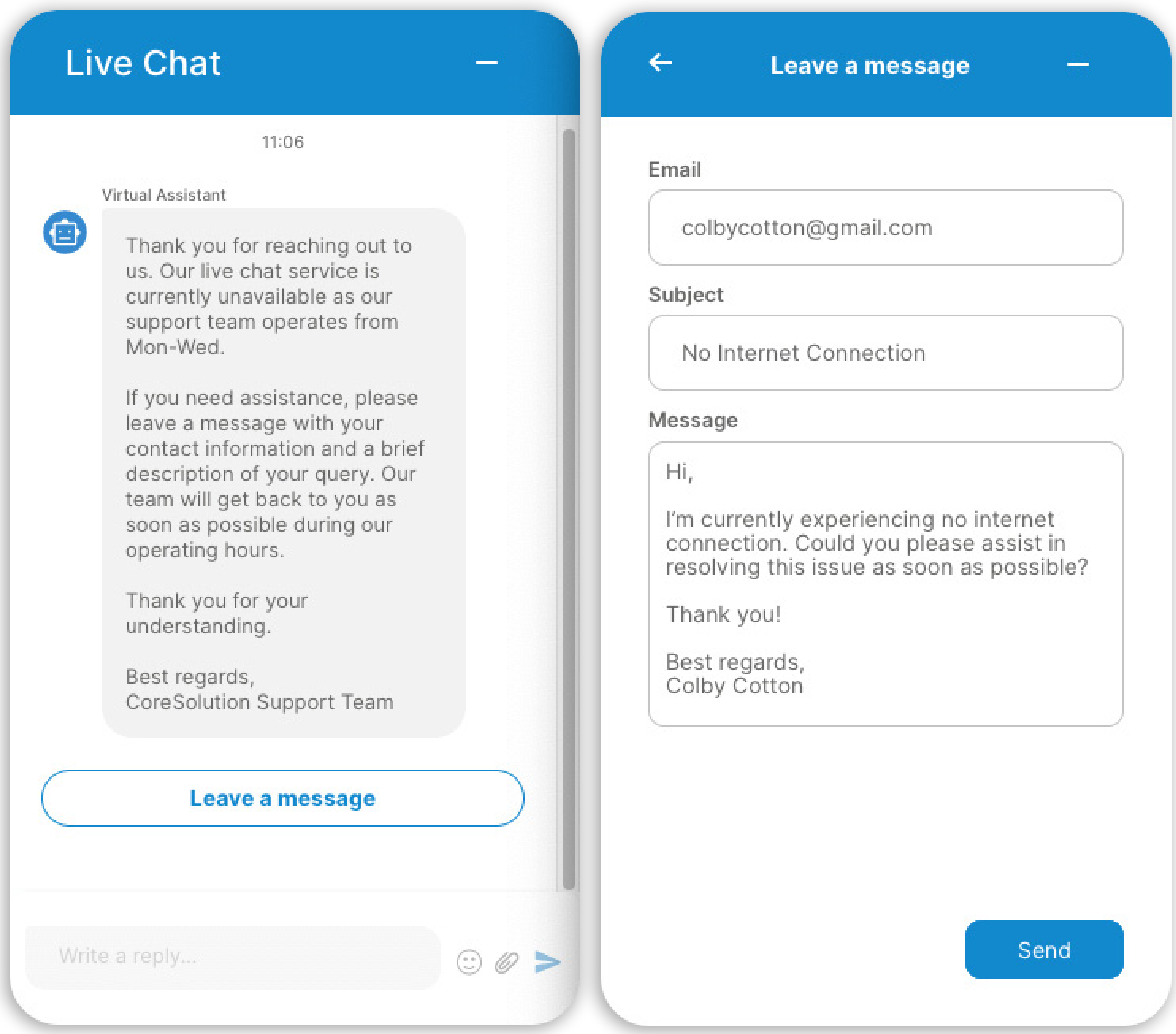
Leave a Message Form

The "Leave a Message Form" is designed to work in conjunction with the "Operation Times" (OT) feature. When activated, it allows users to specify an email address to receive messages initiated via LiveChat during non-working hours. By default, this feature is set to "No" and must be enabled by selecting "Yes." Users must also assign an email address for the form, requiring at least one email channel configured on their PBXware system.



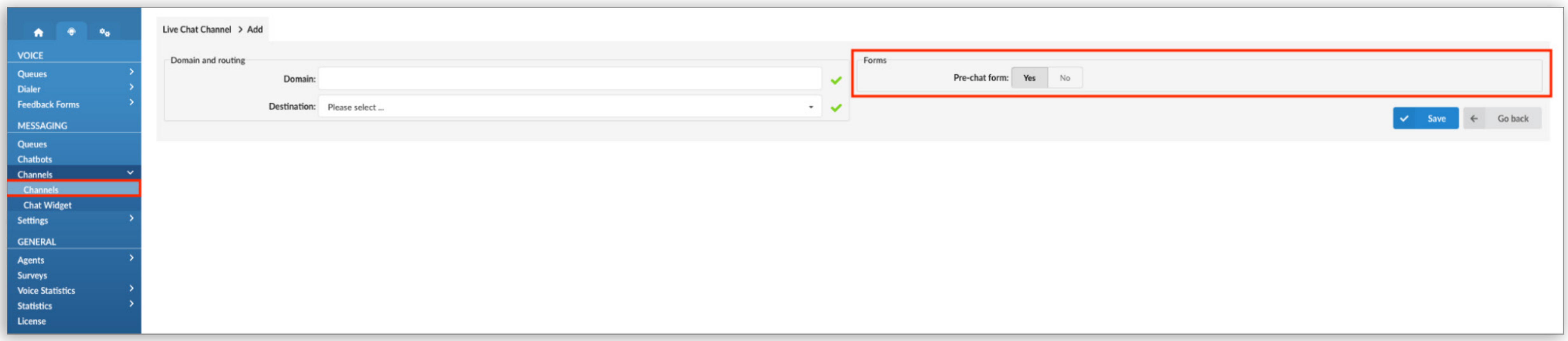
Visitor App

When the "Leave a Message Form" feature is active, and users access LiveChat, they will receive a greeting regarding the operation times (OT) of the business queue after initiating the conversation. If they choose to leave a message, they will be prompted to fill out a form where they need to provide their email address, a brief subject, and a short description of their issue. Once this information is submitted, the LiveChat conversation will be converted into an email conversation, and users can expect to receive responses accordingly.



Pre-Chat Form

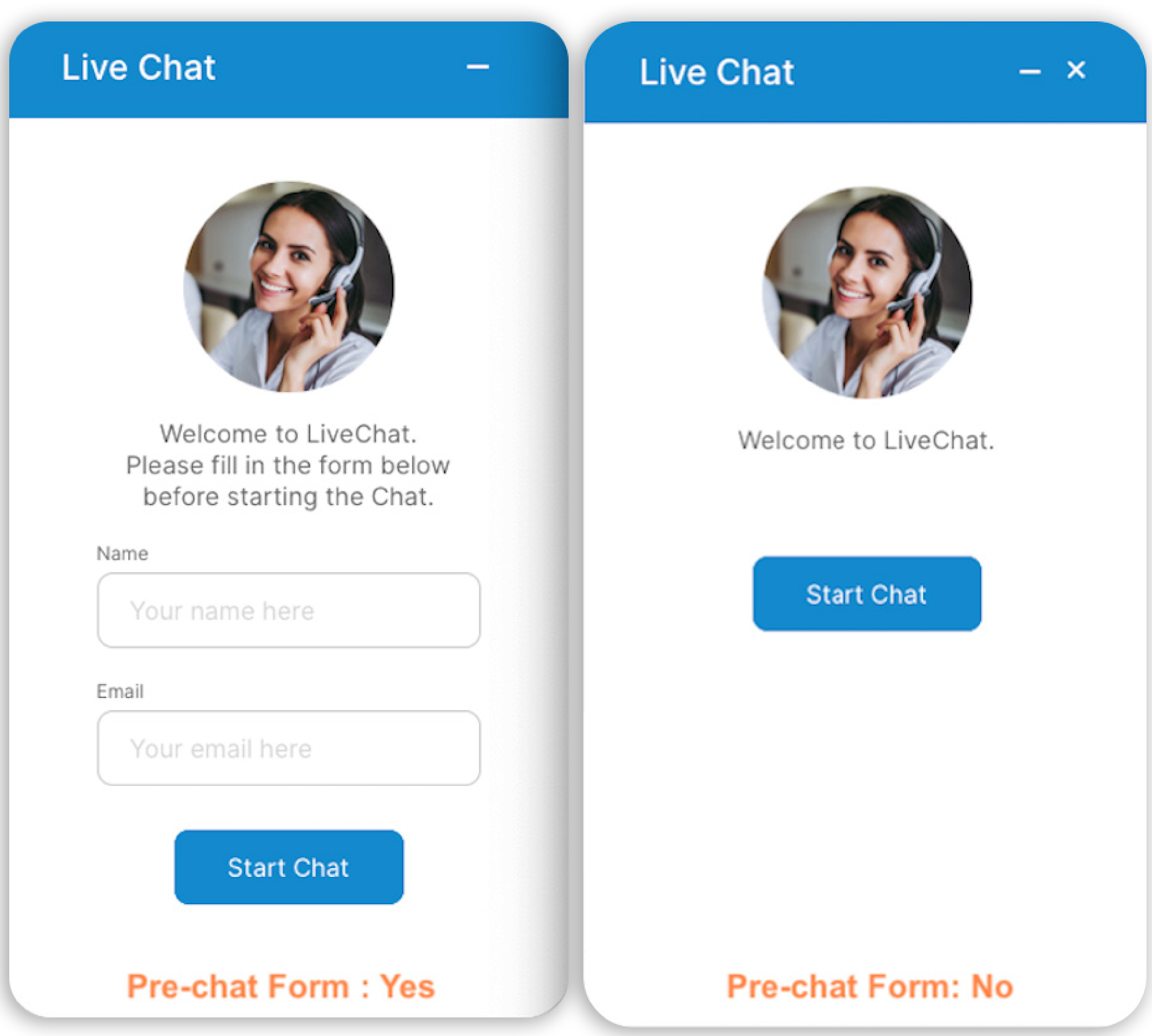
The “Pre-Chat Form” can be enabled in the PBXware system within the Channels section. If disabled, users have the option to start conversations anonymously. Customers can initiate a chat without providing their details (name and email), which can streamline the process and enhance user engagement.



Pre-chat forms are valuable for gathering essential information about a visitor. However, to protect visitor privacy—especially in regions where collecting certain personal information is restricted—we’ve made this feature fully configurable.

Visitor App

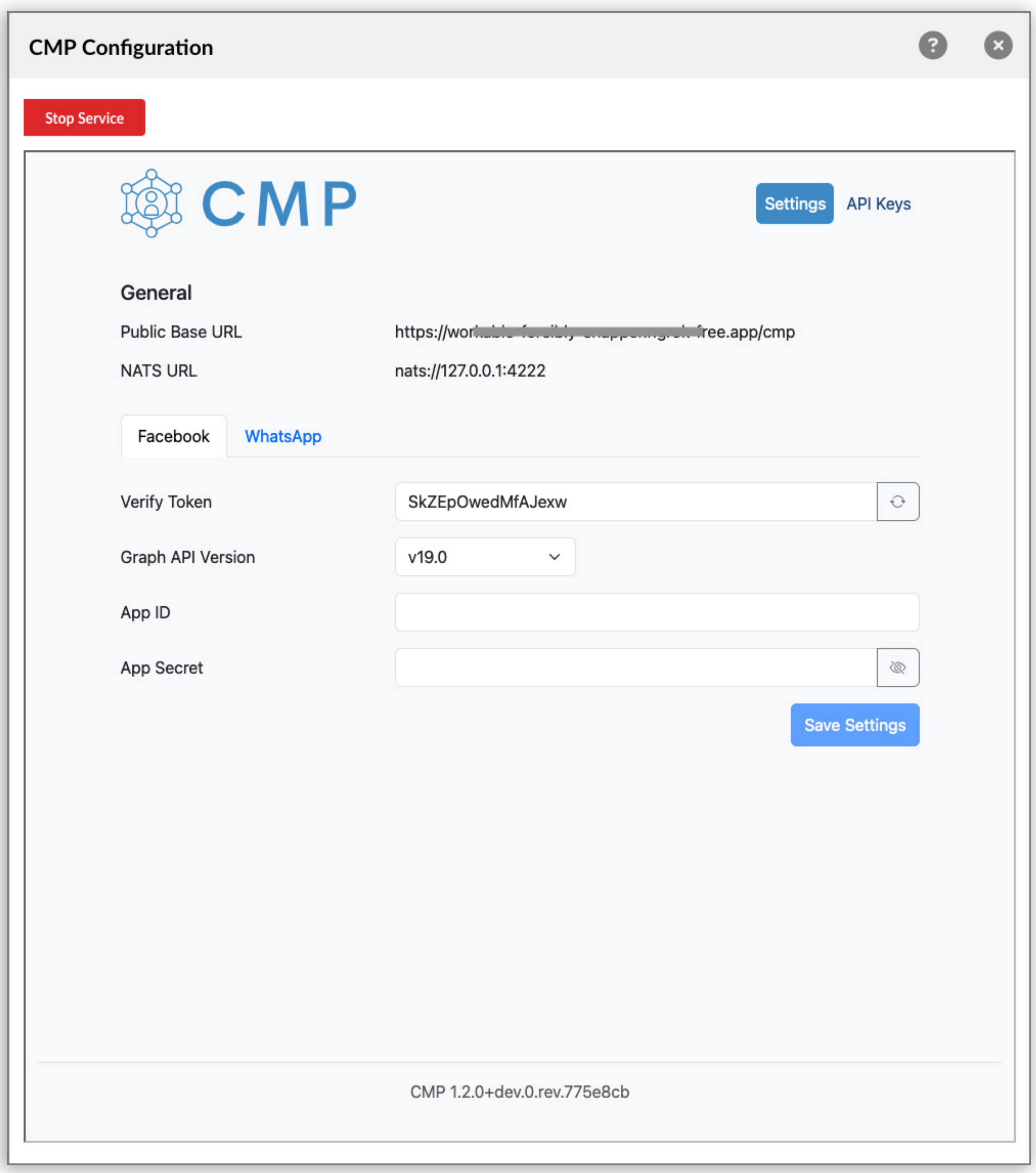
Customers can start a chat by providing their name and email or begin the chat anonymously, allowing them to engage without sharing their personal information.



Once the blue chat icon is clicked, the chat window appears, enabling users to begin conversing with either an agent or a chatbot. This approach enhances the user experience by removing barriers to starting a conversation.

CMP Deployment into PBXware

Starting from version 7.4, the CMP service is integrated into the PBXware system with all of the necessary configurations pre-set. This means users don't need additional or dedicated servers to deploy the CMP service. With an Omnichannel license, the system is ready for integration with Facebook and WhatsApp, requiring a few adjustments through the graphical user interface (GUI).

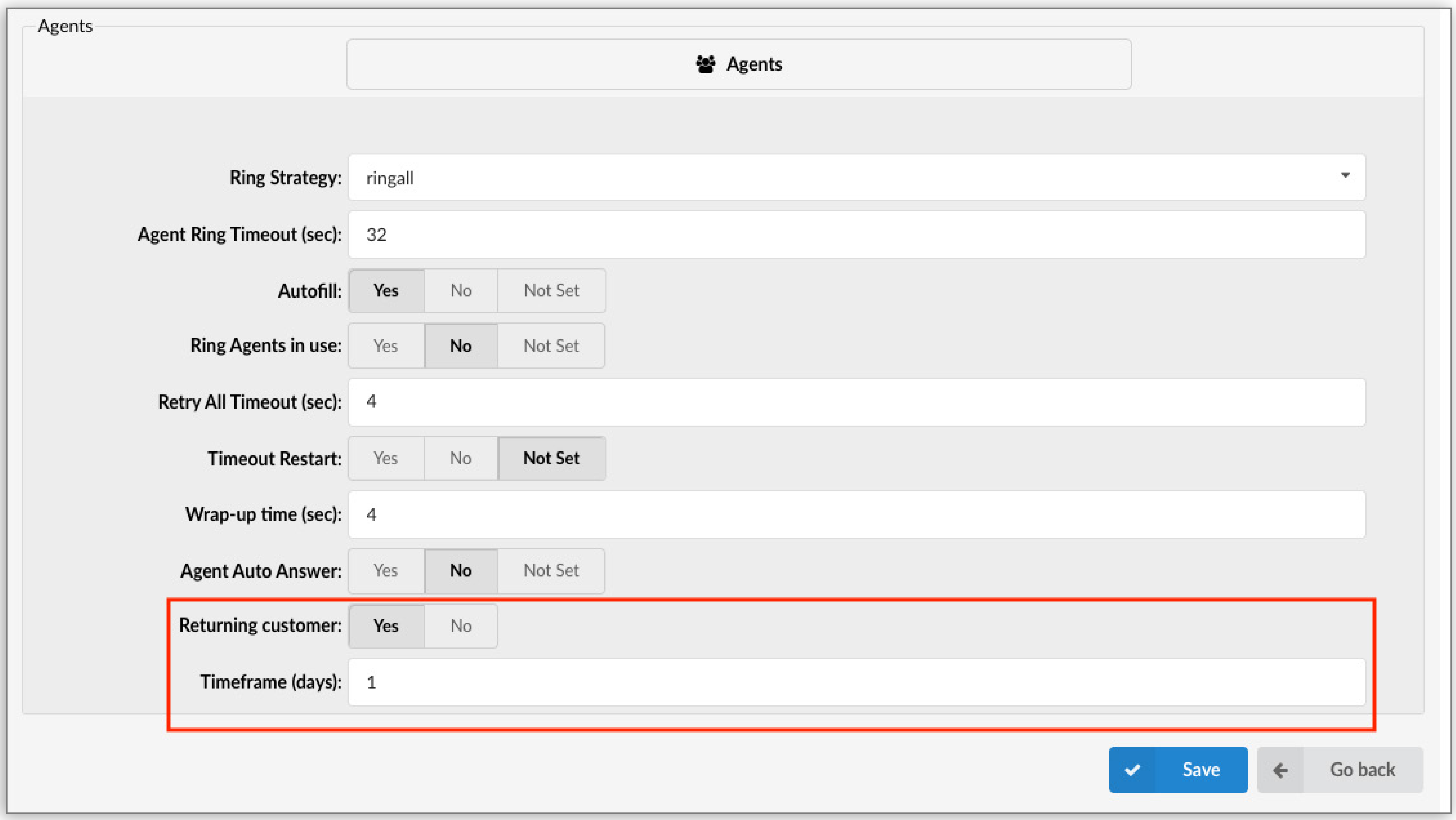


The CMP service can be utilized in two ways:

- **CMP Local:** Configure the CMP to run on a local PBXware system.
- **CMP Remote:** Connect to a CMP service hosted on a remote server. This option also enables users to use another PBXware system as a remote CMP service.

Returning Customer Feature

The Returning Customer feature enhances the customer experience by routing repeat callers to the same agent they previously spoke with, provided that the agent is available. If the agent is unavailable, the call will follow the ring strategy configured for the queue. This feature promotes continuity, allowing returning customers to connect with a familiar agent, which can improve overall satisfaction.

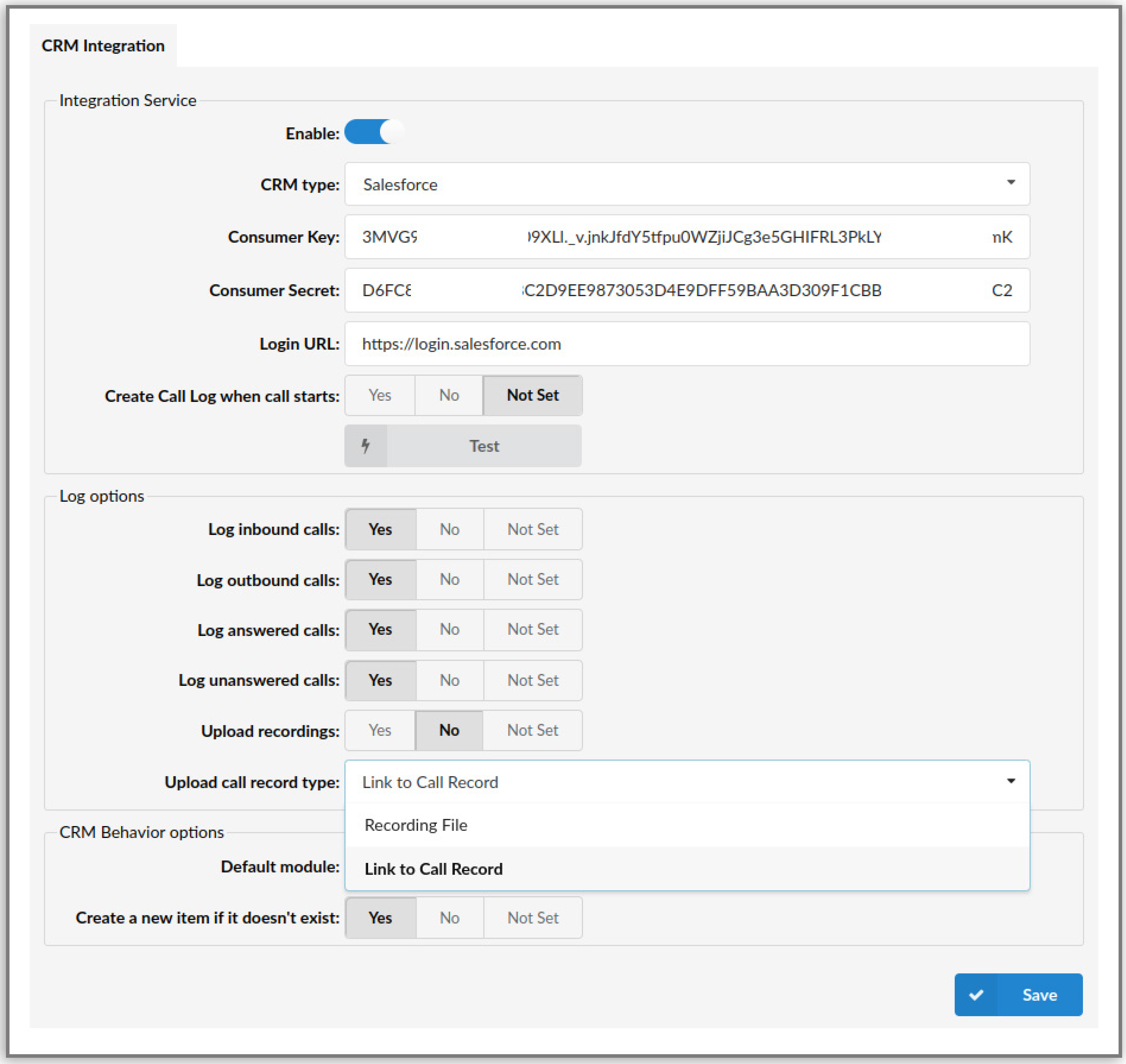


Administrators can set a custom timeframe for identifying returning customers, allowing the system to automatically analyze repeat calls within the specified number of days and route them to the same agents. For example, setting the timeframe to 1 day ensures customers who call back within 24 hours will be directed to the agent they previously talked to.

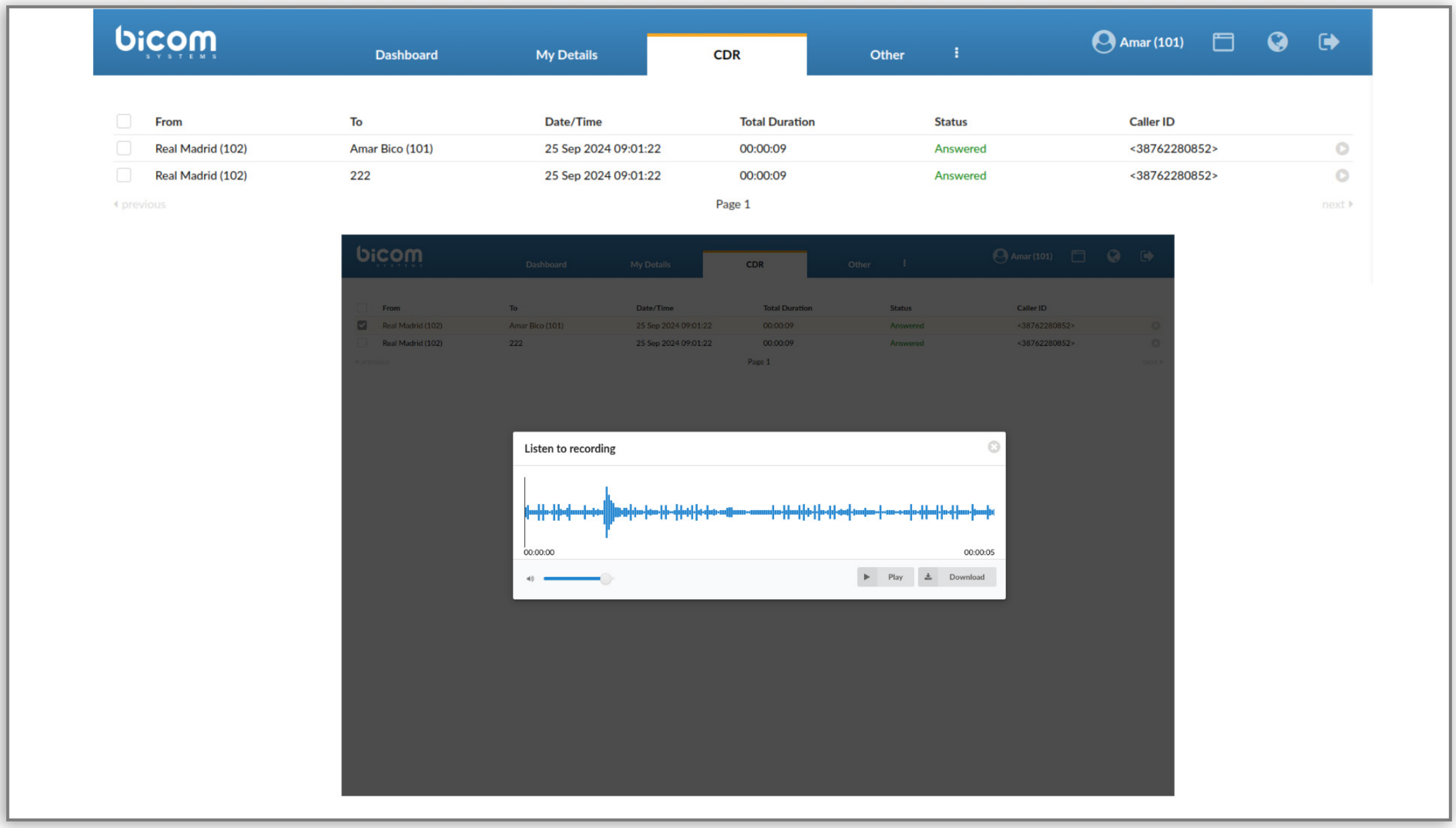
CRM Integrations

Link to a Call Record

The new features include the ability to upload a link to call records, applicable to all existing CRMs.



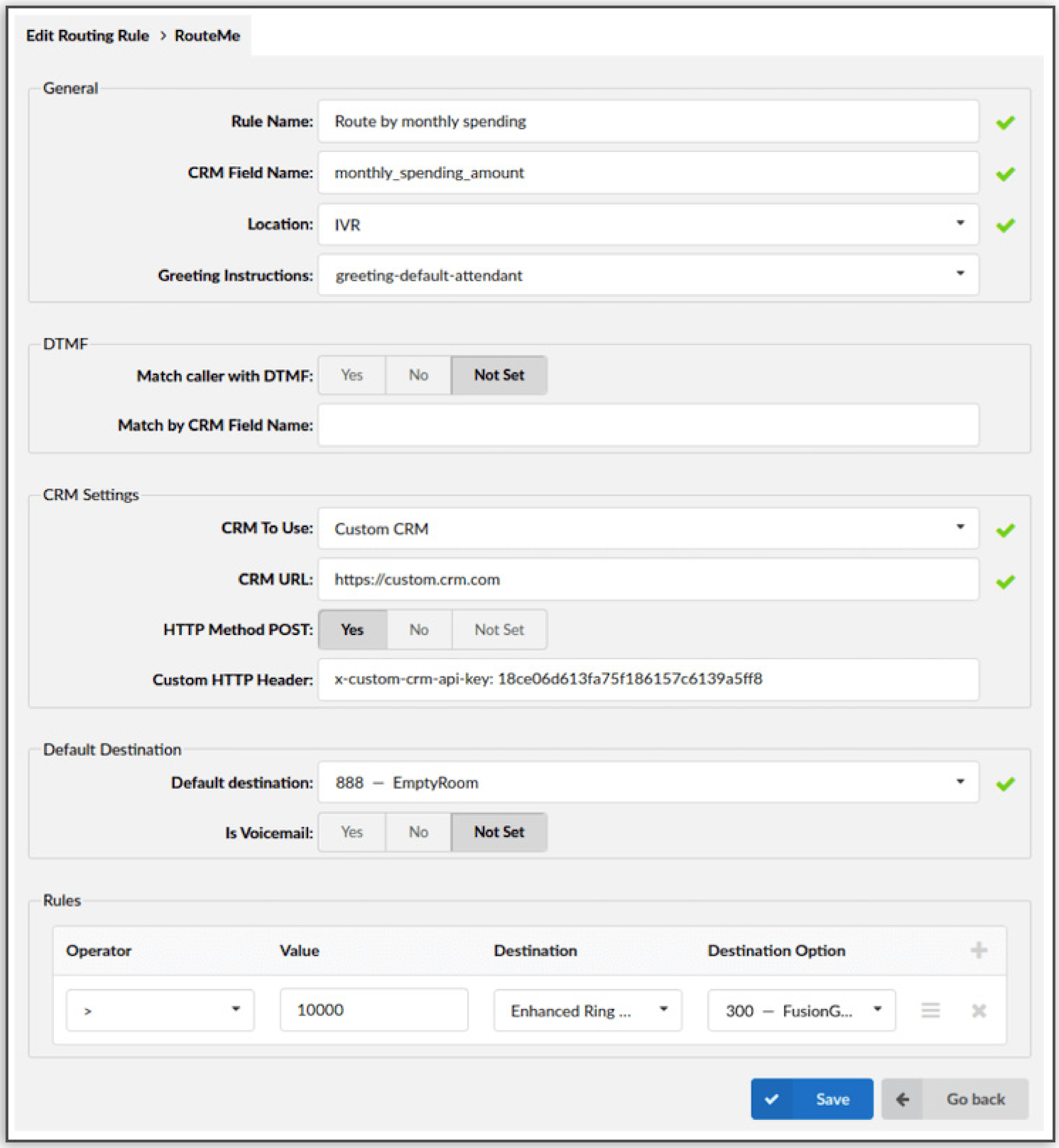
So, besides uploading recording files in the CRM, users now have the option to upload links to call records, which provides flexibility since they do not need to download the file; they can simply click the play button. (OSC)



Moreover, this feature saves storage space, which can help prevent subscription cost increases for certain CRM packages due to reduced space usage.

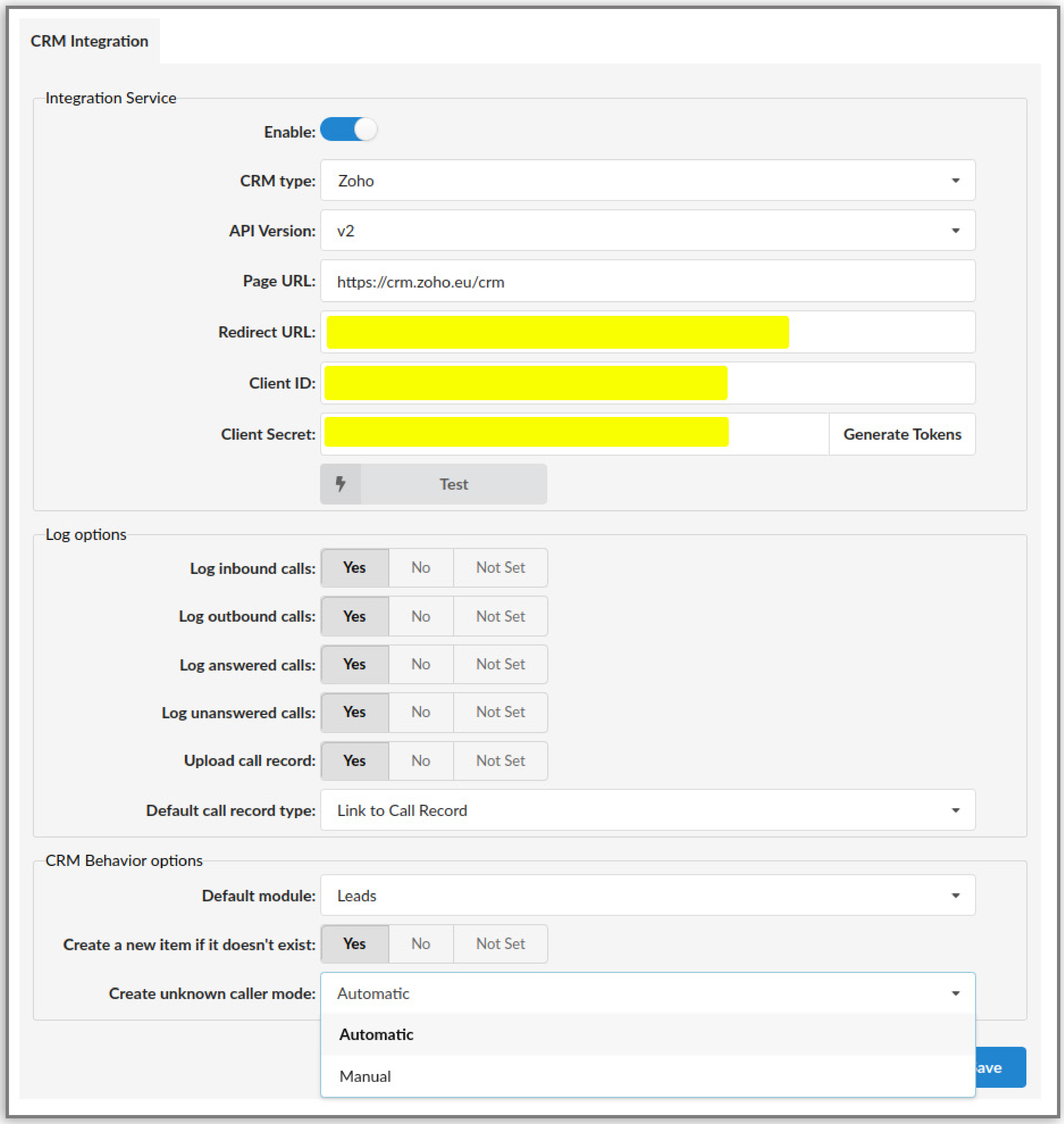
Custom CRM Settings

The CRM URL limit has been increased, removing previous restrictions on submitting requests with additional information. Options for configuring the HTTP POST method, including adding custom HTTP headers, have been added to enable more flexible data submission.



ZOHO Record Creation

Additionally, the “Preventing multiple lead creation by default” feature is specifically available for Zoho CRM users. This option enables users to choose between ‘Automatic’ and ‘Manual’ record creation when the caller number cannot be found in gloCOM’s contacts or in Zoho CRM’s records. If the ‘Automatic’ option is selected, the system will attempt to create a record using the caller’s number. If the ‘Manual’ option is chosen, a gloCOM popup will open a page in Zoho CRM for creating a new record.



This feature is designed to prevent the creation of multiple records with the same data, which can happen when multiple extensions are ringing for the same call.

To take advantage of the enhancements in CRM integrations, a CRM license must be purchased.

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