



InteractionSync

Release Notes

Contact center: Genesys Cloud
Release date: November 4, 2024

Releases

See [InteractionSync version history](#).

November 4, 2024

- Added support to transfer wrap-up notes between InteractionSync and Genesys full client.
- Inbound SMS interactions can now be configured as individual interactions from the InteractionSync configuration page.
- Extended support for SMS interactions; Screen pop activity is now available for inbound interactions.
- New configuration options are available within the Softphone Settings tab:
 - *Script for Phone Call* is available for the agents to view agent scripts within the embedded interaction window.
 - Embedded interaction window can now be enabled separately for messaging, phonecall, and callback interactions.
- **New Feature:** *Tab Views > Interaction Details and WEM Options*
A new setting *Tab Views* has been added to the configuration page. This tab includes interaction details and WEM (Workforce Engagement Management) options that administrators can enable. When enabled, the options will appear as tabs on the InteractionSync softphone.
Important: Agents can view the WEM tab information on the softphone only if they have the necessary Genesys Gamification permissions. If these permissions are not granted, the tab will appear blank. Please ensure agents have the required permissions to view the relevant information.
- Xrm.page API dependency has been removed and replaced with an alternative.

June 17, 2024

- **Queue-specific screen-pop search:** The Screen pop feature is now able to be queue-specific. Based on the queue chosen, the settings are configurable, for example screen-pop trigger.
- Extended the ability to store Voice Transcripts in Dynamics; Genesys Cloud credentials are required to display Voice Transcripts and configure queue-based screen pop settings. The credentials can be managed within the Configuration tab.
- Allow custom session templates to be triggered when an interaction is offered.
- Genesys Cloud Agent Assist is confirmed in a limited capacity. For example, summarization currently requires a manual copy/paste to be added into wrap-up notes.
- Added ability for an Agent to have ISync minimized by default.
- Resolved an issue in CIFv2 applications where the ANI number was not getting associated to the Phone Number field in CRM.

- New configuration options are available within the Softphone Settings tab:
 - A new configurable option *Agent configurable* is available for the *Minimize Softphone by Default* setting. The option empowers agents to minimize the softphone. The option will be available within the release information icon on the softphone.
 - *Click to Dial from closed Activities* - Allows the administrators to initiate the interaction from closed activities. By default, the setting is enabled.
- **Session ID Creation Issue:** Currently, Session IDs are not generated for the records opened from search results, causing functionality limitations. We are working with Microsoft on a potential resolution.
- Various bug fixes and minor improvements.

November 27, 2023

- For CIF v1 only: Closing the active interaction tab with the InteractionSync sidebar open will trigger a warning message unless there is no click event or action from the agent within the InteractionSync sidebar.
- Added a link to the instructions for capturing log files from the rocket icon for version reporting to enable agents to capture log files more easily.
- Various bug fixes and minor improvements.

September 25, 2023

- New configuration options are available within the Softphone Settings tab:
 - *Post Call Survey Frequency* - A new setting available in the Admin Configuration page enabling the ability to set the frequency at which call interactions are sent to a post call survey via the Survey Frequency setting. Intervals can be chosen in 1-30 days.
 - *Outbound Default Queue ID* - New setting available in the Admin Configuration page to select a persistent Outbound Queue ID.
 - Extended support for *Open* messaging functionality to enable 3rd party messaging platforms and store message transcripts.
- Extended support for Genesys Cloud native screen recording with GCBA (Genesys Cloud Background Assistant).
- Various bug fixes and minor improvements.

July 20, 2023

- Added support for callback interactions to update the existing call activity records.

- New configuration options are available within the Softphone Settings tab:
 - *Minimize softphone by default* – ISync sidebar will remain minimized until an interaction is offered.
 - *Minimize softphone on all Tabs (Softphone will remain minimized)* – ISync sidebar will remain minimized, even when an interaction is offered.
- Various bug fixes and minor improvements.

June 13, 2023

- Notes history is accessible via D365 and will be displayed according to the corresponding active interaction type.
- New button *Post Call Survey* is now added to the InteractionSync sidebar; call interactions are sent to a survey via the button.

April 3, 2023

- Fixed an issue with the Version reporting icon from overlapping with the other icons.
- Resolved an issue with saving the configuration after upgrading.

March 14, 2023

- Fixed an issue with the *User selected* config setting, causing an error with the transcript not appearing when a new WhatsApp interaction is created.
- Fixed an issue with the scheduled callback for *ScreenPop on Interaction pickup* config setting; ScreenPop will now appear.
- For CIF v1 only: Fixed an issue with the record when transferred to one agent to the other, not associating with the current interaction.
- Extended support for outbound interactions; Screen pop activity is now available for outbound interactions.
- Entity type can now be changed for the available screen pop.
- Fixed an issue with *createAndUpdateActivity* function not giving an exception when successful.
- Fixed an issue with the contacts not populating when a new outbound interaction is placed.
- New Version reporting icon is now available on the Genesys Cloud softphone.
- Added support for Line Messenger.
- New option *Screen pop on Interaction Pickup* to provide screen pop after an interaction is picked up.
- Added the ability for the Embedded Interaction Window for chats to be controlled by the agent.
- Fixed an issue with the email interaction wrap-up code not updating, when an outbound email is made before deallocation.
- Fixed an issue with the association to be saved after the call is disconnected.

- Fixed an issue with the chat interaction when passing incorrect value from the attribute `IS_ActivityId`, activity must not be created.
- Added *Interaction details* section for WhatsApp, Facebook, and Web Messaging.
- Added support for recordings on the callback entity form.
- Screen pop is now available for outbound SMS interactions.
- Added *formattedDuration* and *interactionUrl* properties to the activity record mapping.
- Varies additional bug fixes and minor improvements.

October 31, 2022

- Fixed an issue where an error was displayed when updating an activity.
- Fixed an issue with the delay in multiple requests updating the activity details in *createAndUpdateActivity* function.
- Added dynamic fields *formattedDuration* and *interactionurl* to the activity record mapping.

July 5, 2022

- For CIF v2 only: Fixed an issue with the new interaction notification alert persisting when accepted in InteractionSync; the alert will now disappear once the interaction is accepted.
- Added support to change the Global Search type to either "Categorized" and "Relevance".
- Changed the method of getting transcripts from API to embedded framework for WebMessaging, Facebook, and WhatsApp.
- Fixed an issue with the maximize/minimize icon not displaying when first logging in.

March 29, 2022

- Added *Shelf* agent assist overlay for chat interactions. (Add-on subscription and configuration via Microsoft Dynamics is required.)
- New option to provide an *Embedded Interaction Window for chats* within the softphone. See Softphone settings tab > Embedded Interaction Window to enable this functionality. When enabled, an incoming chat interaction automatically opens the interaction window. Shelf functionality is supported.
- **Known issue:** Receiving subsequent chat interactions may cause the embedded window to close/minimize. Users may manually open/maximize the window.
- Fixed an issue with placing a call to a search record.
- Fixed an issue with null `clientId` for recordings.

January 21, 2022

- Extended support for digital messaging channels, such as Web Messaging, Facebook Messenger, and WhatsApp. The functionality to store the message transcript and categorize message type is also now available.

- Changed the *User* entity for Default New Interaction Searching to be customizable; previously the User entity was not editable.

December 2, 2021

- Changed the storage location for InteractionSync configuration data within the browser to reduce issues when the browser unexpectedly clears the configuration data.
- Changed how the Contact Search Results are displayed in the UI when using the Custom Dial Page within InteractionSync. When the list of matching records is displayed to the user, the associated field that was matched appears in parentheses.

November 4, 2021

- Fixed an issue with Call Notes not saving after a call is disconnected if Genesys did not send all required attributes about the call.
- Fixed an issue with the browser losing cached configuration data causing records to not auto-associate.

Update InteractionSync

To apply an upgrade to an existing deployed version of InteractionSync, follow the same steps as the initial installation. After the import of the updated solution, the original settings remain unchanged.

1. As a Microsoft Dynamics admin user, navigate to **Settings > Solutions**.
2. Click **Import** button.
3. Select **Choose File** and find the .zip file of the managed solution with the correct release number and click **Next**.
4. Select **Next** on the following screen.
5. On the **Post Import Actions** dialog, ensure the check mark is enabled and select **Import**.
6. It will take several minutes to import the solution – please wait for it to complete.
7. Once complete, you should see a screen that shows the status of the import.
8. Select **Close**.

Note: All users must refresh their browser or log out and back into Dynamics to pick up the changes included in the updated solution.

InteractionSync version history

Version	Release date
2.93.1	November 4, 2024
2.93.0	June 10, 2024
2.92.9	November 27, 2023
2.92.8	September 25, 2023
2.92.7	July 20, 2023
2.92.6	June 13, 2023
2.92.4	March 14, 2023
2.92.3	March 29, 2022

