



RELEASE NOTES

PBXware 7.3.0



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Important Note: The classic Yealink Management Cloud Service (YMCS) version has been upgraded to a new platform. With that, the old RPS portal has been shut down and therefore is no longer functional. Because of that, the new portal has been integrated into the 7.3.0 version of PBXware.

Features

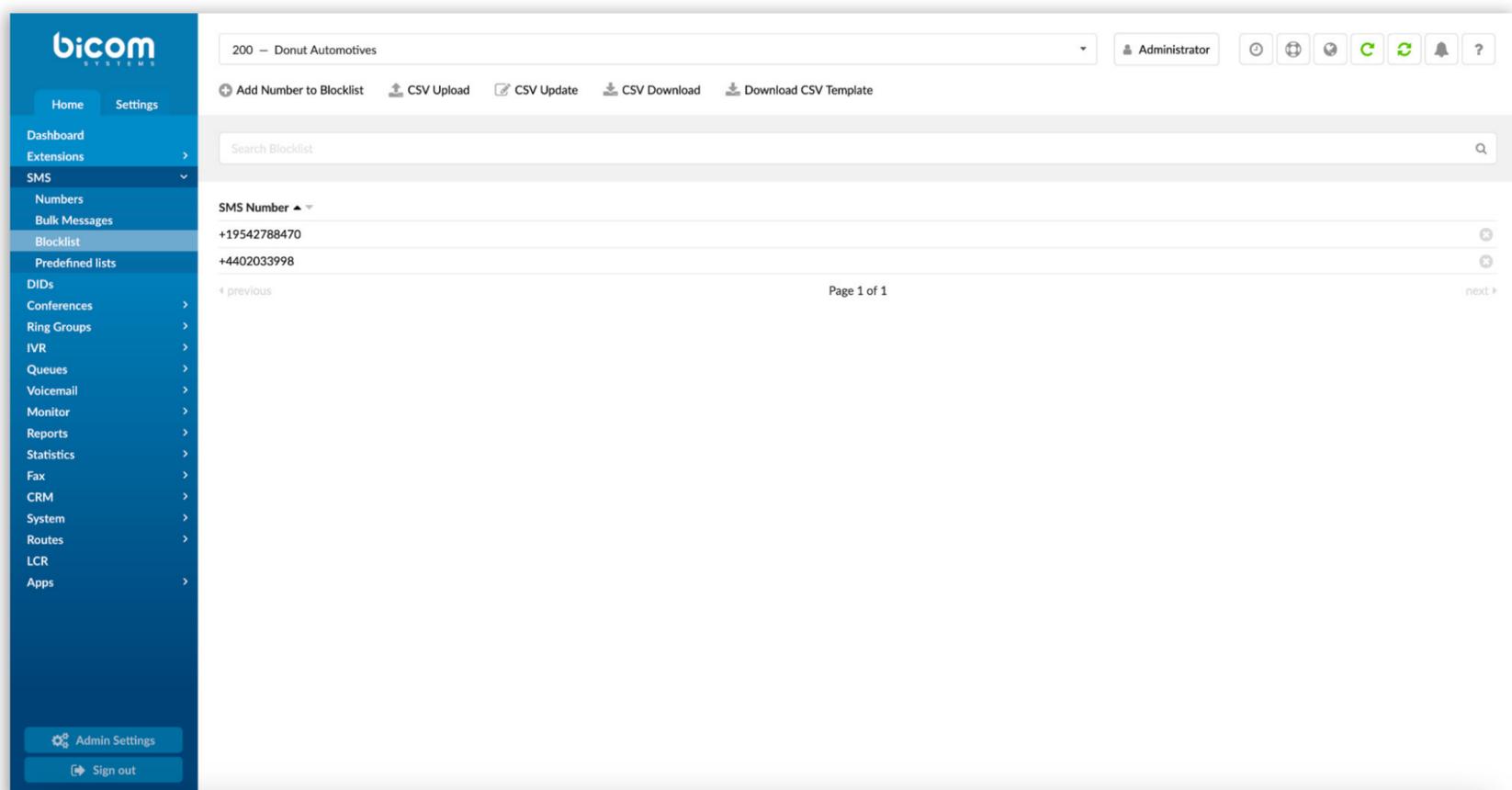
PBXware 7.3 brings major upgrades to SMS features, especially for mass SMS messaging and campaigns. With new tools like Blocklist, Predefined lists, and Opt-in and Opt-out options, customers can now enjoy a more streamlined and effective SMS marketing experience. These enhancements will make SMS messaging easier and more efficient for businesses of any size.

SMS Blocklist

The SMS Blocklist feature empowers administrators with the ability to selectively exclude designated phone numbers from receiving mass SMS communications. This can be achieved either manually through the “Add Number to the Blocklist” function or automatically when recipients opt out by replying with an Opt-out keyword (that can be defined within SMS settings) in an SMS message, signaling their preference to cease receiving mass messages.

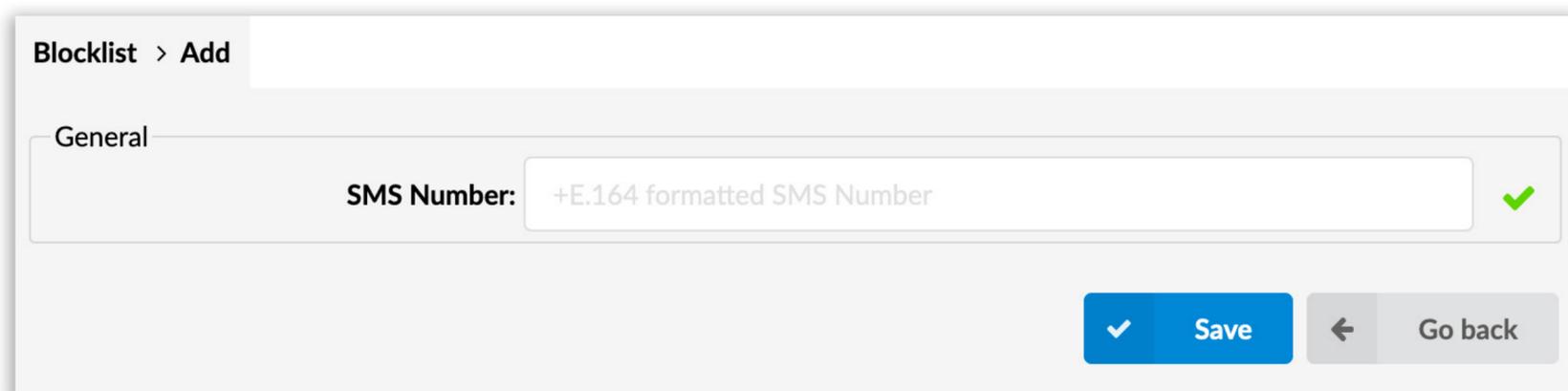
Numbers listed on the Blocklist will be excluded from receiving communications specifically from mass SMS campaigns. However, it’s important to note that direct SMS messages sent by PBXware users will remain unaffected, ensuring uninterrupted communication.

Note: On Multi-tenant systems, this only applies to the campaigns created on a specific tenant where numbers have been added to the Blocklist.



Add Number to Blocklist allows users to add a specific number to the Blocklist to prevent it from receiving messages from the BULK campaigns.

Once the Add Number to Blocklist button is clicked, a new page will open, prompting users to enter an SMS number that should be added to the Blocklist. Please note that numbers must be added in the full +E.164 format.



The screenshot shows a web interface for adding a number to a blocklist. At the top, there is a breadcrumb trail 'Blocklist > Add'. Below this is a 'General' section containing a text input field labeled 'SMS Number:'. The field contains the placeholder text '+E.164 formatted SMS Number' and a green checkmark icon on the right side. At the bottom right of the form, there are two buttons: a blue 'Save' button with a white checkmark icon, and a grey 'Go back' button with a white left-pointing arrow icon.

The system will accept +E.164 numbers starting with both + and 00, but once the Save button is pressed, “00” will be replaced with “+”, and all the numbers in the Blocklist will be displayed in +xxxxxxxxx format to ensure compatibility.

CSV Upload

The **CSV Upload** option allows users to efficiently populate the Blocklist with a large quantity of SMS numbers by importing them from a CSV file. This streamlines the process, eliminating the requirement for manually entering each individual number.

Note: When using the CSV Upload option, all the numbers on the Blocklist will be removed and the Blocklist will only contain numbers entered in the uploaded file.

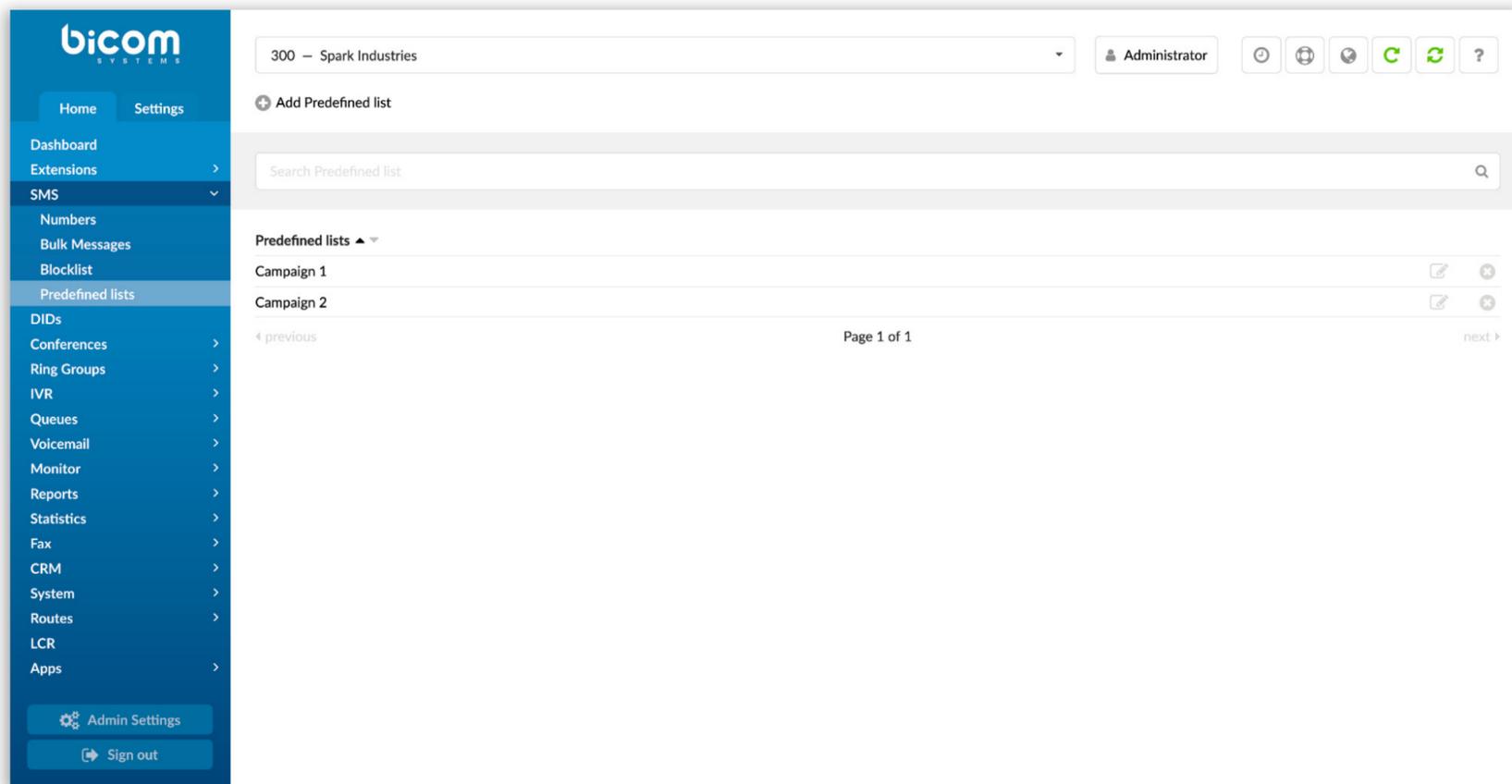
CSV Update

The **CSV Update** feature operates in parallel with the CSV Upload functionality, but it exclusively adds new SMS numbers to the Blocklist while retaining existing entries.

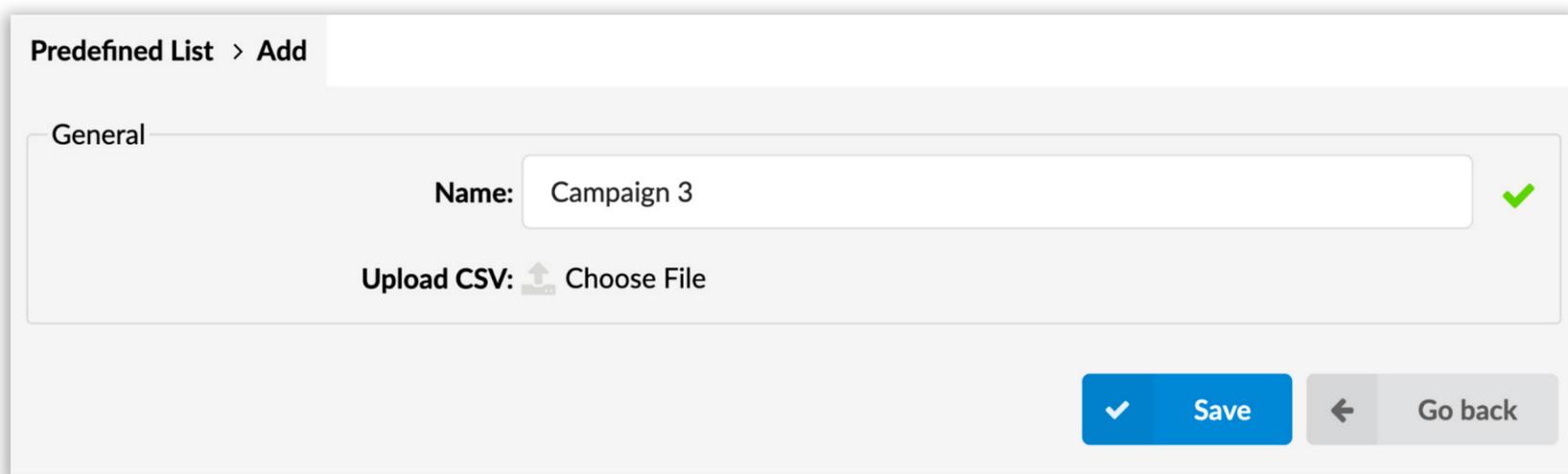
Upon clicking the CSV Update button, a file selection window will appear, allowing the user to choose the desired .CSV file from the computer’s drive. Once selected and confirmed by clicking the Open button, the numbers from the .CSV file will be appended to those already present in the Blocklist. Any number entered in an invalid format will be automatically skipped during the process.

SMS - Predefined Lists

The Predefined list feature allows you to create lists of SMS numbers that will be used for mass SMS campaigns.



Clicking on the **Add Predefined list** button will open a new window, allowing users to assign a name to the new predefined list. At this step, the Upload CSV option can be used to import a list of SMS numbers using a CSV file. If you don't upload a file and simply click the Save button, an empty list will be created. Once the list is created, it can be edited to manually add the SMS numbers in.



Upload CSV

The CSV Upload feature allows users to efficiently populate a predefined list with a large quantity of SMS numbers by importing them from a CSV file. This streamlines the process, eliminating the requirement for manually entering each individual number.

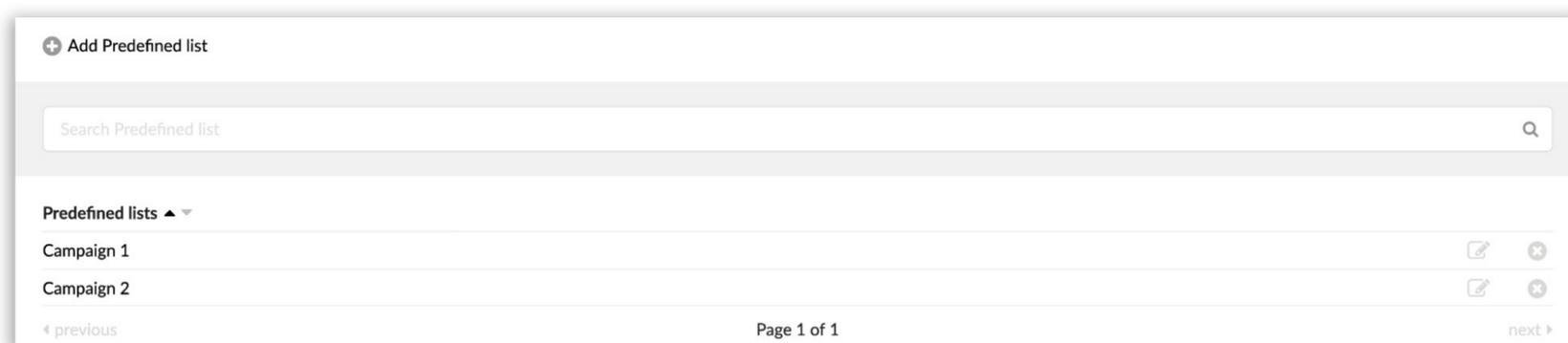
The only header required for the predefined list's CSV file to be valid is "sms_number". However, when SMS numbers are added to a new CSV file, it is also possible to create custom headers to add new fields and provide additional information about the numbers.

To meet the requirements, the first line in the file is reserved for headers and will start with the sms_number header. Additional custom headers can be added after the sms_number header. They must be comma-separated and cannot include spaces. If the user wants to add a header consisting of two words, they can use the underscore (_) symbol instead of space.

For example, we can add new headers for Company Name, City and Country:

```
sms _ number,Company _ Name,City,Country  
"+19542788470","Bicom Systems","Hollywood","US"  
"+442033998800","Bicom Systems","London","UK"  
"+16473131515","Bicom Systems","New Brunswick","CA"  
"+33185001000","Bicom Systems","Paris","FR"
```

Once the new list is created, it will be displayed on the Predefined lists page.



Clicking on the list's name or on the edit icon will take the user to the predefined list edit page, where they can add or remove SMS numbers or rename the list.

The screenshot shows the 'Predefined list edit' page for 'BULK Campaign 1'. At the top, there are four action buttons: 'Add Number to Predefined list', 'CSV Upload', 'CSV Download', and 'Download CSV Template'. Below these is a 'Name' field containing 'BULK Campaign 1' and a blue 'Save' button with a checkmark. A search bar labeled 'Search Predefined list SMS Numbers' is positioned above a table of SMS numbers. The table has four rows, each with an SMS number and a delete icon (a square with an 'x'). The numbers are: +16473131515, +19542788470, +33185001000, and +442033998800. At the bottom of the table, there are navigation links: 'previous', 'Page 1 of 1', and 'next'.

Clicking the **Add Number to Predefined list** button will open a new page allowing users to add a new **SMS number** to the list and to populate any other fields that might have been created by uploading a CSV file containing custom headers.

The screenshot shows the 'Add Number' form for 'Campaign 1'. The breadcrumb 'Campaign 1 > Add Number' is at the top left. The form is titled 'General' and contains four input fields: 'SMS Number' with the value '+27100011390' and a green checkmark icon to its right; 'Company_Name' with the value 'Bicom Systems South Africa'; 'City' with the value 'Magaliessig'; and 'Country' with the value 'ZA'. At the bottom right, there are two buttons: a blue 'Save' button with a checkmark and a grey 'Go back' button with a left arrow.

SMS - Ability to Opt-out

This feature allows users to configure the Opt-In and Opt-Out SMS features with ease.

With this configuration in place, end users can seamlessly manage their preferences regarding receiving mass SMS messages from PBXware campaigns. With the Opt-In feature, recipients have the choice to subscribe to further SMS messages, while the Opt-Out option allows them to discontinue receiving such messages.

It is worth noting that the system prevents confusion by disallowing the use of identical keywords for both Opt-In and Opt-Out functionalities. Additionally, duplicate entries in either field prompt a warning message, ensuring clean configuration and adherence to user preferences.

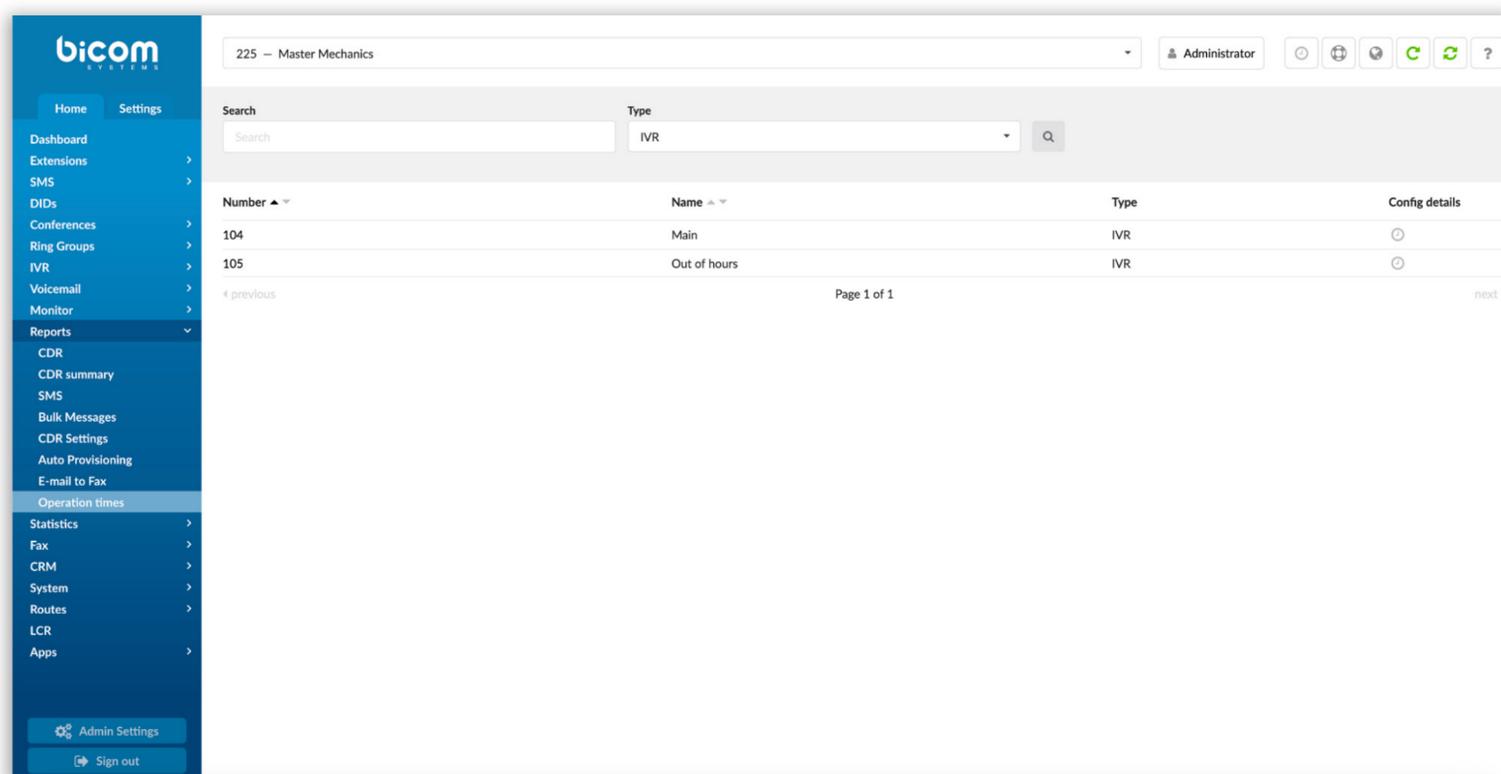
The screenshot displays the 'SMS Options' configuration page. It features a 'Options' section with the following settings:

- Use Opt-In option:** A toggle switch is turned on (blue).
- Opt-In keywords:** A text input field contains the word 'ACCEPT'.
- Opt-In response message:** A text area contains the message: 'Welcome to the Donut Automtives promo channel. You signed up to receive these messages when you created your account on our website. If this was not you or if you no longer want to receive our promo messages, please reply to this message using the opt-out keyword DECLINE'.
- Use Opt-Out option:** A toggle switch is turned on (blue).
- Opt-Out keywords:** A text input field contains the word 'DECLINE'.
- Opt-Out response message:** A text area contains the message: 'You have successfully unsubscribed from receiving messages from the Donut Automtives promo channel. If you would like to continue receiving our promo messages, please reply to this message using the opt-in keyword ACCEPT'.

At the bottom right, there are two buttons: a blue 'Save' button with a checkmark icon, and a grey 'Go back' button with a left arrow icon. Green checkmarks are visible to the right of each configuration field, indicating successful validation.

Operation Times overview

The Operation Times page, added to the Reports menu, allows users to quickly inspect the system elements on which Operation Times rules are enabled and access them from a single point for easy modification.



The page will display DIDs by default, but users can use the filter to display the IVRs, Queues, and Dial groups configured with Operation Times rules as well.

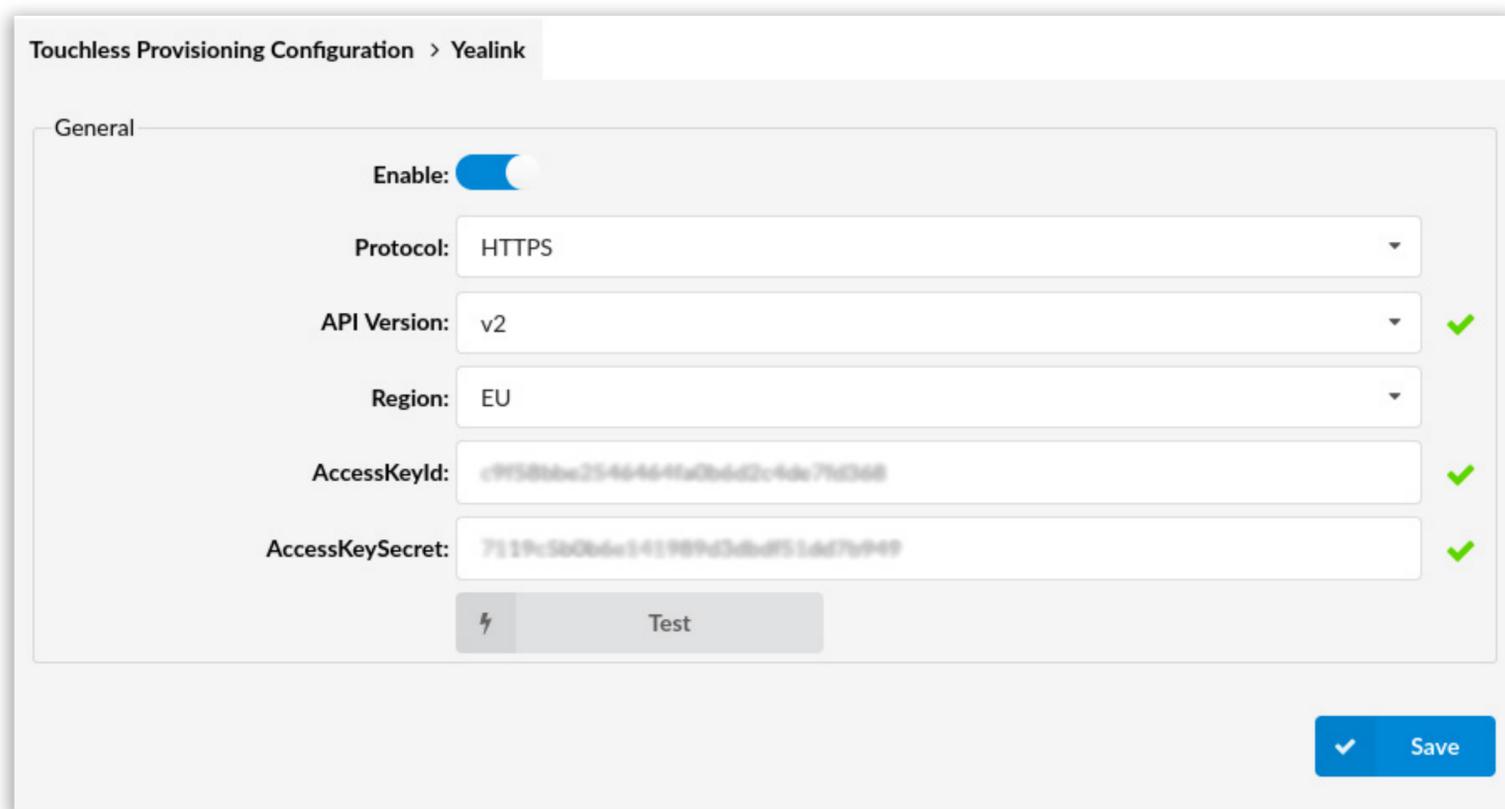
Operation times set on DIDs, IVRs, Dial groups or Queues must be configured in order for them to be displayed on the Operation Times Reports page.

If the Operation times rules on one of the elements are configured, but the configuration is later reverted to “Inherit,” this particular element will not be shown in the list anymore, however, the warning message “The ‘Operation Times’ value is set to ‘Inherit’, please check the rules on Tenant level” will be displayed.

Touchless Provisioning: Yealink's new YMCS portal integration

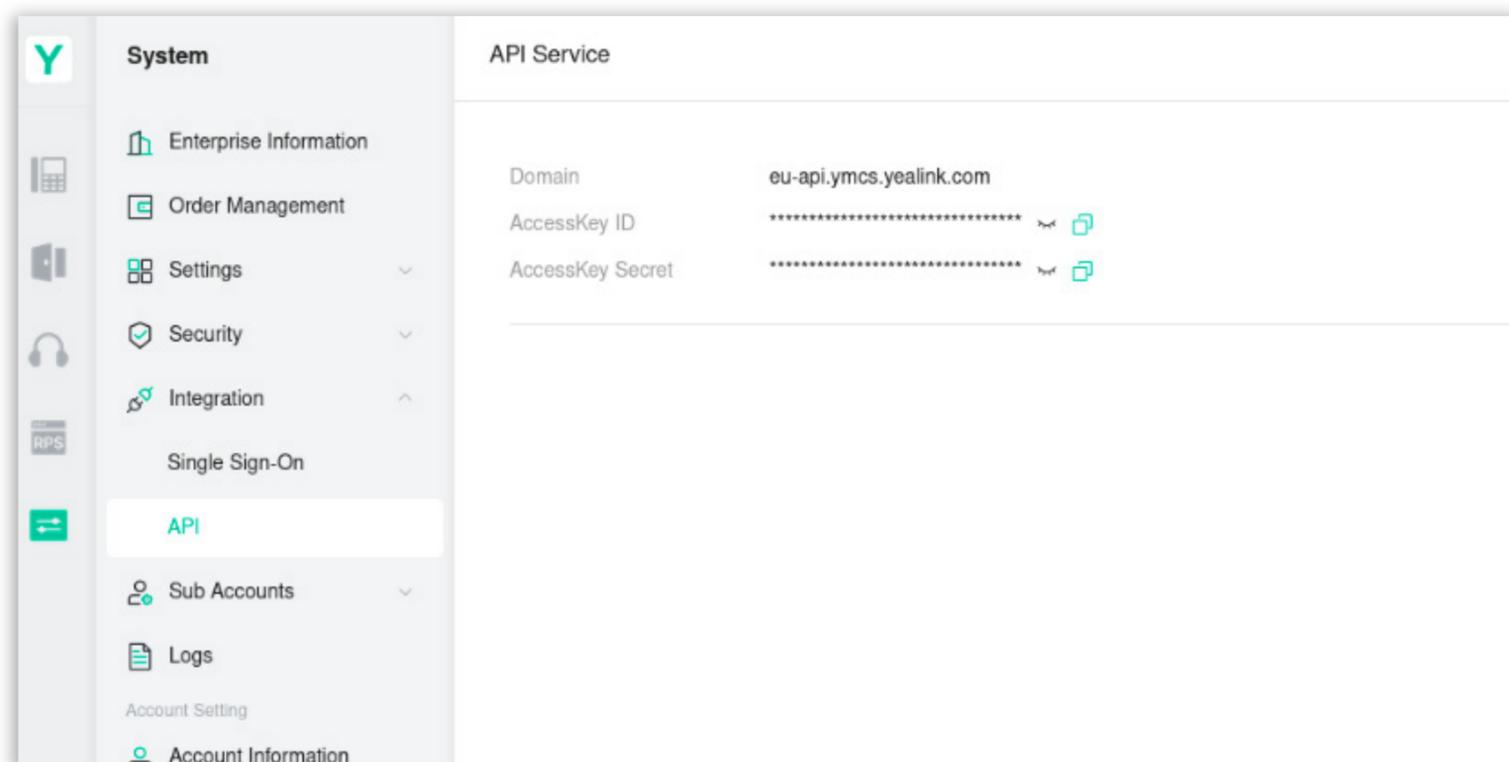
The classic Yealink Management Cloud Service version has been upgraded to a new platform, which was integrated with PBXware for Touchless Provisioning and minor adjustments have been made to PBXware's Touchless Provisioning Configuration process for the new portal. With it, a new field has been added to Yealink's configuration page within the Touchless Provisioning tab called **API Version**. After enabling the Yealink provider, the user can select which API version they want to use, and by selecting **v2**, the new Yealink YMCS portal will be used and the new dropdown **Region** will also be displayed (The selection depends on the type of Yealink YMCS used. Available options are: EU, US, and AU).

Note: API Version v1 is used for the previous Yealink RPS portal (no longer functional and will be removed later).



The screenshot shows the 'Touchless Provisioning Configuration > Yealink' interface. Under the 'General' tab, the 'Enable' toggle is turned on. The 'Protocol' is set to 'HTTPS'. The 'API Version' is set to 'v2' with a green checkmark. The 'Region' is set to 'EU'. The 'AccessKeyId' and 'AccessKeySecret' fields contain masked alphanumeric strings, each with a green checkmark. A 'Test' button with a lightning bolt icon is located below the credentials. A blue 'Save' button with a checkmark is in the bottom right corner.

To get the access credentials (AccessKeyId and AccessKeySecret), users should visit the YMCS Yealink manager and log in with their Yealink YMCS account. Once logged in, the credentials can be found by clicking on the **System settings** tab. By selecting **API** from the **Integration** tab, users should be able to see their credentials which can then be copied and pasted to the PBXware configuration.



Note: in order to provision phones successfully using the new YMCS portal, in addition to the regular TLP procedure (setting the extension's UAD location to Remote, including the device's MAC address, setting Auto provisioning and DHCP to yes) it is also needed to enter the **SN** number of the UAD within the Auto Provision section of the extension. This is required by the new API version.

New Endpoints



Fanvil X301W



Fanvil X303W



Mitel 6930



Mitel 6940



Snom D140

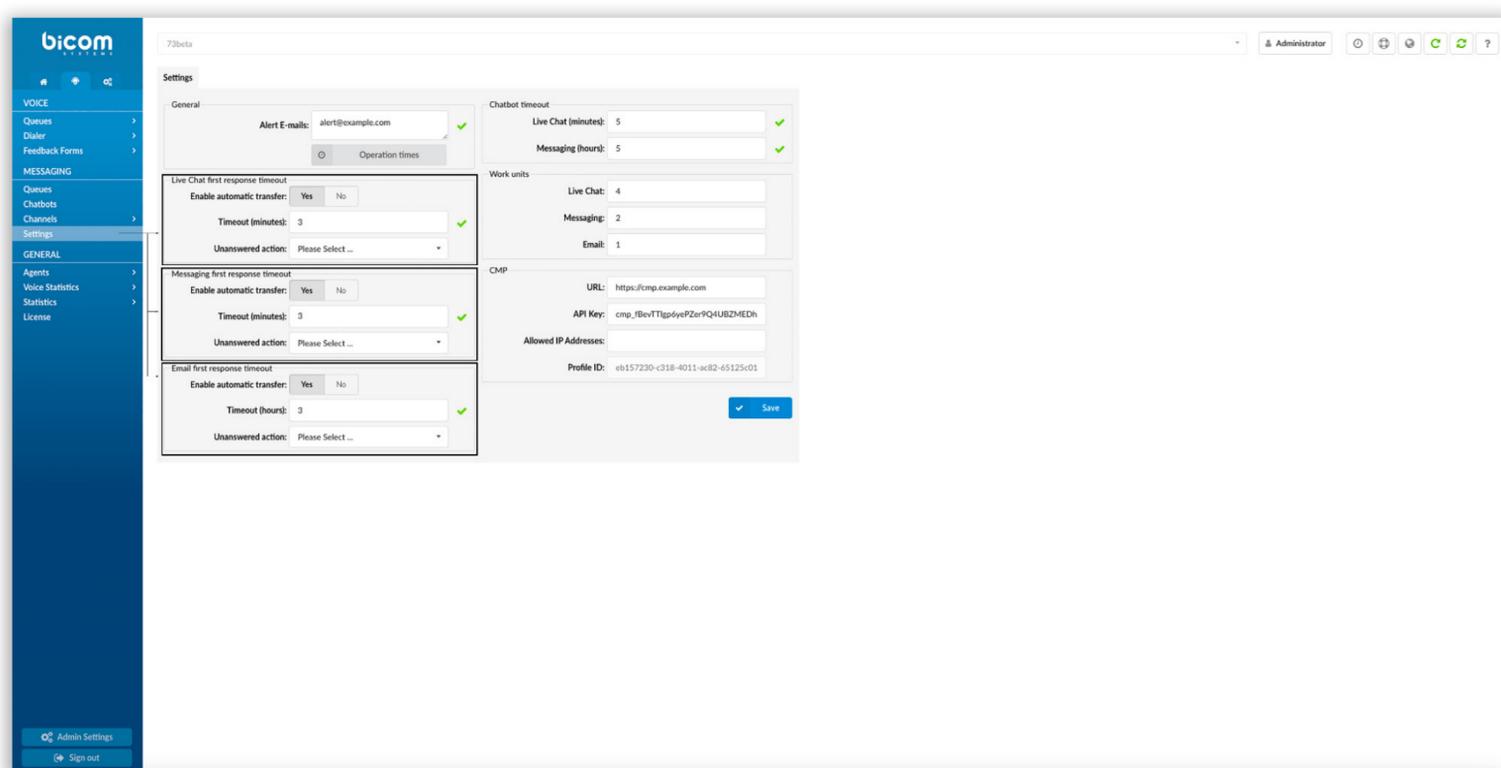


Yealink DECT W75B

CONTACT CENTER MODULE

Settings

The First Response Timeout functionality has been enhanced and divided into three sections for better management: Live Chat, Messaging, and Email. For Live Chat interactions, this feature permits automatic ticket transfers upon timeout expiration, with users able to define a timeout in minutes and an unanswered action, such as logging off or pausing an agent. Similarly, for Messaging interactions, including SMS, Facebook, and WhatsApp, users can toggle the automatic transfer setting to 'Yes', specify a timeout in minutes, and set an unanswered action. For Email interactions, the feature allows users to set a timeout in hours and choose an unanswered action to ensure no customer queries are unattended. In all cases, this mechanism redirects queries to an available agent from a designated queue, enhancing response efficiency and customer satisfaction. These updates aim to provide more tailored management of customer interactions, ensuring that no query goes unanswered and improving overall service quality. This structured approach allows support teams to respond promptly and maintain high standards of customer service.



Chat Transcripts

View Chat Transcripts

This feature enhances the ability to review customer interactions by allowing users to navigate to **Statistics** and open **Breakdowns**. From there, users can select a conversation and choose to view the chat transcript in a new window. This capability ensures that all details of customer interactions are readily accessible for comprehensive review.

Download and Open as TXT File

In addition to viewing transcripts, users can now download chat transcripts and open them as TXT files. This feature applies to all chat transcripts and emails, providing an easy way to save and review conversations offline. By having this option, users can maintain organized and easily accessible records of all customer communications.

These new features collectively improve the efficiency of reviewing and managing customer interactions, providing a better overall experience for both agents and supervisors.

The screenshot displays the 'Agent conversations per channel breakdown' interface. At the top, it shows filters for 'Start date' (10 Jun 2024 00:00:00) and 'End date' (10 Jun 2024 23:59:59). Below this is a table of agent conversations with columns for Conversation ID, Date, Channel, Customer ID, Customer Name, Queue, Campaign, Assignee, Activity Time, Speed To Answer, Entry, Exit, Transferred, Last Action By, and Ended. The table shows four entries for conversations on 10 Jun 2024.

Two windows are overlaid on the table to demonstrate the transcript features:

- View Chat Transcript:** A window showing a chat conversation between Emma Johnson and Mark White. The transcript includes messages about account email verification, duplicate charges, and subscription auto-renewal settings.
- Download Chat Transcript and Open as TXT File:** A window showing the downloaded transcript as a text file. The content is a structured log of the conversation with timestamps and participant names.

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