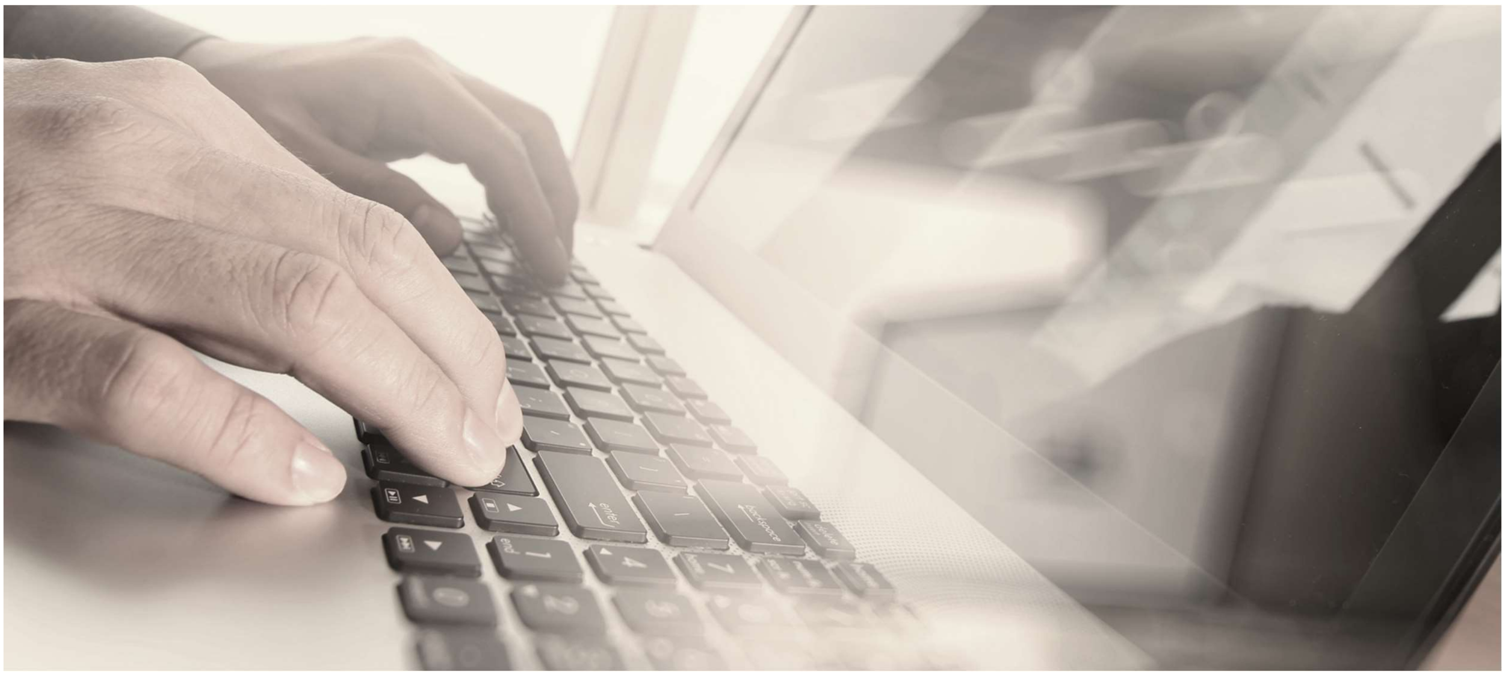


Novus

Release notes v. 1.9 - 20211208.1 STABLE

December 9, 2021
Rev. 1.00

Contents

1 Introduction

This document describes new features, improved features/changes, and bug fixes included as part of the Novus 1.9 roadmap release. This version is 20211208.1 STABLE.
The release is deployed week 49.

2 New features

2.1 Salesforce integration

With the Zylinc@Saleforce Saleforce application, an agent will be able to have automatic search of the calling party's phone number within the Salesforce organization. If an account, contact, user etc. is matching the phone number the Salesforce session will present the found details in a new Salesforce tap within the agents current Salesforce session. The following will happen based on the number of matched entities:

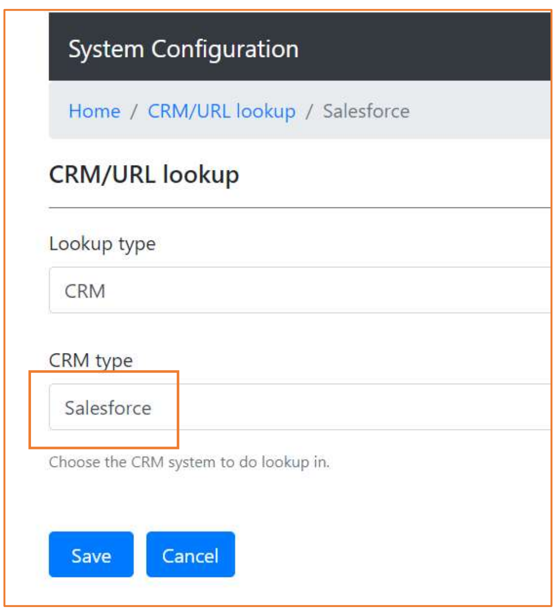
- No match – The Zylinc@Salesforce app will open the small app window presenting that no match was found on the calling phonenumber.
- One unique match – The Zylinc@Salesforce app will remain minimized and directly open the found entity in a new Salesforce tap.
- Multiple matches – The Zylinc@Salesforce app will present all the matching entities, showing the display name and the entity type (account, contact etc.)

The agent in Novus and the Salesforce user is mapped when the email field in both platforms are identical.

The Zylinc@Salesforce app will at some point be available in the Salesforce App Exchange for easy installation to your Salesforce Org, but in this release the app must be installed manually using the Salesforce CLI interface.

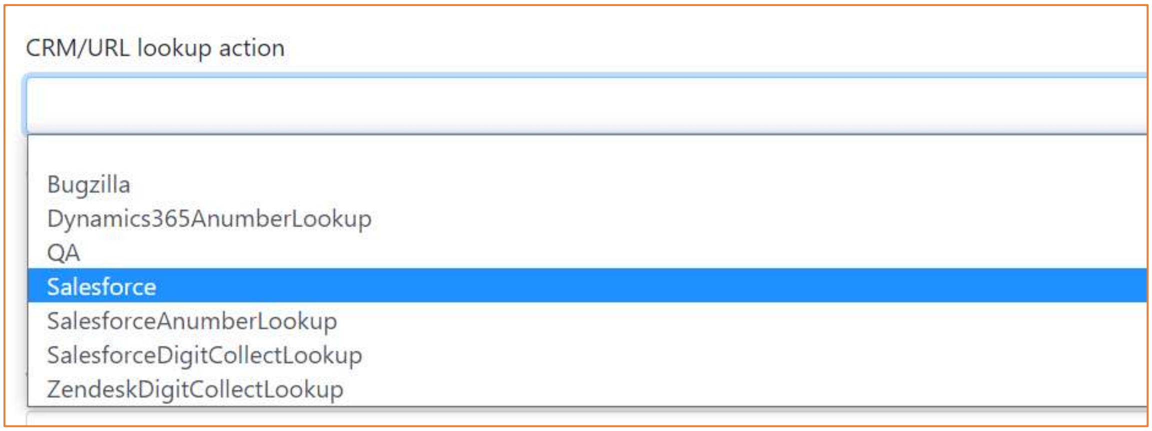
2.1.1 How to configure in Zylinc System Configuration:

- Go to System Configuration – Caller information lookup -> CRM/URL lookup -> Create new
- Setup the CRM type to Salesforce -> Save



You now configure the queue/queues which will have the Salesforce CRM lookup:

- Go to System Configuration - Contact center and PBX configuration -> Queues
- Select the queue and set the CRM/URL lookup action to the Salesforce CRM lookup.

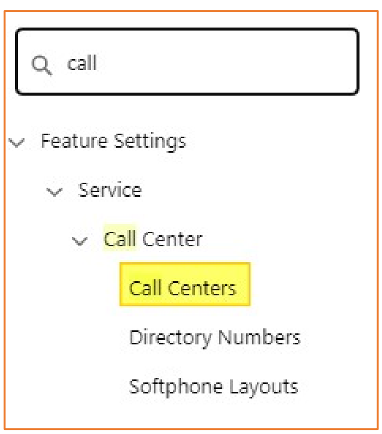


2.1.2 Install Zylinc@Salesforce to your Salesforce Org.

To install the Zylinc@Salesforce app, please contact Zylinc for the installation files and follow the guidelines found in the 'README.md' file. You will also receive the RabbitMQ username and password for your Novus tenant that latter will be used in the configuration of the Zylinc@Salesforce app in Salesforce.

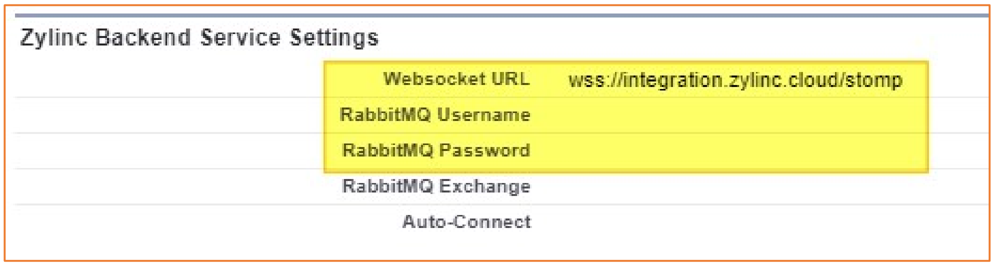
2.1.3 Configure Zylinc@Salesforce in Salesforce:

- Open your Saleforce organization Setup section.
- Go to the 'Call Centers' section.



2.1.3.1 Setup integration with Novus

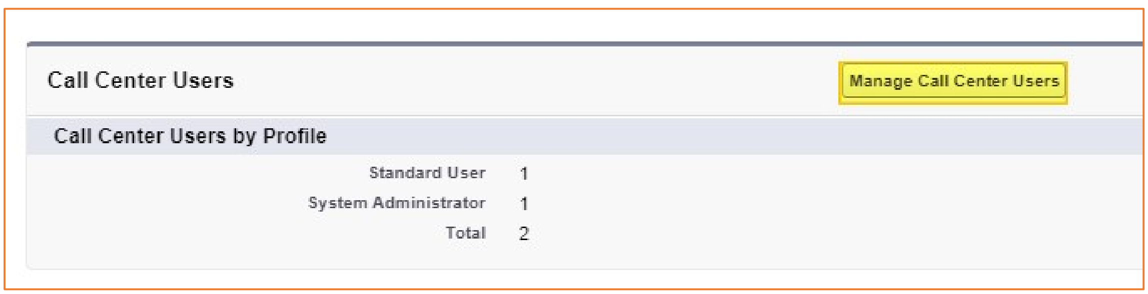
- Click and edit the Zylinc@Salesforce app.



- Set the Websocket URL to: wss://integration.zylinc.cloud/stomp
- Set the RabbitMQ username and password with the values received from Zylinc.
- Leave the RabbitMQ Exchange empty (Not used in current release)
- Set the Auto-Connect to either 'true' or 'false'. The setting determines whether the users/agents by default, should auto connect their Zylinc@Salesforce app or if this must be carried out manually by the agent self.

2.1.3.2 Add users to Zylinc@Salesforce

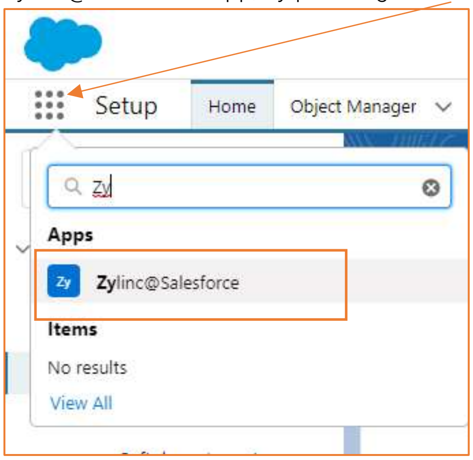
- Press the 'Manage Call Center Users' button in the Zylinc@Salesforce Call-centers page.



- Add all the Salesforce users which must have access to the Zylinc@Salesforce app.

2.1.4 Start Zylinc@Salesforce

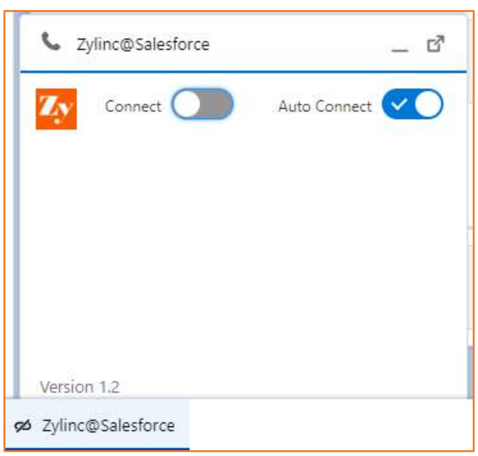
Login to Salesforce with a user that is granted access to the Zylinc@Salesforce app, and search for Zylinc@Salesforce app, by pressing the '9 dots' in the top left corner, and click the app.



The Zylinc@Salesforce app should now be available as a small docked application in the bottom left corner of your Salesforce window.

When clicking on the app, a small window should appear, where the following can be configured.

- Connect: Displays the current connection status to Novus and can be toggled to disconnect and connect.
- Auto Connect: The agent can 'overwrite' the default 'auto connect' setting configured on the Zylinc@Salesforce app it self.



The docked Zylinc@Salesforce app will show the connection state with an icon so the status can be seen without having the window shown.

 = 'Disconnected'

 = 'Connected'

2.2 Scheduled reports

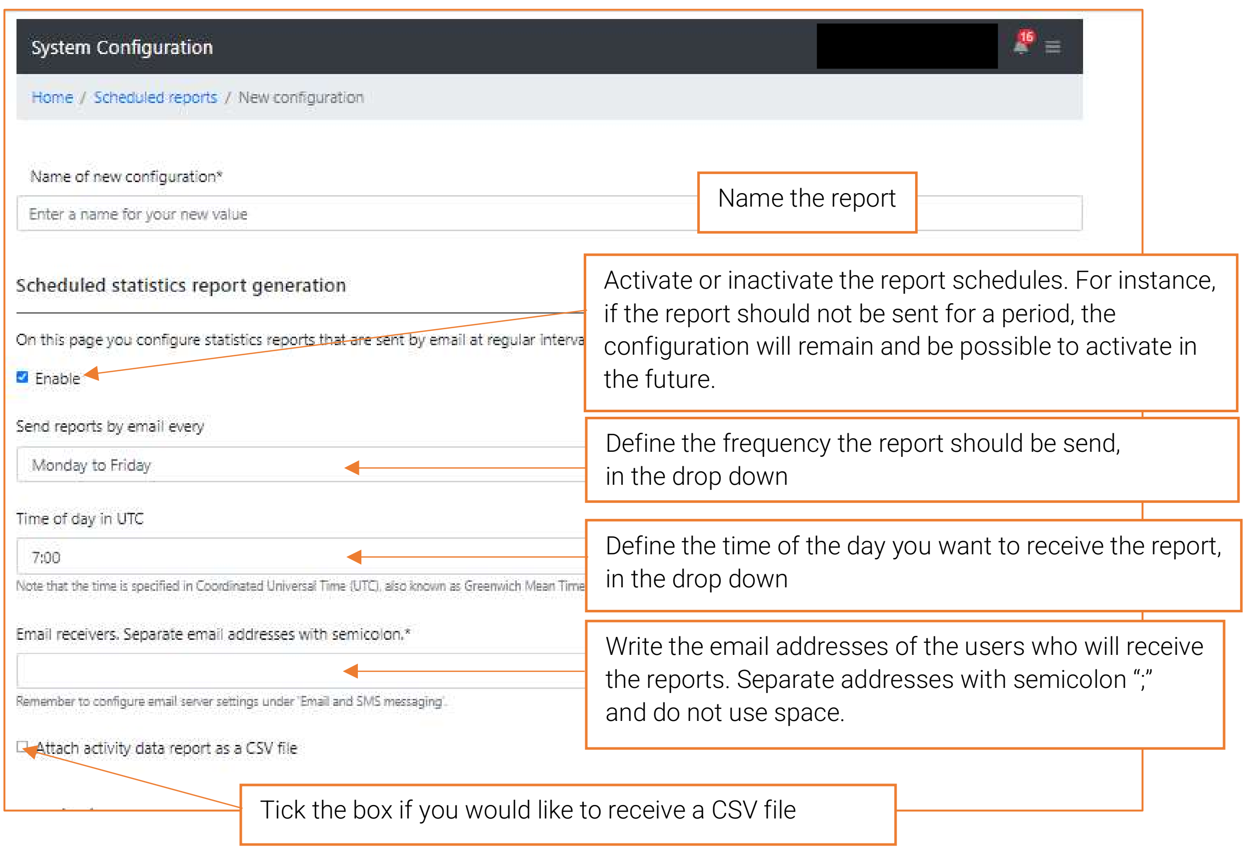
It is possible to configure Novus to automatically send an email with statistical information in PDF and/or CSV format at recurring times. Both the list of recipients and the recurring times can be configured. For every scheduled email report, it is possible to select multiple recipients as well as multiple PDF reports. All recipients of the report will be visible in the received email.

2.2.1 How to configure scheduled reports:

Go to System Configuration – Statistics -> Scheduled reports

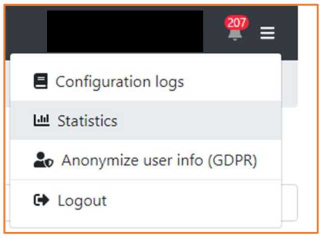
Press Create new and enter the data for your scheduled report.

Scheduled statistics report generation:
In this section, it is possible to set information about the frequency the report should be sent and define the email addresses of the recipients. It is here that the CSV report can be chosen.

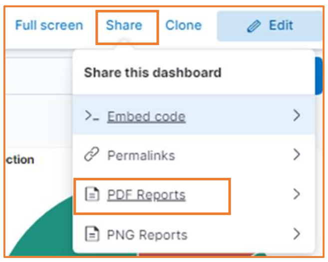


Attached PDF report:
If you would like to receive PDF reports, you need to copy the URL link from Kibana:

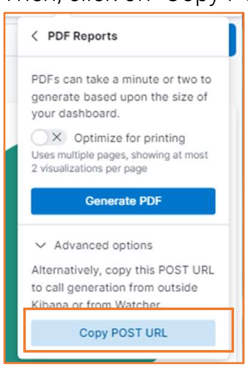
Go to right corner drop down menu, choose statistics



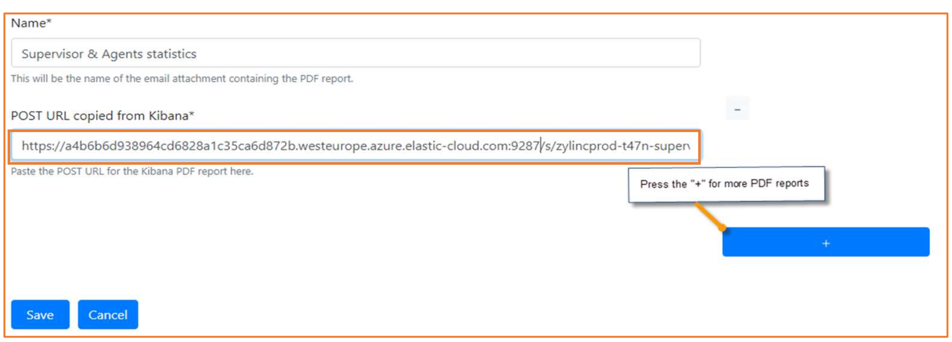
Select the dashboard you want to be sent as PDF and apply your preferred filters.
In the top right corner, select Share and then click PDF Reports:



Then, click on "Copy POST URL":



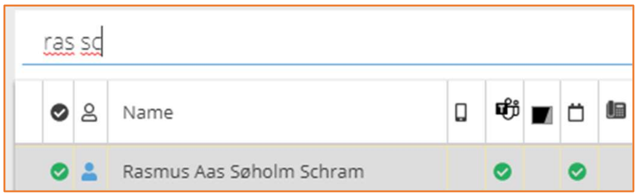
Go back to the System Configuration -> Press the "+" -> type the name of the report and insert the copied POST URL into the field



3 Improved features

3.1 Improved user search

It is now possible to search on multiple search words at once, and only have parts of those typed, as in this example:

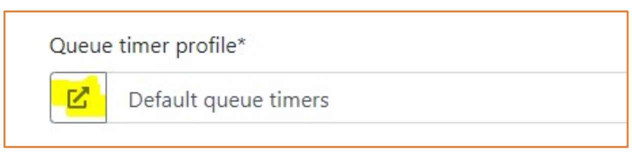


The search query is as follows:

- Match on *displayName*
- Match on *lastName*
- Match on *firstName*
- Match on *email*
- Match on *department*
- Match on *keywords*

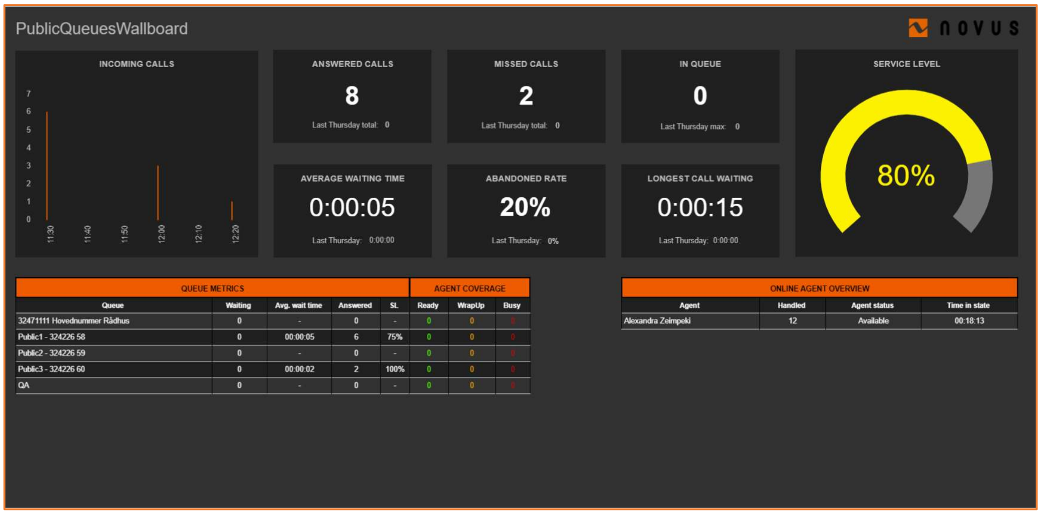
3.2 Direct link to referenced configuration pages

In the Configuration Manager it is now possible to find links that will open the configuration page, that is being referenced. Click the icon and a new browser tab will open the given page that can be edited directly if needed.



3.3 Improved Wallboard design

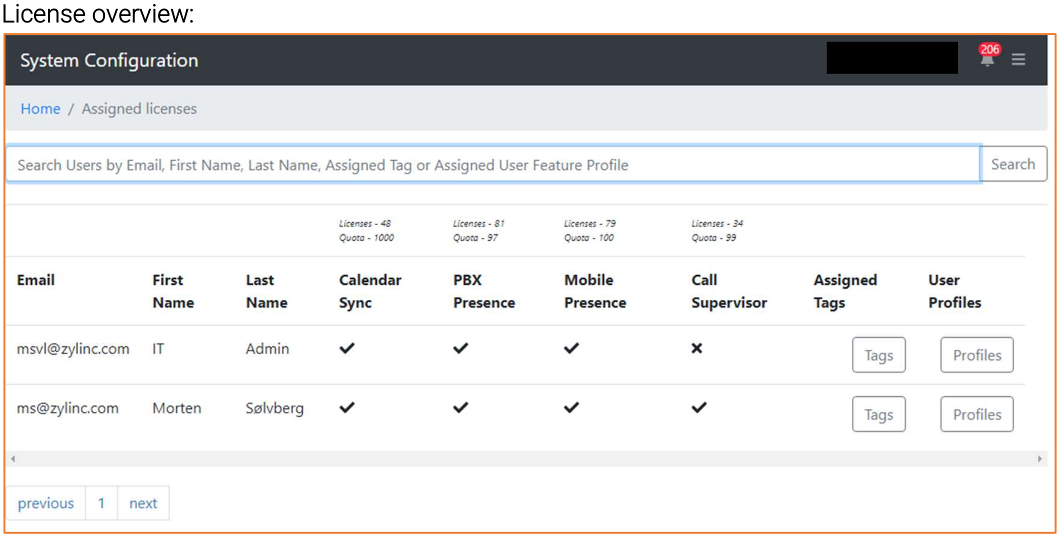
The wallboard has now a new visual design and a histogram of incoming calls has been added. Each bar in the histogram represents a 10 minute period.



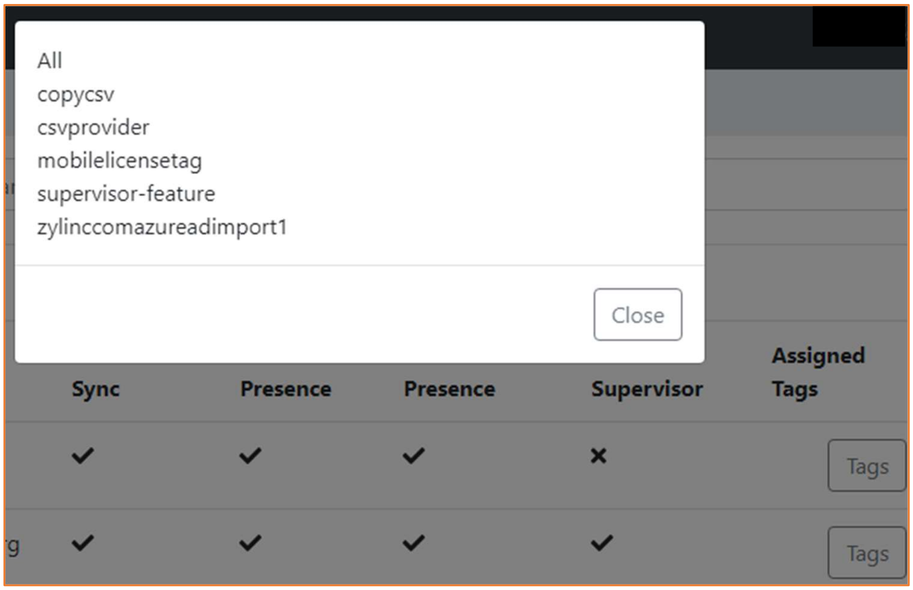
3.4 License overview

It is possible to have a license overview, where the administrator has an overview of the licenses used *(licenses)* and the total number of licenses bought*(quota).* The License overview is a matrix, where the users' email, first name and last name is displayed, followed by a check mark, if the user has been granted specific licenses. It is also possible to see what tags and user profiles, the specific user has been allocated.
There is a search field, where it is possible to search by: first name, last name, email, tags, user profiles.

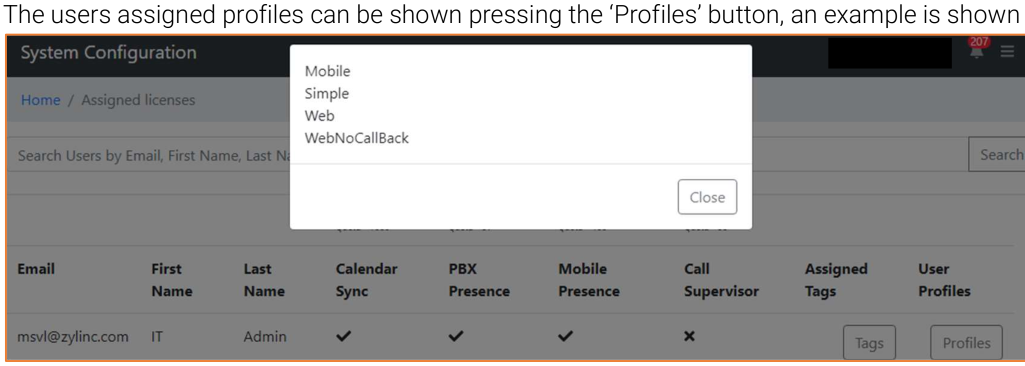
License overview:



View of the tags:
The users assigned tags can be shown pressing the ‘Tags’ button, an example is shown below.

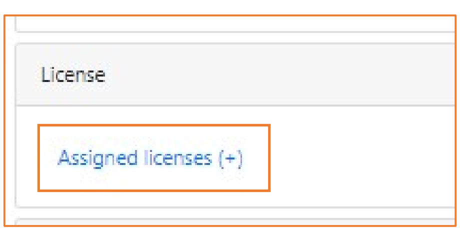


View of the profiles:
The users assigned profiles can be shown pressing the ‘Profiles’ button, an example is shown below.



3.4.1 Where to find license overview

Go to System Configuration -> license -> assigned licenses



4 Bug fixes

4.1 Incorrect wallboard data and visual formats

Incorrect data and display have been corrected.

4.2 Ghost calls being stuck in the web client

Calls were hanging in the client even though there was no actual call, which resulted in the agent to be stuck in busy state and not be able to receive new calls. Now there are no hanging calls.

4.3 Not possible to delete configuration data

It is now possible to delete all configuration data as expected.