



Avaya IP Office Contact Center Task Based Guide – Email & Chat Services

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Change History

This section describes the major changes in this document as of Release 10.1.1.

Issue	Date	Summary of Changes
Release 10.1.1, Issue 1.0	October 2017	Information added stating the "Maximum size for incoming messages" field should have a maximum value limit

IP Office Contact Center Email & Chat Services

Overview

The IP Office Contact Center system can be configured with Email and Chat Utilities that enhance the way customers interact with IP Office Contact Center Agents.

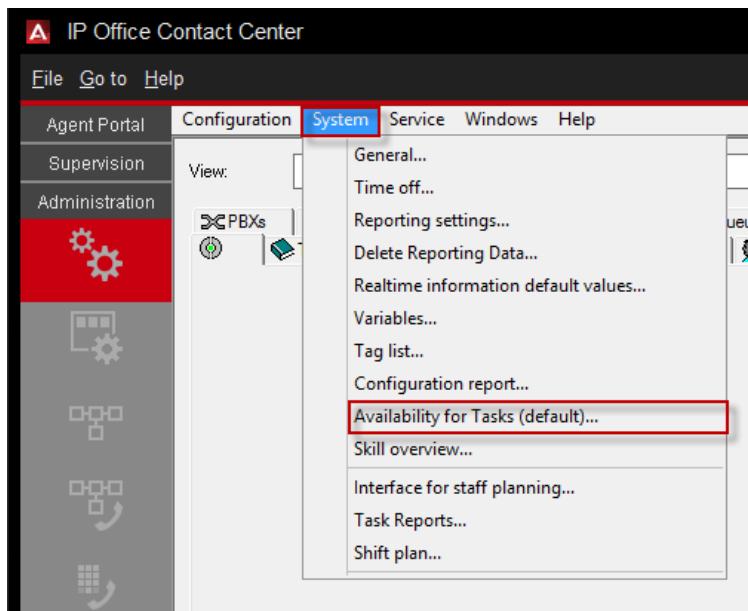
Availability for Tasks

There are extra settings that have to be taken into consideration when introducing Email and Chat.

Most common contact centers will distribute one phone call at a time to Agents. As IP Office Contact Center is a multi-channel environment Voice, Email and Chat have to be configured to suit the customer's requirements. It is possible to deliver emails and chat sessions while on a Voice call.

To check your current settings:

1. Choose **Administration > Configuration > System > Availability for Task (default)...**



2. Here you can set the settings for each task (for example the default with allow only one telephony call but will allow 3 emails and 3 chat sessions to be sent to each Agent).
When configured, click the **OK** button.

Availability for Tasks

Telephony

Maximum calls per agent: 1

Can agent receive e-mail while on a call?: Yes

Can agent receive chat requests while on a call?: No

E-mail

Maximum e-mails per agent?: 3

Can agent receive calls while processing e-mail?: No

Can agent receive chat requests while processing e-mail?: No

☐ Alerting E-Mails block Voice calls

Chat

Maximum chat requests per agent?: 3

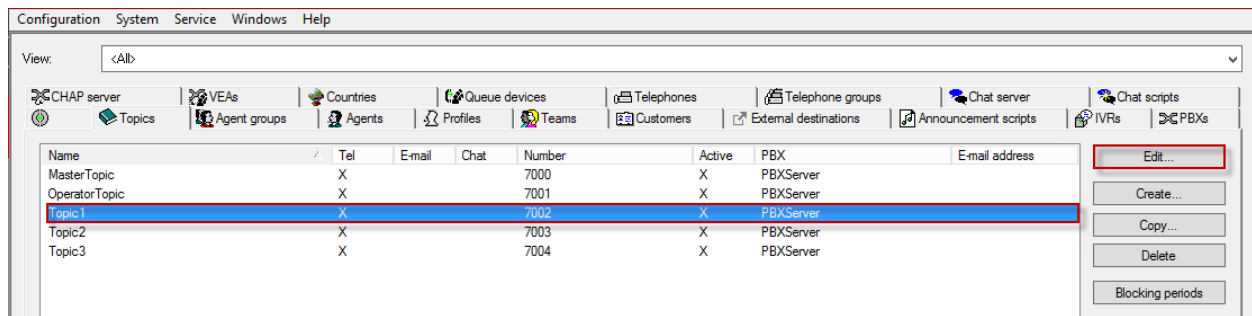
Can agent receive calls while processing chat?: No

Can agent receive e-mails while processing chat?: Yes

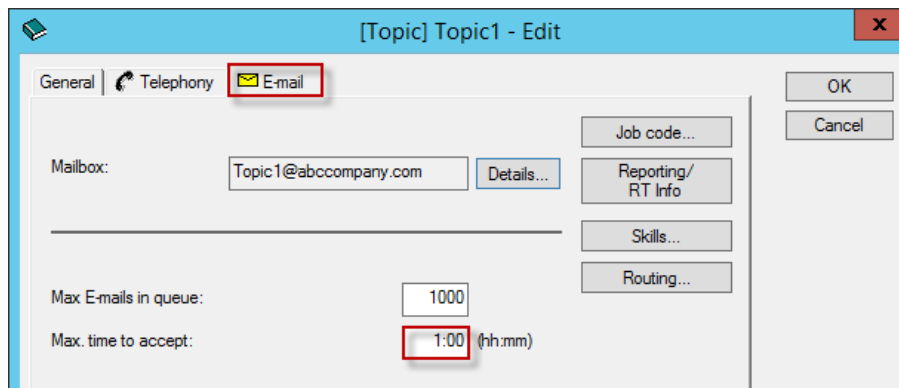
☐ Use also for Last Agent, Current Agent and Personal Contact

Time to accept

When using Email and Chat, the Agent can be sent a task to which they have a set time to respond. If the Agent does not respond, the Agent will be signed off from all agent groups. If the default time needs to be changed, this is done on a per Topic basis. To change choose a **Topic** and the select the **Edit** button.



Under the **Email** Tab (Default is 00:00 hh:mm)



Under the **Chat** Tab (Default is 3:00 mm:ss)

The screenshot shows the 'Topic1 - Edit' dialog box with the 'Chat' tab selected. The 'Chat' tab is highlighted with a red box. The dialog box contains the following fields and buttons:

- General** | **Telephony** | **E-mail** | **Chat** (selected)
- Jabber Identifier:**
- @**
- Password:**
- Max. time to accept:** (mm:ss)
- Chat script at...**
 - reject**
 - hold**
 - end**
- OK** **Cancel**

IP Office Contact Center Email Service

The IP Office Contact Center has a built in Unified Mail Routing system server that can be used to Queue and filter emails to Agents. The email service types that can be utilized are:

- SMTP (Encryption None, TLS)
- POP3 (Encryption None, SSL/TLS, Start TLS)
- IMAP4 (Encryption None, SSL, TLS, Start TLS)

Required Information

To successfully utilize the IP Office Contact Center's Email service there are a number of factors that should be considered. Some of these details should be checked and discussed with the customer:

Email Considerations

- Are there adequate Multichannel Licenses available for the agents who will use IP Office Contact Center's Email Services?
- Will the customer be utilizing POP3 or IMAP4 as their mail utility?
- Does the customer have an existing SMTP service that can be used?
- What relay host authentication account will be used?
- What is the relay host authentication account's user name and password?
- What is the mail server's (relay host) domain name?
- Have you ensured that all the email ports for example, SMTP Port 25 are not blocked by Antivirus software or a Firewall?

Have Agent Privileges been assigned for Email?

The available Privileges include:

- E-mail Administrator - The agent can configure email settings.
- Keyword based Email Routing - This privilege allows the agent to configure email scripts that allow emails to be searched for specific text.
- Email Supervisor - Assigns email supervisory privileges to the agent.
- Use Textblocks - Allows the agent to use configured Text Blocks
- Agent Queue View - Allows the agent to view any emails in the queue, for the Topics that he/she is assigned.
- Delete Emails - Allows the agent to delete any active emails. Note: Once an email has been deleted it cannot be retrieved.
- Email Archive - Allows the agent to view archived emails. Only completed emails can be archived.
- Textblock administrator - This allows the agent to create text blocks for commonly used text and phrases that can be included in email messages
- Defer Emails - Allows the agents to store email messages in a “held” folder for later use
- Print Emails - Allows the agent to print emails.
- Automatic Sign On - Allows the agent to be automatically signed on to the agent groups to which they are assigned.
- Reply as agent - Allows the agent to select whether they reply to emails as an agent or from the topic. The email address used in the message will be changed to the agent’s email address or the topic’s email address depending on their selection.

Please refer to the *Avaya IP Office Contact Center Task Based Guide - Telephony User Interface Configuration* for further details relating to Agent Privileges and Authorization.

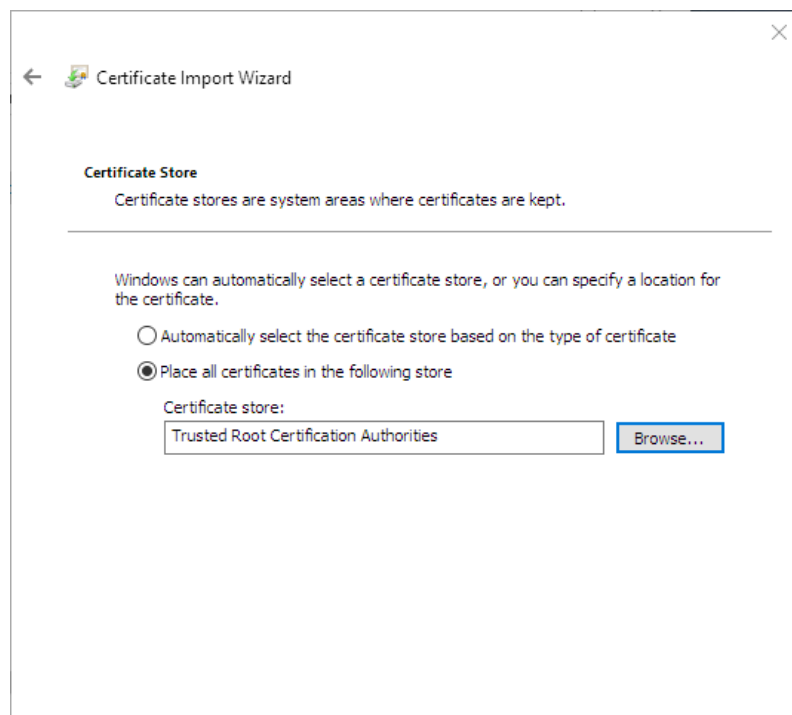
The following section will illustrate the configuration of IP Office Contact Center’s Email Service and is split into a number of sections:

- Licensing
- Setting up Email (SMTP used, POP3 and IMAP details at end of section)
- IP Office Contact Center Email Configuration
- E-mail Flow
- Text blocks/Auto reply
- Archive email database

Secure Email Certificate requirements for IMAP4 and POP3 configurations

No certificates are required to be installed on the IP Office Contact Center server for IMAP4 or POP3 configurations. The server certificate will be sent by the POP3 or IMAP4 server, for example from a Microsoft Exchange Server. This occurs at runtime during the TLS handshake process. Therefore the certificate must not be stored in any local certificate store on the client i.e. the IP Office Contact Center server.

Note: When using email connections that require the function “Verify Server Certificate”, you will need to import the security certificate in the Certificate Store “Trusted Root Certification Authorities” of the IP Office Contact Center server.



Licensing

To provide Agents with the capability to receive Emails within the IP Office Contact Center, Multichannel Agent licenses are required.

- A. Email Users
- B. Chat Users



Web License Manager (WebLM v6.3)

MultiVantage Customer Interaction Express - Release: 3 - SID: 22012050(Enterprise license file)

You are here: Licensed Products > CIE > View by Feature

License installed on: 02 June 2014 17:26:08 +01:00

License File Host IDs: A4-5D-36-FC-FB-1C

Feature (License Keyword)	License Capacity	Currently available
Number of concurrent E-Mail User (VALUE_CIE_CC_USER_NONVOICE) A	10	8
Number of CIE IVR PORTS (VALUE_CIE_IVR_PORT)	30	0
Number of concurrent Supervisors (VALUE_CIE_CC_SUPERVISOR)	10	7
Number of concurrent Inbound Voice User (VALUE_CIE_CC_USER_VOICE)	10	10
Number of CIE IVR Systems (VALUE_CIE_IVR_CON)	2	1
Number of CLIP entries in DB (VALUE_CIE_CC_CLIP)	5000	4999
Number of Nonvoice Media Phone Lines (VALUE_CIE_CC_MEDIA_LINE)	30	30
Number of concurrent User with Integration Interface (VALUE_CIE_CC_BLCCON)	10	10
Number of concurrent User with Extended Voice features (VALUE_CIE_CC_MONTELUSER)	10	7
Number of concurrent Chat User (VALUE_CIE_CC_USER_CHAT) B	10	10
Enablement of UMR (FEAT_CIE_CC_UMR)	on	Not counted
Enablement of Texttemplates for Users (VALUE_CIE_CC_TEXTMODULES)	500	498
Enablement of Base100 (FEAT_CIE_CC_BASE100)	on	Not counted
Number of concurrent Service Users (VALUE_CIE_CC_SERVUSER)	10	10
Number of IPO Connections (VALUE_CIE_PX_IPO)	5	4
Number of concurrent Team Leaders (VALUE_CIE_CC_TEAMLEADER)	10	7

WebLM Home

Install license

Licensed products

▼ CIE

View by feature

View by local WebLM

Enterprise configuration

► Local WebLM Configuration

► Usages

► Allocations

Periodic status

Uninstall license

Server properties

Manage users

Shortcuts

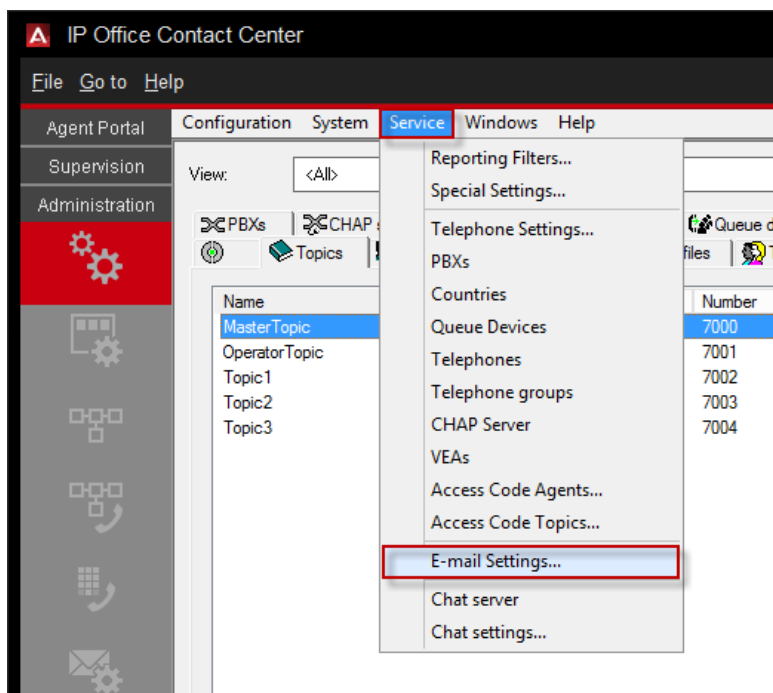
Help for Installed Product

SMTP Email Configuration

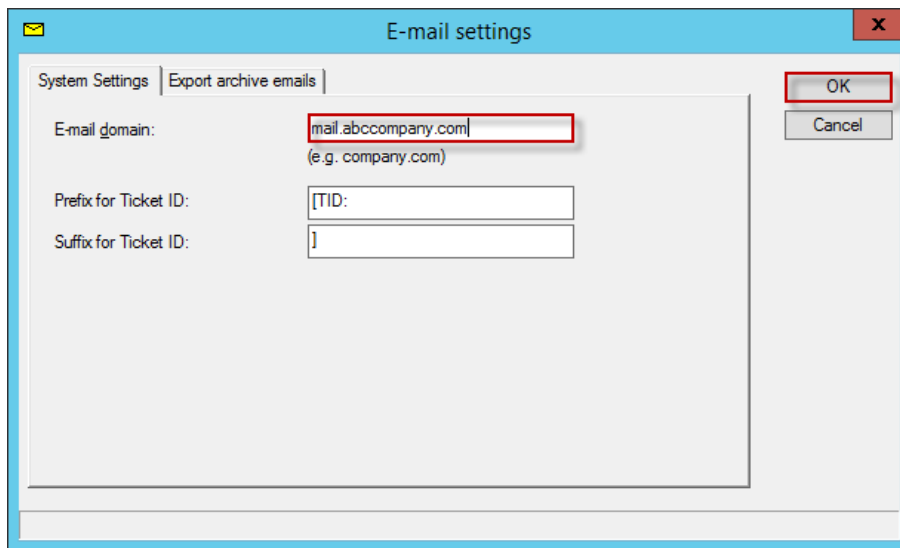
(POP3 and IMAP details at end of section)

The SMTP Settings below can be utilized by a customer with their own SMTP Service. 3rd party SMTP systems like Google Mail may also be used. For details of the settings required for Google Mail SMTP, please see the end of this section.

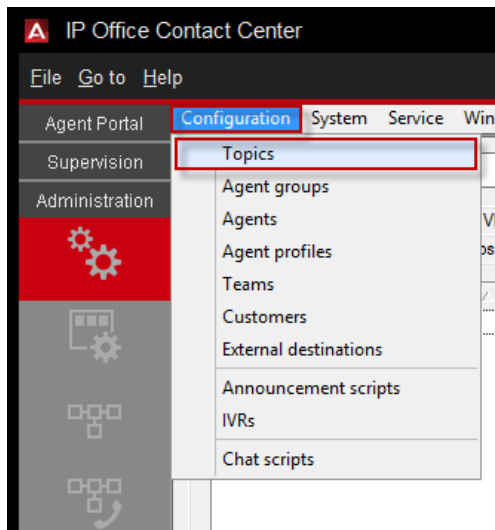
1. Click **Service** followed by **E-mail settings**.



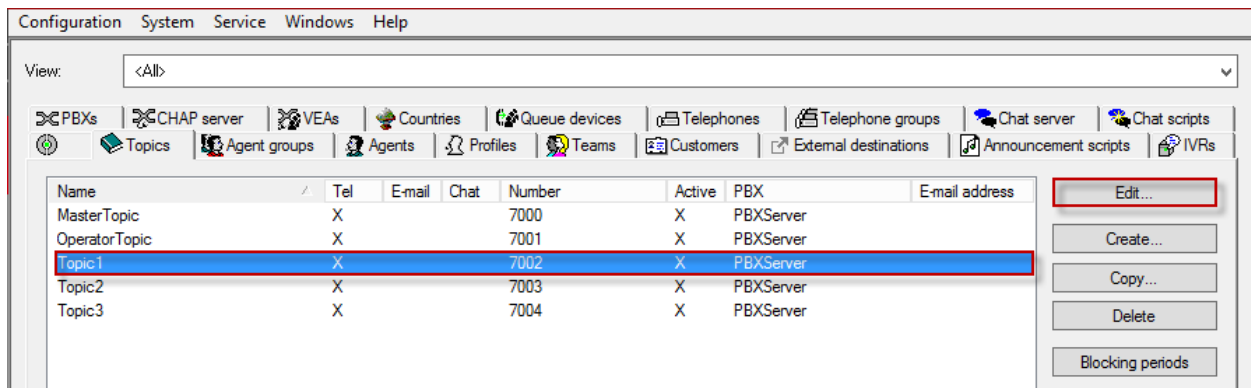
2. In the **E-Mail Domain** field, enter the fully qualified domain name of the customer's SMTP mail service. For example, **mail.abccompany.com** (hostname.domainname) and then click the **OK** button.



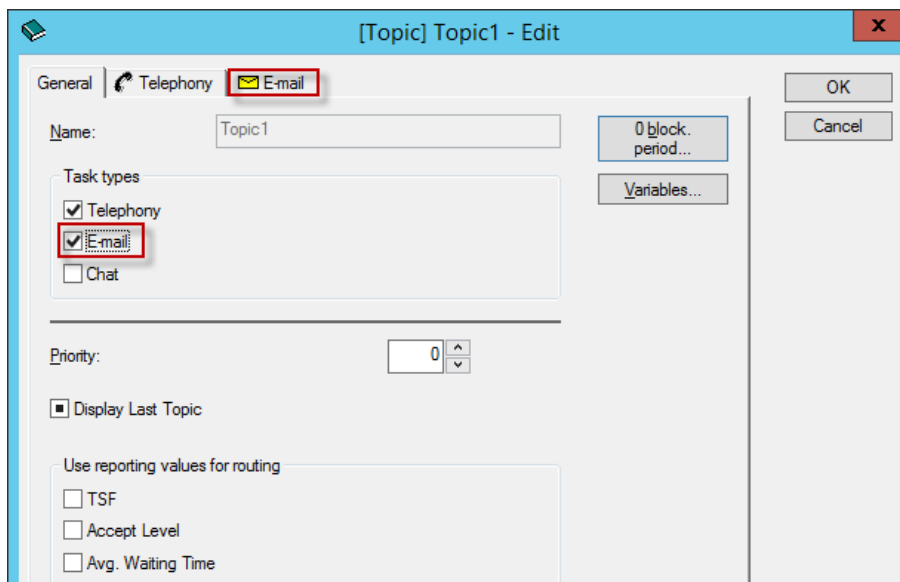
3. Click **Configuration** and then select **Topic**.



4. Select the required **Topic**, for example Topic 1 and then click the **Edit** button.



5. Select the Task Type **E-mail** and then click the **E-mail** tab.



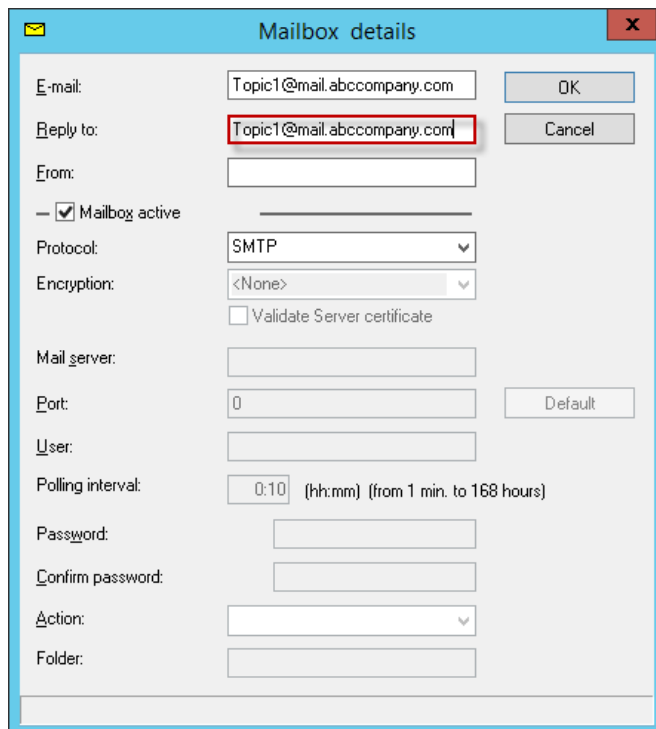
6. Click the **Details...** button.

The screenshot shows the 'E-mail' tab of the '[Topic] Topic1 - Edit' dialog box. The 'Mailbox:' field is empty, and the 'Details...' button next to it is highlighted with a red rectangle. Other fields include 'Max E-mails in queue:' (1000), 'Max. time to accept:' (0:00), and 'Agent group:' (<None>). Buttons for 'Job code...', 'Reporting/RT Info', 'Skills...', and 'Routing...' are on the right. 'OK' and 'Cancel' buttons are at the bottom right.

7. In the e-mail field type the email address to be used for the topic. For example, **Topic1@mail.abccompany.com**

The screenshot shows the 'Mailbox details' dialog box. The 'E-mail:' field contains 'Topic1@mail.abccompany.com' and is highlighted with a red rectangle. Other fields include 'Reply to:', 'From:', 'Protocol:' (SMTP), 'Encryption:' (<None>), 'Mail server:', 'Port:' (0), 'User:', 'Polling interval:' (0:10), 'Password:', 'Confirm password:', 'Action:', and 'Folder:'. There are 'OK' and 'Cancel' buttons at the top right.

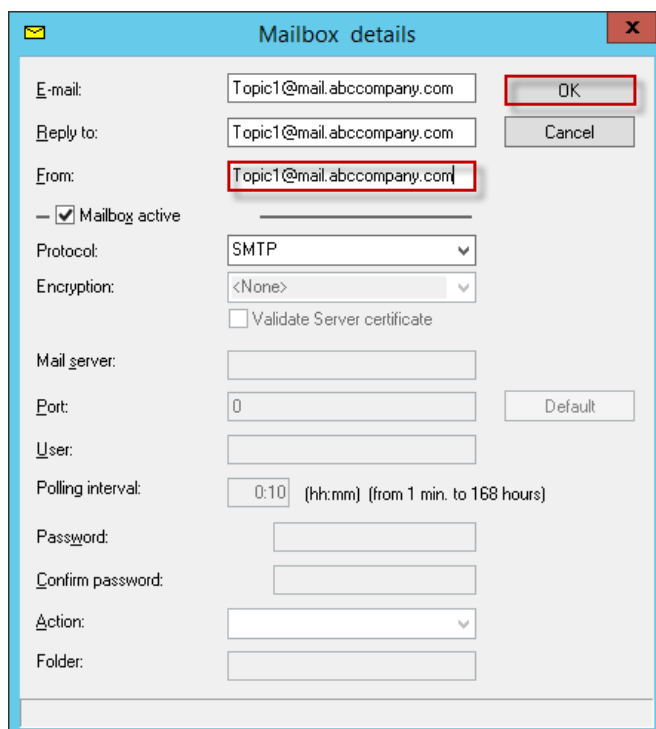
8. In the **Reply to** field type the email address to be used for the topic. For example,
Topic1@mail.abccompany.com



The image shows a 'Mailbox details' dialog box with a blue title bar and a red close button. The dialog contains several fields for configuring an email mailbox. The 'Reply to' field is highlighted with a red rectangular box. The 'E-mail' field also contains the same email address. The 'From' field is empty. The 'Mailbox active' checkbox is checked. The 'Protocol' is set to 'SMTP'. The 'Encryption' is set to '<None>'. The 'Validate Server certificate' checkbox is unchecked. The 'Mail server' field is empty. The 'Port' is set to '0'. The 'User' field is empty. The 'Polling interval' is set to '0:10'. The 'Password' and 'Confirm password' fields are empty. The 'Action' dropdown is set to 'None'. The 'Folder' field is empty. The 'OK' and 'Cancel' buttons are on the right side of the dialog.

E-mail:	Topic1@mail.abccompany.com	OK
Reply to:	Topic1@mail.abccompany.com	Cancel
From:		
☒ Mailbox active		
Protocol:	SMTP	
Encryption:	<None>	
☐ Validate Server certificate		
Mail server:		
Port:	0	Default
User:		
Polling interval:	0:10 (hh:mm) (from 1 min. to 168 hours)	
Password:		
Confirm password:		
Action:		
Folder:		

9. In the **From** field type the email address to be used for the topic. For example,
Topic1@mail.abccompany.com



The image shows the same 'Mailbox details' dialog box as in the previous step. In this step, the 'From' field is highlighted with a red rectangular box. The 'E-mail' and 'Reply to' fields still contain the same email address. The 'OK' button is also highlighted with a red rectangular box. All other fields and settings remain the same as in the previous step.

E-mail:	Topic1@mail.abccompany.com	OK
Reply to:	Topic1@mail.abccompany.com	Cancel
From:	Topic1@mail.abccompany.com	
☒ Mailbox active		
Protocol:	SMTP	
Encryption:	<None>	
☐ Validate Server certificate		
Mail server:		
Port:	0	Default
User:		
Polling interval:	0:10 (hh:mm) (from 1 min. to 168 hours)	
Password:		
Confirm password:		
Action:		
Folder:		

10. Click the **OK** button.

[Topic] Topic1 - Edit

General | Telephony | E-mail

Mailbox: Topic1@mail.abccompany.com Details...

Job code... Reporting/RT Info

Skills... Routing...

Max E-mails in queue: 1000

Max. time to accept: 0:00 (hh:mm)

☐ Add ticket ID in subject

Agent group: <None>

OK Cancel

11. The Topic is displayed with Email selected.

Configuration System Service Windows Help

View: <All>

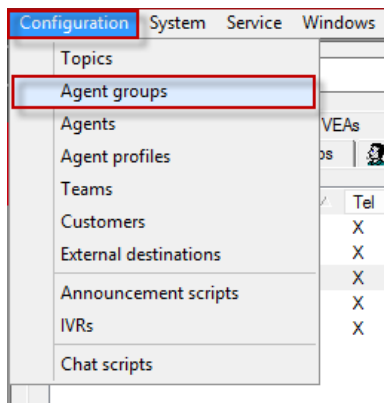
PBXs CHAP server VEA Countries Queue devices Telephones Telephone groups Chat server Chat scripts

Topics Agent groups Agents Profiles Teams Customers External destinations Announcement scripts IVRs

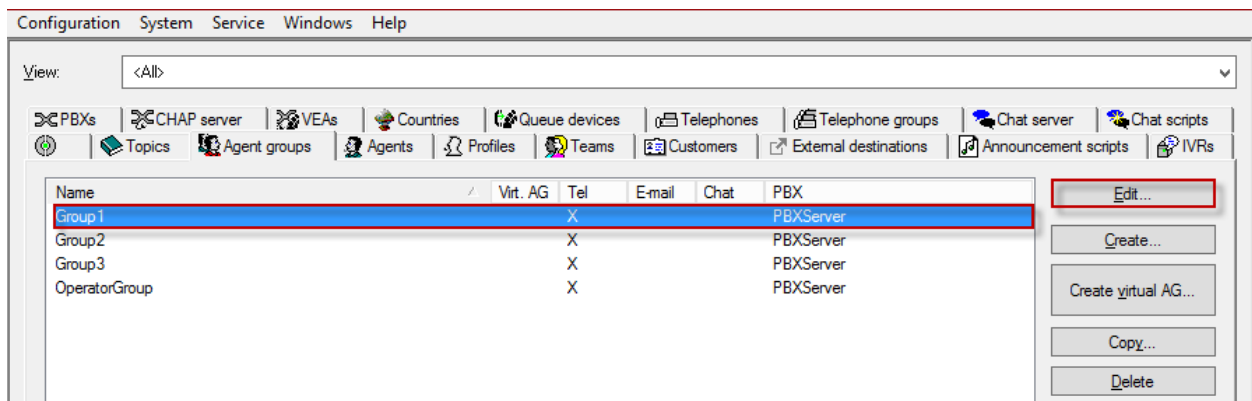
Name	Tel	E-mail	Chat	Number	Active	PBX	E-mail address
MasterTopic	X			7000	X	PBXServer	
OperatorTopic	X			7001	X	PBXServer	
Topic1	X	X		7002	X	PBXServer	Topic1@mail....
Topic2	X			7003	X	PBXServer	
Topic3	X			7004	X	PBXServer	

Edit... Create... Copy... Delete Blocking periods

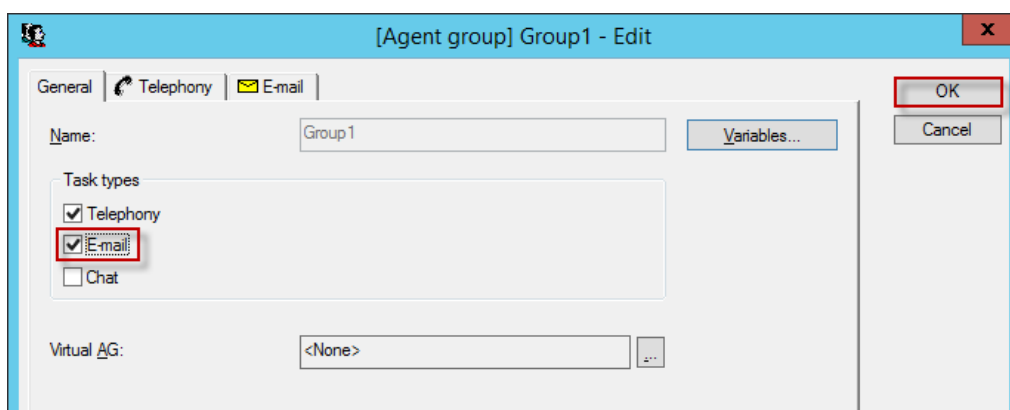
12. Click **Configuration** and then select **Agent group**.



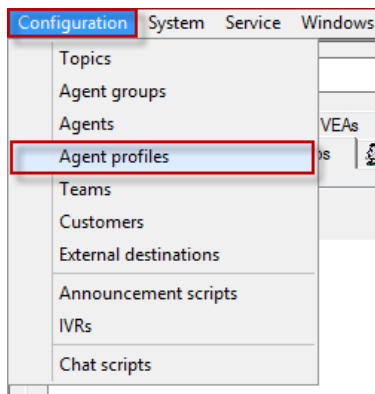
13. Select the required group, for example **Group1** and then click the **Edit** button.



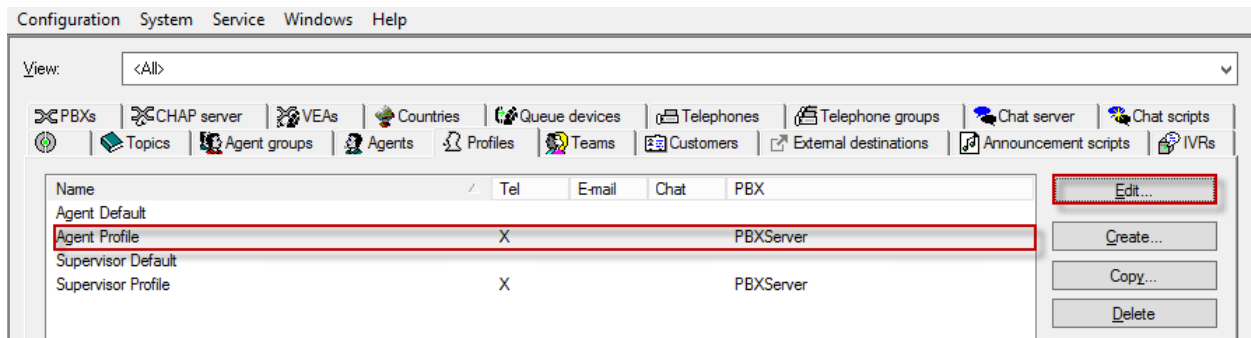
14. Click the **E-mail Task type** and then click the **OK** button.



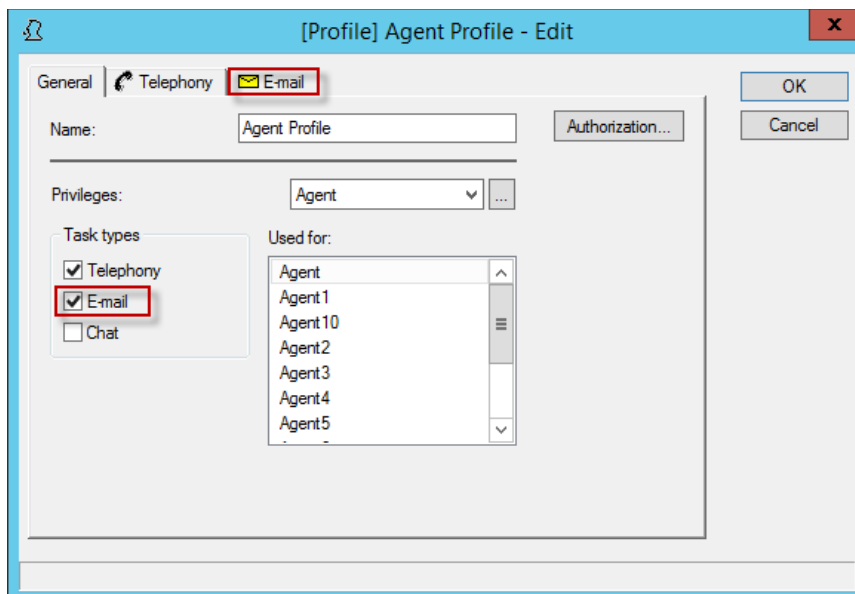
15. Click **Configuration** and then select **Agent profile**.



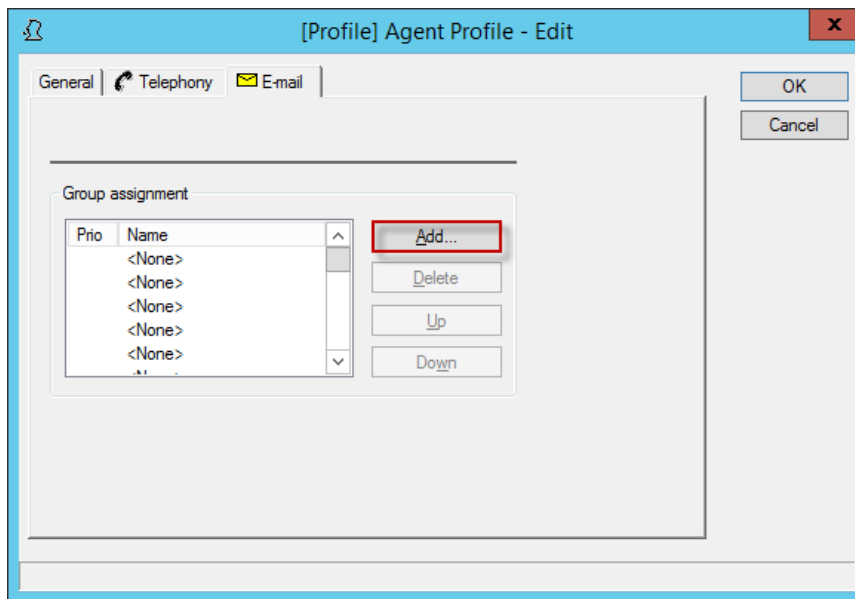
16. Click the **Agent profile** that the agents in Group 1 are assigned to and then click the **Edit...** button.



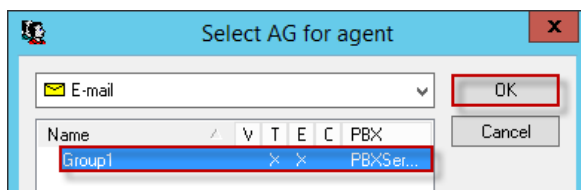
17. Click the **E-mail** Task Type and then select the **E-mail** tab.



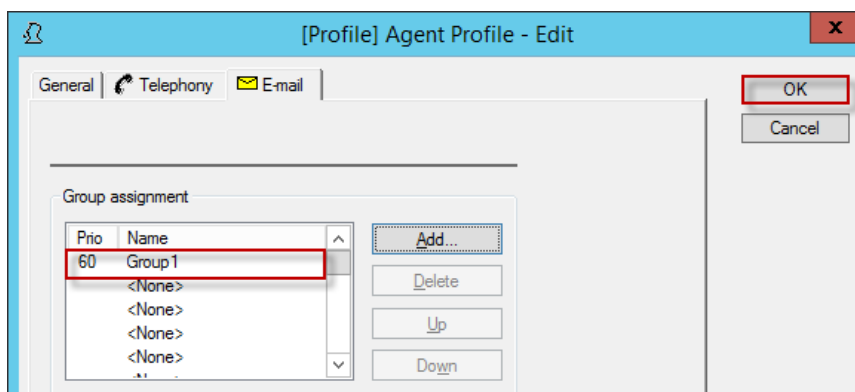
18. Click the **Add...** button.



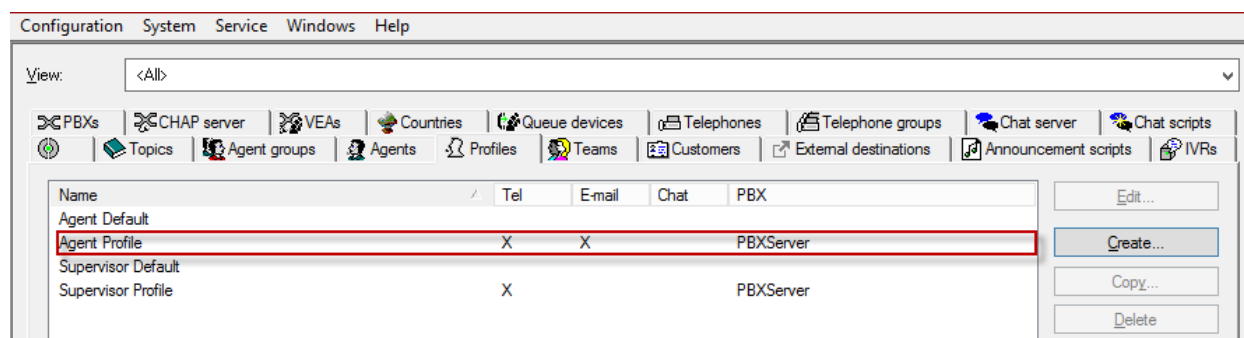
19. Click **Group1** and then select the **OK** button.



20. Group1 has now been assigned, click the **OK** button.

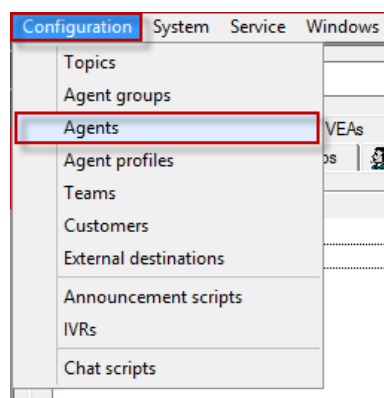


21. The Agent Profile is displayed with **Email** selected.

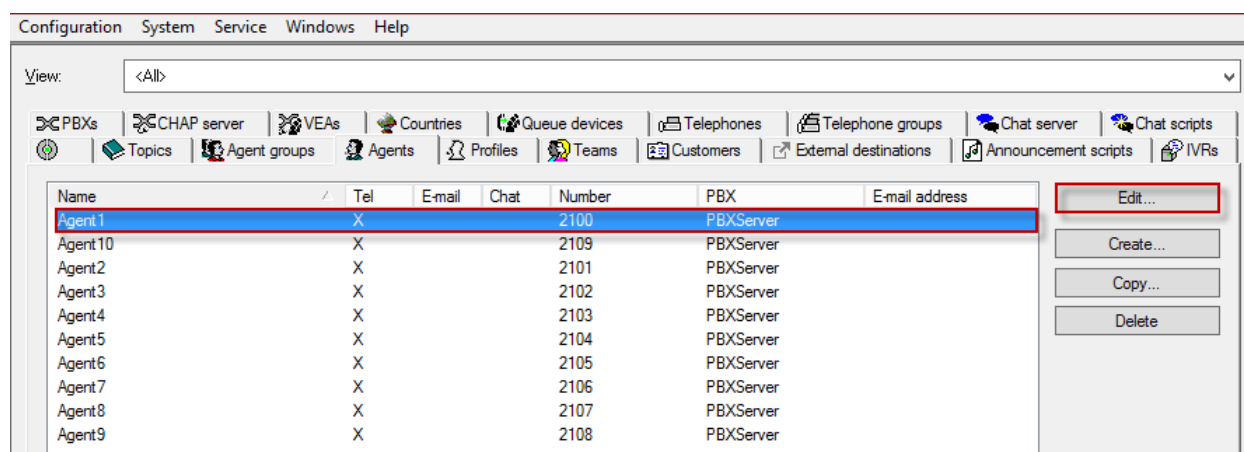


22. The mailbox details of each Email configured agent in Group 1 can now be defined.

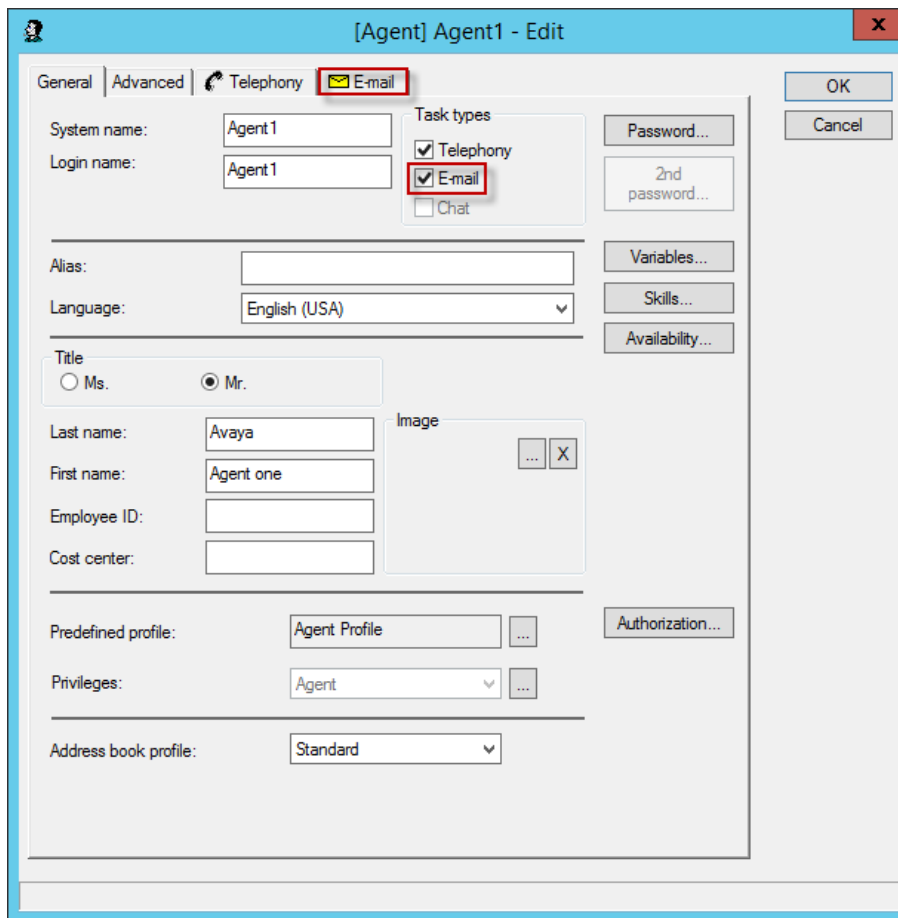
Click **Configuration** and then select **Agent**.



23. Click the required agent, in this example **Agent1** and then click the **Edit...** button.

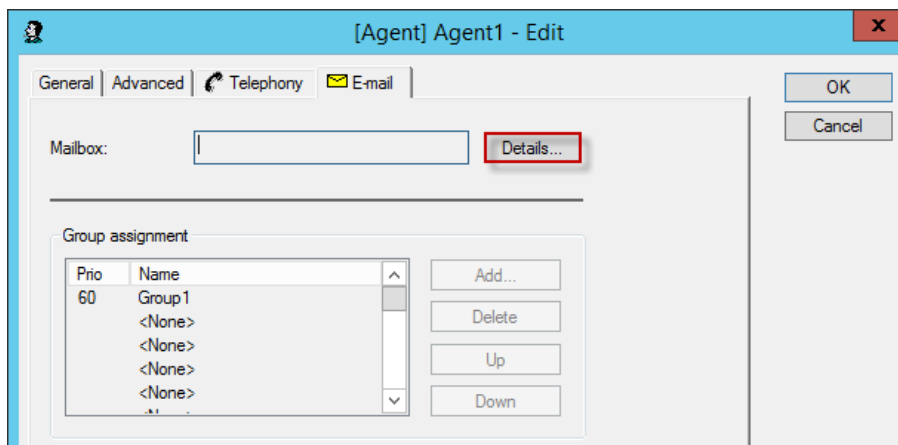


24. Under Task types choose **E-mail** and then Click the **Email** Tab.



The screenshot shows the 'Email' tab of the '[Agent] Agent1 - Edit' dialog box. The 'E-mail' checkbox under the 'Task types' section is selected and highlighted with a red box. The 'Email' tab is also highlighted with a red box. Other fields include System name: Agent1, Login name: Agent1, Alias: (empty), Language: English (USA), Title: Mr. (selected), Last name: Avaya, First name: Agent one, Employee ID: (empty), Cost center: (empty), Predefined profile: Agent Profile, Privileges: Agent, and Address book profile: Standard.

25. Click the **Details...** button.



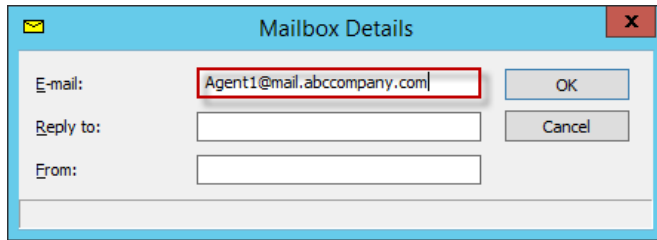
The screenshot shows the 'Email' tab of the '[Agent] Agent1 - Edit' dialog box. The 'Details...' button is highlighted with a red box. The 'Mailbox' field is empty. Below it is a 'Group assignment' section with a table showing a list of groups and their priorities.

Prio	Name
60	Group1
	<None>
	<None>
	<None>
	<None>

Buttons: Add..., Delete, Up, Down.

26. In the E-mail field type the required email address for the agent for example,

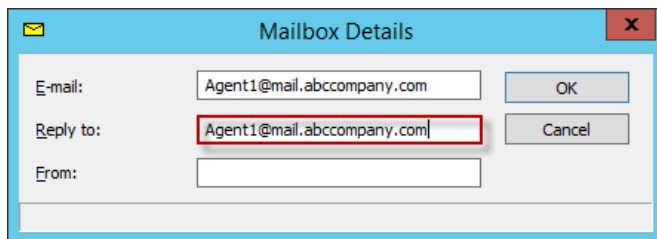
Agent1@mail.abccompany.com



The image shows a 'Mailbox Details' dialog box with a blue header and a red close button. It contains three input fields: 'E-mail:', 'Reply to:', and 'From:'. The 'E-mail:' field is filled with 'Agent1@mail.abccompany.com' and is highlighted with a red border. To the right of the fields are 'OK' and 'Cancel' buttons.

27. In the **Reply to** field enter the required email address for example,

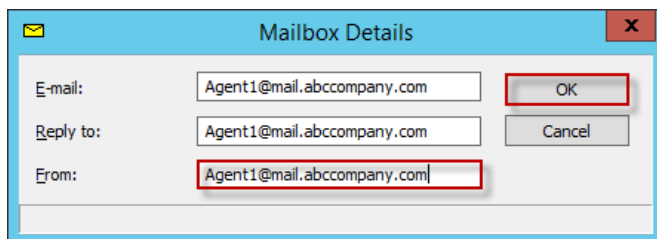
Agent1@mail.abccompany.com



The image shows the 'Mailbox Details' dialog box. The 'Reply to:' field is now filled with 'Agent1@mail.abccompany.com' and is highlighted with a red border. The 'E-mail:' field remains filled with the same address.

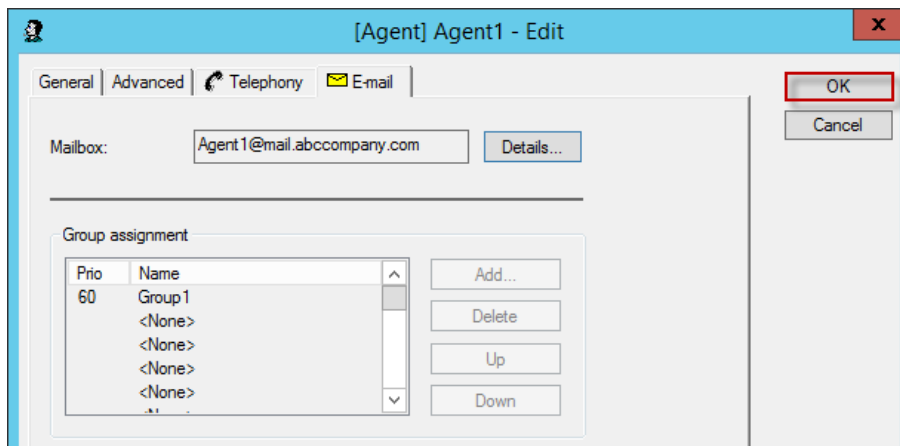
28. In the **From** field enter the required email address for example

Agent1@mail.abccompany.com and then click the **OK** button.

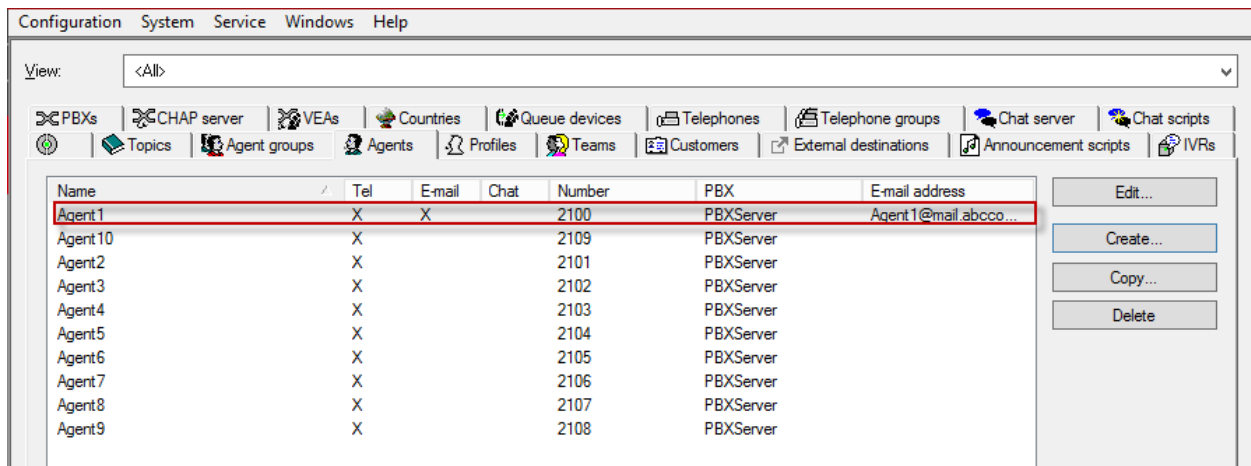


The image shows the 'Mailbox Details' dialog box. The 'From:' field is filled with 'Agent1@mail.abccompany.com' and is highlighted with a red border. The 'OK' button is also highlighted with a red border.

29. Click the **OK** button.

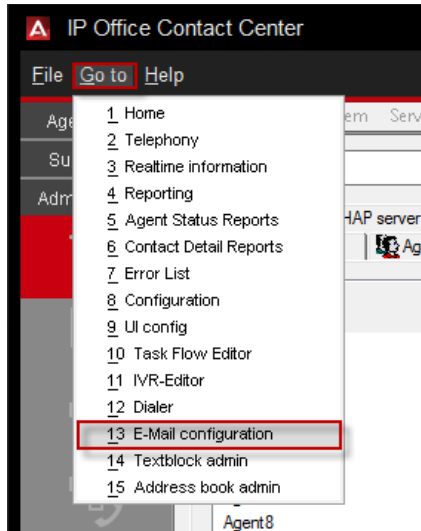


30. Repeat the above process to assign E-mail settings to all agents in E-mail topics /Tasks.

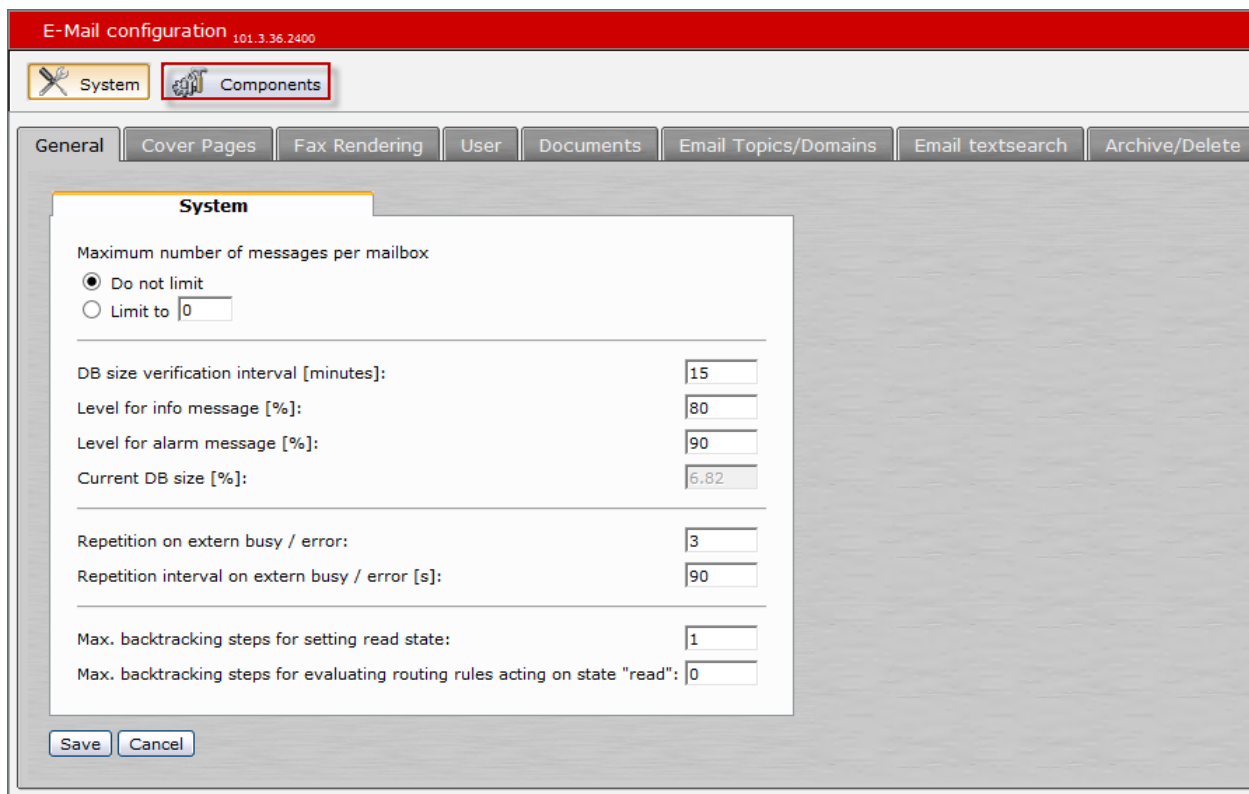


IP Office Contact Center Email Configuration

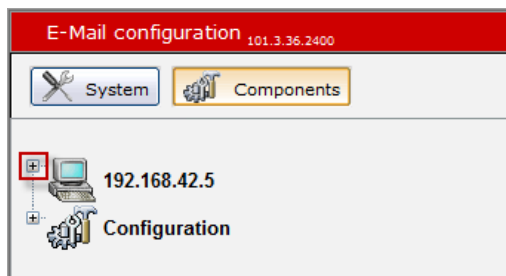
1. Click **Go to** and then select **E-Mail configuration**.



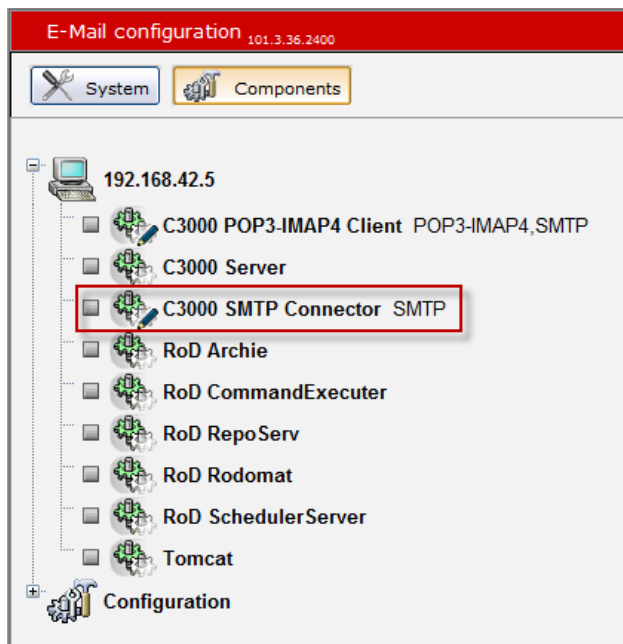
2. Click the **Components** button.



3. Expand the menu using the + button.



4. Click the **C3000 SMTP Connector SMTP** link.



5. Click the **Local accepted DNS domains** tab.

The screenshot shows the 'C3000 SMTP Connector -- Webpage Dialog' window. The 'Local accepted DNS domains' tab is selected and highlighted with a red box. The dialog contains various configuration options for SMTP, including message size limits, delivery permissions, and TLS settings. The 'Add' button in the 'Local accepted DNS domains' section is highlighted with a red box.

C3000 SMTP Connector

General | **Local accepted DNS domains** | Security

Maximum size of incoming messages [MB]: 2

Maximum database size [%]: 90

Permit delivery to local users: ☒

Identify local users by full name: ☒

Send error messages automatically: ☒

Service for telephone number-based targets: [dropdown]

Enable SMTP receiving: ☒

SMTP receiving port: 25

Certificate store: User account [dropdown]

Certificate issued to: [text field]

Relayhost for outgoing mails: [text field]

Use TLS: never [dropdown]

TLS Server Host: [text field]

Verify Server Certificate: ☒

SMTP greeting identification on outgoing mails: localhost

Relayhost authentication

Preferred mode: None [dropdown]

User login: [text field]

Login password: [text field]

Resend delay in case of errors [s]: 1800

Local accepted DNS domains:

Add [abccompany.com] x

Domain

Save Cancel

6. In the field adjacent the **Add** button enter the customer's email service domain name for example, **abccompany.com** and then click the **Add** button.

The screenshot shows the 'C3000 SMTP Connector -- Webpage Dialog' window, specifically the 'Local accepted DNS domains' tab. The 'Add' button is highlighted with a red box, and the domain name 'abccompany.com' is entered in the adjacent text field. The 'Domain' label is also visible below the text field.

C3000 SMTP Connector

General | Local accepted DNS domains | Security

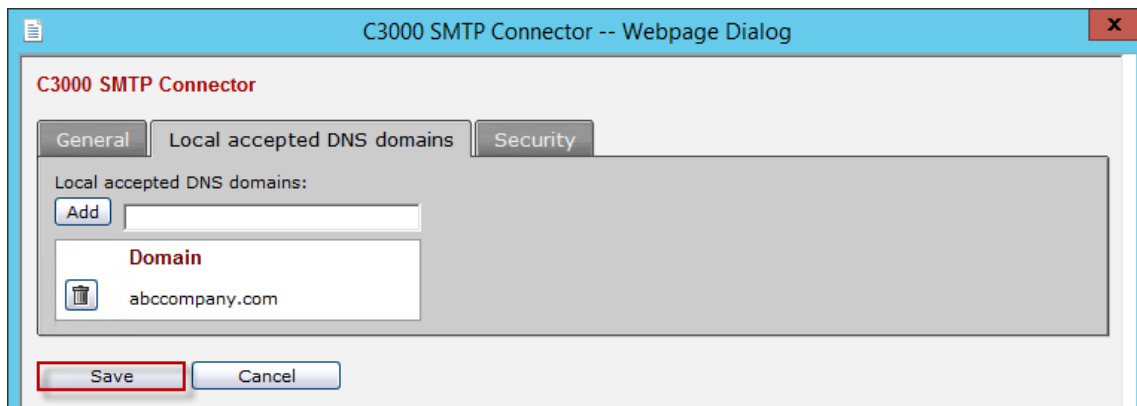
Local accepted DNS domains:

Add [abccompany.com] x

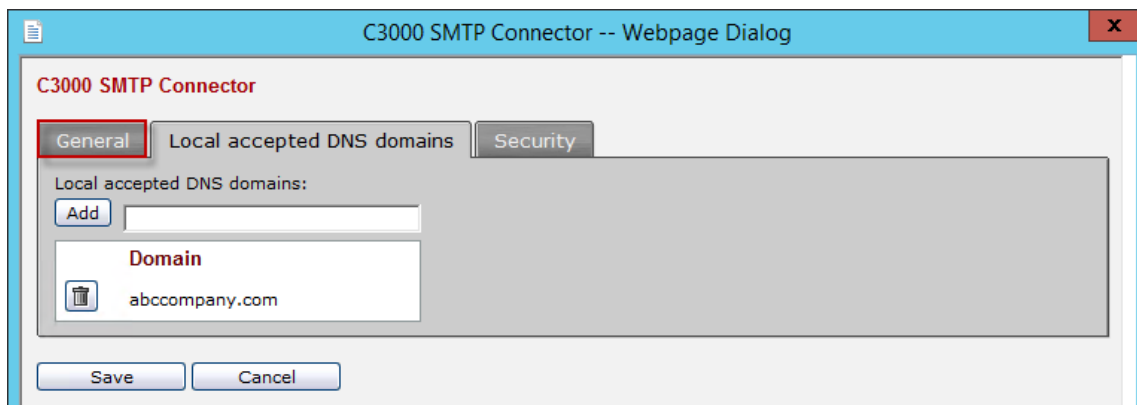
Domain

Save Cancel

7. The configured Domain is displayed. Click the **Save** button.



8. Click the **General** tab.



9. In the **Relayhost for outgoing mails** field, enter the **IP Address** of the customer's relay host mail server.

C3000 SMTP Connector -- Webpage Dialog

C3000 SMTP Connector

General Local accepted DNS domains Security

Maximum size of incoming messages [MB]: 2

Maximum database size [%]: 90

Permit delivery to local users: ☒

Identify local users by full name: ☒

Send error messages automatically: ☒

Service for telephone number-based targets: [v]

Enable SMTP receiving: ☒

SMTP receiving port: 25

Certificate store: User account [v]

Certificate issued to: []

Relayhost for outgoing mails: 192.168.42.55 [x]

Use TLS: never [v]

TLS Server Host: []

Verify Server Certificate: ☒

SMTP greeting identification on outgoing mails: localhost

Relayhost authentication

Preferred mode: None [v]

User login: []

Login password: []

Resend delay in case of errors [s]: 1800

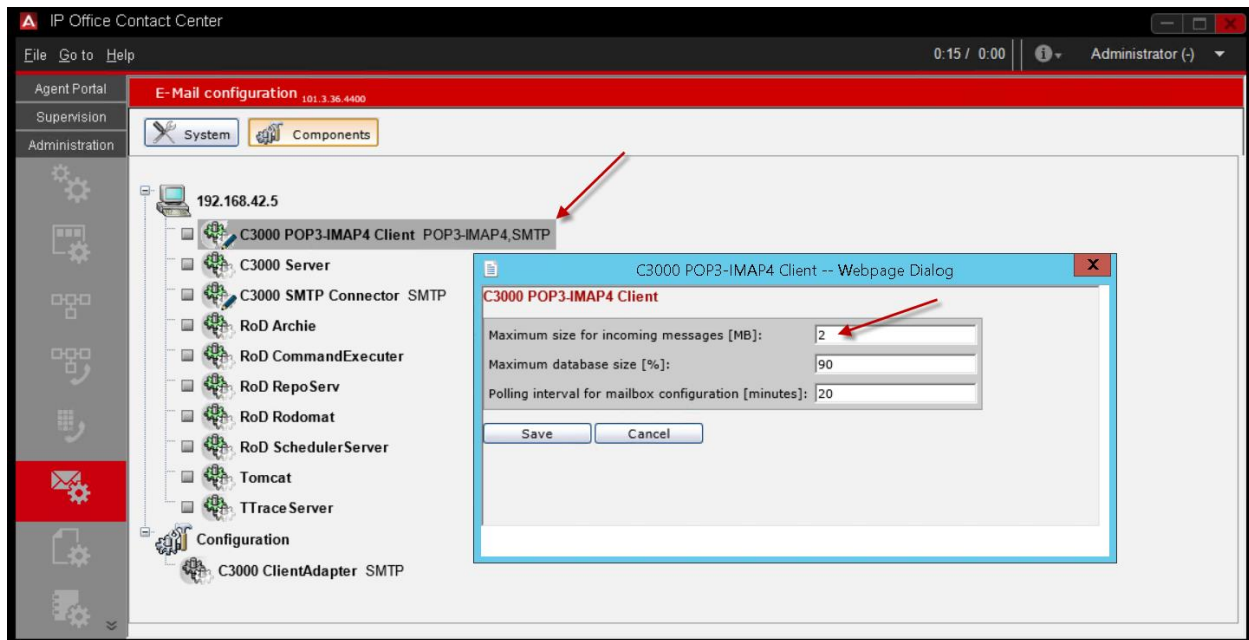
Save Cancel

10. Change the **Relayhost authentication** as required for the customer.

The screenshot shows the 'C3000 SMTP Connector -- Webpage Dialog' window. The 'General' tab is active. The 'Maximum size of incoming messages [MB]' is set to 2, with a red 'A' icon next to it. The 'Relayhost for outgoing mails' is set to 192.168.42.55. The 'Relayhost authentication' section is highlighted with a red box, showing 'Preferred mode' set to 'None', 'User login' and 'Login password' fields, and 'Resend delay in case of errors [s]' set to 1800. The 'Save' and 'Cancel' buttons are at the bottom.

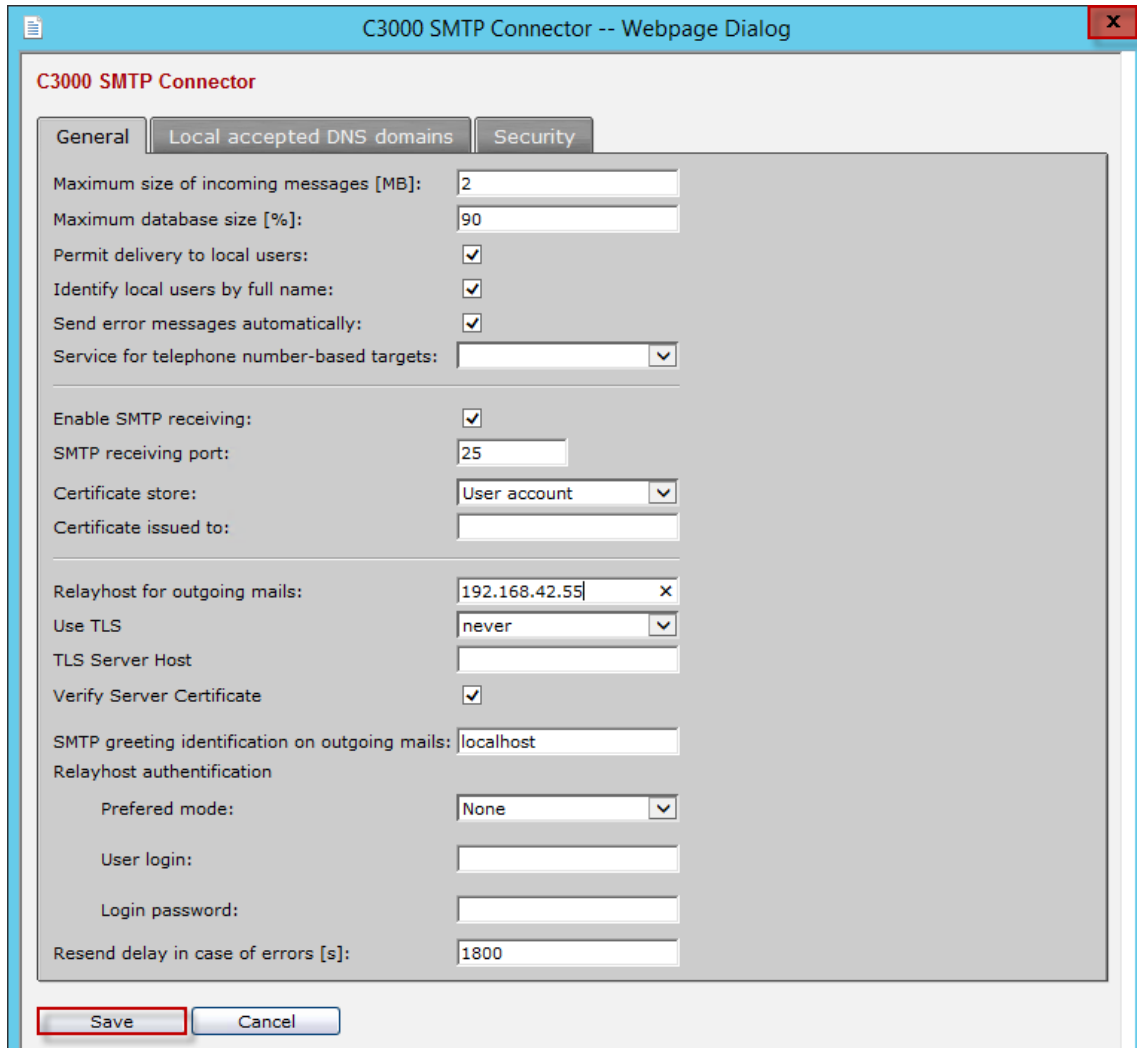
- A. The maximum size of incoming messages can be changed if required. It is recommended that the maximum size is not configured beyond 10MB.

This is also the case for POP3-IMAP4 configurations where the maximum size of incoming messages should not be configured beyond 10MB



Note: For outgoing emails, attachments are only supported up to 10MB in size. Depending on the network quality between the client PC and the IP Office Contact Center server, the sending/uploading of an email can take several minutes. Poor network quality/speeds can cause a disconnection between the User Interface and the IP Office Contact Center server and consequently the agent may be logged off from E-Mail.

11. Once all settings have been configured click the **Save** button and then select the **X** button to close the window.



C3000 SMTP Connector

General | Local accepted DNS domains | Security

Maximum size of incoming messages [MB]: 2

Maximum database size [%]: 90

Permit delivery to local users: ☒

Identify local users by full name: ☒

Send error messages automatically: ☒

Service for telephone number-based targets: [dropdown]

Enable SMTP receiving: ☒

SMTP receiving port: 25

Certificate store: User account [dropdown]

Certificate issued to: [text box]

Relayhost for outgoing mails: 192.168.42.55 [dropdown]

Use TLS: never [dropdown]

TLS Server Host: [text box]

Verify Server Certificate: ☒

SMTP greeting identification on outgoing mails: localhost

Relayhost authentication

Preferred mode: None [dropdown]

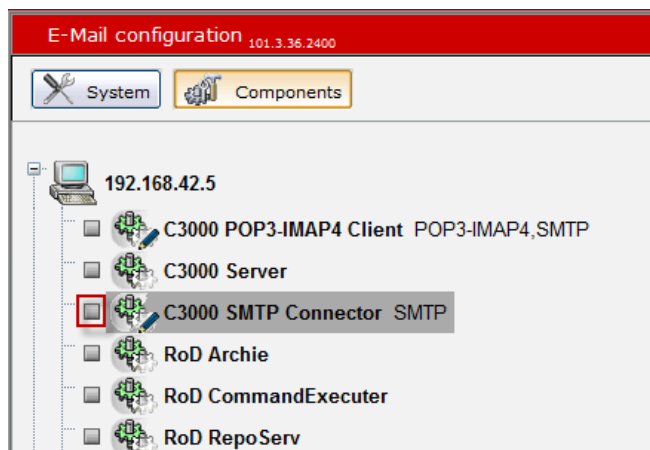
User login: [text box]

Login password: [text box]

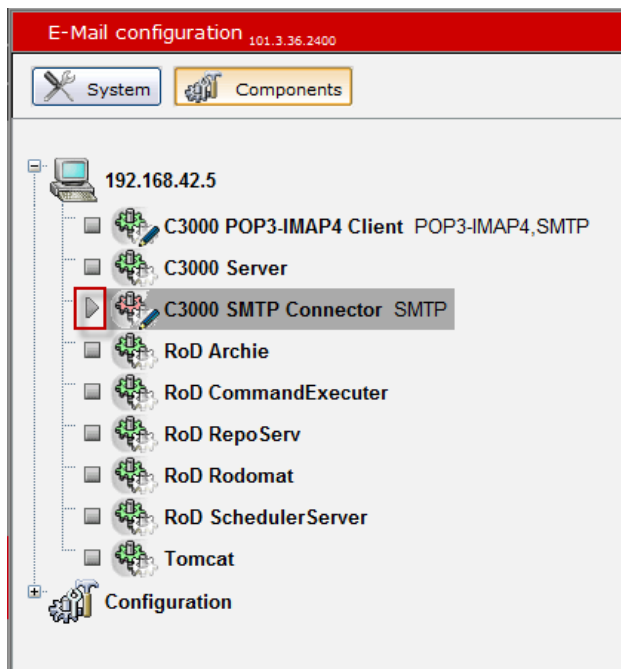
Resend delay in case of errors [s]: 1800

Save Cancel

12. Click the grey box to stop the **C3000 SMTP Connector SMTP** Service.



13. Click the grey arrow to start the **C3000 SMTP connector SMTP** service.



14. If the customer is using a 3rd party SMTP service such as Google Mail, the following settings will be required to replace the previous settings.

- | | |
|--------------------------------------|---|
| A. Relayhost for outgoing mails: | smtp.googlemail.com |
| B. Use TLS: | If available |
| C. TLS Server Host: | smtp.googlemail.com |
| D. Select Verify Server Certificate: | Select |
| E. Preferred mode: | Login |
| F. User login: | googlemail user account. |
| G. Login password: | googlemail user account password |
| H. Local accepted DNS domains: | gmail.com |

C3000 SMTP Connector -- Webpage Dialog

C3000 SMTP Connector

General Local accepted DNS domains Security

Maximum size of incoming messages [MB]: 2

Maximum database size [%]: 90

Permit delivery to local users: ☒

Identify local users by full name: ☒

Send error messages automatically: ☒

Service for telephone number-based targets:

Enable SMTP receiving: ☐

SMTP receiving port: 25

Certificate store: User account

Certificate issued to:

Relayhost for outgoing mails: smtp.googlemail.com **A**

Use TLS: if available **B**

TLS Server Host: smtp.googlemail.com **C**

Verify Server Certificate: ☒ **D**

SMTP greeting identification on outgoing mails: localhost

Relayhost authentication

Preferred mode: Login **E**

User login: qatest.stuffjart@gmail.co **F**

Login password: **G**

Resend delay in case of errors [s]: 1800

C3000 SMTP Connector -- Webpage Dialog

C3000 SMTP Connector

General Local accepted DNS domains Security

Local accepted DNS domains:

Add

Domain

☐ gmail.com **H**

Save Cancel

15. If the customer is using a **POP3/IMAP** email system (Google Mail use SSL/TLS), alter the details of the topic's email account.

Note: With some external email accounts for example Google mail, you need to allow “Access for less secure apps” within the email settings of your email account. These settings have to be completed before the account can be used by IP Office Contact Center

The screenshot shows the 'Topic1 - Edit' dialog box with the 'E-mail' tab selected. The 'Mailbox' field is empty, and the 'Details...' button next to it is highlighted with a red box. Other fields include 'Max E-mails in queue' (1000), 'Max. time to accept' (0:00), 'Add ticket ID in subject' (unchecked), and 'Agent group' (<None>). Buttons for 'Job code...', 'Reporting/RT Info', 'Skills...', and 'Routing...' are on the right.

The screenshot shows the 'Mailbox details' dialog box. Fields include 'E-mail' (Topic1abccompany@gmail.com), 'Reply to' (Topic1abccompany@gmail.com), 'From' (empty), 'Mailbox active' (checked), 'Protocol' (POP3), 'Encryption' (SSL/TLS), 'Mail server' (pop.gmail.com), 'Port' (995), 'User' (Topic1abccompany@gmail.com), 'Polling interval' (0:01), 'Password' (masked), 'Confirm password' (masked), 'Action' (dropdown), and 'Folder' (empty). The 'Details...' button from the previous dialog is highlighted with a red box.

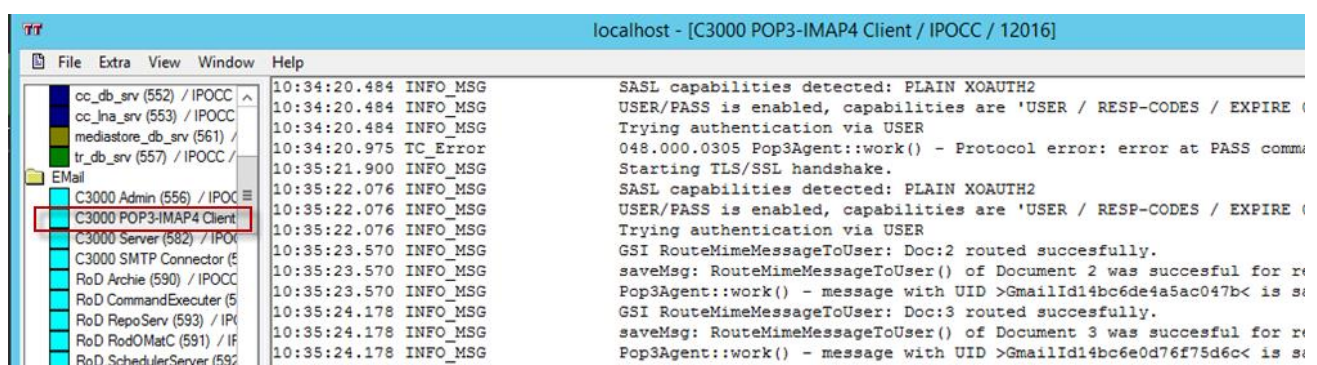
16. If an **IMAP4** email system is to be used (for Google Mail use SSL/TLS), alter the details of the Topic's email account.

The 'Mailbox details' dialog box is shown with the following fields and values:

- E-mail: Topic1abccompany@gmail.com
- Reply to: Topic1abccompany@gmail.com
- From: (empty)
- ☒ Mailbox active
- Protocol: IMAP4
- Encryption: SSL/TLS
- ☐ Validate Server certificate
- Mail server: imap.gmail.com
- Port: 993
- User: Topic1abccompany@gmail.com
- Polling interval: 0:01 (hh:mm) (from 1 min. to 168 hours)
- Password: (masked with dots)
- Confirm password: (masked with dots)
- Action: Mark as read
- Folder: (empty)

Buttons: OK, Cancel, Default.

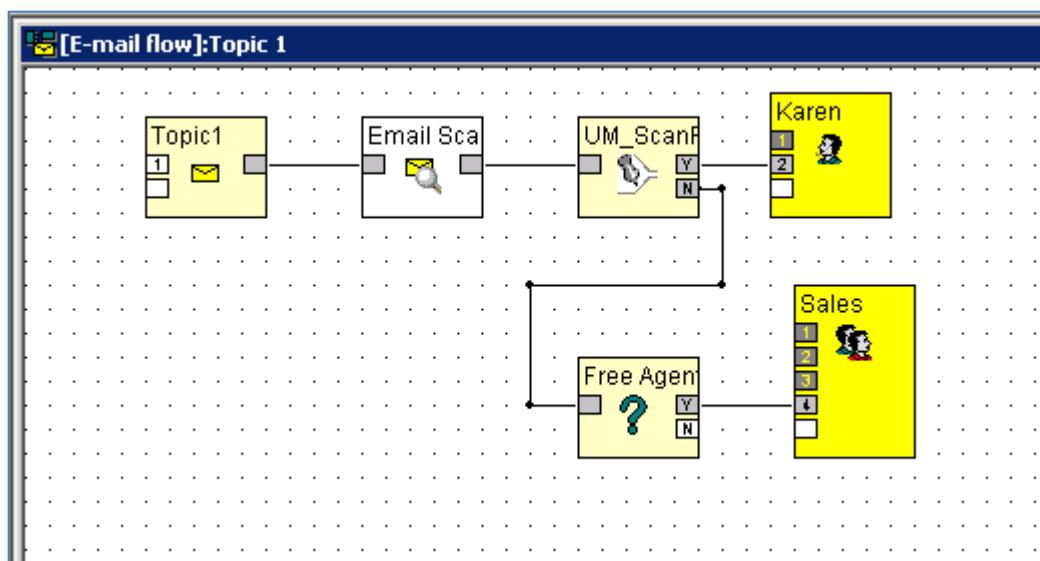
17. TTrace – Email – C3000 POP3-IMAP Client can be used to check for any connection issues.



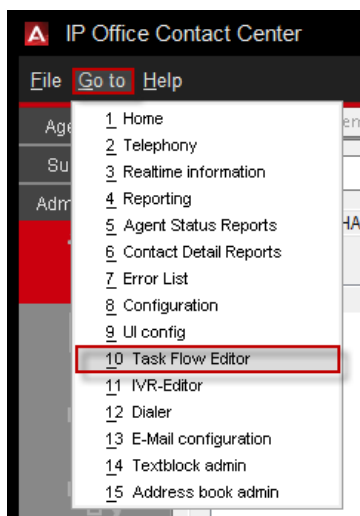
Creating an E-mail Flow

The IP Office Contact Center Email services can be configured to scan email content for keywords and distribute the email accordingly to an appropriate Email configured agent. If a keyword is not matched the email can be distributed for example, to an agent group.

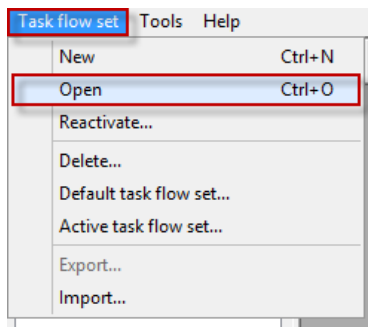
In this example, an Email flow will be configured that will scan the email for the keyword “Desktop” and if found in the email, the email will be distributed to agent ‘Karen’. If the email does not contain the keyword, it will be directed to the email Group Sales.



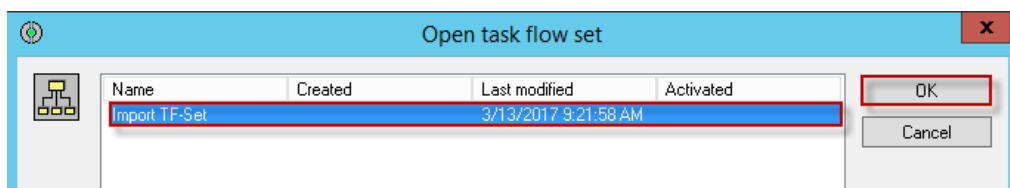
18. From the **Go to** menu click **Task Flow Editor**.



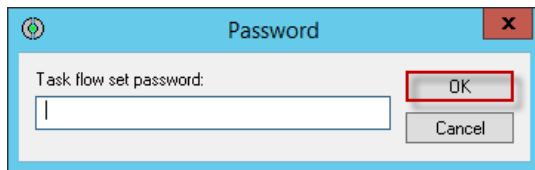
19. Click **Task flow set** and then select **Open**.



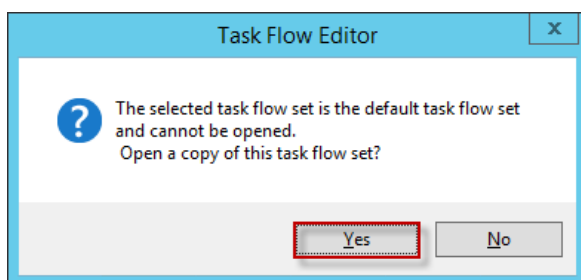
20. Click the required **Task flow** and then select the **OK** button.



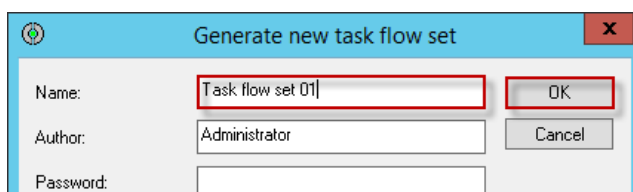
21. Choose the **OK** button.



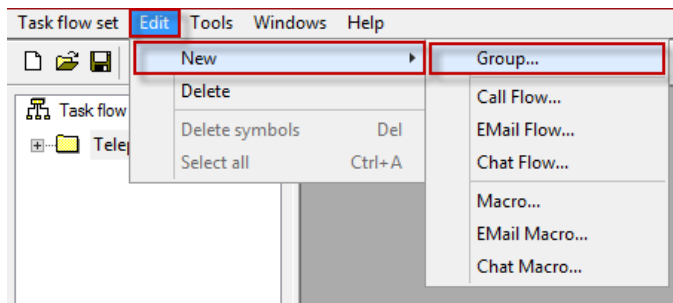
22. Choose the **Yes** button to take a copy of the default task flow set.



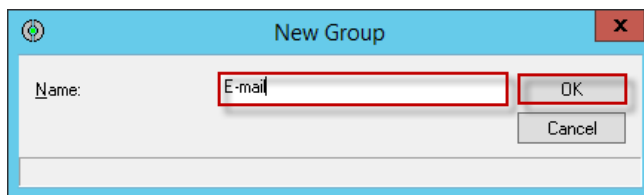
23. Type the **name** of the task flow set and then choose the **OK** button.



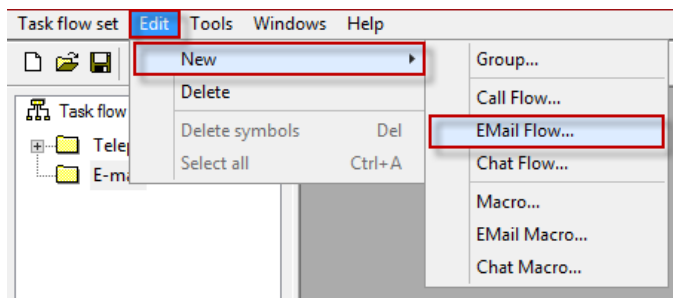
24. Choose **Edit – New** and then select **Group**



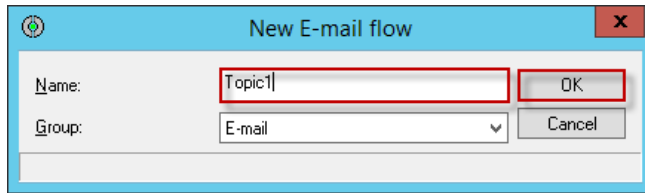
25. .Type the name of the **new group** and then select the **OK** button



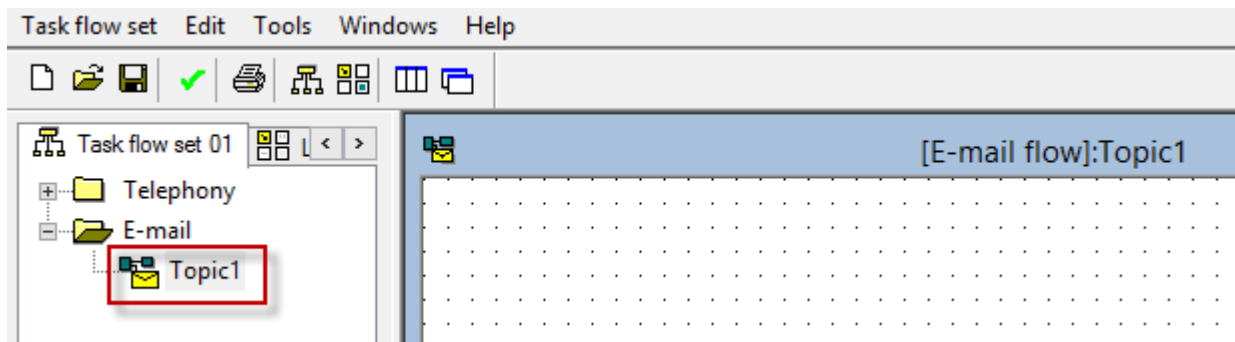
26. Click **Edit – New** and then select **Email flow....**



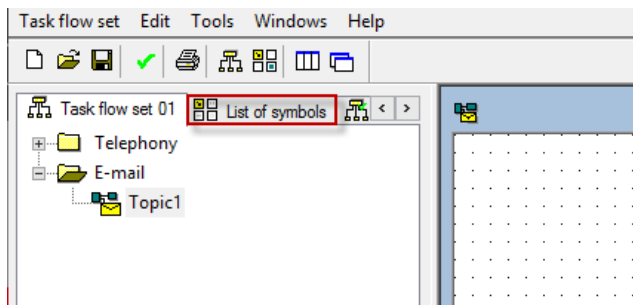
27. In the **Name** field enter a name for the Email flow and choose the **OK** button. The new group should be selected as default.



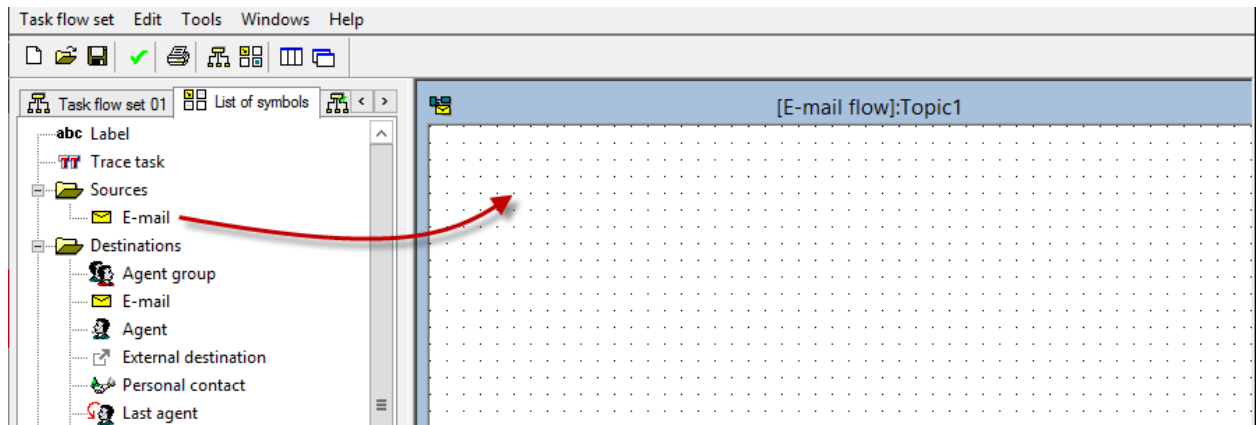
28. The Email Flow is displayed.



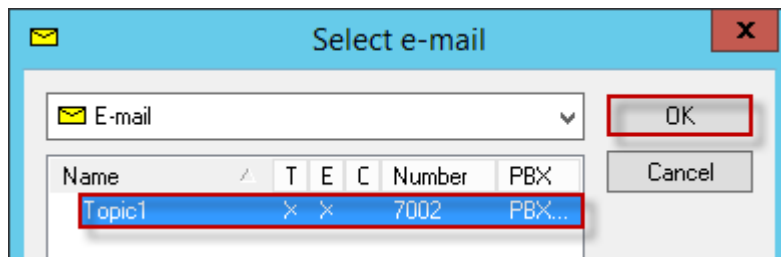
29. Click **List of symbols** tab.



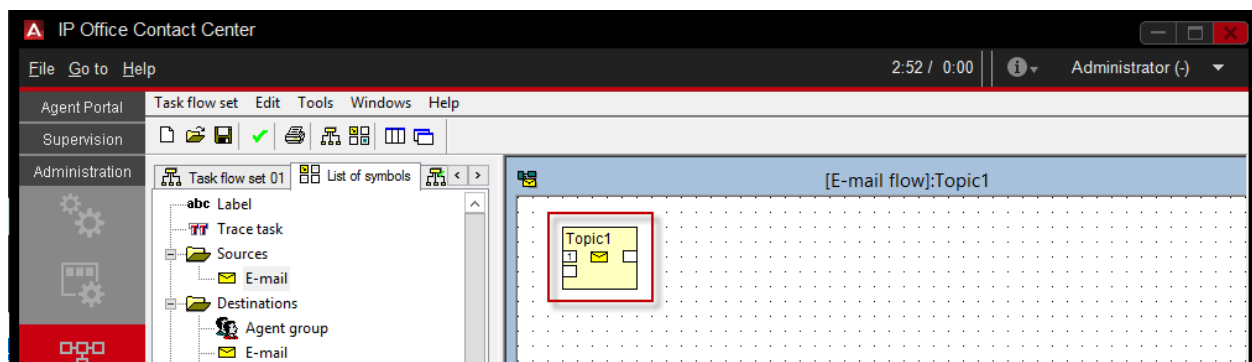
30. To start an Email flow an **E-mail** element can be used. Drag the Email element into the Email flow working area.



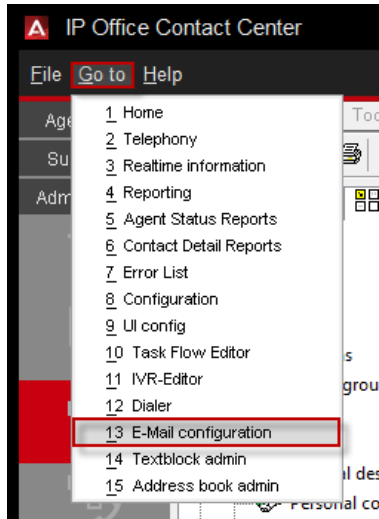
31. Click **Topic1** and then select the **OK** button.



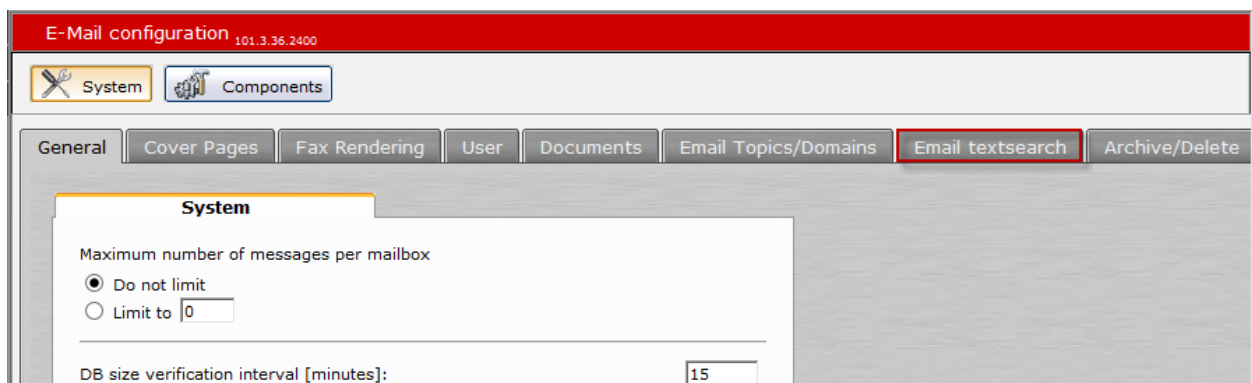
32. The configured element is displayed.



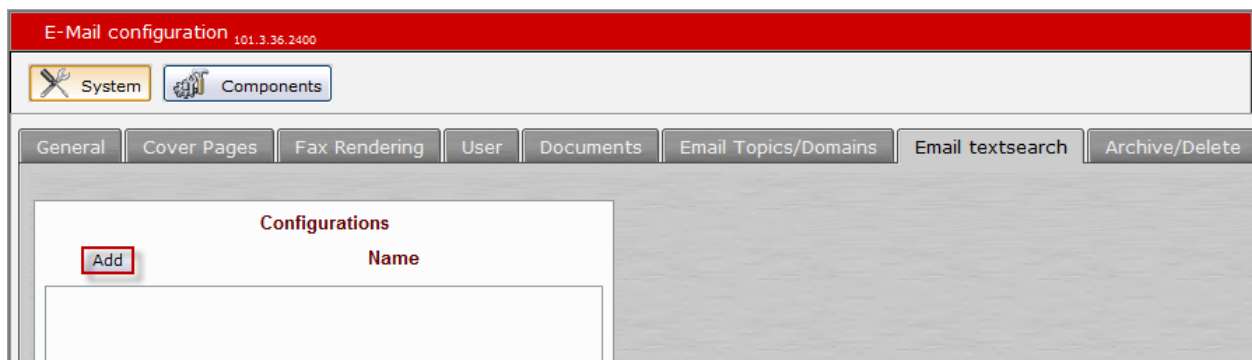
33. The email will now be scanned for a keyword. This can be achieved using an Email script element. To use an Email script element, the keyword text that will be used to search the email contents must be defined. Click the **Go to** menu and then select **E-Mail configuration**.



34. Click the **E-Mail textsearch** tab.



35. Click the **Add** button.



36. In the **Configuration name** field type **Email Scan** and then select the **pencil** button.

Edit configuration -- Webpage Dialog

Configuration name:

Keyword pattern	Task Tag
	UM_ScanResult1
	UM_ScanResult2
	UM_ScanResult3

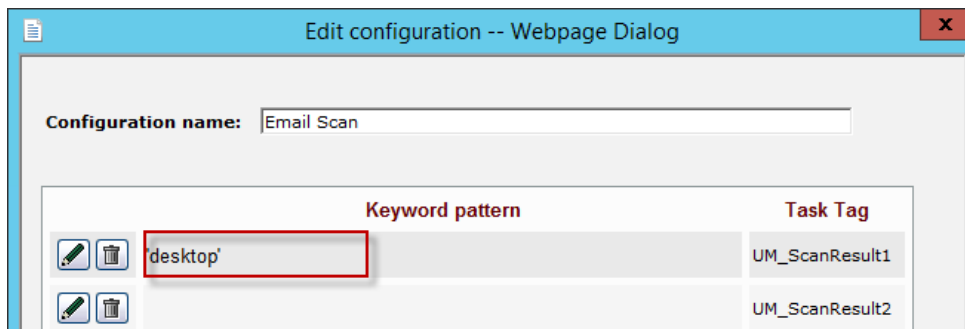
37. In the **Keyword** field, type the required word that will be searched in emails. In this example a keyword of **desktop** has been added. Click the **Apply** button.

Keyword pattern -- Webpage Dialog

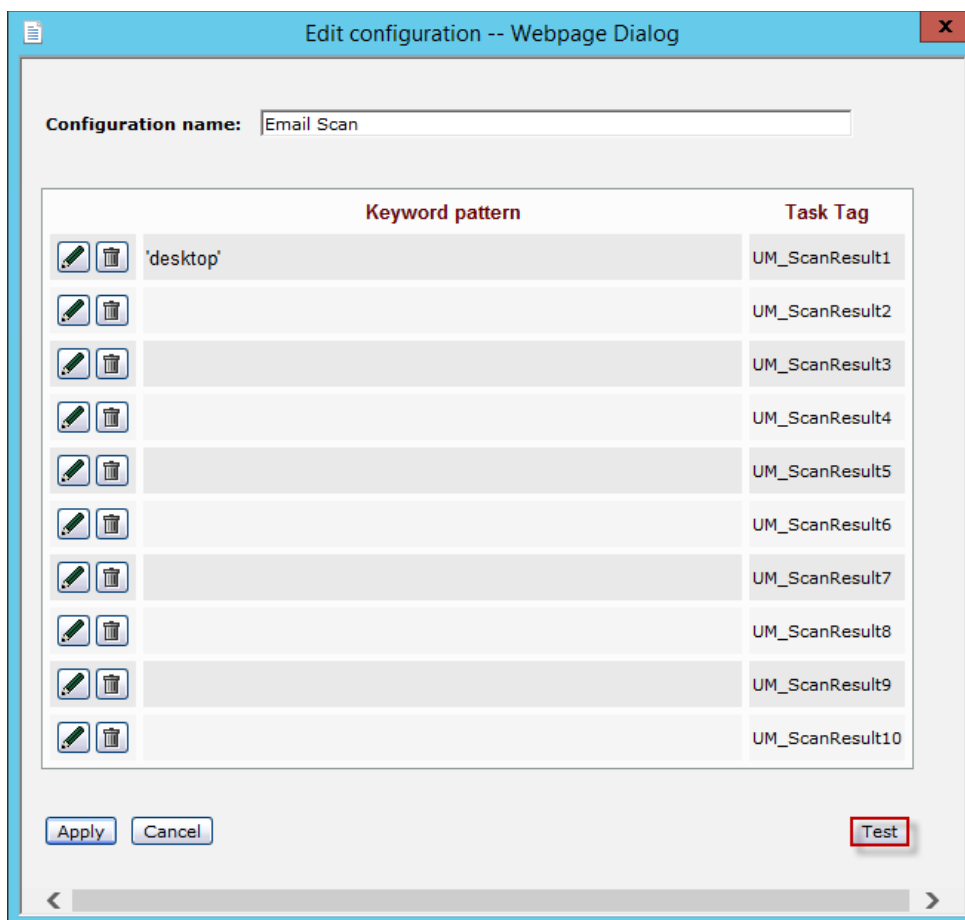
Configuration -- Keyword pattern 1

Add	Keyword
	desktop

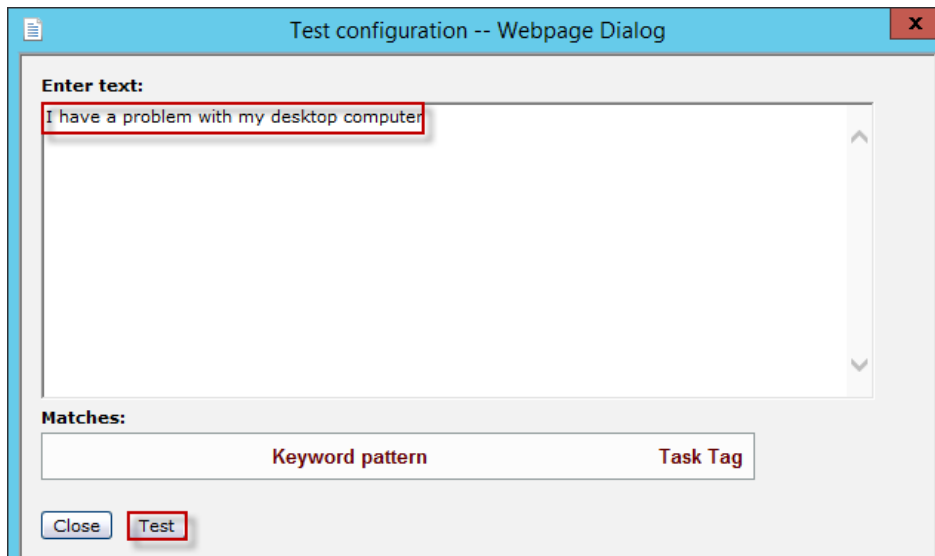
38. The configured Keyword is displayed.



39. The Keyword can be tested. Click the **Test** button.

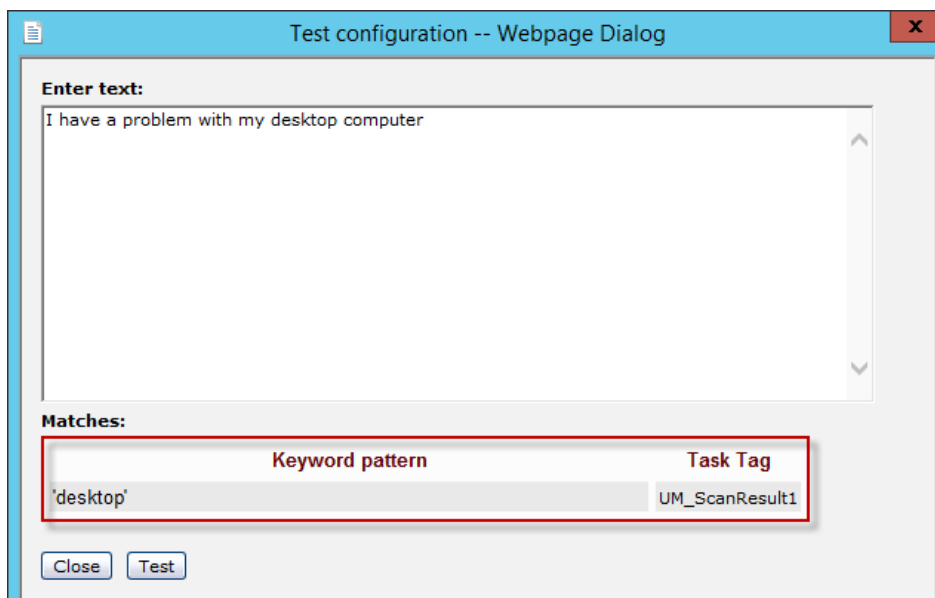


40. In the **Enter** text field enter a phrase containing the keyword. For example, **I have a problem with my Desktop computer** and then select the **Test** button.



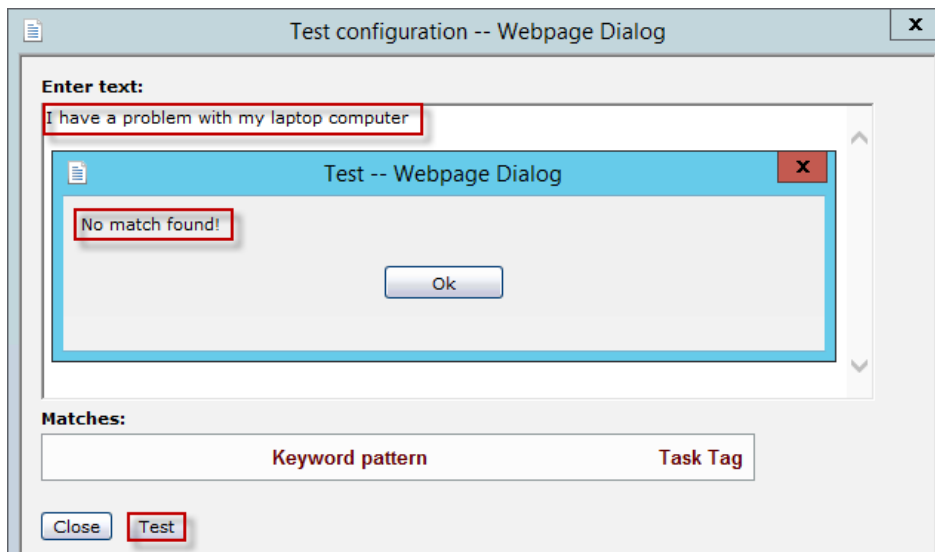
The screenshot shows a dialog box titled "Test configuration -- Webpage Dialog". It has a text input field labeled "Enter text:" containing the text "I have a problem with my desktop computer". Below this is a section labeled "Matches:" which is currently empty. At the bottom, there are two buttons: "Close" and "Test". The "Test" button is highlighted with a red rectangular box.

41. The matched Keyword text will be displayed in the **Matches:** panel.

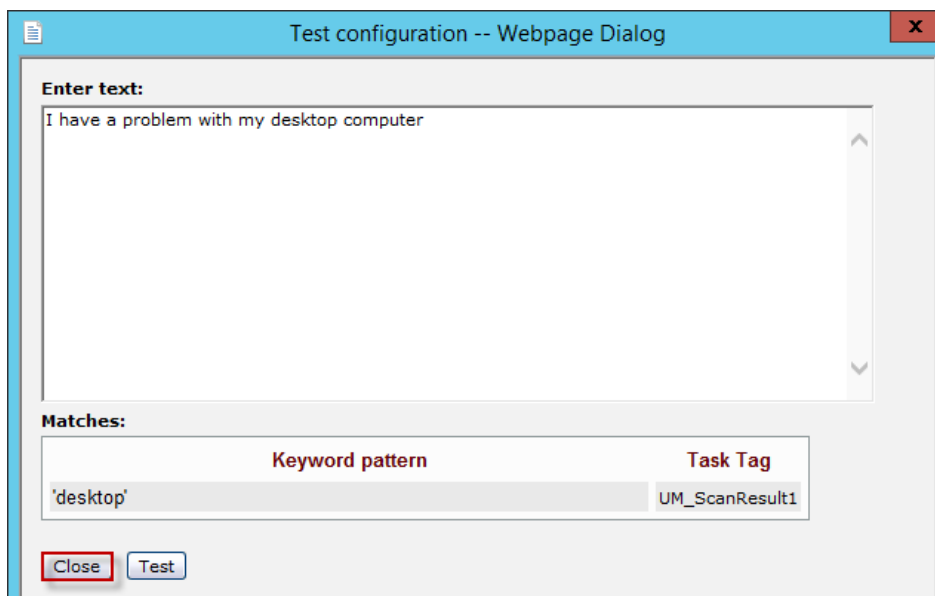


This screenshot shows the same dialog box after the "Test" button was clicked. The "Enter text:" field remains the same. The "Matches:" section now displays a table with two columns: "Keyword pattern" and "Task Tag". The first row shows the value "desktop" under "Keyword pattern" and "UM_ScanResult1" under "Task Tag". The "Test" button at the bottom is highlighted with a red rectangular box.

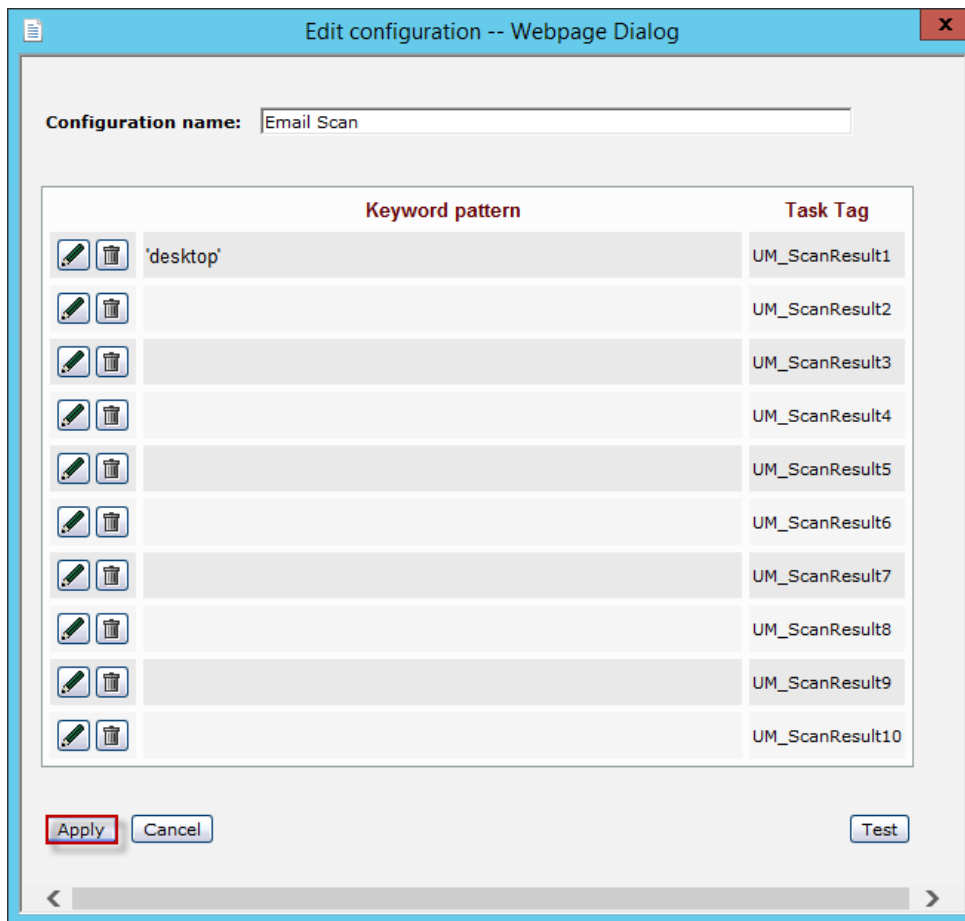
42. A notification box will be displayed if the text does not match the keyword. In this case the test text is “I have a problem with my laptop computer”. So when looking for the keyword “desktop” no match is found.



43. Click the **Close** button.



44. The configured Keyword is displayed. Click the **Apply** button.



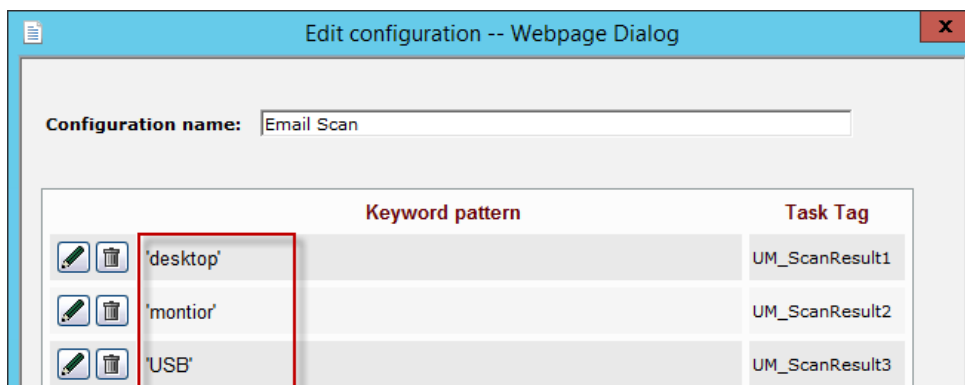
Edit configuration -- Webpage Dialog

Configuration name:

Keyword pattern	Task Tag
'desktop'	UM_ScanResult1
	UM_ScanResult2
	UM_ScanResult3
	UM_ScanResult4
	UM_ScanResult5
	UM_ScanResult6
	UM_ScanResult7
	UM_ScanResult8
	UM_ScanResult9
	UM_ScanResult10

Apply **Cancel** **Test**

45. Additional keywords can be added as required.

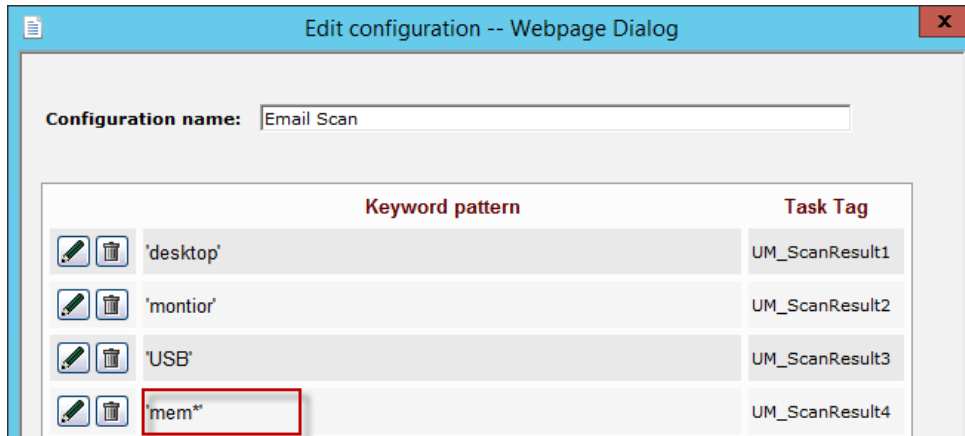


Edit configuration -- Webpage Dialog

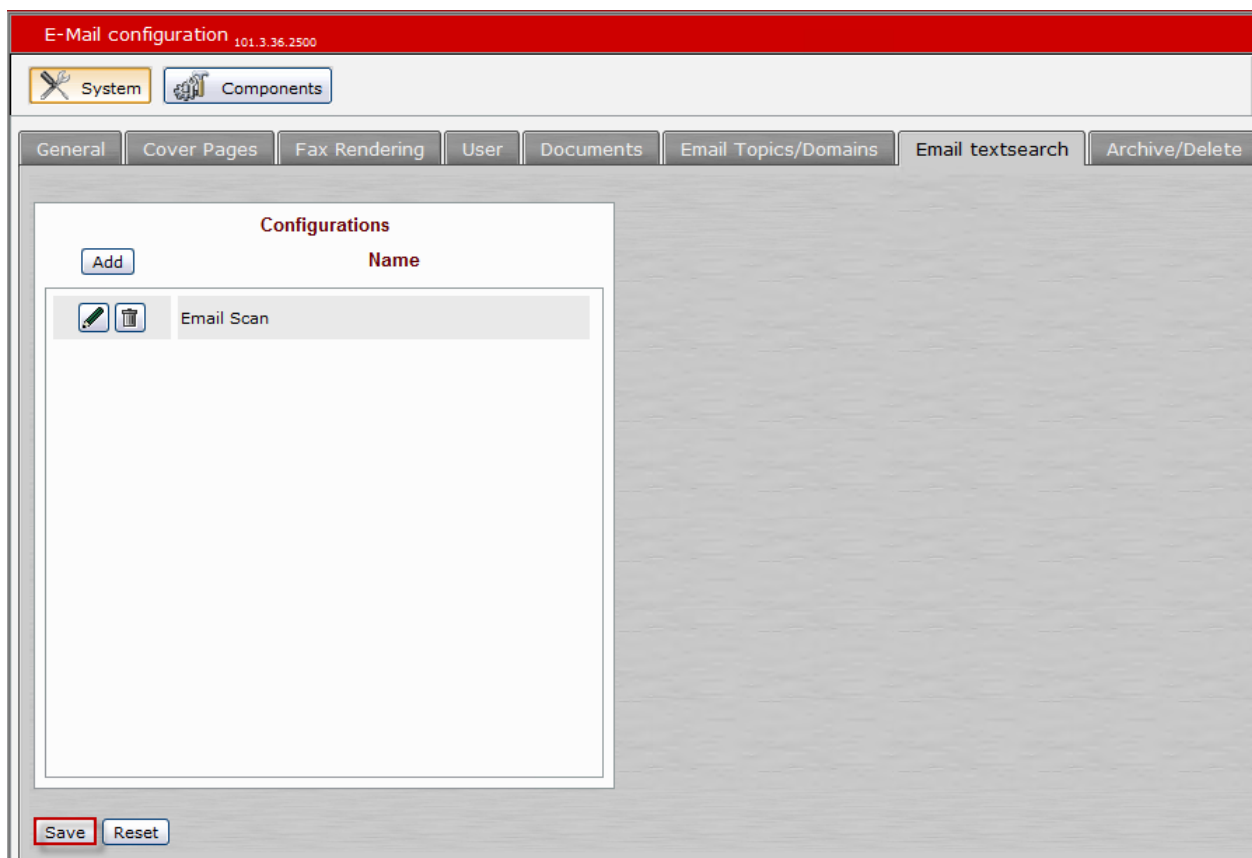
Configuration name:

Keyword pattern	Task Tag
'desktop'	UM_ScanResult1
'montior'	UM_ScanResult2
'USB'	UM_ScanResult3

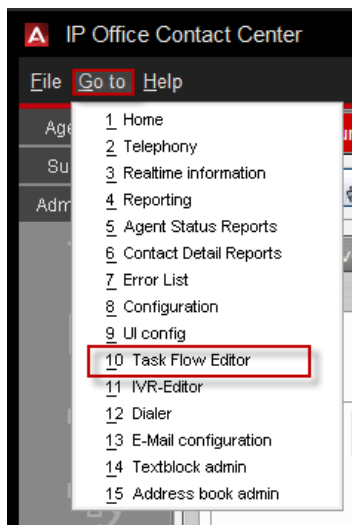
Partial words and phrases can also be added ending with a *. For example, mem* will recognize abbreviations relating to the word memory.



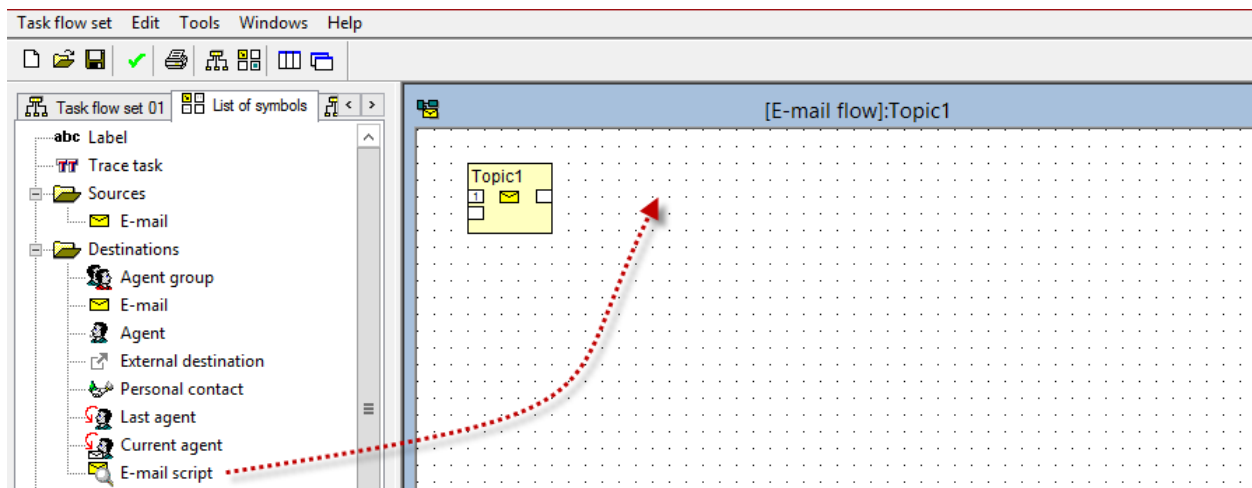
46. Click the **Save** button.



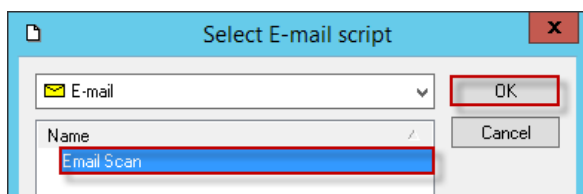
47. Return to the Email Flow. Click the **Go to** menu and then select the **Task Flow Editor**.



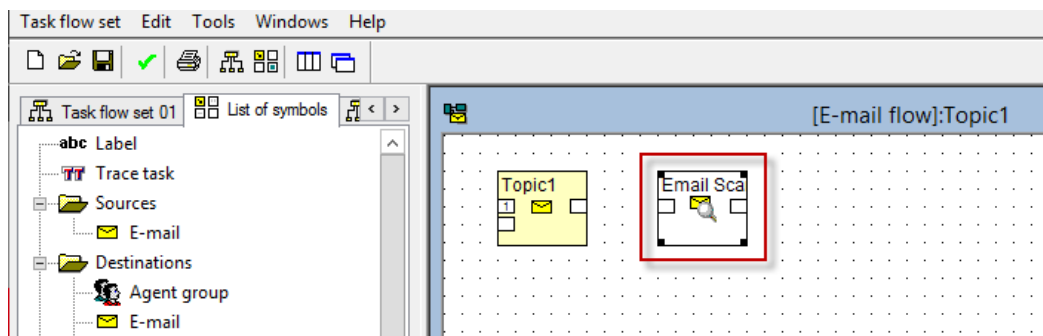
48. Drag the **E-mail script** into the Email flow working area.



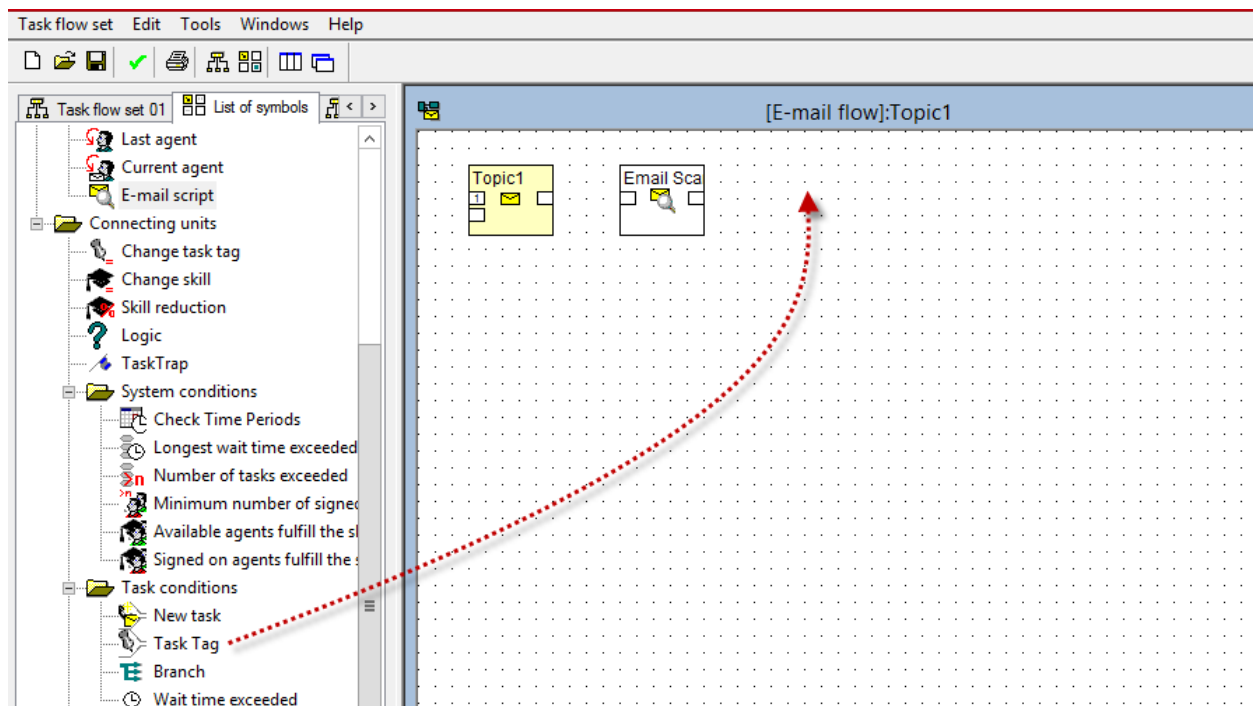
49. Select **Email Scan** and then select the **OK** button.



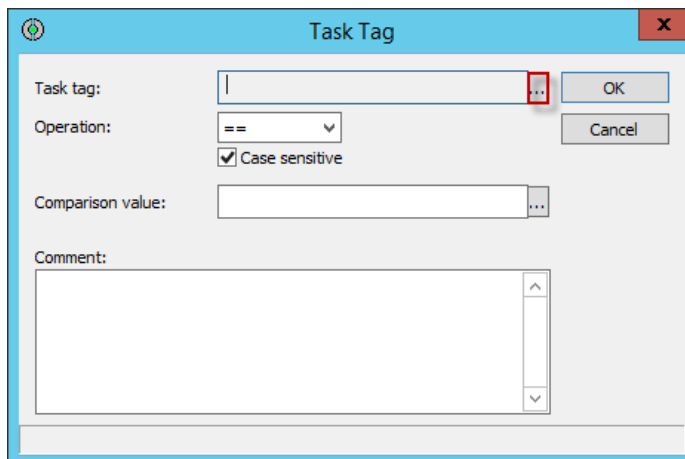
50. The configured element is displayed.



51. After the email has been checked for Keywords, we need to split the email path if any of the keywords were found. This can be achieved using a Task Tag element. Drag a **Task Tag** into the email flow working area.



52. Click the browser button ... adjacent to **Task tag** field.



Task Tag

Task tag: ... OK

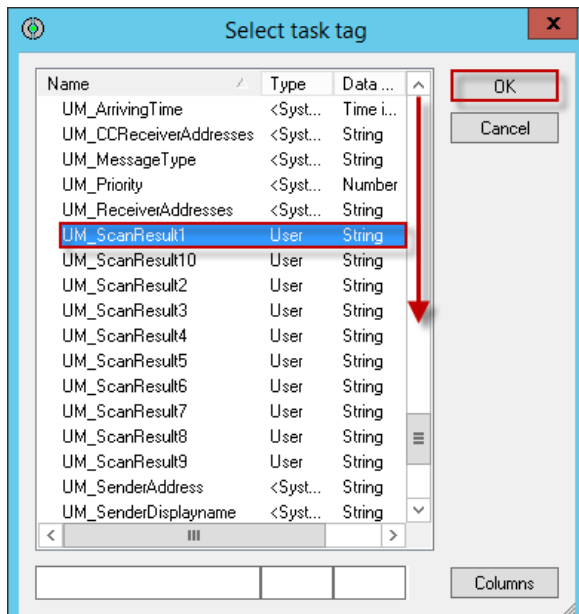
Operation: == Cancel

☒ Case sensitive

Comparison value: ...

Comment:

53. Click **UM_ScanResult1** and then click the **OK** button.



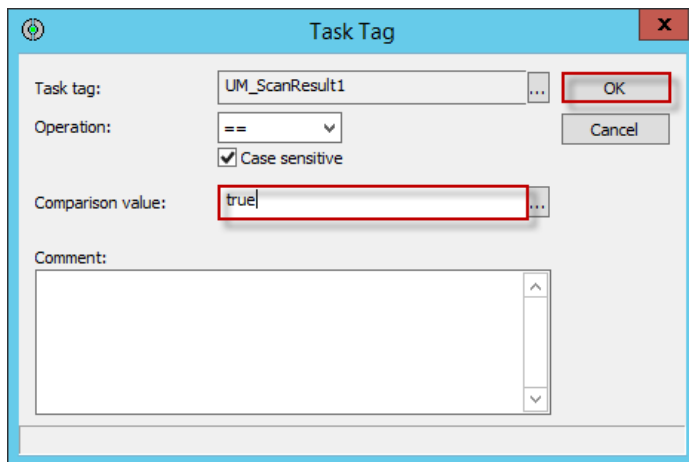
Select task tag

Name	Type	Data ...
UM_ArrivingTime	<Syst...	Time i...
UM_CCReceiverAddresses	<Syst...	String
UM_MessageType	<Syst...	String
UM_Priority	<Syst...	Number
UM_ReceiverAddresses	<Syst...	String
UM_ScanResult1	User	String
UM_ScanResult10	User	String
UM_ScanResult2	User	String
UM_ScanResult3	User	String
UM_ScanResult4	User	String
UM_ScanResult5	User	String
UM_ScanResult6	User	String
UM_ScanResult7	User	String
UM_ScanResult8	User	String
UM_ScanResult9	User	String
UM_SenderAddress	<Syst...	String
UM_SenderDisplayname	<Syst...	String

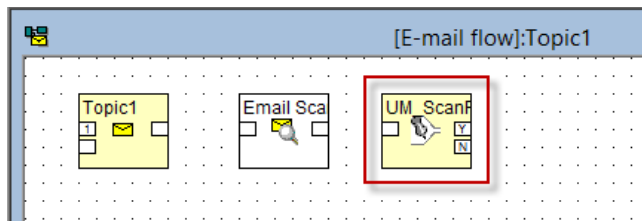
OK Cancel

Columns

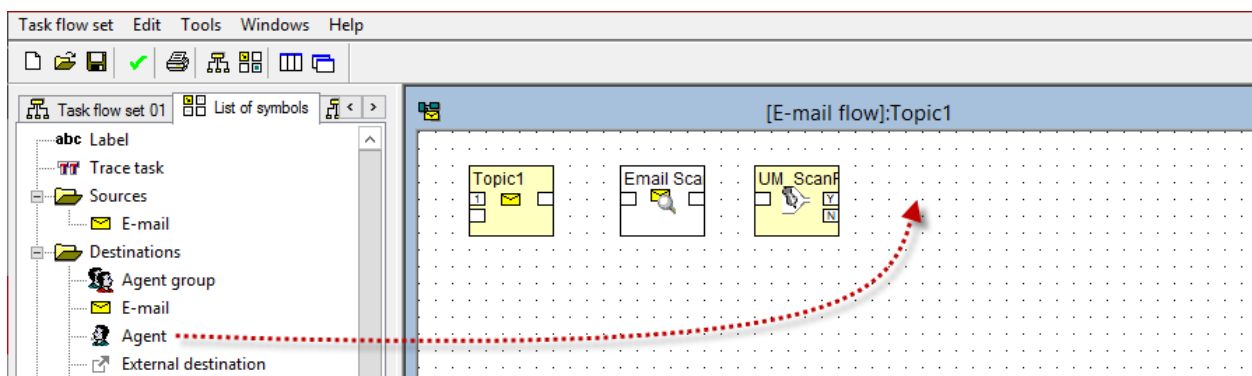
54. In the **Comparison** field type **true** and then select the **OK** button



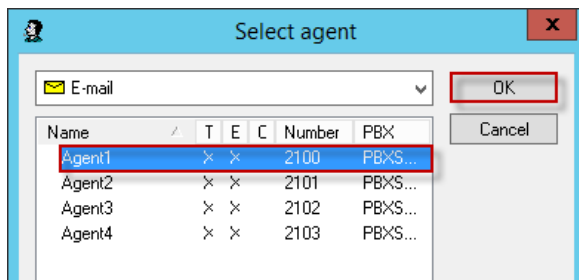
55. The configured element is displayed.



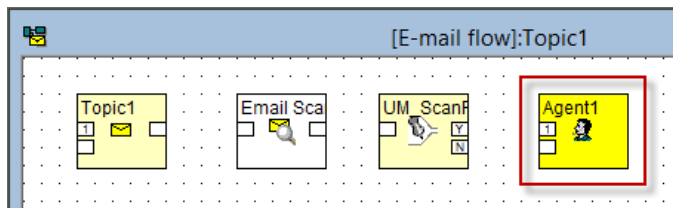
56. In this example, if the email contains a keyword it should be directed to Agent1 . This can be achieved using an **Agent** element. Drag the element into the Email flow working area.



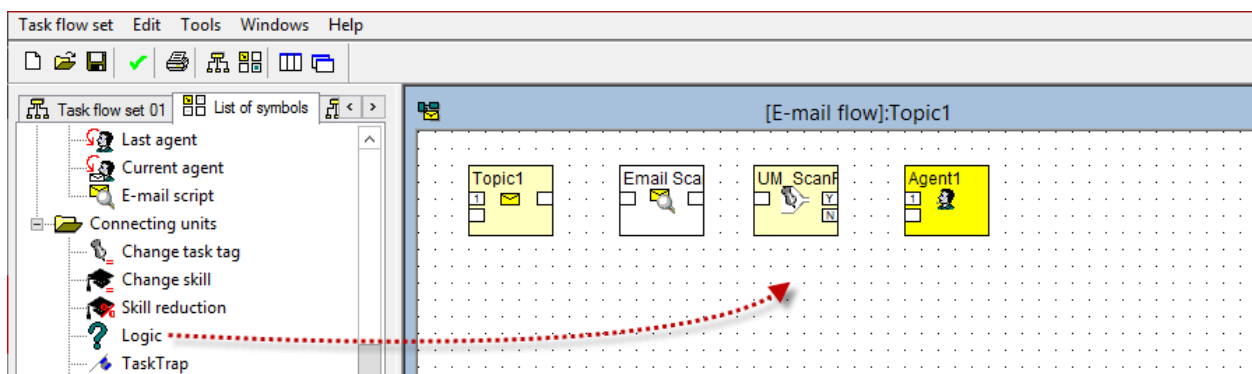
57. Click agent **Agent1** and then select the **OK** button.



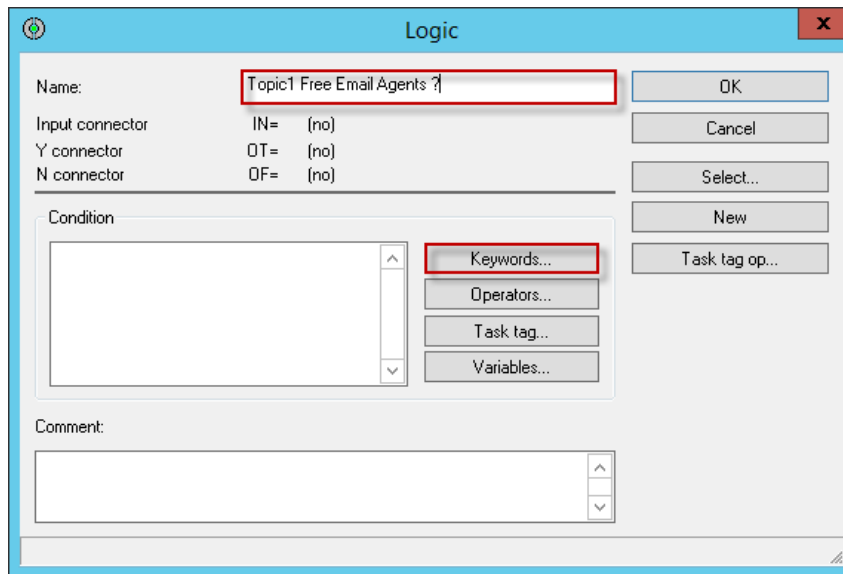
58. The configured element is displayed.



59. If the email does not contain a keyword, the system is required to check that an Agent is free before the email is distributed to the agent. This can be achieved using a **Logic** element. Drag the element into the Email flow working area.

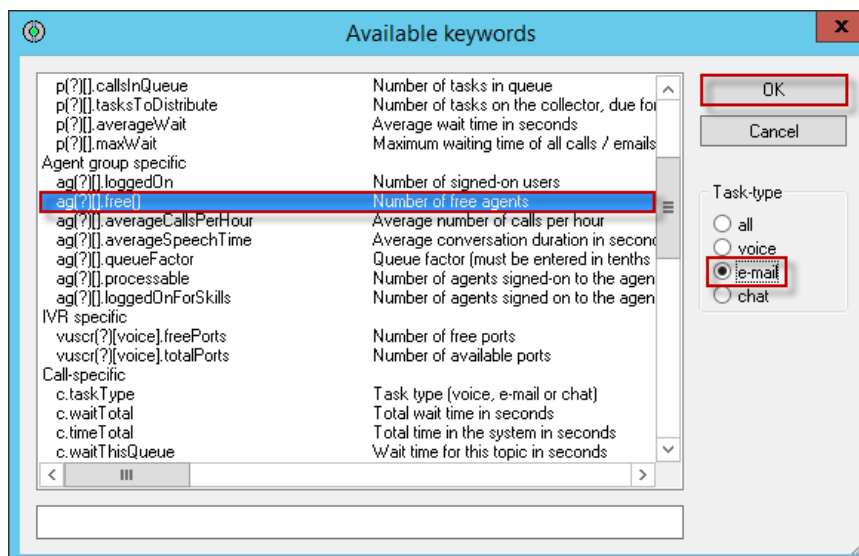


60. In the **Name** field type **Topic1 Free Email Agents ?** and then select the **Keywords** button.



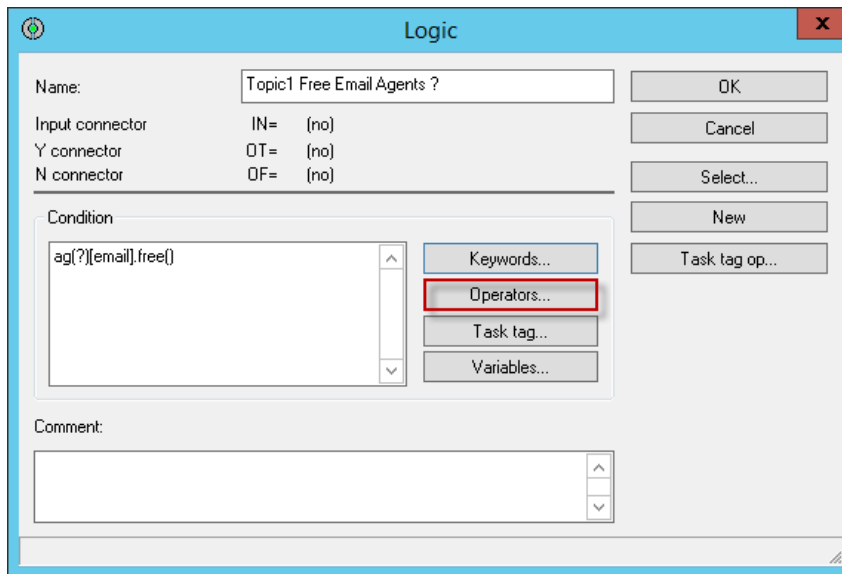
The screenshot shows the 'Logic' dialog box. The 'Name' field is set to 'Topic1 Free Email Agents ?'. Below it, the 'Input connector' is 'IN= (no)', 'Y connector' is 'OT= (no)', and 'N connector' is 'OF= (no)'. In the 'Condition' section, the 'Keywords...' button is highlighted. Other buttons in this section include 'Operators...', 'Task tag...', and 'Variables...'. On the right side of the dialog, there are buttons for 'OK', 'Cancel', 'Select...', 'New', and 'Task tag op...'. A 'Comment' field is at the bottom.

61. Click **Number of free agents** and then choose **e-mail** under Task-type and then select the **OK** button.

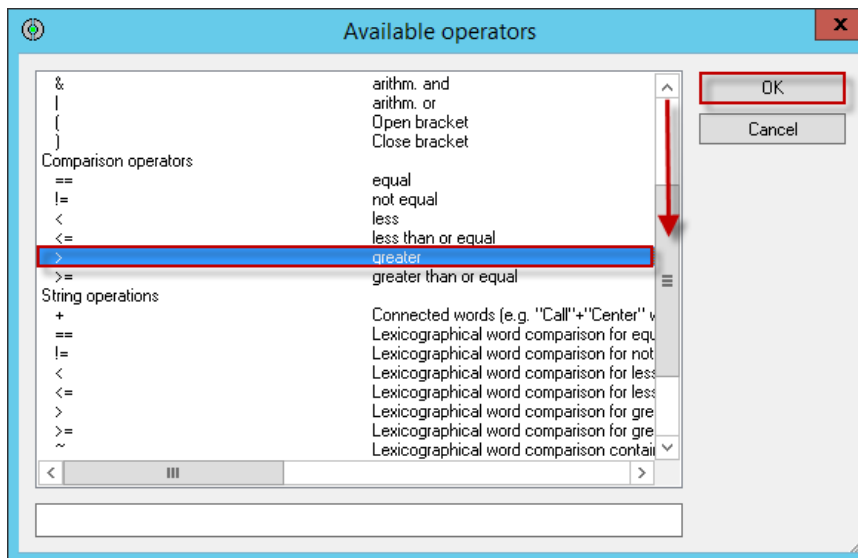


The screenshot shows the 'Available keywords' dialog box. A list of keywords is displayed on the left, with 'ag(?)[] free()' selected. The description for this keyword is 'Number of free agents'. On the right, the 'Task-type' section has three radio buttons: 'all', 'voice', and 'e-mail'. The 'e-mail' option is selected. The 'OK' button is highlighted. Other buttons include 'Cancel'.

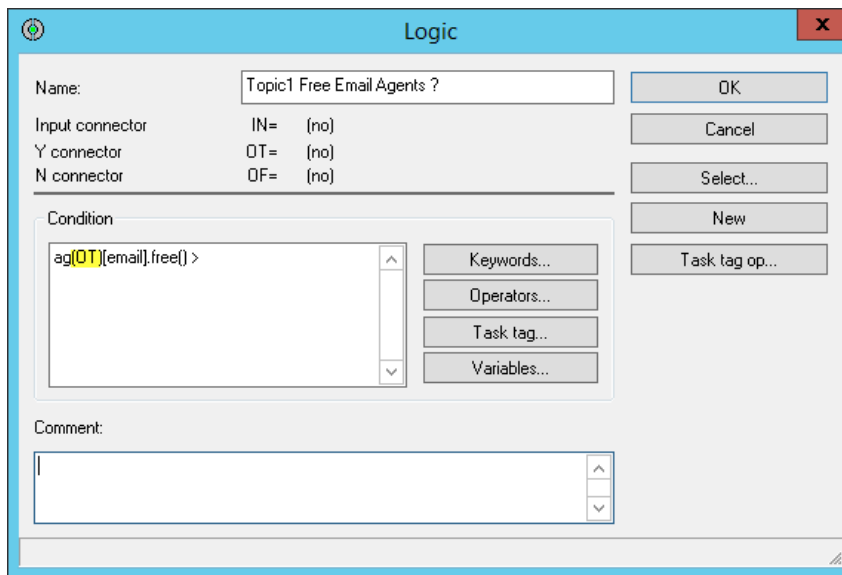
62. Click the **Operators** button.



63. Select the **greater** operator and then select the **OK** button.



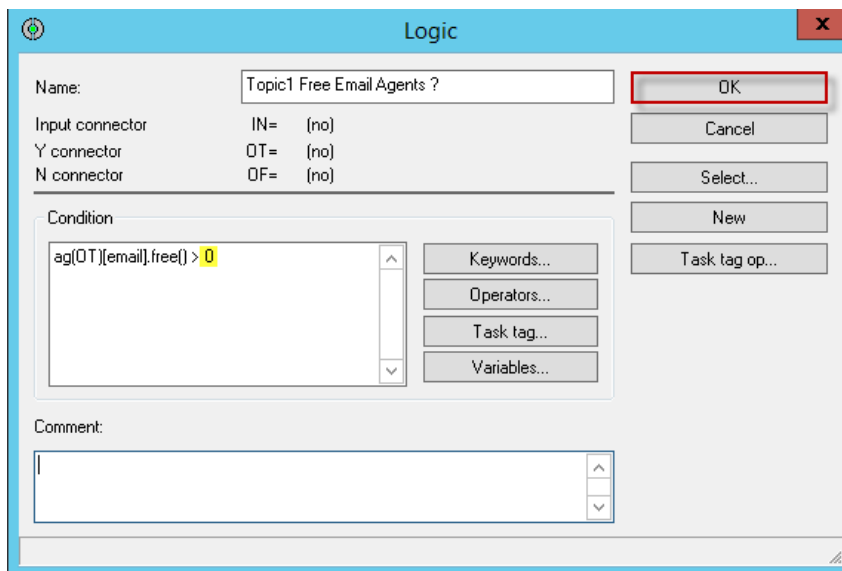
64. Change the ? to **OT**



The screenshot shows the 'Logic' dialog box with the following fields and buttons:

- Name:** Topic1 Free Email Agents ?
- Input connector:** IN= (no)
- Y connector:** OT= (no)
- N connector:** OF= (no)
- Condition:** ag(OT)(email).free() >
- Comment:** (empty text box)
- Buttons:** OK, Cancel, Select..., New, Task tag op..., Keywords..., Operators..., Task tag..., Variables...

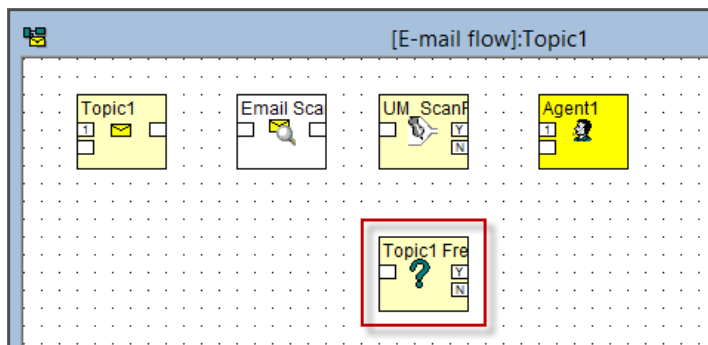
65. Place a **0** at the end of the Condition and then click the **OK** button.



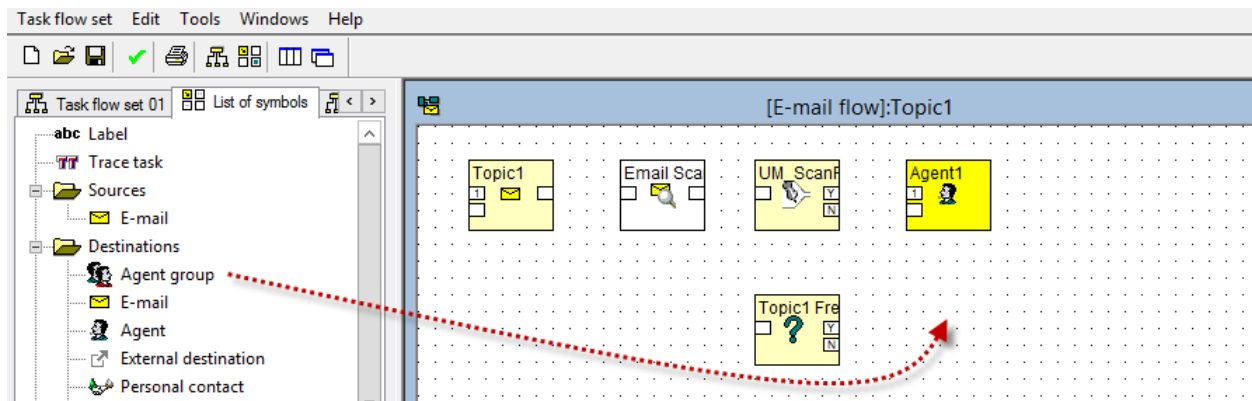
The screenshot shows the 'Logic' dialog box with the following fields and buttons:

- Name:** Topic1 Free Email Agents ?
- Input connector:** IN= (no)
- Y connector:** OT= (no)
- N connector:** OF= (no)
- Condition:** ag(OT)(email).free() >0
- Comment:** (empty text box)
- Buttons:** OK (highlighted with a red box), Cancel, Select..., New, Task tag op..., Keywords..., Operators..., Task tag..., Variables...

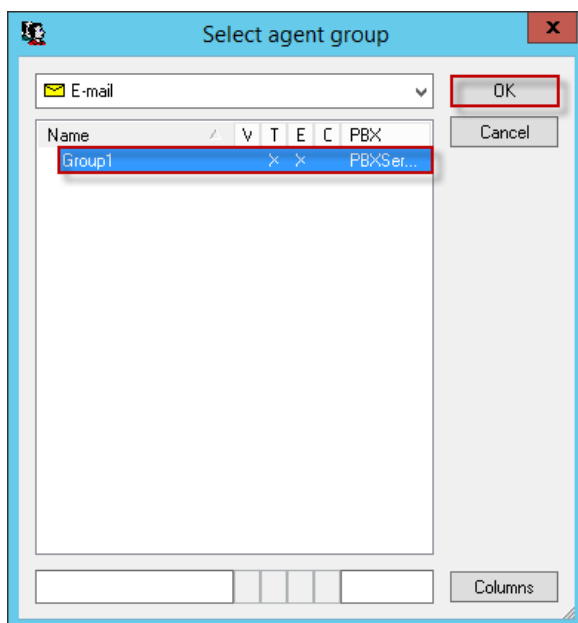
66. The configured element is displayed.



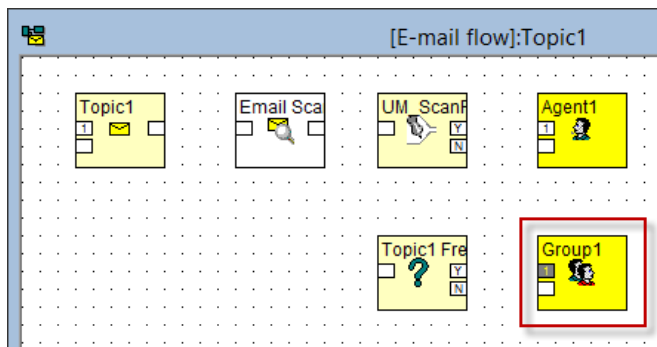
67. In this example, if there are free email agents available to receive the email it will be directed to the Agent group **Group1**. This can be achieved using an **Agent group** element. Drag the element into the E-mail flow working area.



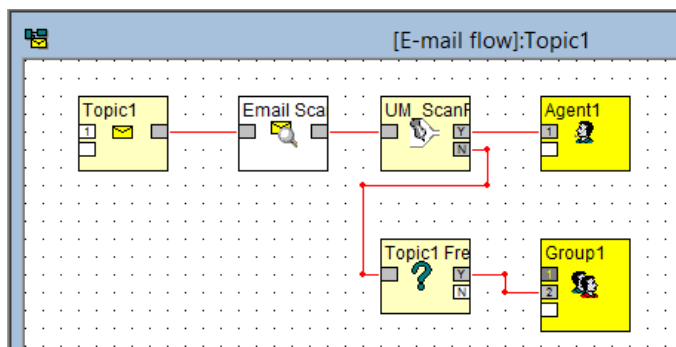
68. Select **Group1** and then click the **OK** button.



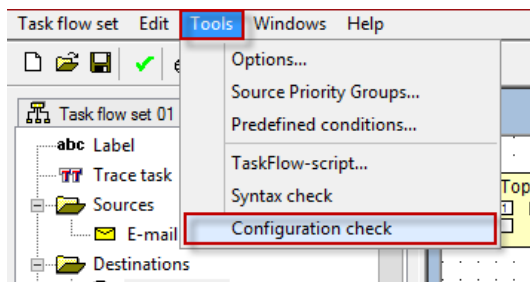
69. The configured element is displayed.



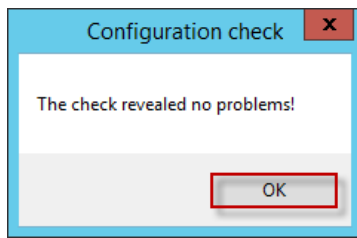
70. Connect the elements as illustrated below.



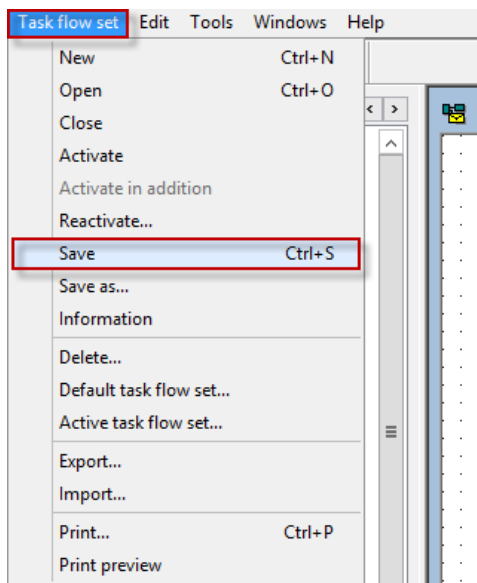
71. Choose Tools and then select Configuration check.



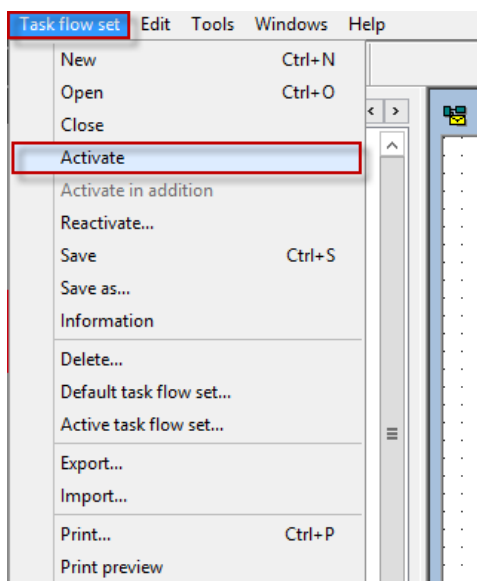
72. Click the **OK** button.



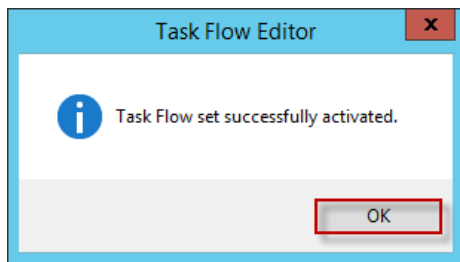
73. Click **Task flow set** and then click **Save**.



74. Click **Task flow set** and then click **Activate**.



75. When prompted click the **OK** button.



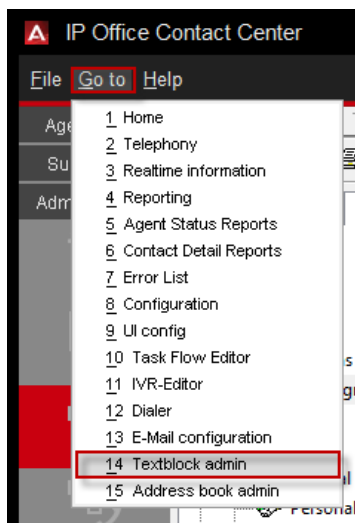
Text Blocks/Autoreply

Text blocks can be used to automate standard responses given by E-Mail, Topics & Agents in the course of answering customer emails. Text Blocks can be added to the response email or customized per email as required.

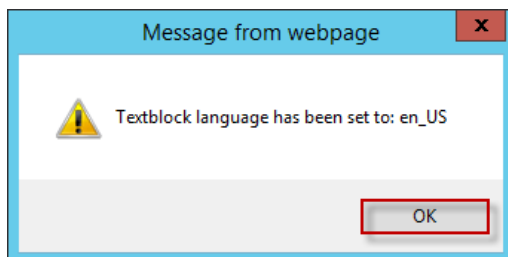
Auto reply templates can be used when an Incoming email arrives at a topic or when the email arrives at the Agent.

To configure a Text Block with an Auto Reply:

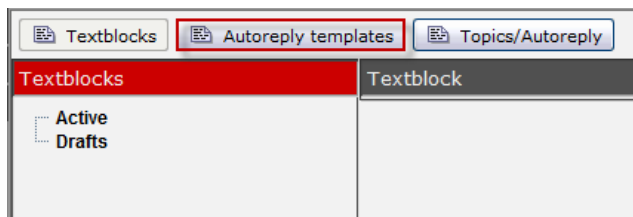
1. Click **Go to** from the menu and then select **Textblock admin**.



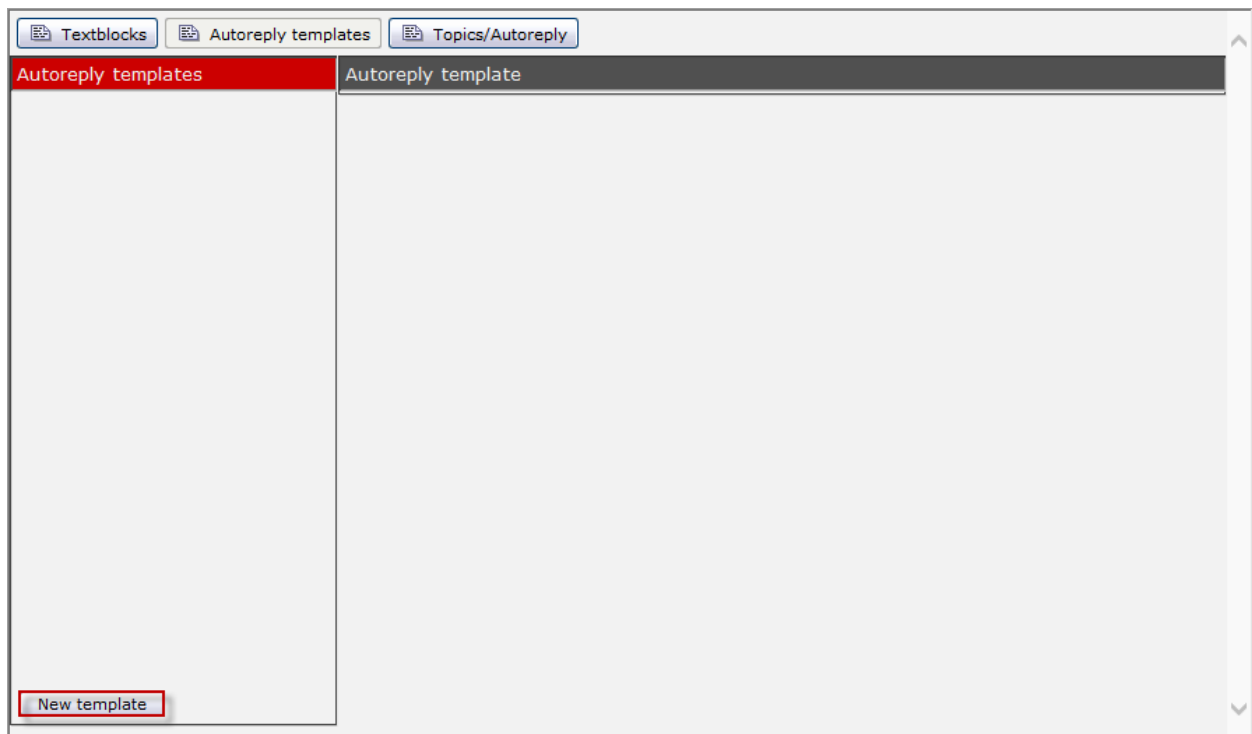
2. The first time Textblock admin is used the following message is seen. Choose the OK button.



3. Click the **Autoreply templates** button.



4. Click the **New template** button.



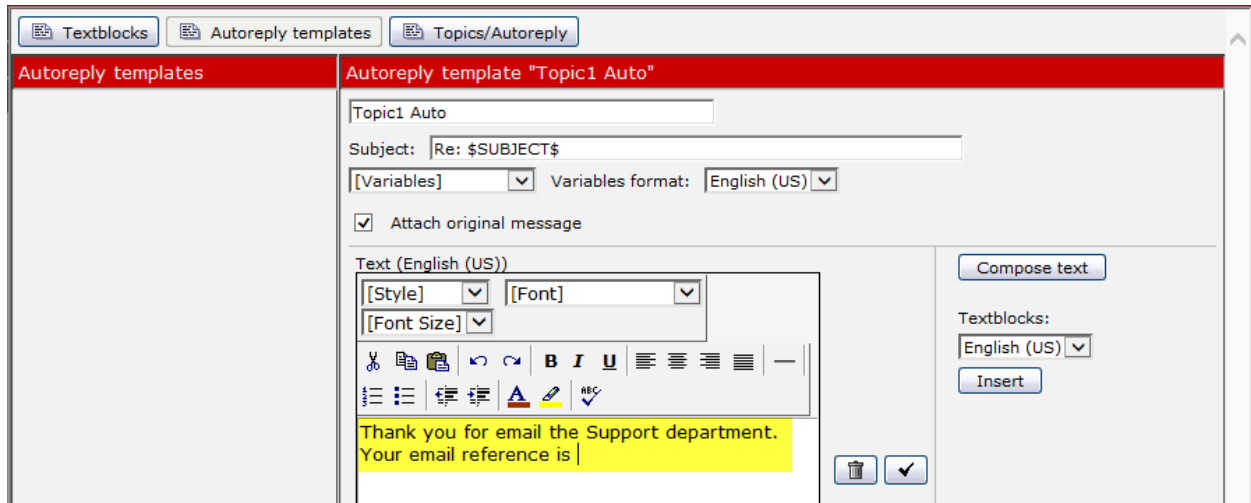
5. Change the name of the template to **Topic1 Auto**.

The screenshot shows the 'Autoreply templates' section of the Avaya IP Office Contact Center interface. The 'New autoreply template' form is displayed. The name field is set to 'Topic1 Auto'. The subject is 'Re: \$SUBJECT\$'. The variables format is 'English (US)'. The 'Attach original message' checkbox is checked. The 'Compose text' button is visible on the right side of the form.

6. Click the **Compose text** button.

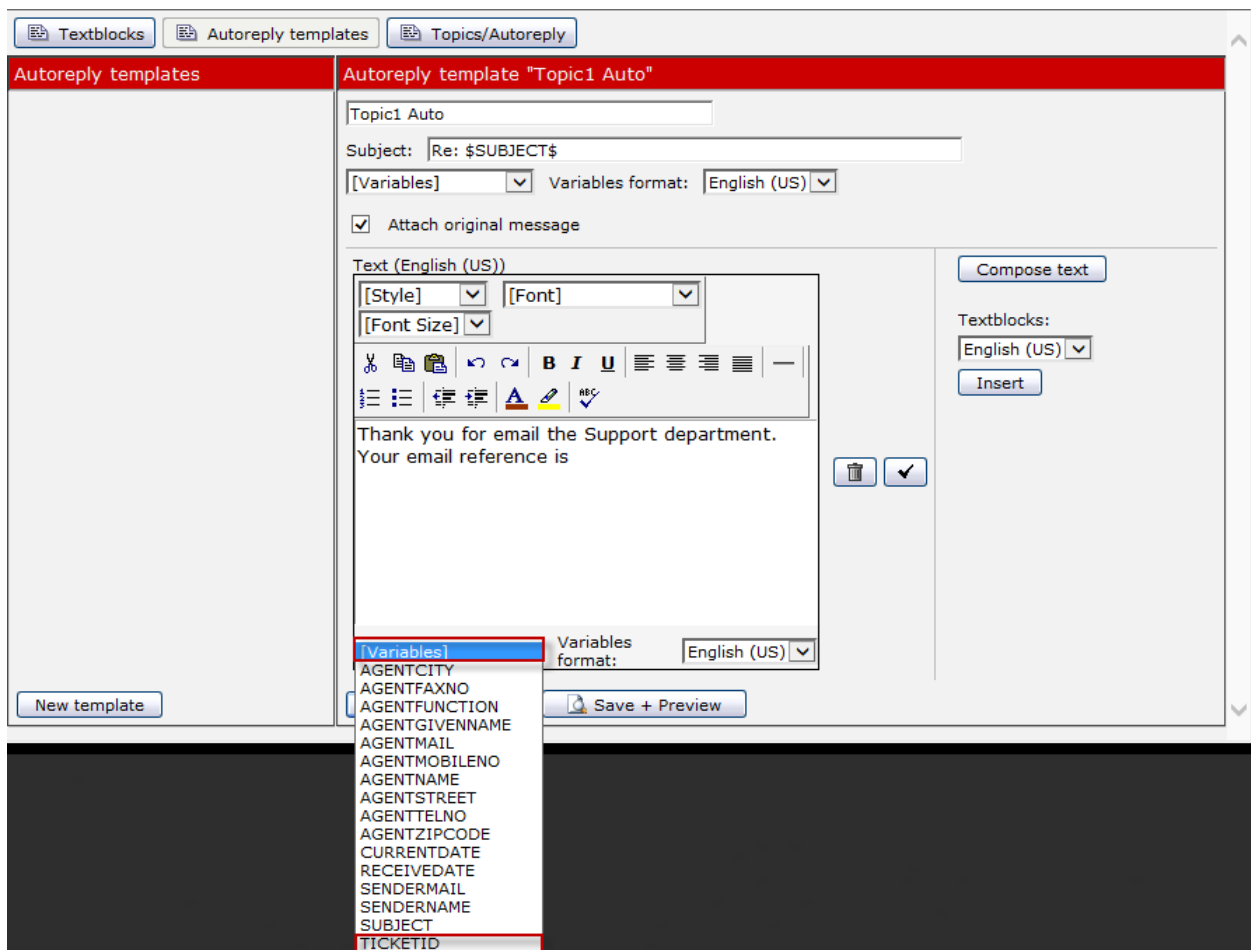
The screenshot shows the 'Autoreply templates' section of the Avaya IP Office Contact Center interface. The 'New autoreply template' form is displayed. The name field is set to 'Topic1 Auto'. The subject is 'Re: \$SUBJECT\$'. The variables format is 'English (US)'. The 'Attach original message' checkbox is checked. The 'Compose text' button is highlighted with a red box on the right side of the form.

7. In the text field type **Thank you for emailing the Support department. Your email reference is**



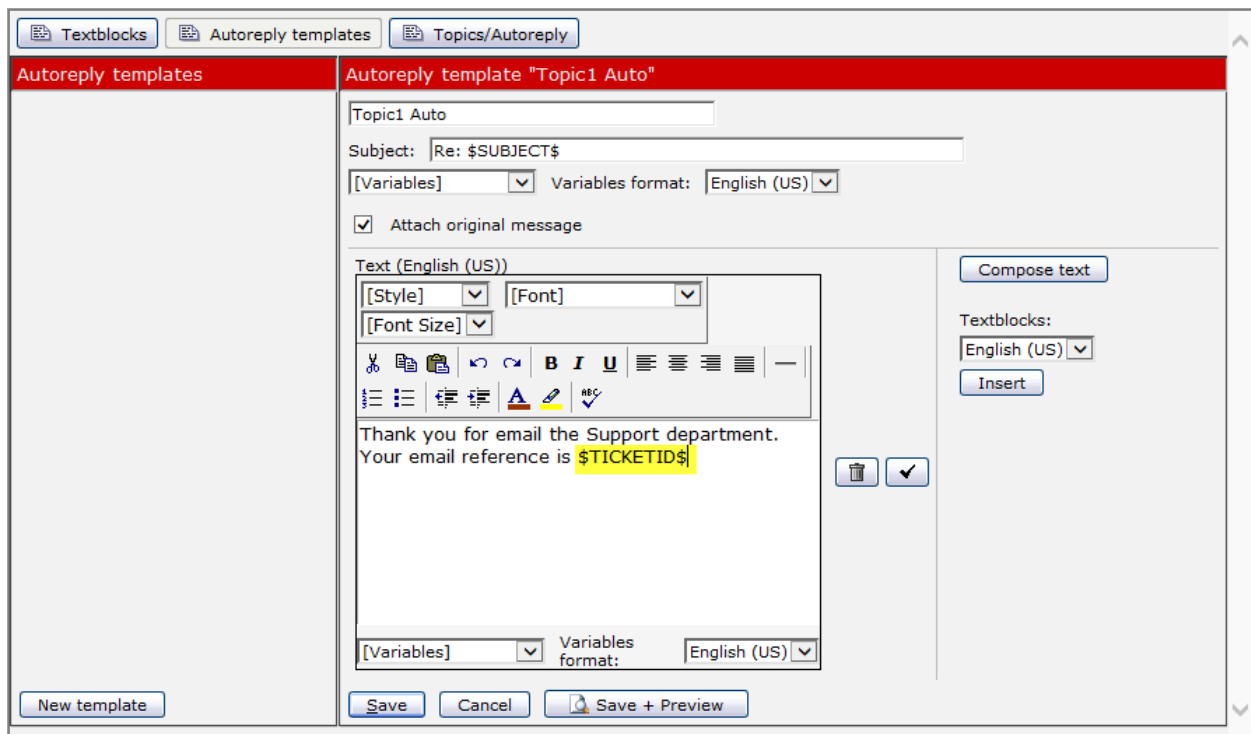
The screenshot shows the 'Autoreply templates' section of the Avaya IP Office Contact Center interface. The 'Autoreply template "Topic1 Auto"' is selected. The 'Text (English (US))' field contains the text 'Thank you for email the Support department. Your email reference is'. The 'Variables' dropdown is set to '[Variables]' and the 'Variables format' is set to 'English (US)'. The 'Attach original message' checkbox is checked. The 'Compose text' button is visible.

8. Click the **Variables** drop down box and select **TICKETID**.



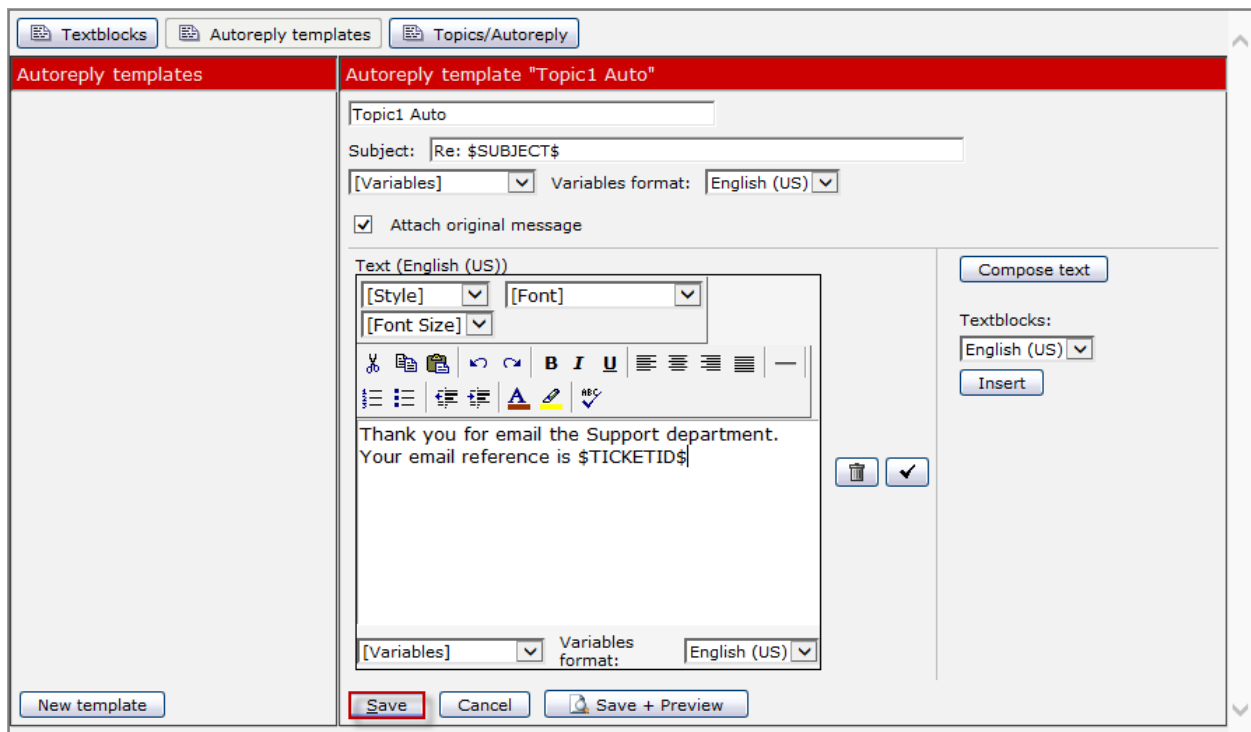
The screenshot shows the 'Autoreply templates' section of the Avaya IP Office Contact Center interface. The 'Autoreply template "Topic1 Auto"' is selected. The 'Text (English (US))' field contains the text 'Thank you for email the Support department. Your email reference is'. The 'Variables' dropdown is open, showing a list of variables including 'TICKETID'. The 'Variables format' is set to 'English (US)'. The 'Save + Preview' button is visible.

9. This will place a reference ID into the email, which can be searched in the Archive.



The screenshot shows the 'Autoreply templates' window with the 'Autoreply template "Topic1 Auto"' selected. The interface includes a left sidebar with 'Textblocks', 'Autoreply templates', and 'Topics/Autoreply'. The main area has a red header bar. Below the header, there are fields for 'Topic1 Auto', 'Subject: Re: \$SUBJECT\$', and a 'Variables' dropdown set to 'English (US)'. A checkbox 'Attach original message' is checked. A rich text editor shows the text 'Thank you for email the Support department. Your email reference is \$TICKETID\$'. To the right, there are 'Compose text', 'Textblocks: English (US)', and 'Insert' buttons. At the bottom, there are 'New template', 'Save', 'Cancel', and 'Save + Preview' buttons. The 'Save' button is highlighted with a red box.

10. Click the **Save** button.



This screenshot is identical to the previous one, showing the 'Autoreply template "Topic1 Auto"' configuration. The 'Save' button at the bottom is highlighted with a red box, indicating the next step in the process.

11. Click the **Topic/Autoreply** button.

Textblocks Autoreply templates **Topics/Autoreply**

Autoreply templates

Topic1 Auto

Autoreply template "Topic1 Auto"

Rename Topic1 Auto

Subject: Re: \$SUBJECT\$

[Variables] Variables format: English (US)

☒ Attach original message

Text (English (US))

Thank you for email the Support department.
Your email reference is \$TICKETID\$

Compose text

Textblocks: English (US)

Insert

12. Click **Topic1**

Textblocks Autoreply templates **Topics/Autoreply**

Topics

Topic1

Topic

13. Click the **Autoreply template** drop down arrow and select **Topic1 Auto**.

Textblocks Autoreply templates **Topics/Autoreply**

Topics

Topic1

Topic "Topic1"

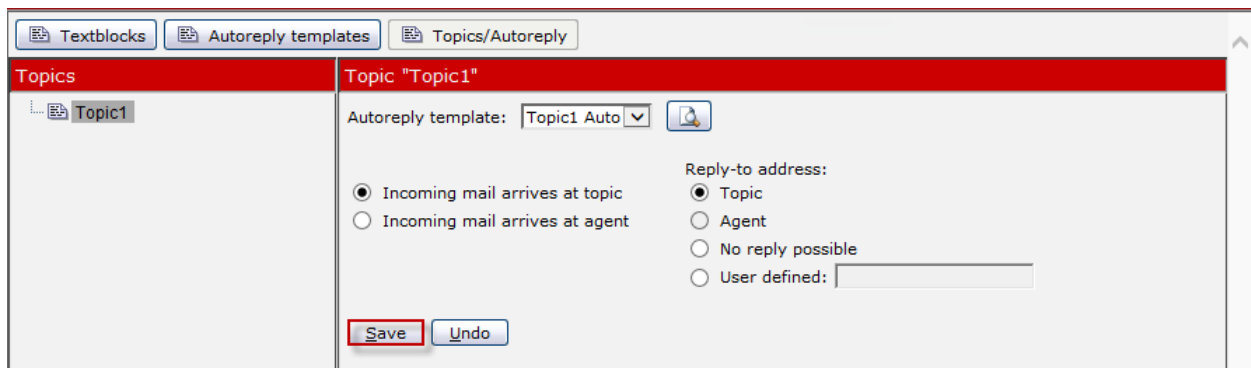
Autoreply template: Topic1 Auto

☒ Incoming mail arrives at topic
☐ Incoming mail arrives at agent

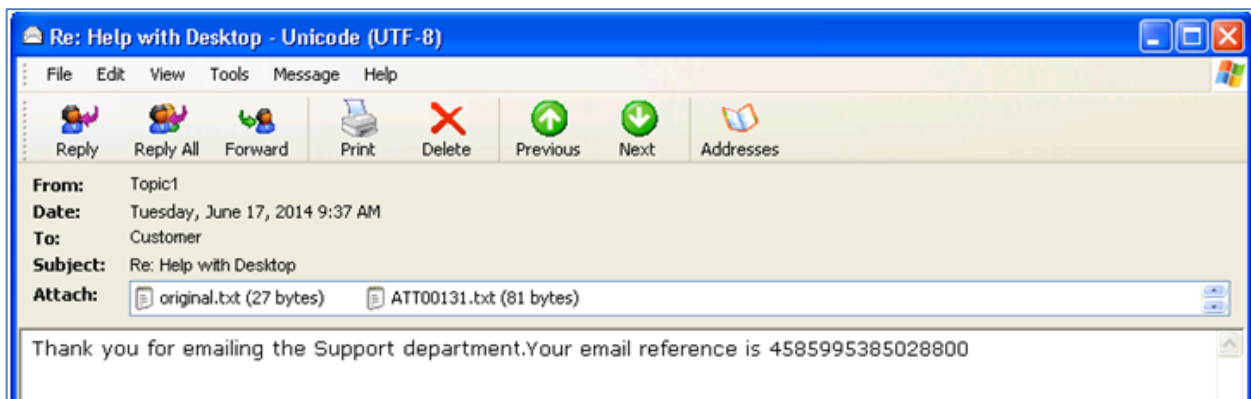
Reply-to address:
☒ Topic
☐ Agent
☐ No reply possible
☐ User defined:

Save Undo

14. Click the **Save** button.

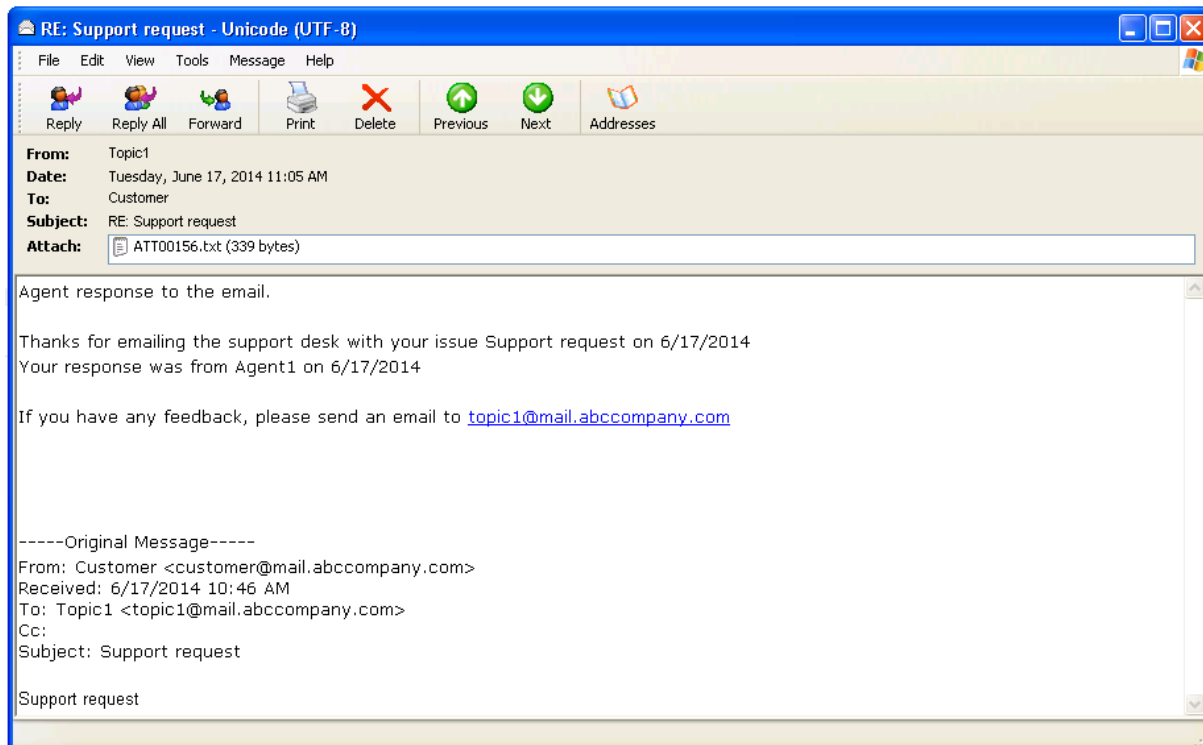


When an email is now sent to Topic1, the sender will automatically receive an email as illustrated below.

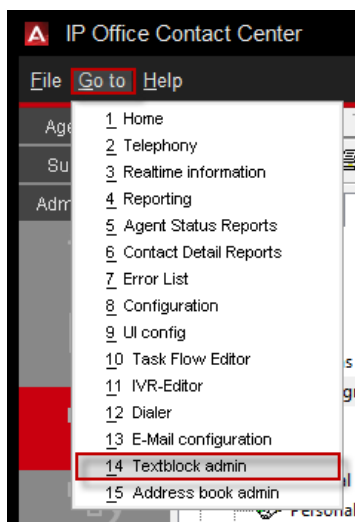


Textblocks

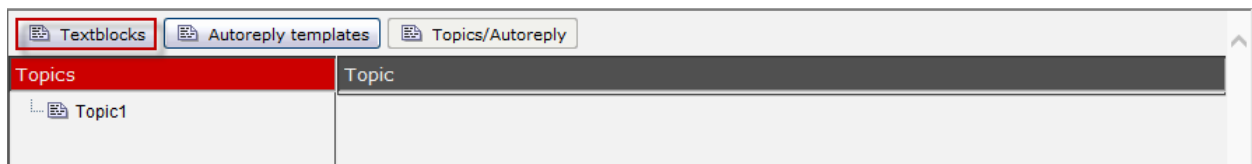
Textblock templates can be used to create standard blocks of text that can be added to email replies sent to customers. Templates can be used with Variables that can be altered by the Agent or entered automatically, before sending an email response.



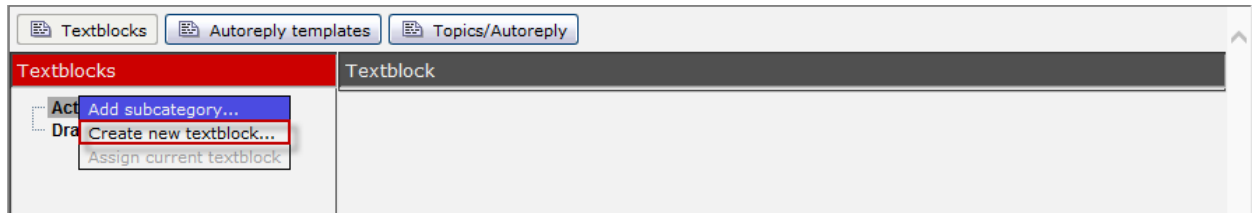
1. Click **Go to** and select **Textblock admin**.



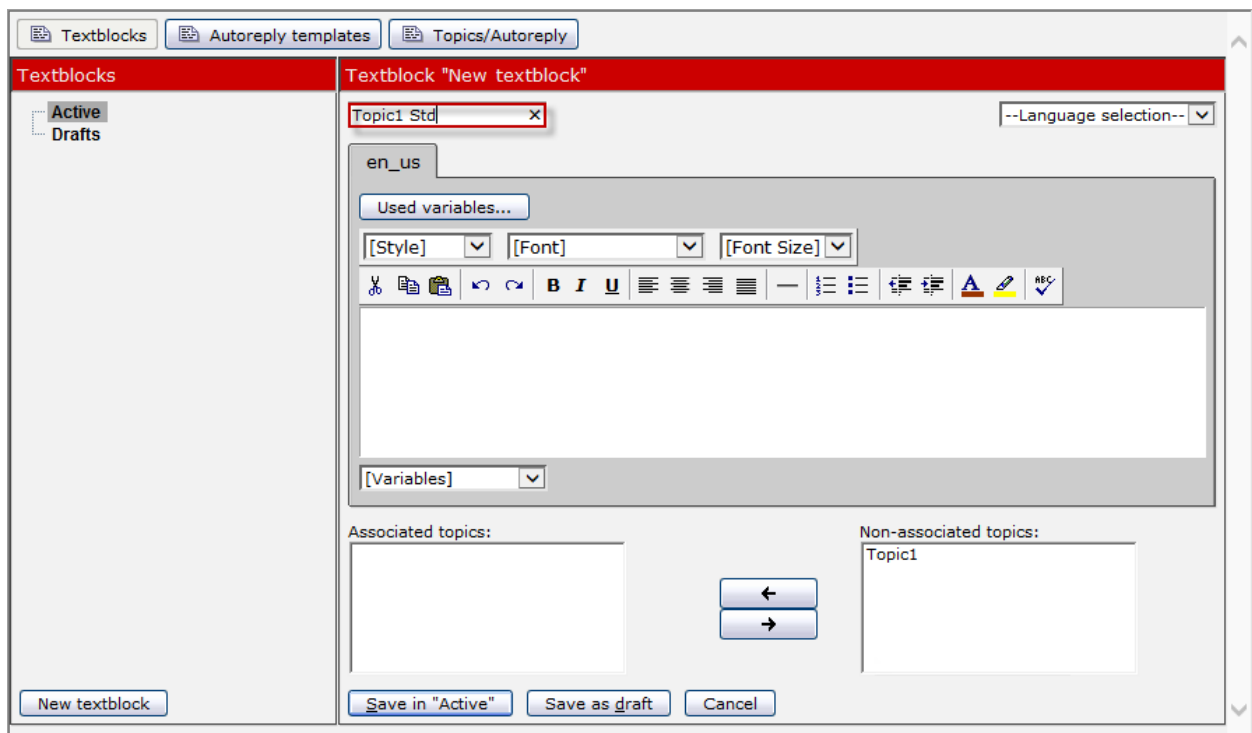
2. Click the **Textblocks** button.



3. Right click on the **Active** link and select **Create new textblock...**



4. Enter a name for the Textblock in the **New textblock** field. For example, **Topic1 Std.**



- From the **Language selection** drop down box select the required language. In this example, **English (UK)** has been selected.

The screenshot shows the 'Textblocks' window with the 'New textblock' dialog open. The 'Language selection' dropdown is open, showing a list of languages. 'English (UK)' is highlighted with a red box. The 'en_us' tab is currently selected in the dialog.

- Choose the **en_uk** tab.

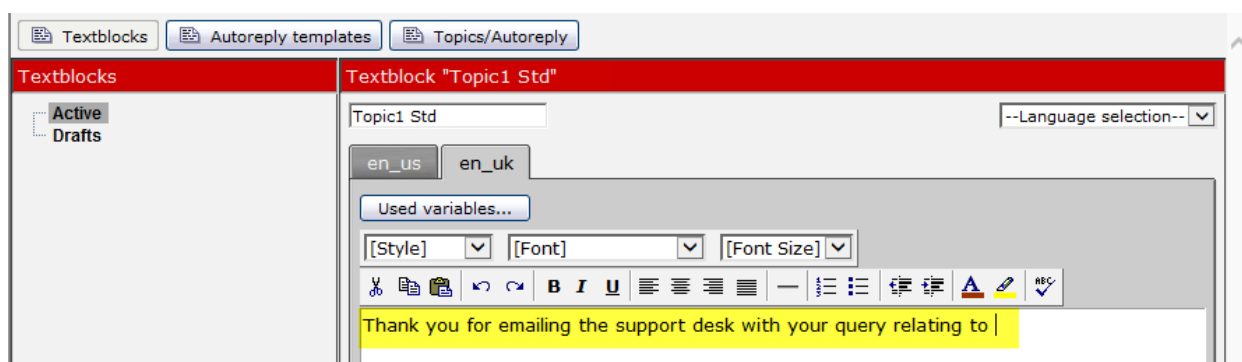
The screenshot shows the 'Textblocks' window with the 'New textblock' dialog open. The 'en_uk' tab is now selected, and the 'Language selection' dropdown is closed. The 'en_us' tab is also visible and highlighted with a red box.

In this example, a text block will be added that will include a number of variables. The text block to be configured is as follows:

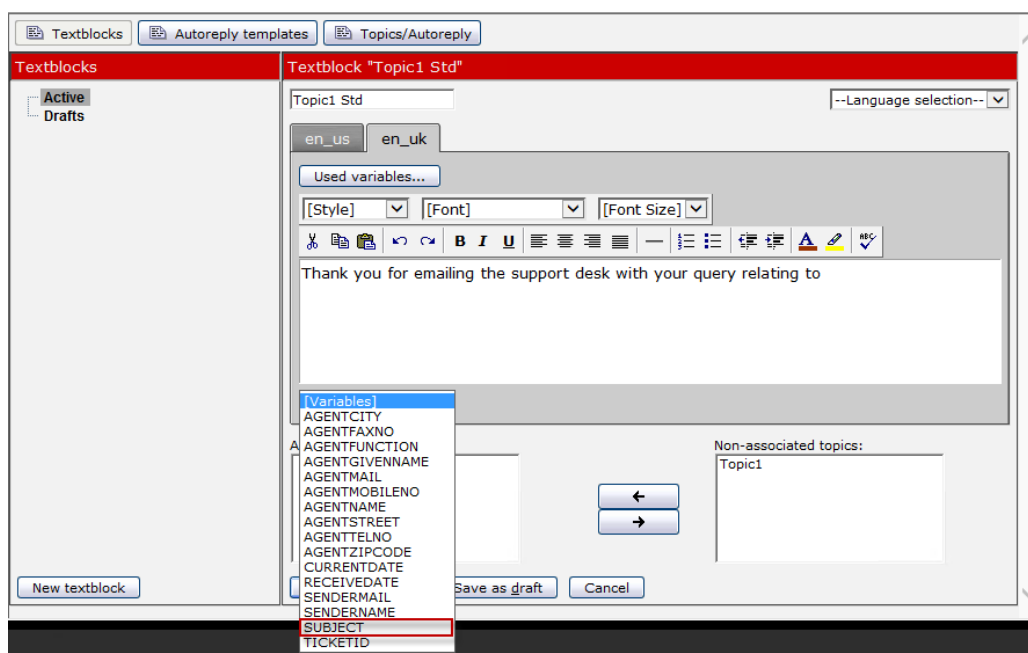
Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$.

Your email response was from \$AGENTNAME\$ sent on \$CURRENTDATE\$

1. In the text window enter the standard text that can be added to email replies. For example, **Thank you for emailing the support desk with your query relating to**



2. In this example, a variable will be added to reference a "Subject". Click after the text block text, and then click the **Variables** drop down list. Select **Subject**.



- Continue the text block with any additional text. In this example, the words **received on** have been added.

The screenshot shows the 'Textblocks' editor interface. On the left, there's a sidebar with 'Active' and 'Drafts' tabs. The main area is titled 'Textblock "Topic1 Std"'. It features a language selection dropdown set to 'en_us'. Below this is a 'Used variables...' section with dropdowns for '[Style]', '[Font]', and '[Font Size]'. A rich text editor toolbar is visible, followed by the text: 'Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on'. The words 'received on' are highlighted in yellow.

- Click the **Variables** drop down box and select **RECEIVEDDATE**.

This screenshot shows the same 'Textblock "Topic1 Std"' editor, but with the 'Variables' dropdown menu open. The menu lists various system variables, and 'RECEIVEDDATE' is highlighted with a red box. The text in the editor now reads: 'Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on'. At the bottom, there are buttons for 'New textblock', 'Save as draft', and 'Cancel'. A 'Non-associated topics:' section on the right shows 'Topic1'.

5. Continue the text with **Your email response was from**

The screenshot shows the 'Textblocks' editor interface. On the left, there's a sidebar with 'Active' and 'Drafts' tabs. The main area is titled 'Textblock "Topic1 Std"'. It contains a text editor with the following content:

Topic1 Std

en_us en_uk

Used variables...

[Style] [Font] [Font Size]

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from |

6. Click the Variables drop down box and select **AGENTNAME**.

The screenshot shows the 'Textblocks' editor interface. On the left, there's a sidebar with 'Active' and 'Drafts' tabs. The main area is titled 'Textblock "Topic1 Std"'. It contains a text editor with the following content:

Topic1 Std

en_us en_uk

Used variables...

[Style] [Font] [Font Size]

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from

[Variables]
 AGENTCITY
 AGENTFAXNO
 AGENTFUNCTION
 AGENTGIVENNAME
 AGENTMAIL
 AGENTMOBILENO
 AGENTNAME
 AGENTSTREET
 AGENTTELNO
 AGENTZIPCODE
 CURRENTDATE
 RECEIVEDATE
 SENDERMAIL
 SENDERNAME
 SUBJECT
 TICKETID

Non-associated topics:
 Topic1

New textblock Save as draft Cancel

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from \$AGENTNAME\$|

7. Continue the text with the words **sent on**.

The screenshot shows the 'Textblocks' editor interface. On the left, there's a sidebar with 'Active' and 'Drafts' tabs. The main area is titled 'Textblock "Topic1 Std"'. It contains a text editor with the following content:

Topic1 Std

en_us en_uk

Used variables...

[Style] [Font] [Font Size]

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from \$AGENTNAME\$ **sent on**

8. Click the **Variables** drop down list and select **CURRENTDATE**.

The screenshot shows the 'Textblocks' editor interface. The 'Variables' dropdown menu is open, displaying a list of variables. The variable 'CURRENTDATE' is highlighted in red. The text in the editor is:

Topic1 Std

en_us en_uk

Used variables...

[Style] [Font] [Font Size]

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from \$AGENTNAME\$ sent on

Variables:

- AGENTCITY
- AGENTFAXNO
- AGENTFUNCTION
- AGENTGIVENNAME
- AGENTMAIL
- AGENTMOBILENO
- AGENTNAME
- AGENTSTREET
- AGENTTELNO
- AGENTZIPCODE
- CURRENTDATE**
- RECEIVEDATE
- SENDERMAIL
- SENDERNAME
- SUBJECT
- TICKETID

Non-associated topics:

Topic1

Buttons: New textblock, Save as draft, Cancel

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from \$AGENTNAME\$ sent on \$CURRENTDATE\$

9. In this example, addition text has been added to state: **If you have any feedback please send an email to topic1@mail.abccompany.com**

The screenshot shows the 'Textblocks' management interface. On the left, there's a sidebar with 'Active' and 'Drafts' tabs. The main area is titled 'Textblock "Topic1 Std"'. It features a language selection dropdown set to '--Language selection--'. Below this are tabs for 'en_us' and 'en_uk'. A 'Used variables...' button is present. The text editor shows the following content:

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from \$AGENTNAME\$ sent on \$CURRENTDATE\$

If you have any feedback, please send an email to topic1@mail.abccompany.com

At the bottom, there's a '[Variables]' dropdown menu.

10. Now we can assign this Textblock to be used with a Topic. Choose **Topic1** under Non-associated topics.

This screenshot shows the same 'Textblocks' interface, but now for a 'New textblock'. The text content is identical to the previous one, but the feedback instruction is now a link: 'If you have any feedback, please send an email to topic1@mail.abccompany.com'. Below the text editor, there are two lists for topic assignment:

- Associated topics:** An empty list box.
- Non-associated topics:** A list box containing 'Topic1'.

Between these lists are left and right arrow buttons. At the bottom, there are three buttons: 'New textblock', 'Save in "Active"', and 'Save as draft', along with a 'Cancel' button.

11. Choose the **Associate topic** arrow.

The screenshot shows the 'Textblocks' editor interface. On the left, there's a sidebar with 'Active' and 'Drafts' tabs. The main area is titled 'Textblock "New textblock"'. It contains a text editor with the following content:

Topic1 Std

en_us en_uk

Used variables...

[Style] [Font] [Font Size]

Thank you for emailing the support desk with your query relating to \$SUBJECT\$ received on \$RECEIVEDATE\$

Your email response was from \$AGENTNAME\$ sent on \$CURRENTDATE\$

If you have any feedback, please send an email to topic1@mail.abccompany.com

[Variables]

Associated topics:

Non-associated topics:

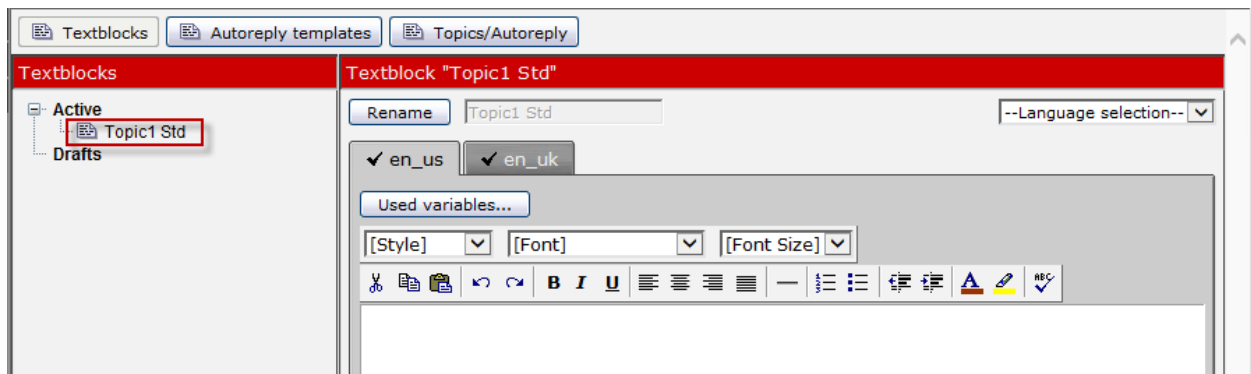
Topic1

At the bottom, there are three buttons: 'New textblock', 'Save in "Active"', and 'Save as draft', along with a 'Cancel' button. The 'Associate topic' arrow (left-pointing arrow) is highlighted with a red box.

12. Click the **Save in "Active"** button.

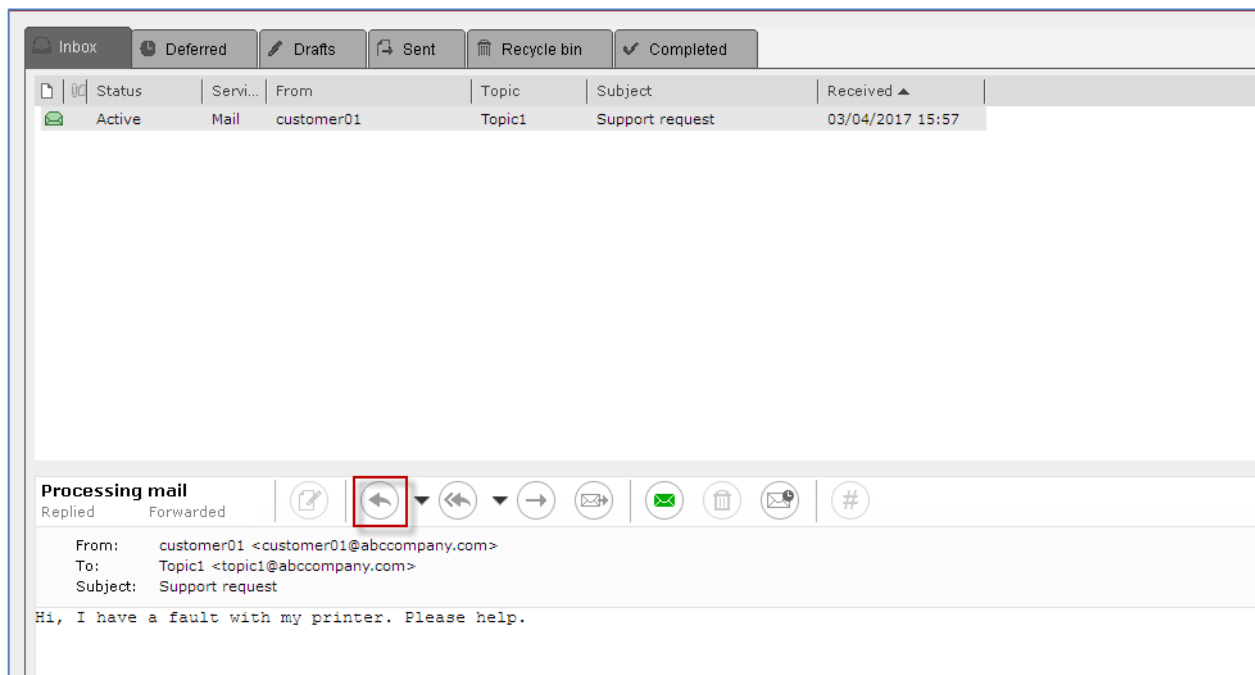
The screenshot shows the 'Textblocks' editor interface. On the left, there's a sidebar with 'Active' and 'Drafts' tabs. The main area is titled 'Textblock "Topic1 Std"'. It contains the same text editor as the previous screenshot, but the content is now 'Topic1 Std'. The 'Associated topics' list now contains 'Topic1', and the 'Non-associated topics' list is empty. The 'Save in "Active"' button is highlighted with a red box.

13. The new **Textblock** is displayed.



How to use a textblock

1. When an Agent receives an email and marks it as active, they press the reply button on their user interface.



2. The Textblocks are displayed on the right hand side of the screen.

The screenshot shows the 'Reply mail' window in the Avaya IP Office interface. The window has a header with 'Replied' and 'Forwarded' buttons, and a toolbar with icons for email actions. The main area displays the email content, including the 'From:' field with a 'To...' button, the 'Subject:' field, and a rich text editor with a toolbar. The email content is as follows:

-----Original Message-----
 From: customer01 <customer01@abccompany.com>
 Received: 03/04/2017 15:57
 To: Topic1 <topic1@abccompany.com>
 Cc:
 Subject: Support request

Hi, I have a fault with my printer. Please help.

On the right side of the window, there is a 'Textblocks' sidebar. It contains a 'Language:' dropdown menu set to 'English (UK)', a 'Topic:' dropdown menu set to 'Topic1', and a list of text blocks with 'Topic1 Std' selected. An 'Add' button is located at the bottom of the sidebar.

Note: The agent will require the **Use textblocks** privilege to use this feature

The screenshot shows the 'Agent privileges' dialog box. The 'E-mail' tab is selected and highlighted with a red box. The dialog box has a title bar with a green icon and a close button. The main area is divided into two columns: 'Agent' and 'Configuration'. The 'Agent' column has a 'UI' sub-tab. The 'Configuration' column has a 'Variables' sub-tab. The 'Agent' column contains the following checkboxes:

- ☐ E-mail Administrator
- ☐ Keyword based E-mail routing
- ☐ E-mail Supervisor
- ☒ Use textblocks
- ☐ Agent queue view
- ☐ Delete e-mails
- ☐ E-Mail Archive

The 'Configuration' column contains the following checkboxes:

- ☐ Textblock administrator
- ☐ Defer e-mails
- ☐ Print e-mails
- ☐ Automatic sign on
- ☐ Reply as agent

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog box.

- The agent can fill out the response before using the textblock or use a textblock for the response. Click the required Textblock and click the **Add** button.

Reply mail
Replied Forwarded

From: Topic1
To: customer01 <customer01@abccompany.com>
Subject: RE: Support request

Normal Verdana Small

Hi, thanks for the email. Can you please send me your printers serial number and purchase date.

-----Original Message-----
From: customer01 <customer01@abccompany.com>
Received: 03/04/2017 15:57
To: Topic1 <topic1@abccompany.com>
Cc:
Subject: Support request

Hi, I have a fault with my printer. Please help.

Textblocks
Language: English (UK)
Topic: Topic1
Topic1 Std
Add

- The Textblock is now inserted into the email response. Select the **Send** button to send the email to the customer.

Reply mail
Replied Forwarded

From: Topic1
To: customer01 <customer01@abccompany.com>
Subject: RE: Support request

Normal Verdana Small

Hi, thanks for the email. Can you please send me your printers serial number and purchase date.

Thank you for emailing the support desk with your query relating to Support request received on 03/04/2017

Your email response was from Agent1 sent on 03/04/2017

If you have any feedback, please send an email to topic1@mail.abccompany.com

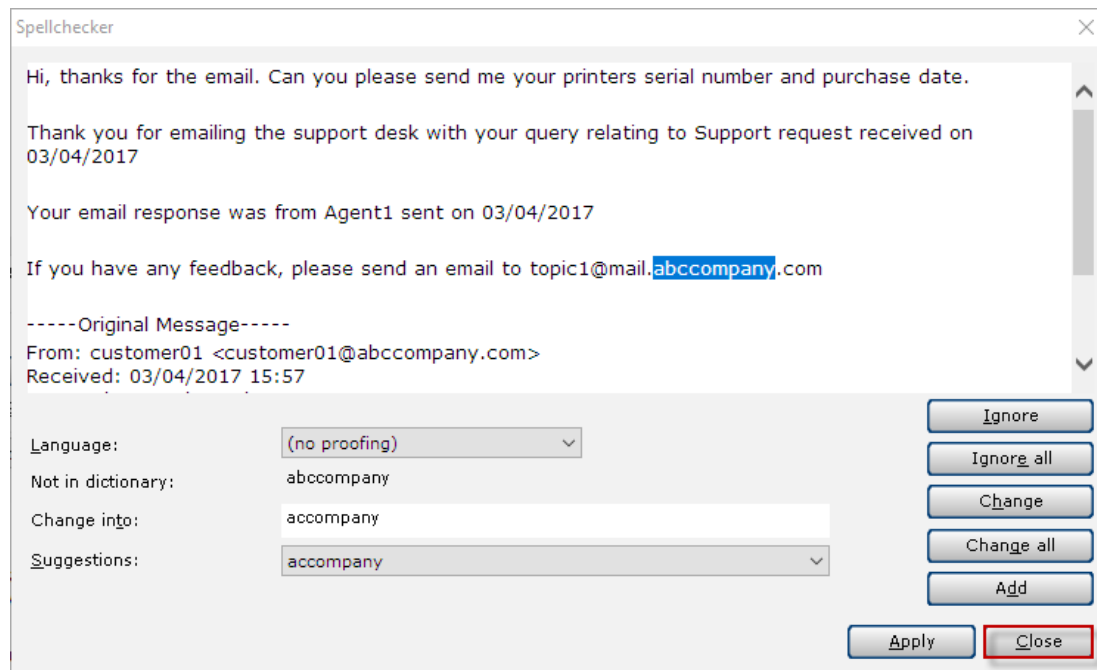
-----Original Message-----
From: customer01 <customer01@abccompany.com>
Received: 03/04/2017 15:57
To: Topic1 <topic1@abccompany.com>
Cc:
Subject: Support request

Hi, I have a fault with my printer. Please help.

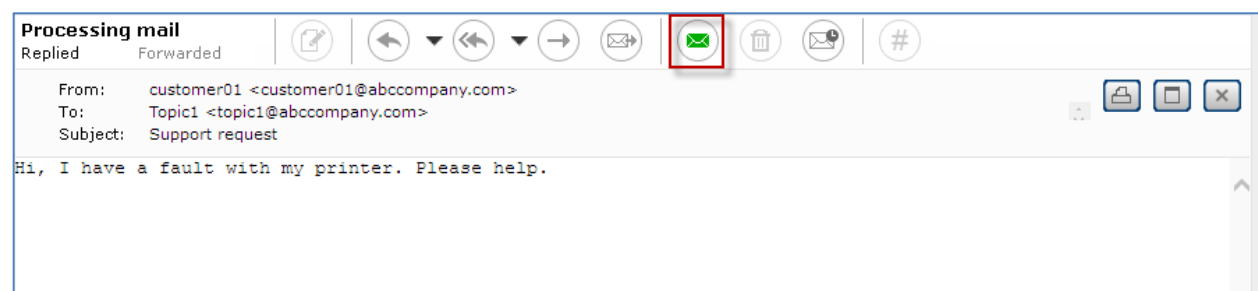
Textblocks
Language: English (UK)
Topic: Topic1
Topic1 Std
Add

5. The Agent will then be prompted with the Spellchecker if an error is found. When the spell checking is complete choose the **Close** button. If the spell checker was used the Agent will need to choose the **Send** button again.

Note: This is valid only if automatic spell check is enabled on system, profile or agent. By default, spell check is disabled.



6. The Agent can now mark the email as Complete.



7. The customer receives the email containing the text block.

Archiving / Deleting the Email Database

Emails can be archived to the umarchive database and removed from the c3000 database by using an archive schedule.

When using the archive function only emails that are in the completed state will be moved into the umarchive database. This will decrease the size of the c3000 database but increase the size of the umarchive database. From release 9.1.6 a new feature called Mail Exporter can now be used for archiving emails and is explained in its own section in this guide.

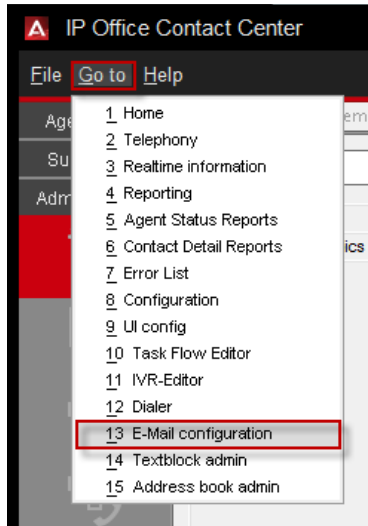
The following kinds of emails are not considered by archiving function:

- emails sent to recycle bin

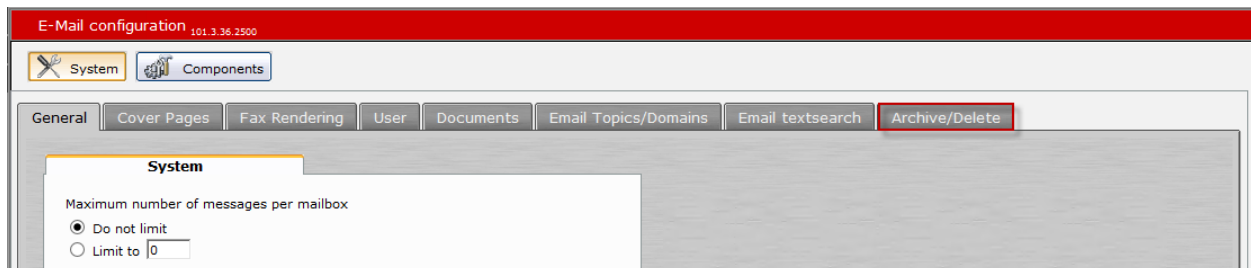
- emails directly sent by an agent (replies to normally routed mails are taken into account by archiving)

Archiving Emails process

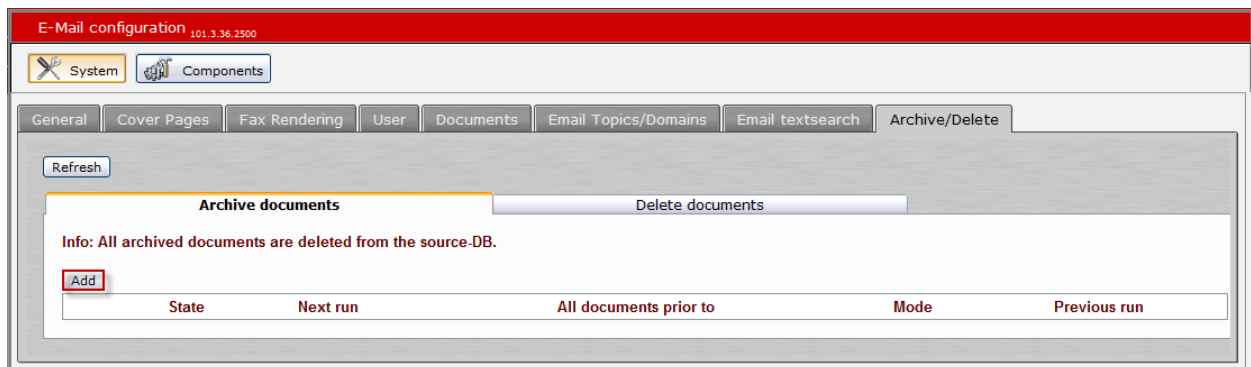
1. Click the **Go to** menu and then select **E-Mail configuration**.



2. Click the **Archive/Delete** tab.



3. Click the **Add** button.



- You can now create a single or reoccurring archive that will run after a defined period of minutes/hours/days/weeks or months.

E-Mail configuration 101.3.36.2500

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

Archive documents Delete documents

Info: All archived documents are deleted from the source-DB.

Add

State	Next run	All documents prior to	Mode	Previous run
☒ ☐ ready activate ☒	4/4/17 9:57 AM ☐ once ☐ repeat after 1 day(s) Start: 4/4/17 9:57:00 AM End: 4/4/17 9:57:00 AM	4/3/17 9:57 AM	once	

All documents older than 1 day(s)

- Enter the required time and date for the archive and click the **Add** button. In this example, an archive has been created that will repeat daily at 1 am from the 1st May 2017 and will move all documents older than 30 days to the archive database.

E-Mail configuration 101.3.36.2500

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

Archive documents Delete documents

Info: All archived documents are deleted from the source-DB.

Add

State	Next run	All documents prior to	Mode	Previous run
☒ ☐ ready activate ☒	4/4/17 10:09 AM ☐ once ☒ repeat after 1 day(s) Start: 5/1/17 01:00:00 AM End: 5/1/17 01:00:00 AM		once	

All documents older than 30 day(s)

Date -- Webpage Dialog

May 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

- Click the green tick to add the schedule.

E-Mail configuration 101.3.36.2500

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

Archive documents Delete documents

Info: All archived documents are deleted from the source-DB.

Add

State	Next run	All documents prior to	Mode	Previous run
ready	4/4/17 10:09 AM	4/3/17 10:09 AM	once	

activate ☒

repeat after 1 day(s)

Start: 5/1/17 01:00:00 AM

End:

All documents older than 30 day(s)

- The archive schedule is displayed.

E-Mail configuration 101.3.36.2500

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

Archive documents Delete documents

Info: All archived documents are deleted from the source-DB.

Add

State	Next run	All documents prior to	Mode	Previous run
ready	5/1/17 1:00 AM	4/1/17 1:00 AM	every 1 days	

- When logged in as that User, to view the E-Mail Archive, click **E-Mail client** followed by **View** and then select **Visible folders**.

IP Office Contact Center

File Go to E-Mail Client Help

Agent Port

Import address book

Create address import file

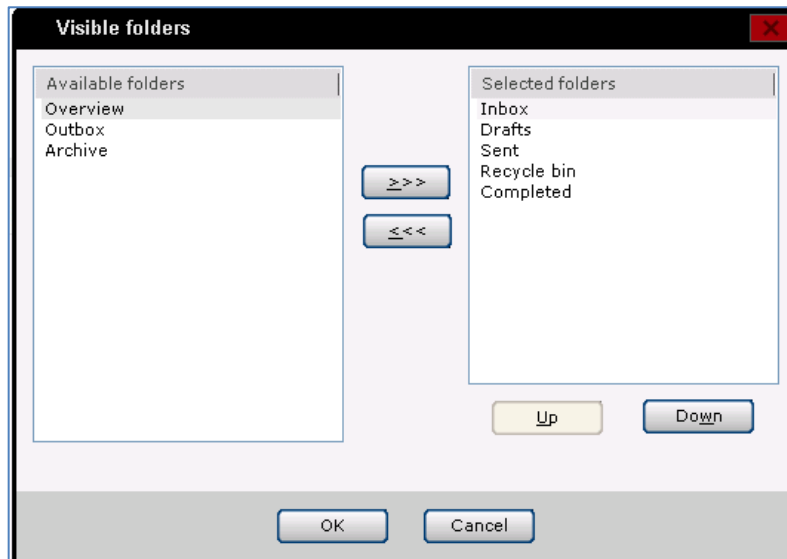
View Visible folders

Additional options Columns...

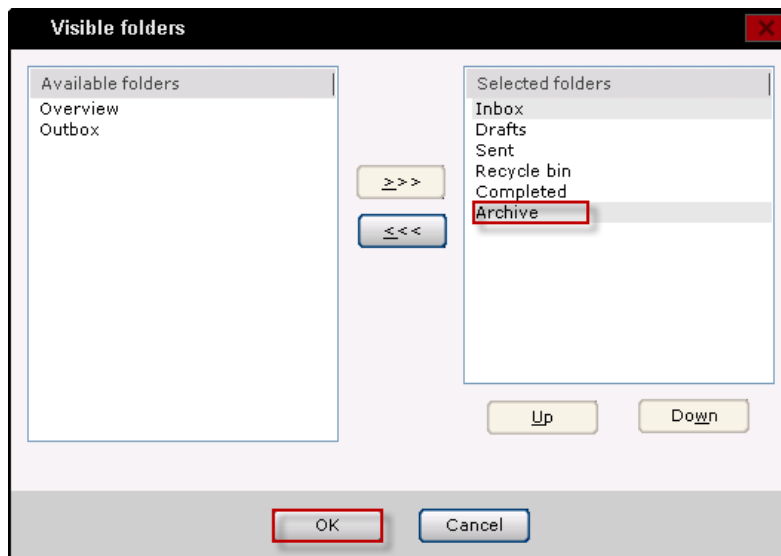
Recycle bin Completed

Status	Service	From	Topic	Subject	Received
Read	Mail	Customer	Topic1	14:21	6/16/2014 2:22...

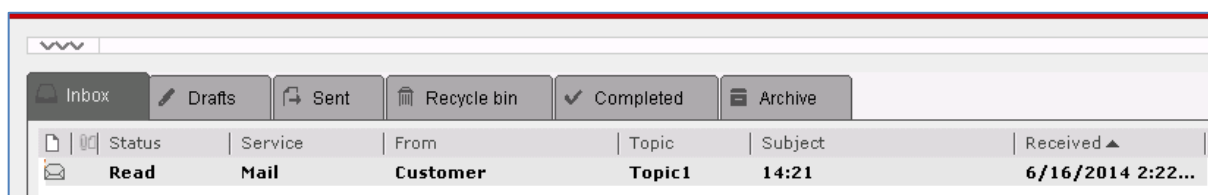
9. The default Visible folders are displayed.



10. Select the **Archive** folder and Click the >>> button to move the folder to the **Selected folders** view window and then click the **OK** button.



11. The Archive view will now be visible.



Deleting Emails process

WARNING! DELETED EMAILS CANNOT BE RESTORED

Delete Job

Automatic deletion of emails only consider emails in database c3000. It has no impact on emails that have already been archived.

Therefore, in the email's Archive tab, an email will never disappear even when a deletion job is executed. In addition, emails in the recycle bin are not considered by 'delete document' tasks. When an email is deleted by a delete job, it is removed from database c3000 (not moved to recycle bin) and there is no possibility to restore it.

Note: You cannot run a delete documents task, if you currently have an active archive task. Make sure your archive task is deactivated.

E-Mail configuration 100.3.26 2.7200

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

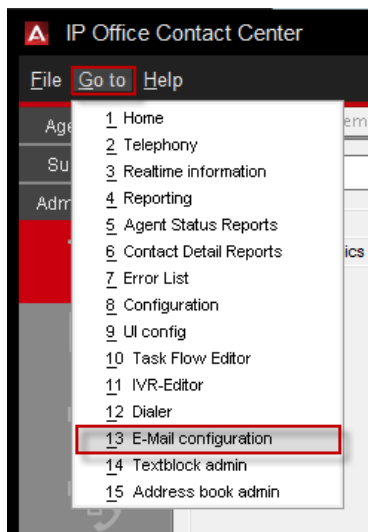
Archive documents **Delete documents**

Info: All archived documents are deleted from the source-DB.

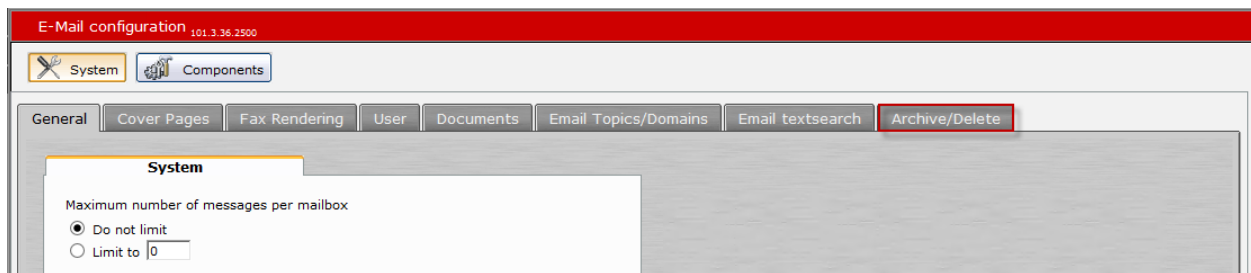
Add

State	Next run	All documents prior to	Mode	Previous run
deactivated			every 1 days	

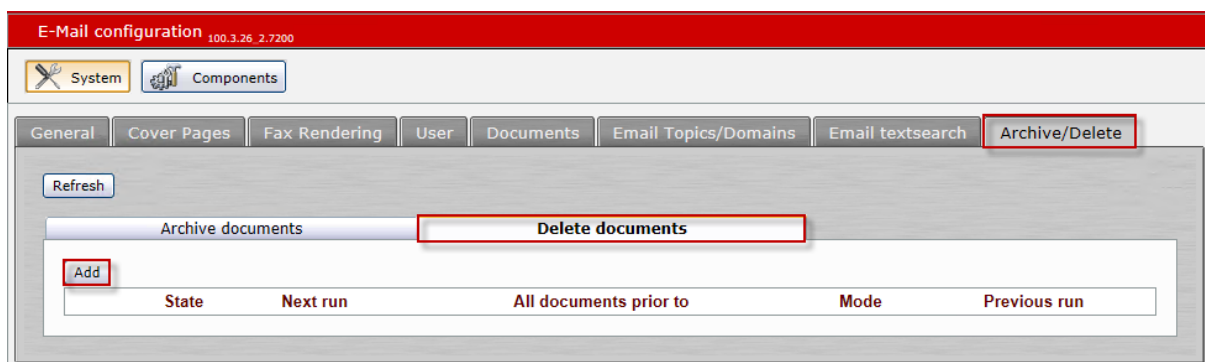
1. Click the **Go to** menu and then select **E-Mail configuration**.



2. Click the **Archive/Delete** tab.



3. Choose the **Delete documents** tab. Then select the **Add** button.



- Configure the delete task as you would an archive task. Once configured choose the **green tick** to continue

E-Mail configuration 100.3.26 2.7200

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

Archive documents **Delete documents**

Add

State	Next run	All documents prior to	Mode	Previous run	
	ready	18/11/16 14:56	17/11/16 14:56	once	
☒ once ☐ repeat after 1 day(s) Start: 18/11/16 14:56:00 End:					
activate ☒ All documents older than 1 day(s)					

- The new delete documents task schedule can now be seen.

E-Mail configuration 100.3.26 2.7200

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

Archive documents **Delete documents**

Add

State	Next run	All documents prior to	Mode	Previous run	
	ready	18/11/16 16:10	17/11/16 16:10	once	18/11/16 16:05

- Once the task has finished the **state** will update.

E-Mail configuration 100.3.26 2.7200

System Components

General Cover Pages Fax Rendering User Documents Email Topics/Domains Email textsearch Archive/Delete

Refresh

Archive documents **Delete documents**

Add

State	Next run	All documents prior to	Mode	Previous run	
	finished			once	18/11/16 16:10

Mail Exporter.

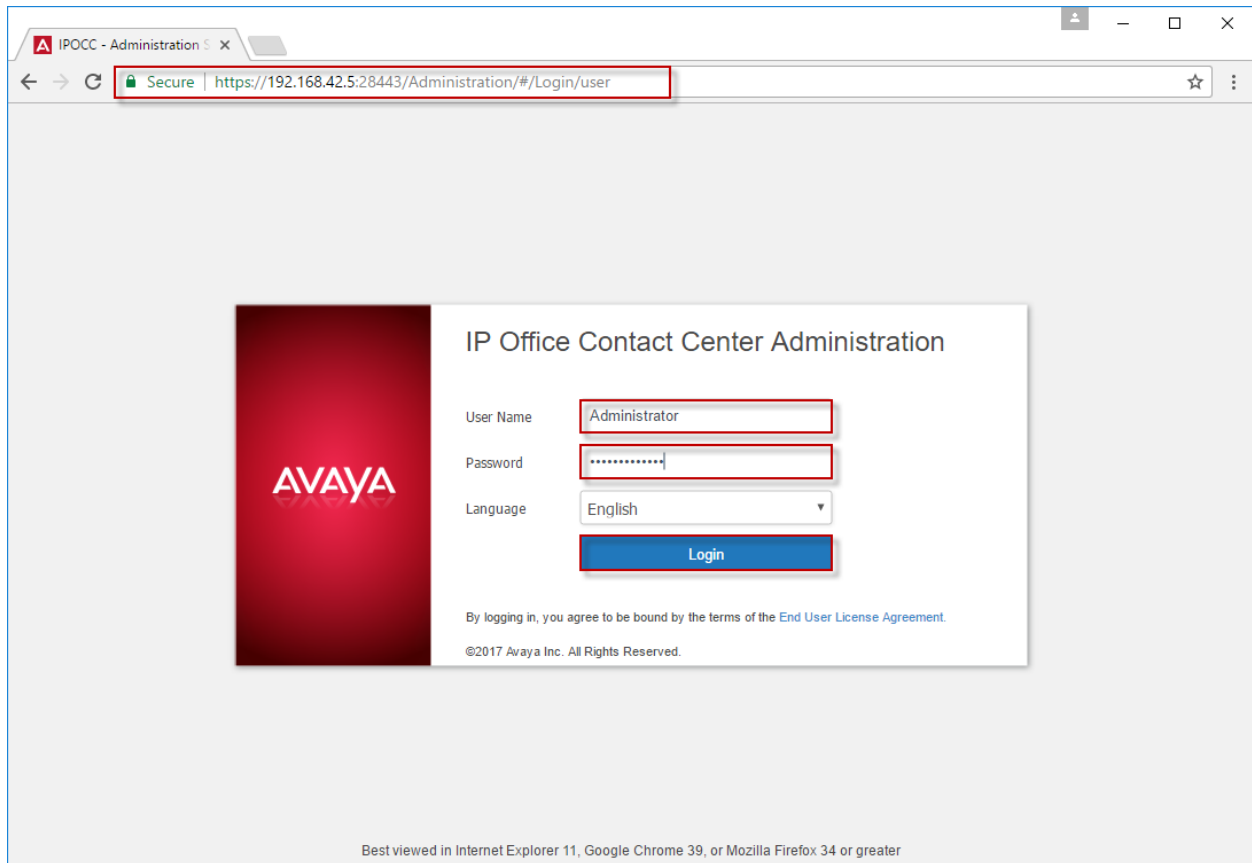
There is a new feature called Mail Exporter that automatically archives your emails into files that can be viewed offline in a 3rd party e-mail program such as Outlook, or Thunderbird.

Once an email has resided in the IP Office Contact Center archive database and is older than 100 days (timestamp from initial email arrival), they will be zipped into files (Maximum 250MB each) and moved from the archive database. The customer then has 100 days to obtain the zipped file before it is **deleted** from the server.

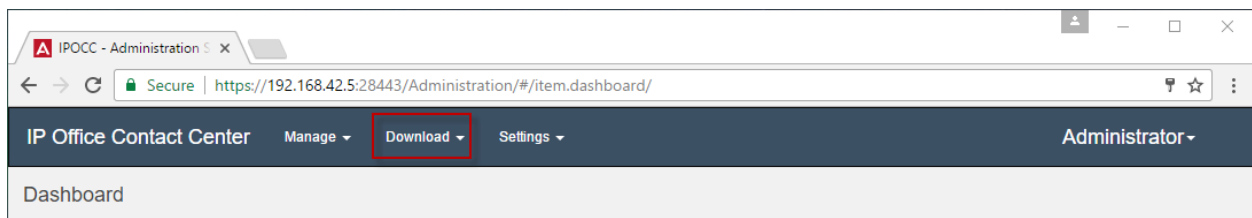
This schedule is processed automatically on the archive database, but the schedule to move the file to the archive database must first be configured manually.

Access to the zipped email files:

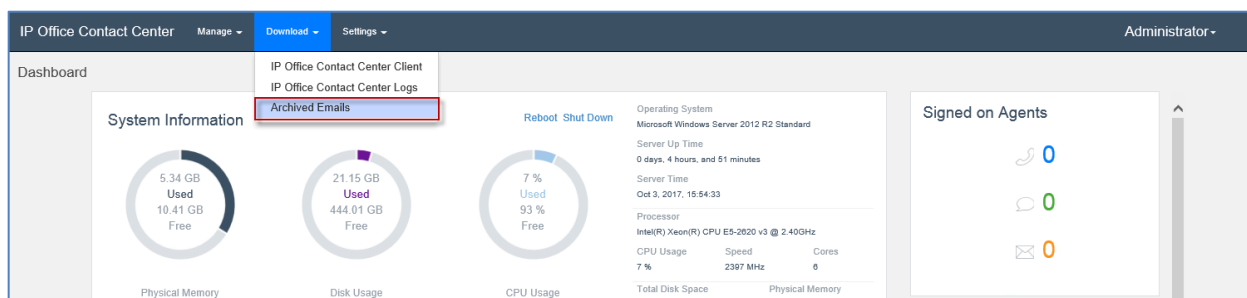
1. Using a browser enter **https://XXX.XXX.XXX.XXX:28433/Administration** (Where XXX.XXX.XXX.XXX is the IP address of the IP Office Contact Center server). Then login with the User name **Administrator**.



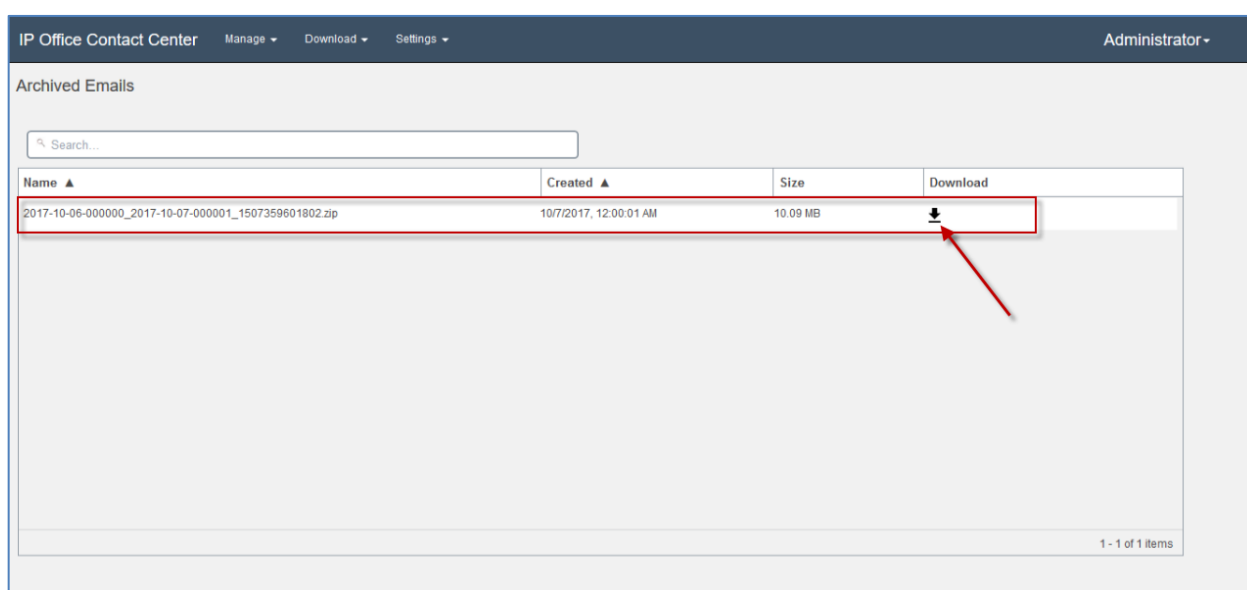
2. Choose the **Download** option.



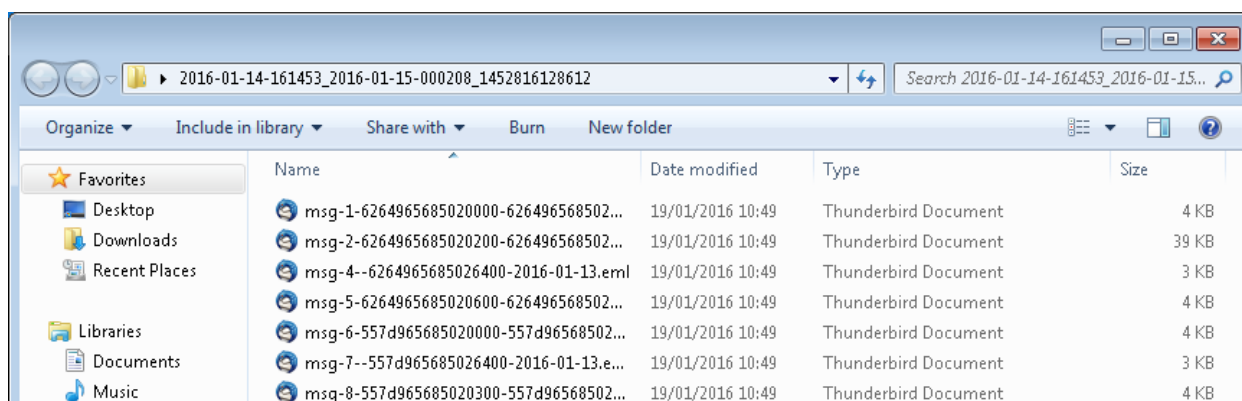
3. Choose **Archived E-Mails**.



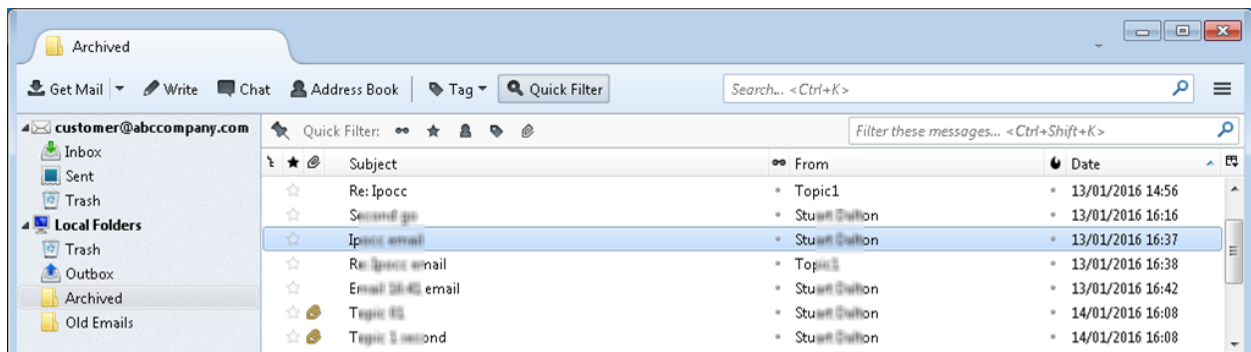
4. All of the archived E-Mails will now be shown and can be downloaded from the server.



5. Then extract the contents of the zipped file and copy into your 3rd party email program.



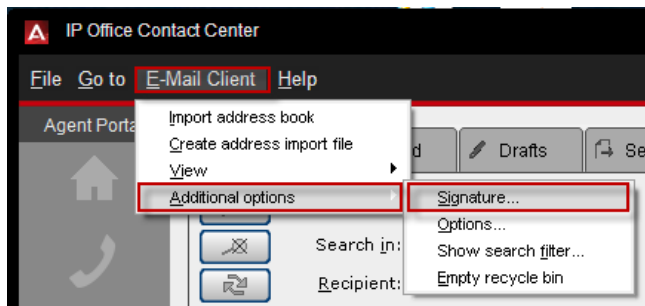
6. The archive can now be viewed using an email program.



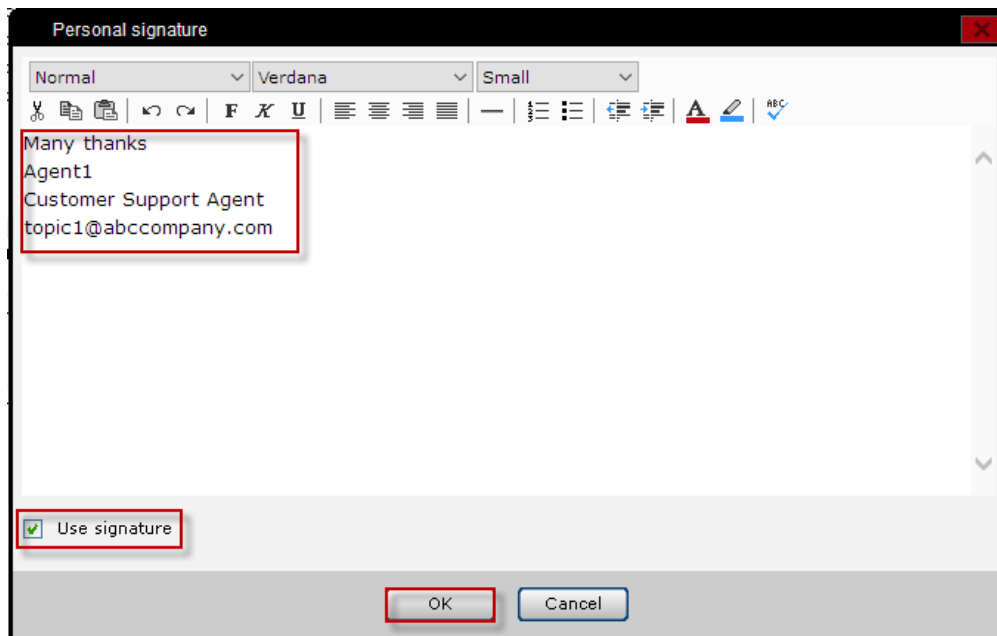
Email Personal Signature

Each individual agent can have a personal email signature.

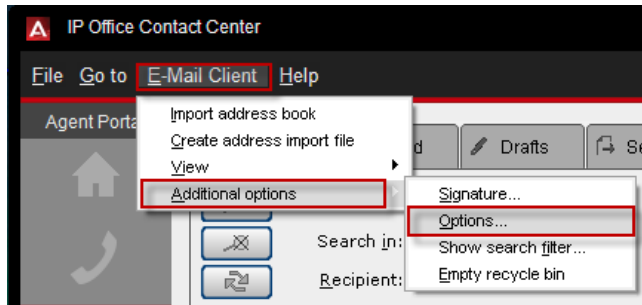
1. From agents Email User Interface, select **Email Client** and click **Additional Options** followed by **Signature**.



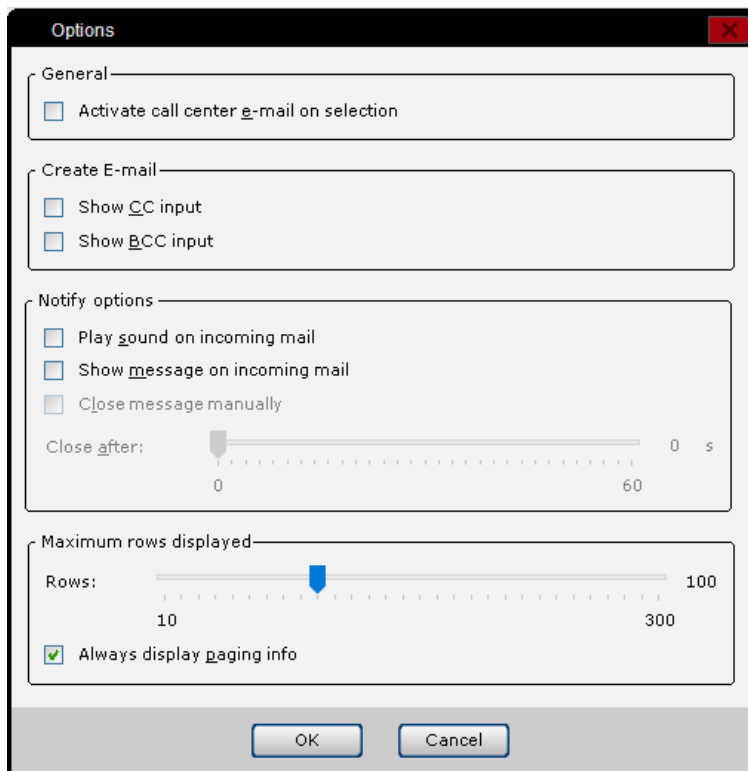
2. The agent's personal signature can be created. Enter the required text, choose **Use signature** and then click the **OK** button.



3. Additional Email options are available. Select **Email Client**, then **Additional options** followed by **Options**.



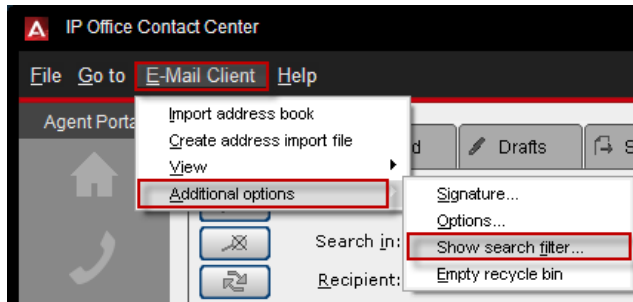
4. A number of options are available for selection.



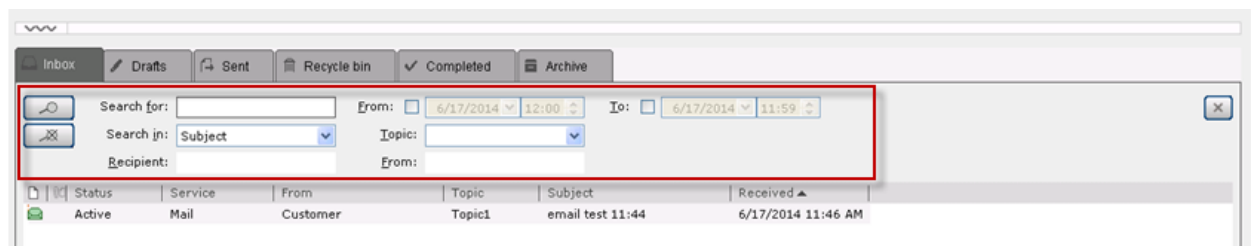
Show search filter

Agent search filters allow the Agent to filter the components folders to find a specific email.

1. Select **Email Client**, then **Additional Options** followed by **Show search filter**.



2. The search parameters are then available for use by the agent.

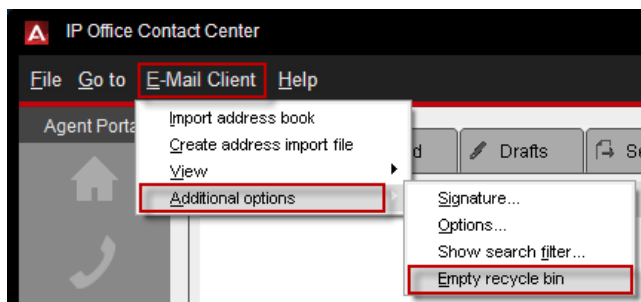


Recycle Bin

Manually deleted emails (deleted by agent) are sent to the recycle bin. Each agent has their own recycle bin. Each recycle bin is never purged or deleted automatically.

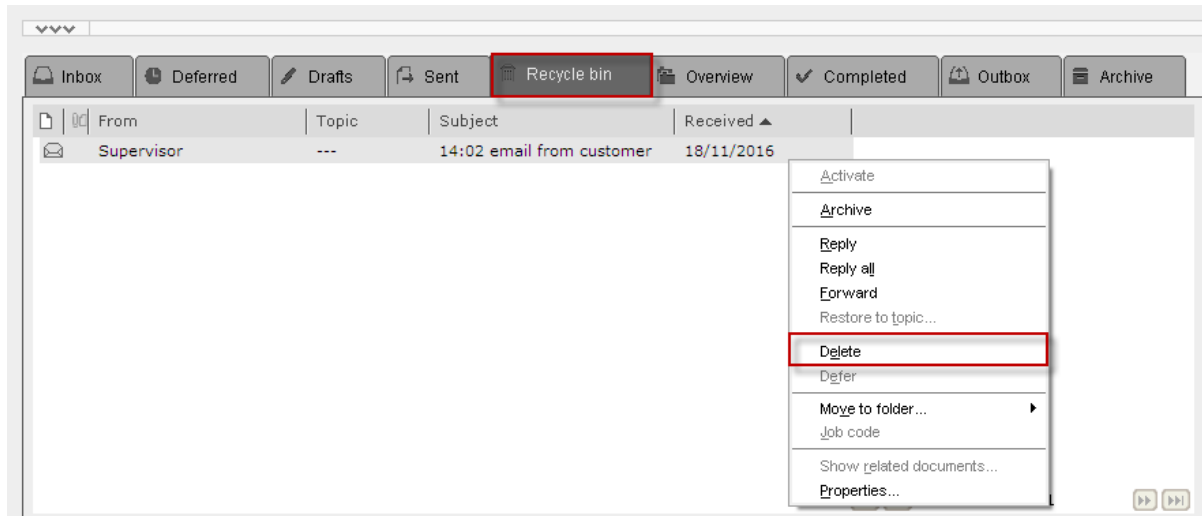
Because emails in recycle bin are not taken into account by archive/delete jobs it is in the agents responsibility to delete them on a regular base. Otherwise they will never get deleted and waste space on disk.

To empty the email recycle bin, select **Email Client**, then **Additional Options** followed by **Empty recycle bin**.



Or each email can be deleted from the recycle bin manually, while the Agent is viewing the recycle bin.

To delete an email while viewing the recycle bin, just right hand mouse button on the email and choose the **Delete** option.

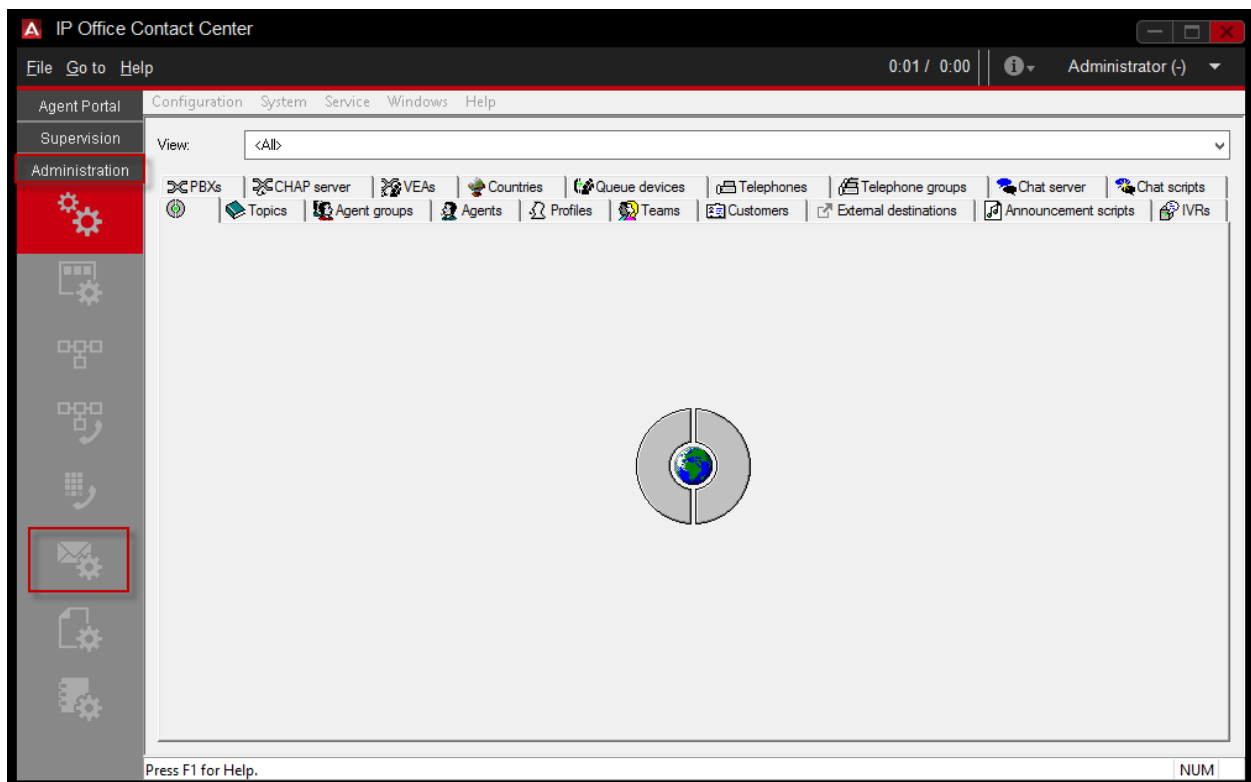


Email Security

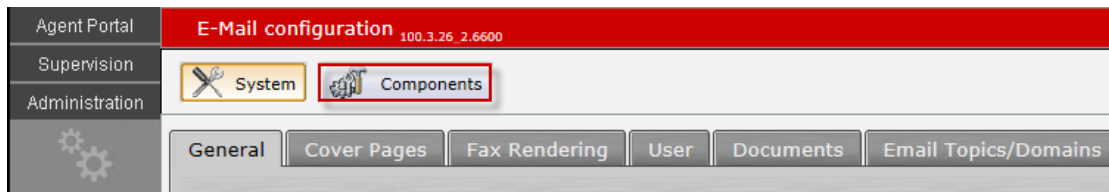
To increase security and help prevent SPAM emails, it is recommended that you do not allow your own specific domains or IP addresses to send E-mails into the IP Office Contact Center. To allow this, you can block domains and IP addresses. As an alternate to this you can activate valid sender domains and this will only allow traffic for the entered valid domain.

To enhance security, you can configure the rules. Proceed as follows:

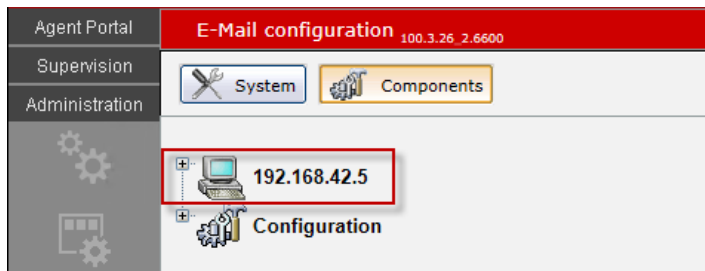
1. Under **Administration** choose **E-mail configuration**.



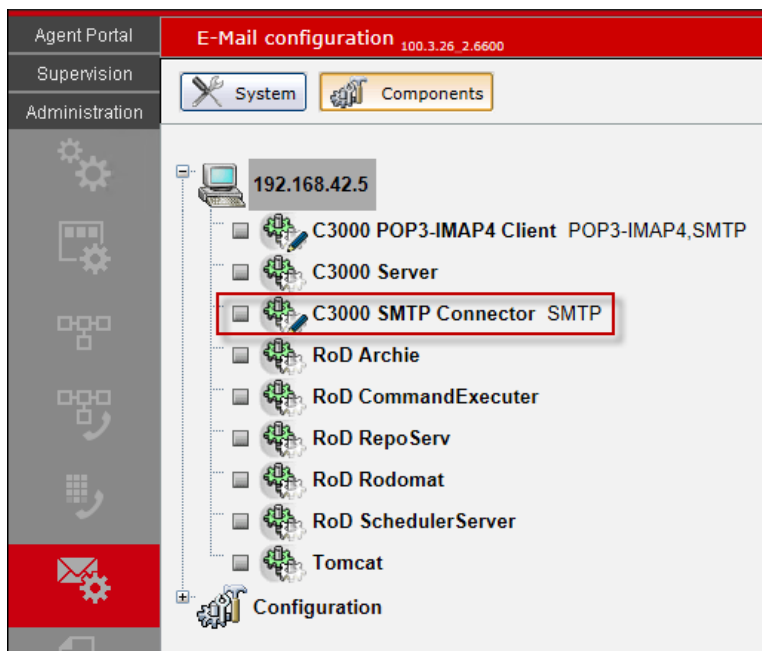
2. Choose the **Components** button.



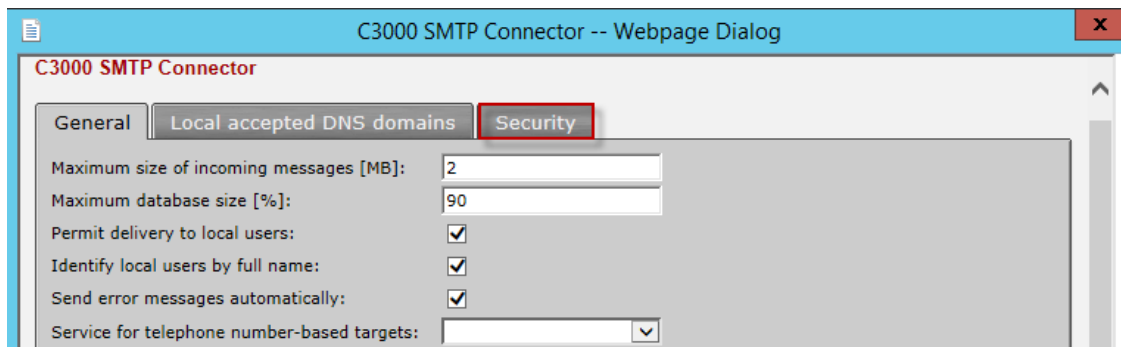
3. Choose your **Server** (This will be shown as the IP address of your IP Office Contact Center server) to expand the options.



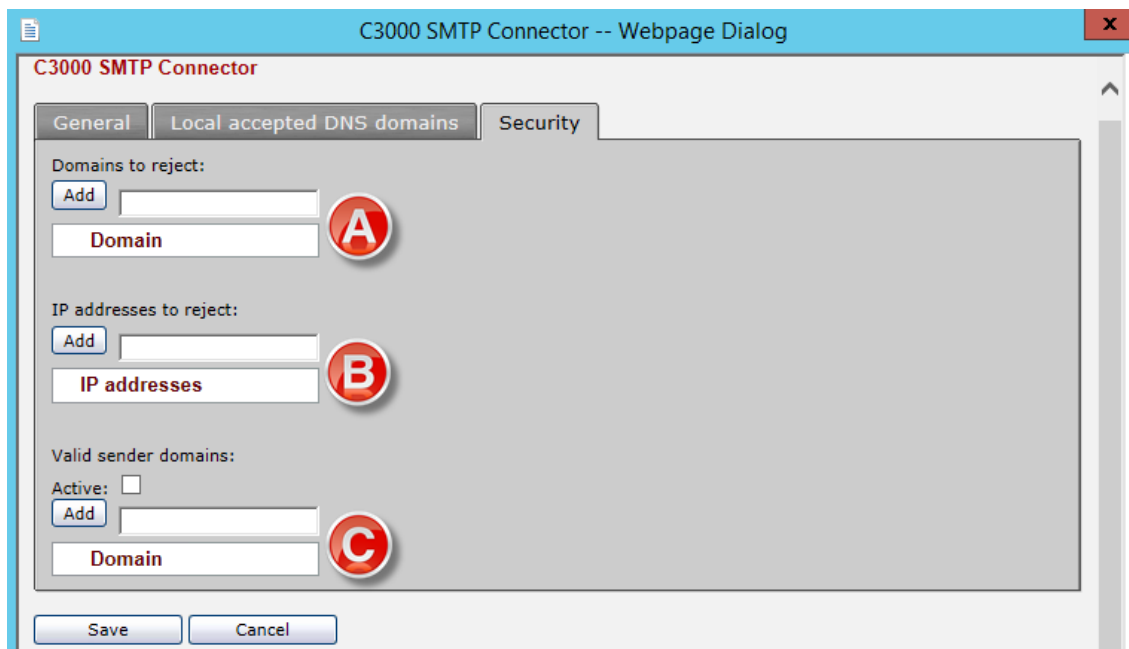
4. Choose the **C3000 SMTP Connector**.



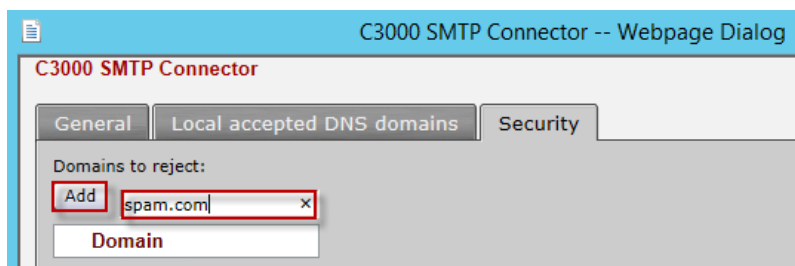
5. Choose the **Security** tab.



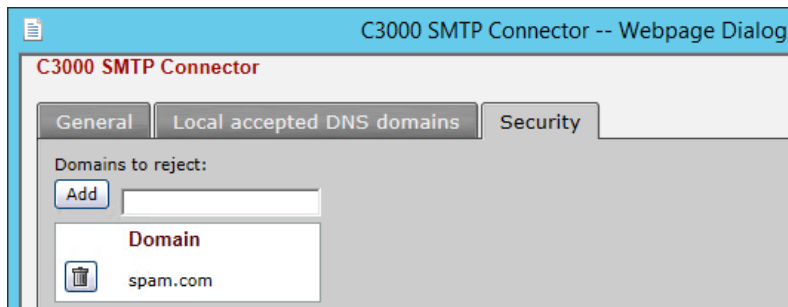
6. In the **Security** tab, you can add or remove the necessary **Domains**, **IP addresses** or **Valid sender domains** to secure up your IP Office Contact Center E-mail.



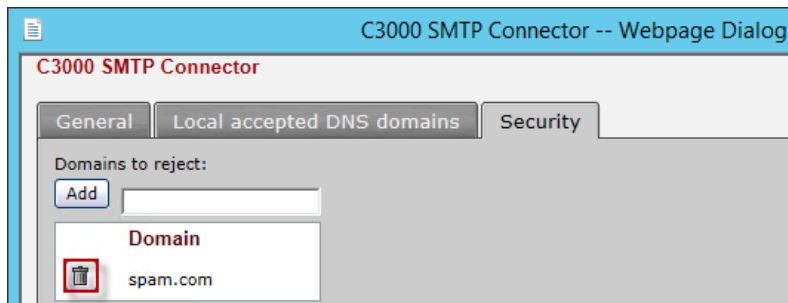
- A. To add a Domain from which emails will be rejected, type the **domain name** in the field above Domain and click the **Add** button.



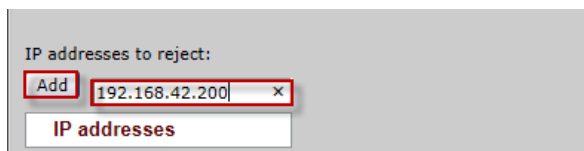
Any emails sent from this domain, will now be rejected. You may repeat the process and add more Domains to be rejected.



If required, the **Bin** icon can be used to delete the entry



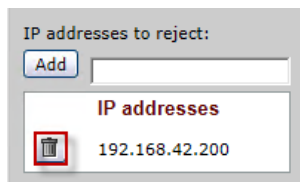
- B. To add an IP address from which emails will be rejected, type the **IP address** in the field above IP addresses and click the **Add** button.



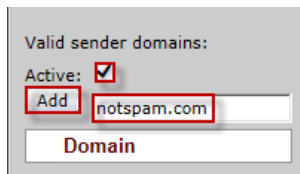
Any emails sent from this IP Address, will now be rejected. You may repeat the process and add more IP Addresses to be rejected.



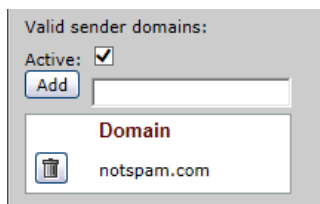
If required, the **Bin** icon can be used to delete the entry



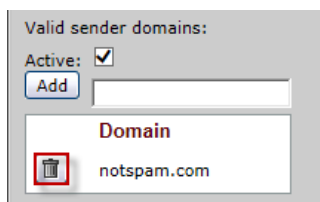
- C. To add a Valid sender domain from which emails will be accepted, choose the **Active** tick box and then type the **domain name** in the field above Domain and click the **Add** button.



All emails will be blocked except for emails sent from this domain. You may repeat the process and add more Valid sender domains to be accepted.

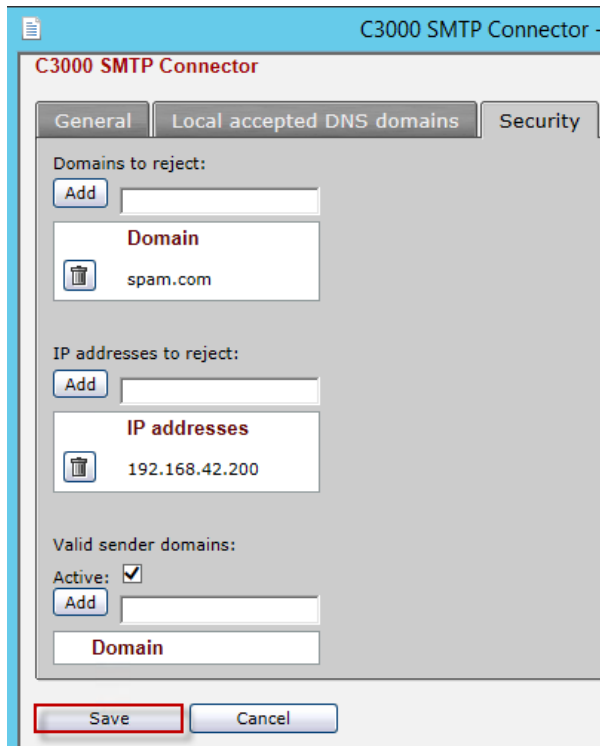


If required, the **Bin** icon can be used to delete the entry

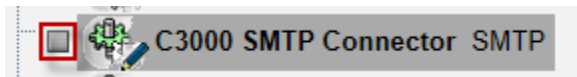


7. Click **Save** to confirm your security settings.

Note: You should not have Valid sender domains marked as Active, if you are using Domains to reject or IP addresses to reject entered.



8. You now need to stop and start the C3000 SMTP Connector to activate the changes.
Click the **Stop** button



9. Click the **Start** button to start the service.



McAfee firewall settings

If you are using McAfee firewall, a number of steps are required to allow the email component to function.

1. Right-click McAfee on the task bar.
2. Select VirusScan Console.
3. Double-click Access Protection.
4. Select for left menu, Categories>Anti-virus Standard Protection
5. Select Prevent mass mailing worms from sending email.
6. Click Edit.
7. Add SMTPConnector.exe. Within the “processes to exclude” textbox, scroll to the bottom, separated with a comma, Add the required processes: SMTPConnector.exe, IVR.exe, Scheduler.exe, Mailsend.exe

Possible required processes for email configuration:

- IVR.exe: for voice mail
- Scheduler.exe: for sending automatically generated reports
- Mailsend.exe: for sending emails about alarm events using TTrace
- SMTPConnector.exe: for email routing through SMTP

IP Office Contact Center Chat Service

Required Information

To successfully utilize the IP Office Contact Center's Chat service there are a number of factors that should be considered. Some of these details should be checked and discussed with the customer:

Chat Considerations

- Are there adequate Multichannel Licenses available for the agents who will use IP Office Contact Center's Chat Services?
- Will the customer be using the one-X Portal service or their own XMPP (Jabber) service can be utilized with IP Office Contact Center's Chat Service to supply the XMPP service?
- Have the following Ports been configured
5222/TCP (Client-to-Server)
5269/TCP (Server-to-Server)
5223/TCP Legacy-SSL: (SSL)
- Have Agent Privileges been assigned for Chat?
- The available Privileges include:

Agent Tab – Chat Section

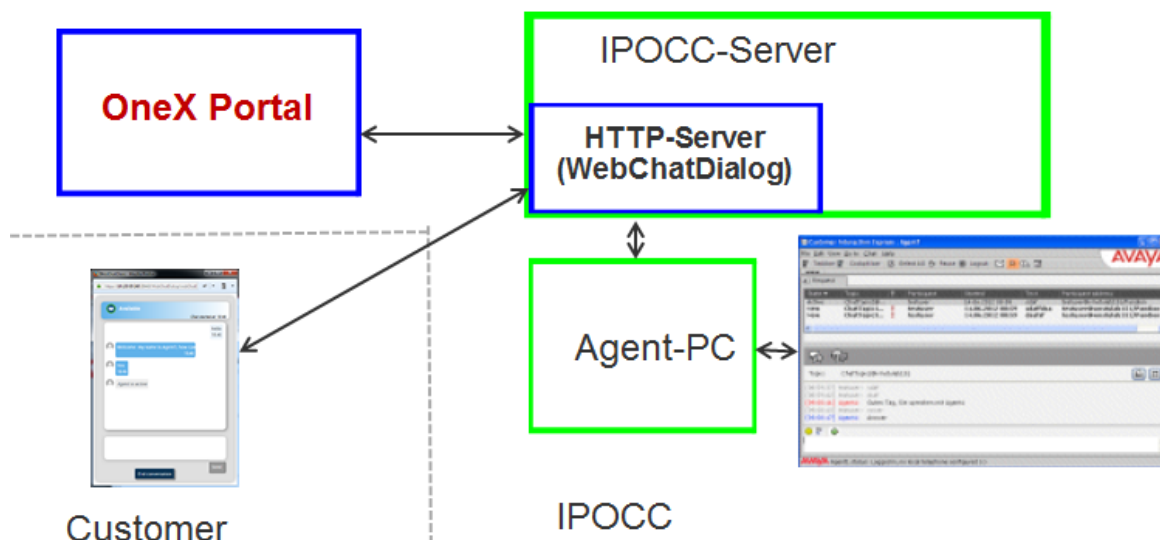
- Automatic Sign On - The agent will be automatically signed on to all Chat Agent Groups to which they have been assigned
- Advanced Archive View - The agent has the option to use the chat archive.

Configuration Tab

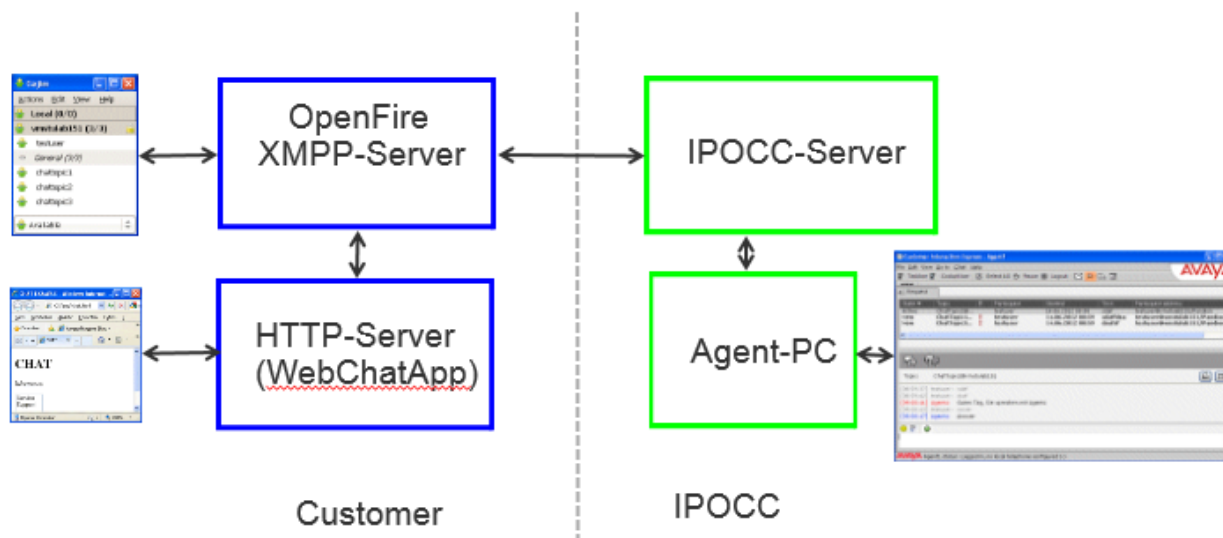
- Chat Server - Allows the agent to configure Chat Server settings.
- Chat Settings - Allows the agent to configure Chat settings.

An example, of the structure of an IP Office Contact Center XMPP address/ identifier is as follows:

If the customer is using one-X Portal to provide the XMPP service



If the customer is using their own server to provide the XMPP service



In this example Openfire has been used to provide an XMPP service when one-X Portal is not available. How to install and configured Openfire is document at the end of the Chat section.

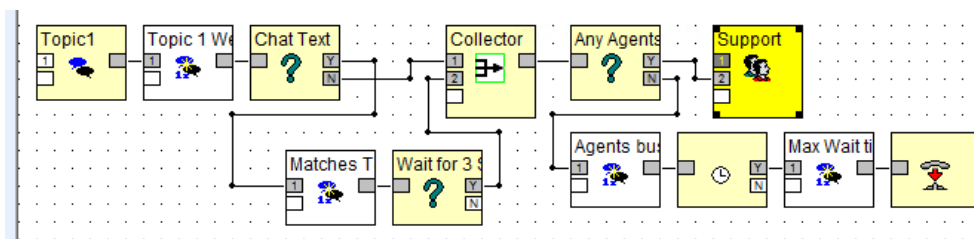
XMPP - Extensible Messaging and Presence Protocol

How to setup and Use the CHAT on IP Office Contact Center

NOTE: Making any changes to any Chat flow will require a restart of the service IPOCC Chat Taskserver. It is highly recommended that changes made to the IP Office Contact Center Chat or Web services are carried out in a maintenance window, which is outside of normal business hours. This will allow any required testing and restarting of services to take place without interruption of business operations.

The following areas of configuration will be examined:

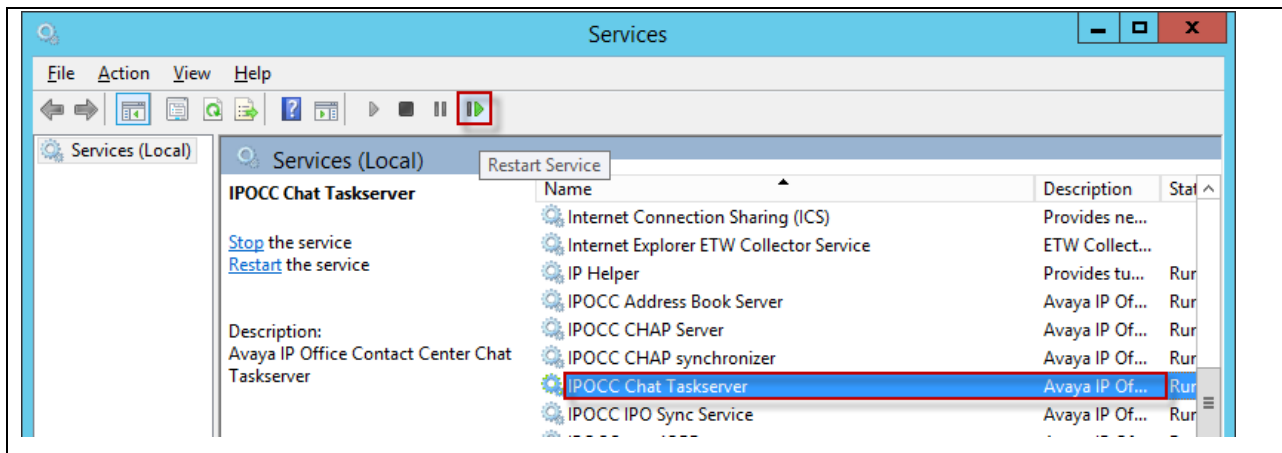
1. The installation and configuration of the XMPP Service.*
2. The configuration of existing Topics and Agents to Use CHAT.*
3. Building a Chat flow to facilitate a CHAT session.*
 - a. Querying a CHAT message and responding automatically to customer.
 - b. Configuring a 5 minute queue limit for the Chat session.
 - c. Providing a Welcome message to the customer.
 - d. Providing an End of session message to the customer.



4. Configuring Chat scripts against the Chat topic.
5. Testing a Chat Session with XMPP client (Pidgin).
6. Using the CHAT web Java example provided in the install DVD, to link a Web page to the IP Office Contact Center CHAT topics.

*Not required if already set via the Configuration wizard or Configuration spreadsheet.

NOTE: Changes to any Chat flow will require a restart of the IPOCC Chat TaskServer before testing.

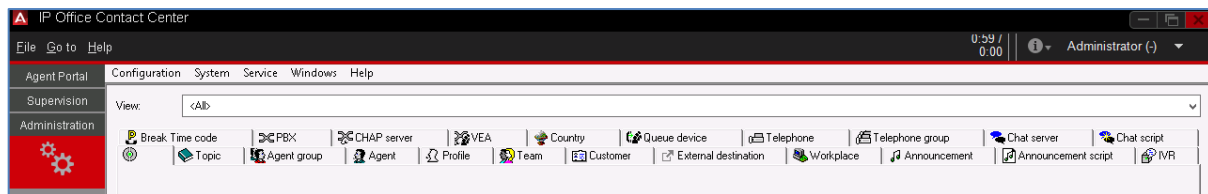


Configuring an existing Topic to Use CHAT

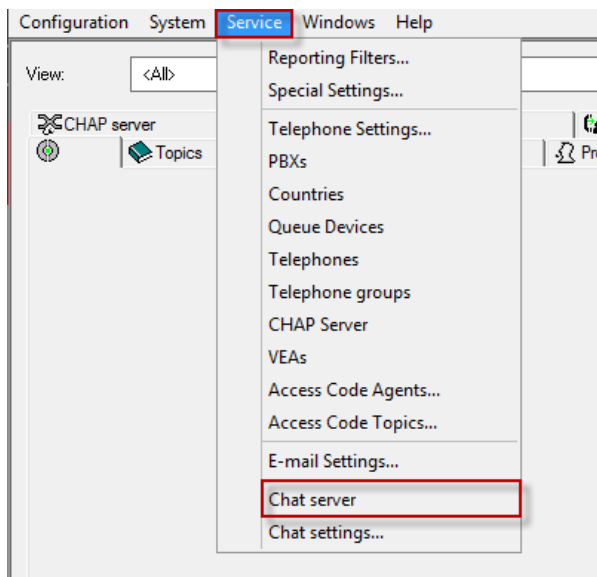
If all the CHAT settings are known and can be entered into the excel configuration spreadsheet as part of the initial installation of IP Office Contact Center, additional configuration is not required.

However, in the following example for demonstration purposes, the entire manual CHAT configuration process will be illustrated. Settings for using both the Openfire and one-X Portal will be shown.

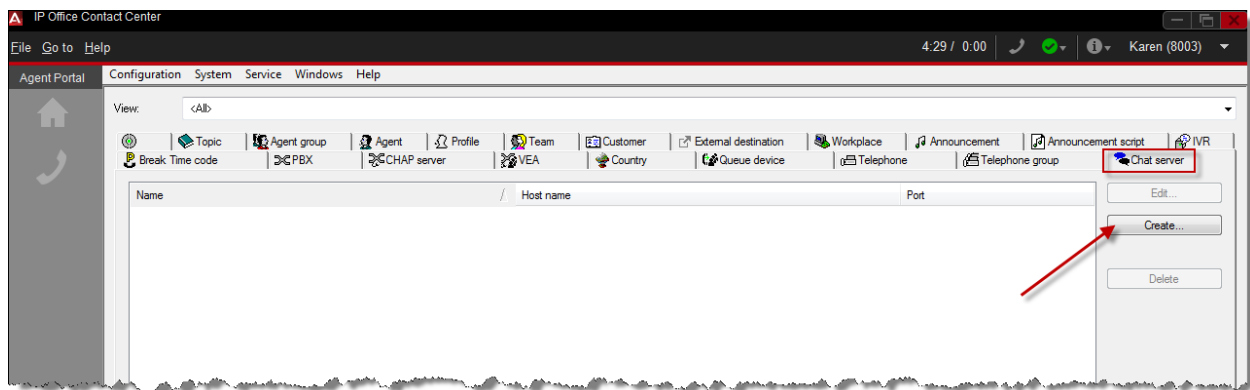
1. Login to IP Office Contact Center with Administrative access.



2. Click **Service** and then select **Chat server**.



3. Click the **Create...** button.



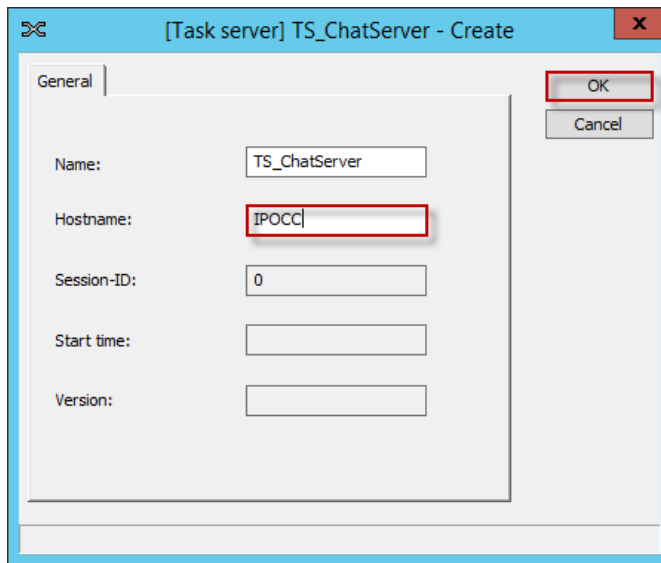
4. Now add the details of the XMPP link
 - A. Enter the name **ChatServer**
 - B. Enter the **hostname** of the IP Office Server Edition or application server that contains the one-X Portal service or the host name of the Openfire server.
 - C. Enter port **5222**.
 - D. Enter the **Domain** name. (For a Cloud based installation, this must be the Public IP Address of the Chat Server (one-X portal))
 - E. Choose **Automatic negotiation**.

5. Now click the **Edit** button.

Non Cloud Installation

Cloud Installation

6. In the **Hostname** field, enter the **host name** of the IP Office Contact Center server and click the **OK** button.



[Task server] TS_ChatServer - Create

General

Name: TS_ChatServer

Hostname: IPOCC

Session-ID: 0

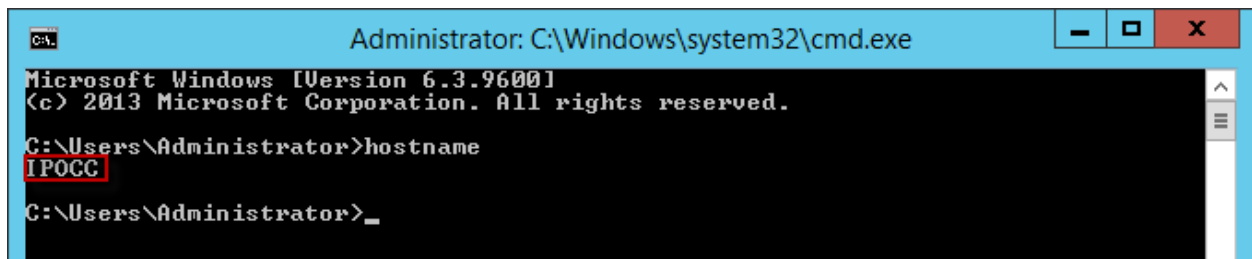
Start time:

Version:

OK

Cancel

Note: We can use the command prompt on the IP Office Contact Center server to determine the host name. Just open a **cmd** prompt and type **hostname** and **enter** and the host name will be displayed

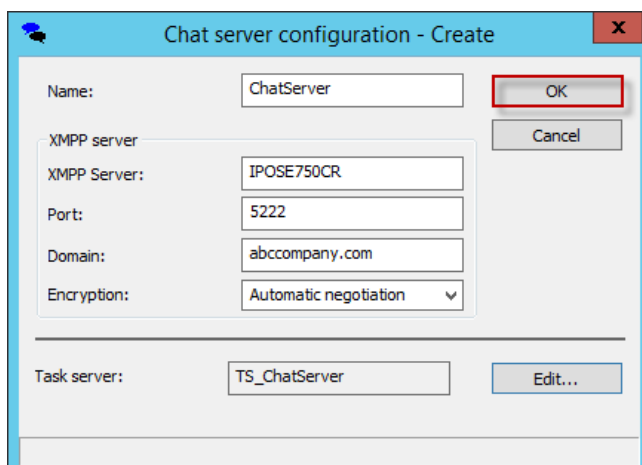


```
C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>hostname
IPOCC

C:\Users\Administrator>
```

7. Click the **OK** button to confirm the settings.



Chat server configuration - Create

Name: ChatServer

XMPP server

XMPP Server: IPOSE750CR

Port: 5222

Domain: abccompany.com

Encryption: Automatic negotiation

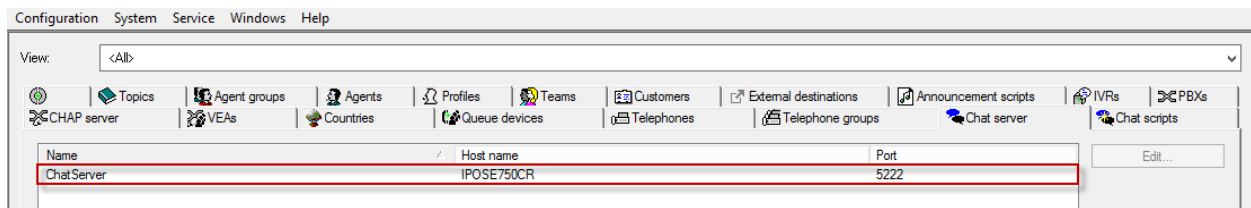
Task server: TS_ChatServer

OK

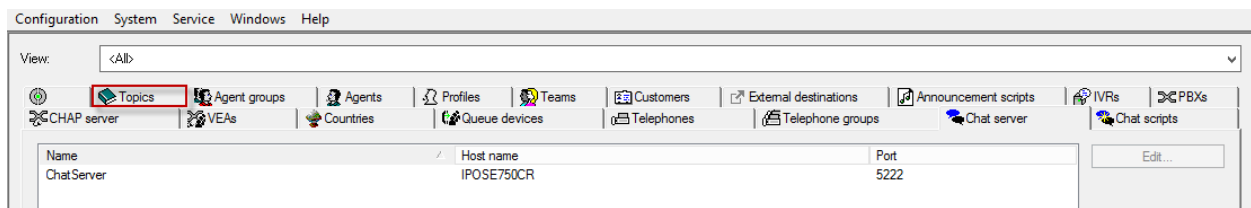
Cancel

Edit...

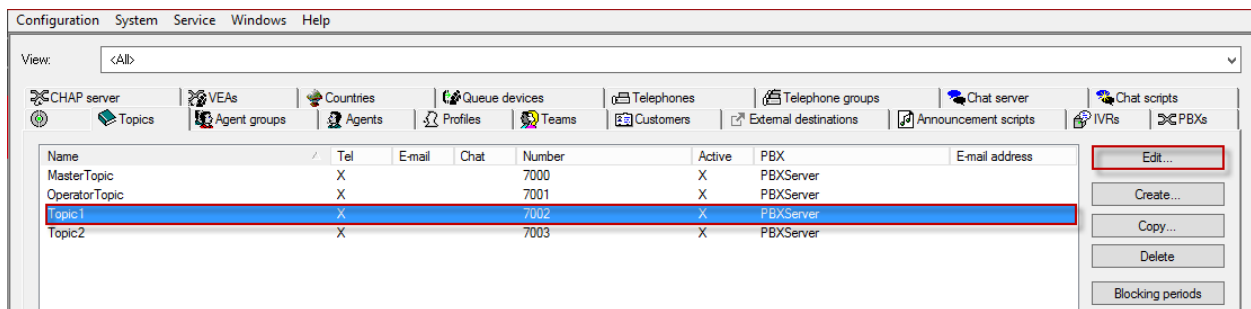
8. The new Chat server is displayed.



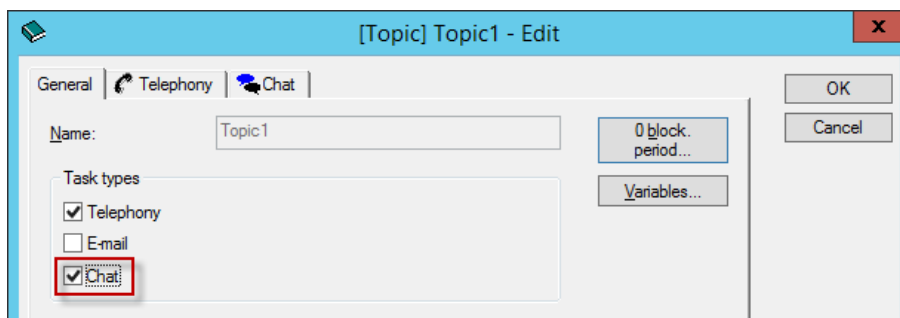
9. We will now configure Topic 1 to facilitate Chat. Click the **Topic** tab.



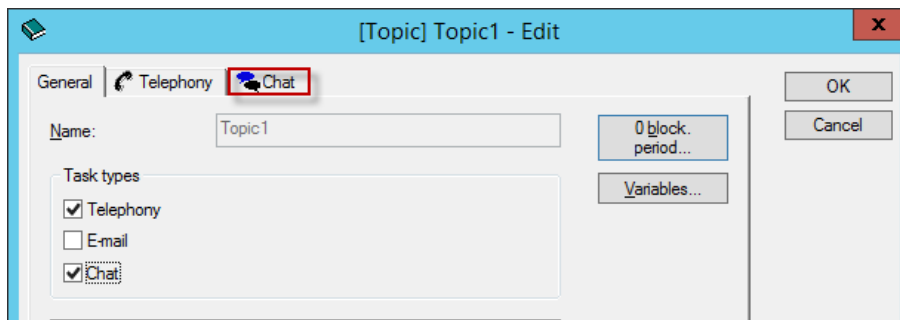
10. Select **Topic 1** and then select the **Edit** button.



11. Select the **Chat** Task Type.

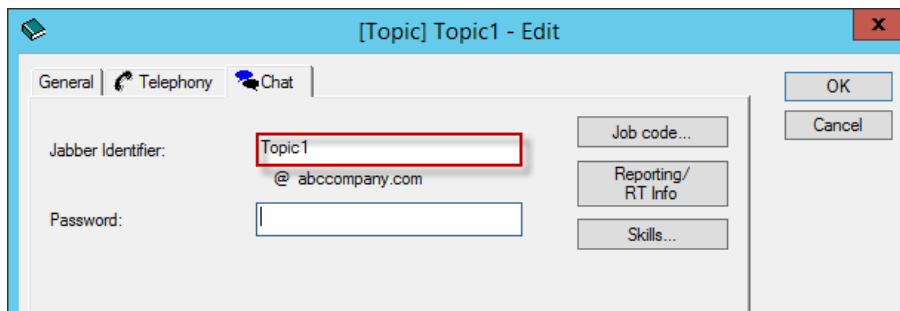


12. Click the **Chat** Tab.



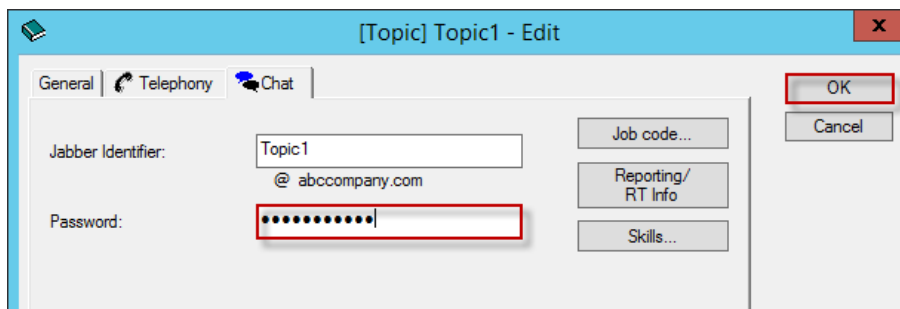
The screenshot shows the 'Chat' tab selected in the 'Topic1 - Edit' dialog. The 'Name' field contains 'Topic1'. Under 'Task types', 'Telephony' and 'Chat' are checked, while 'E-mail' is unchecked. Buttons for '0 block. period...', 'Variables...', 'OK', and 'Cancel' are visible.

13. In the **Jabber Identifier** field enter the XMPP name. For example **Topic1**.



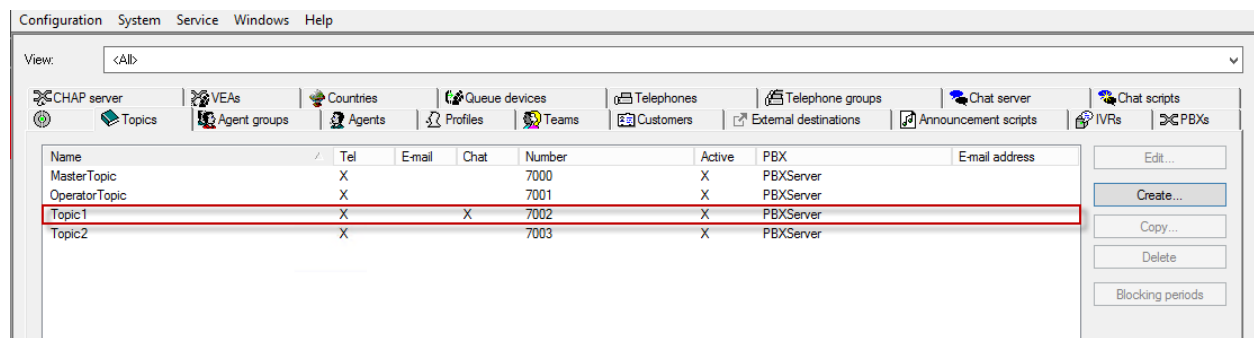
The screenshot shows the 'Jabber Identifier' field containing 'Topic1' and '@ abccompany.com'. The 'Password' field is empty. Buttons for 'Job code...', 'Reporting/ RT Info', 'Skills...', 'OK', and 'Cancel' are visible.

14. In the **Password** field enter the **XMPP password** for the Topic1 account and then select the **OK** Button.



The screenshot shows the 'Password' field filled with dots. The 'OK' button is highlighted with a red box. Buttons for 'Job code...', 'Reporting/ RT Info', 'Skills...', 'OK', and 'Cancel' are visible.

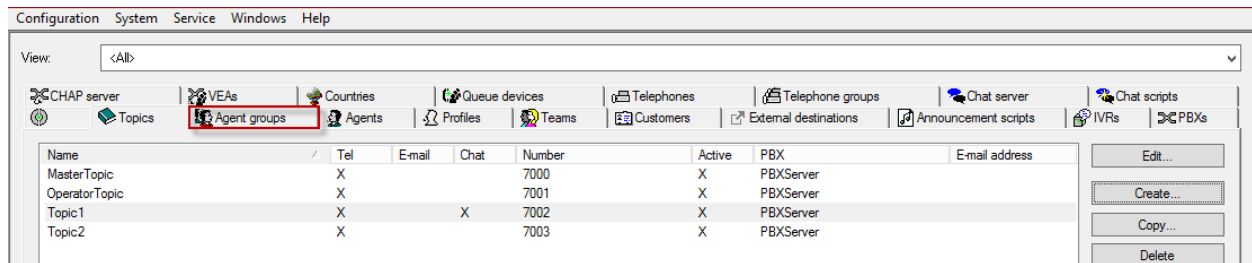
15. Topic 1 is now configured for Chat.



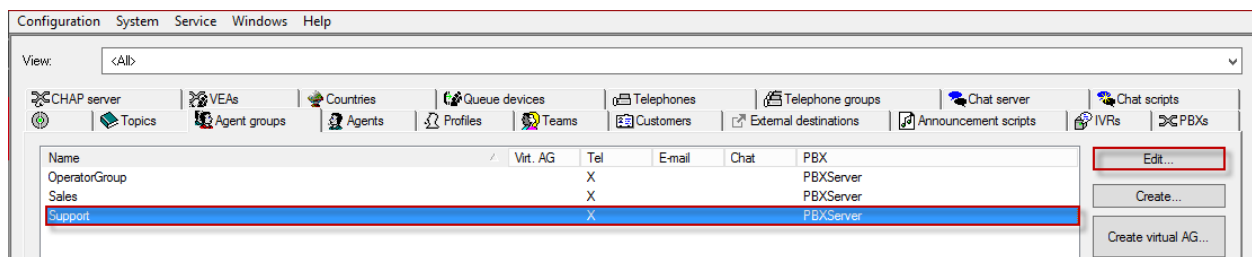
NOTE: Making any changes to any Chat setting for a Topic will require a restart of the services IPOCC Chat Taskserver & IPOCC Tomcat WWW. It is highly recommended that changes made to the IP Office Contact Center Chat or Web services are carried out in a maintenance window, which is outside of normal business hours. This will allow any required testing and restarting of services to take place without interruption of business operations.

Configuring an existing Agent Group to Use CHAT

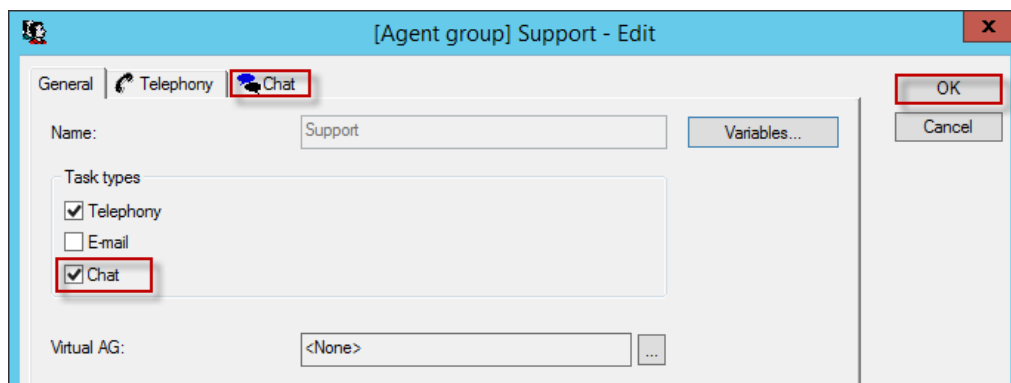
1. Click the **Agent group** tab.



2. Select an Agent Group that is to be used for Chat for example, **Support** and then click the **Edit** button.

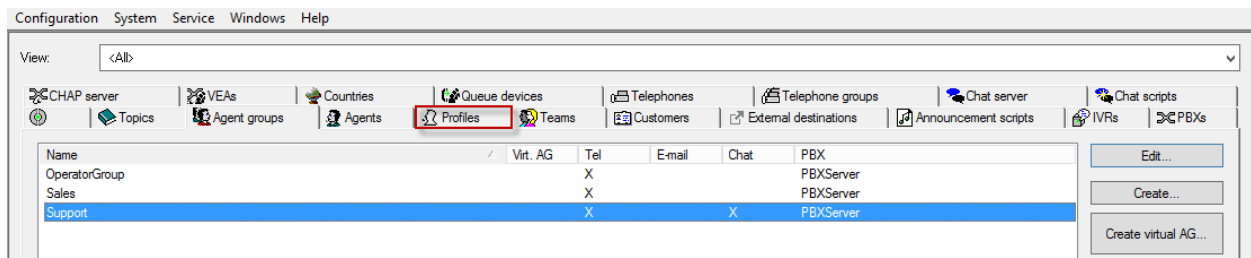


3. Select the Task Type **Chat** and then select the **OK** button.

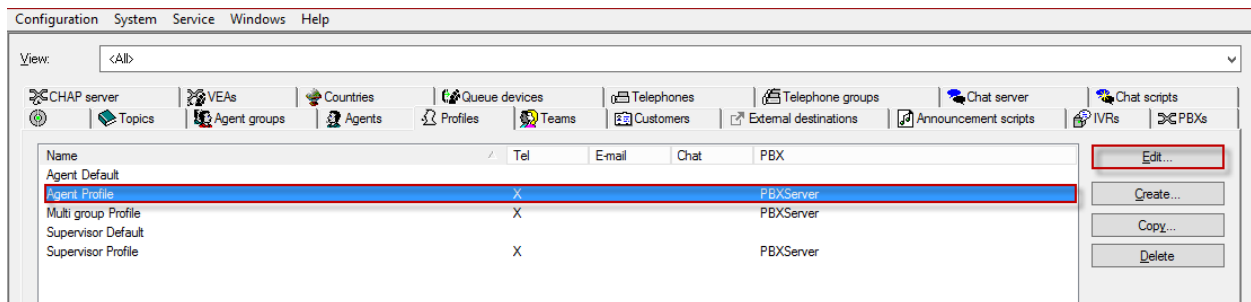


4. We now need to configure the Agent profiles to use the IP Office Contact Center's Chat feature. It is recommended to use Profiles for your Agents. In this example, Agents 1-10 were added to the **Agent profile** within the configuration wizard, as part of IP Office Contact Center's initial installation.

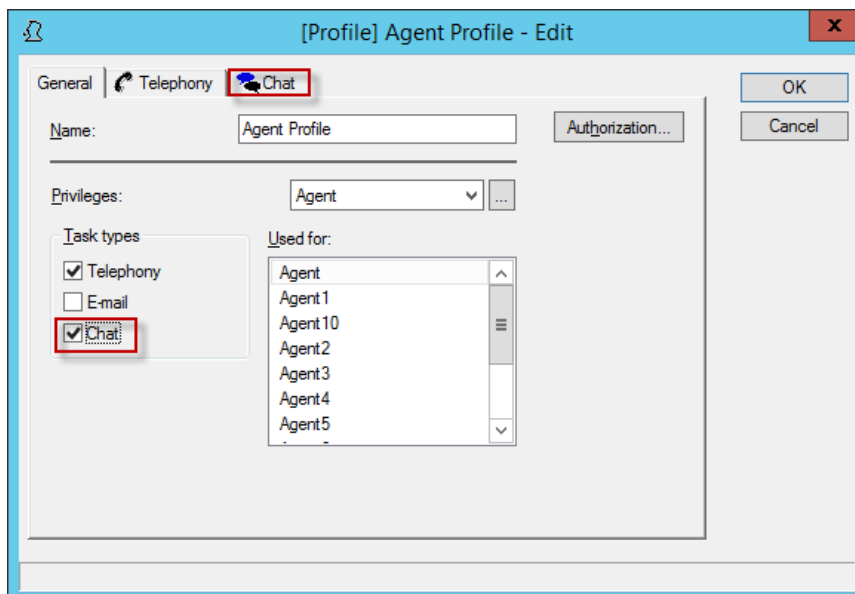
5. Click the **Profile** Tab.



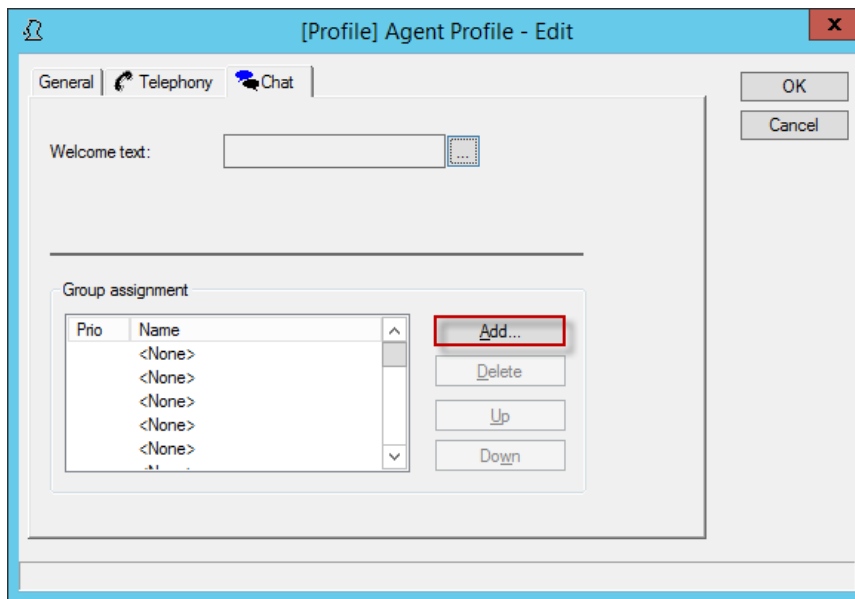
6. Select the Agents Profile that will be used and then select the **Edit...** button.



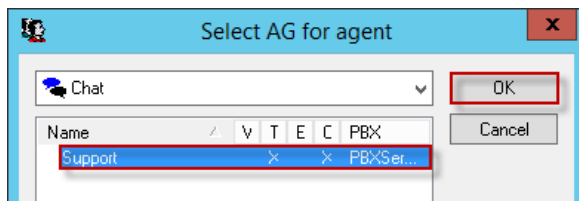
7. Select the **Chat** Task Type and then select the **Chat** tab.



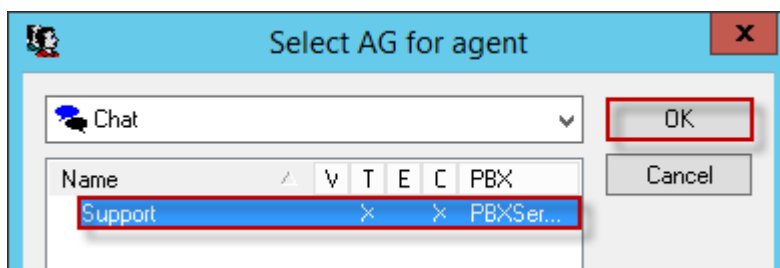
8. Click the **Add** button.



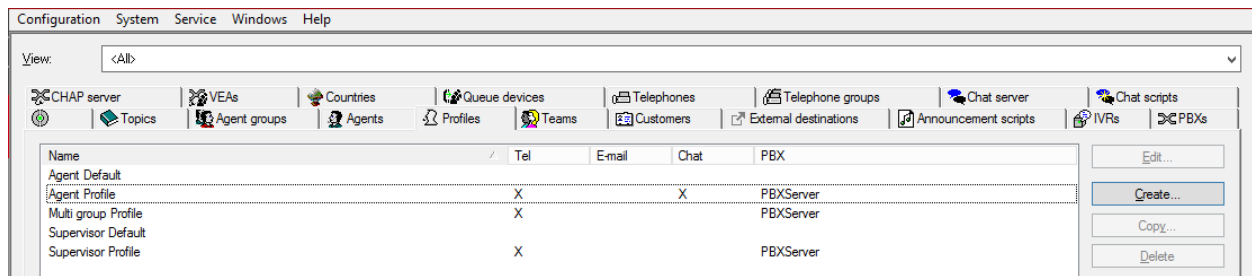
9. Click **Support** and then select the **OK** button.



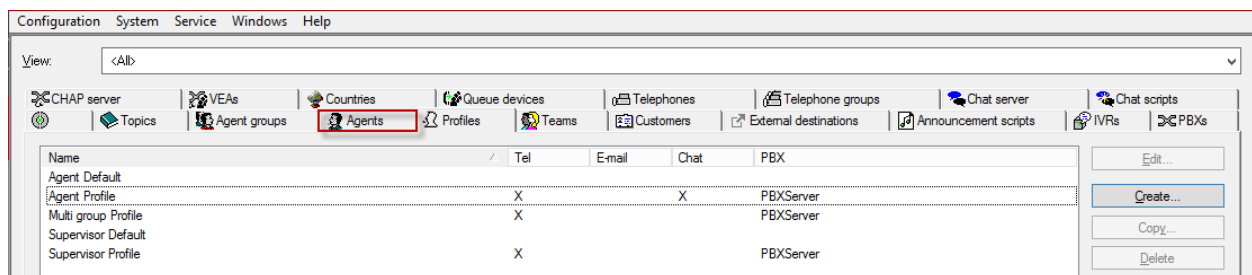
10. Click the **OK** button.



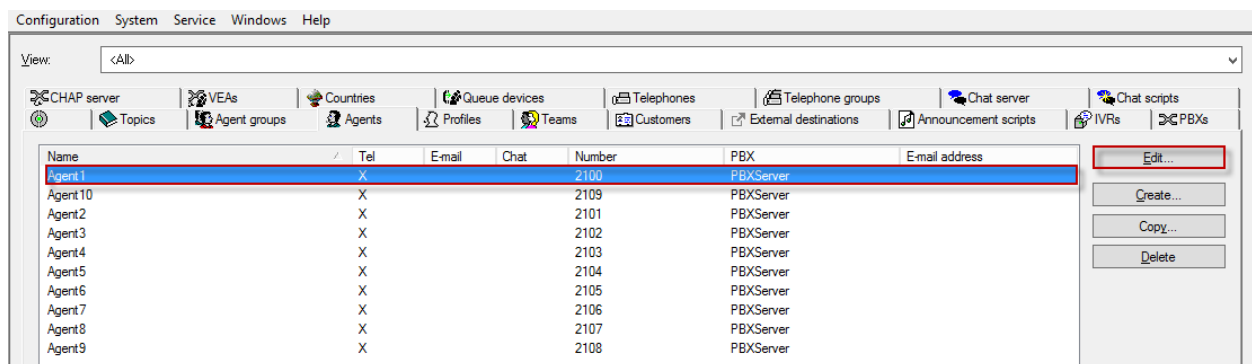
11. The Profile has now been changed.



12. Click the **Agents** tab.



13. Select an Agent who is going to use Chat and click the **Edit** button.



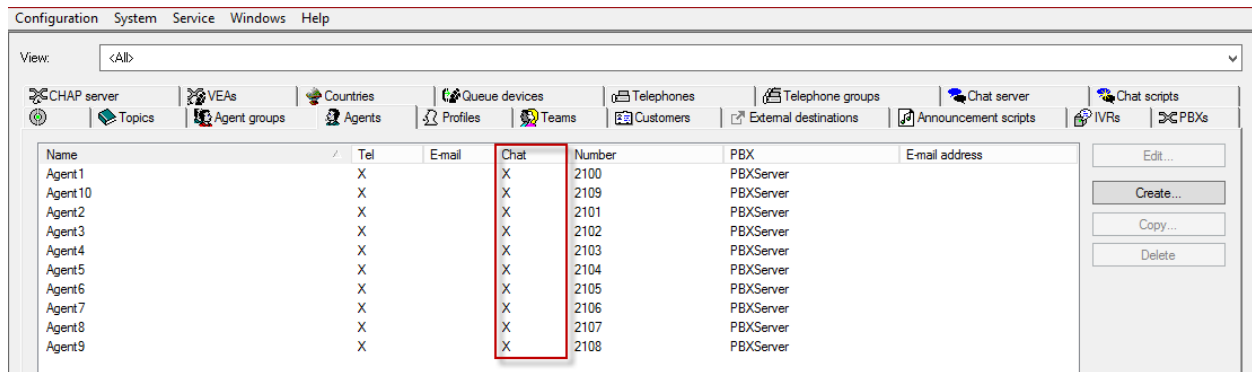
14. Click the **Chat** Task Type and then select the **Chat** tab.

The screenshot shows the 'Chat' tab of the '[Agent] Agent1 - Edit' dialog box. The 'Task types' section has three checkboxes: 'Telephony' (checked), 'E-mail' (unchecked), and 'Chat' (checked). The 'Chat' checkbox is highlighted with a red box. Other fields include 'System name' (Agent1), 'Login name' (Agent1), 'Alias' (empty), 'Language' (English (USA)), 'Title' (Ms. selected), 'Last name' (Agent1), 'First name' (empty), 'Employee ID' (empty), 'Cost center' (empty), 'Predefined profile' (Agent Profile), 'Privileges' (Agent), and 'Address book profile' (Standard). Buttons for 'Password...', '2nd password...', 'Variables...', 'Skills...', 'Availability...', and 'Authorization...' are visible on the right.

15. Check that you can see the Agent group **Support** within the Group assignment field that was added under **Profiles**.

The screenshot shows the 'Group assignment' field in the 'Chat' tab. A list box displays the following items: '60 Support', '<None>', '<None>', '<None>', and '<None>'. The '60 Support' item is highlighted with a red box. To the right of the list box are buttons for 'Add...', 'Delete', 'Up', and 'Down'. The 'Welcome text' field is empty at the top.

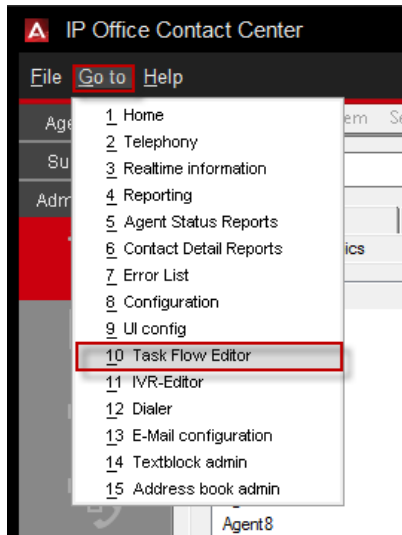
16. The Chat Task Type has now been assigned to Agent 1. Repeat the above steps until all the Agents in Agent Group **Support** have been assigned with the Chat Task Type.



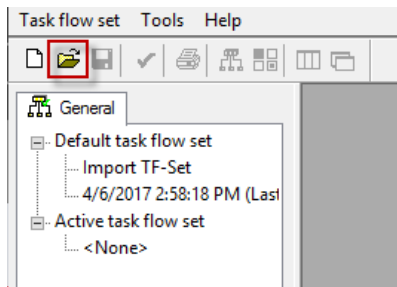
The next step in the Chat configuration process is to build a Chat Flow that will facilitate the Chat feature.

Building a Chat Flow

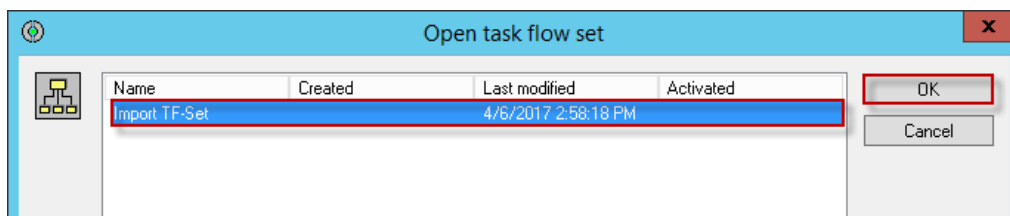
1. Click the **Go to** menu and then select **Task Flow Editor**.



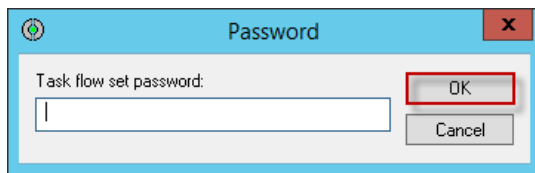
2. Click **Task flow set** and then select **Open**.



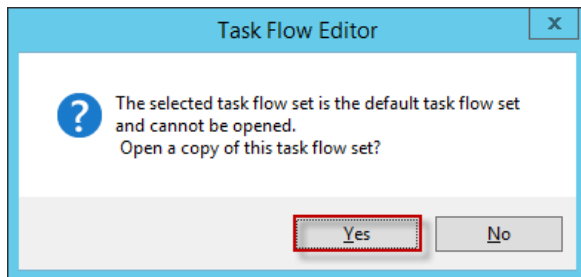
3. Select the Active task flow set as required and then click the **OK** button.



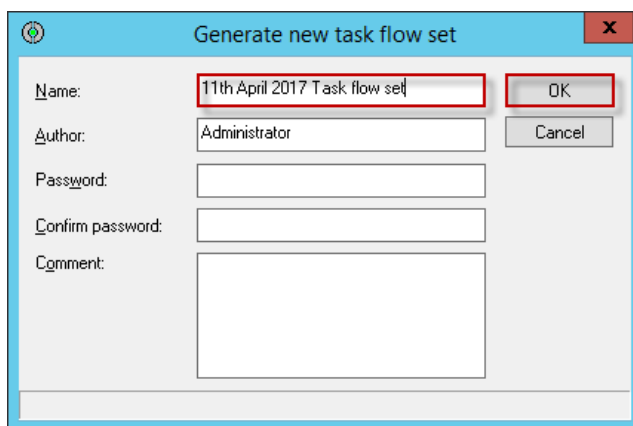
4. Enter the password (if required) and then select the **OK** button.



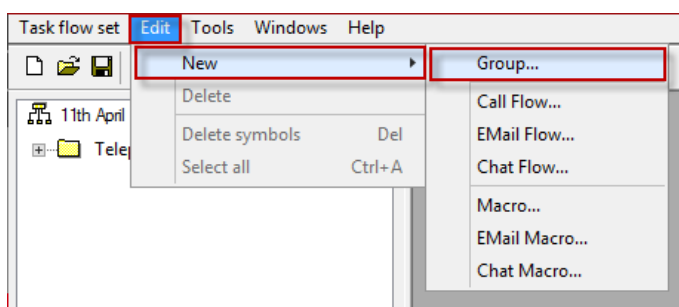
5. If the task flow set is currently in use click **Yes** to open a copy of this task flow set.



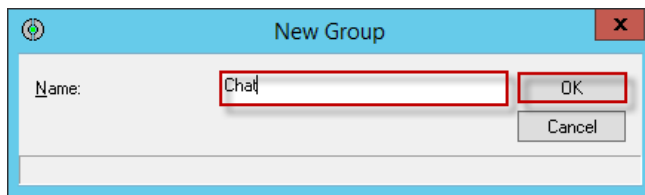
6. In the **Name** field enter a name for the task flow set and then click the **OK** button.



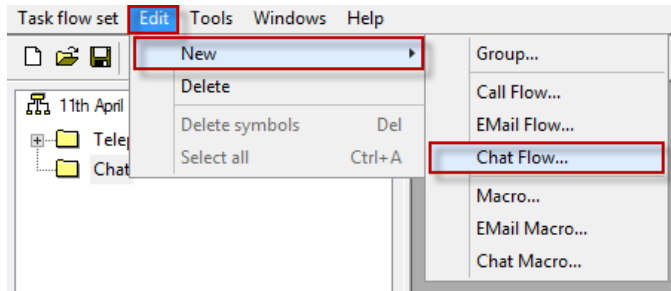
7. Choose **Edit – New – Group**



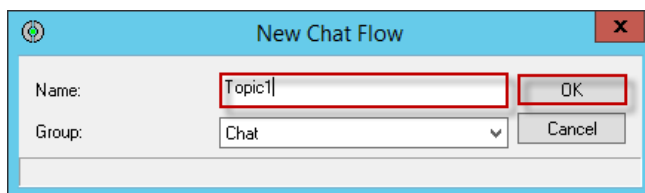
8. Type Chat and they choose the OK button.



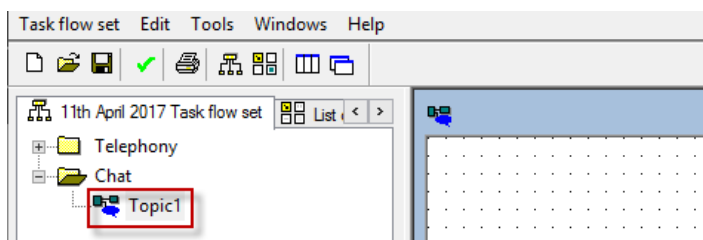
9. Click **Edit** and then select **New – Chat Flow**.



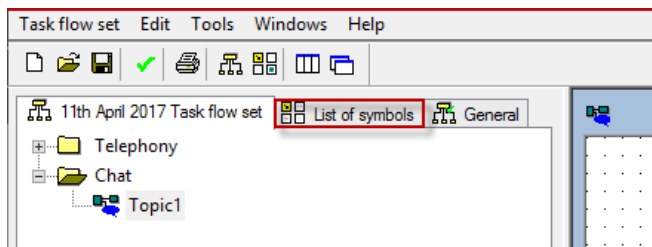
10. In the **Name** field enter **Topic1** and then select the **OK** button. The new Group is automatically used.



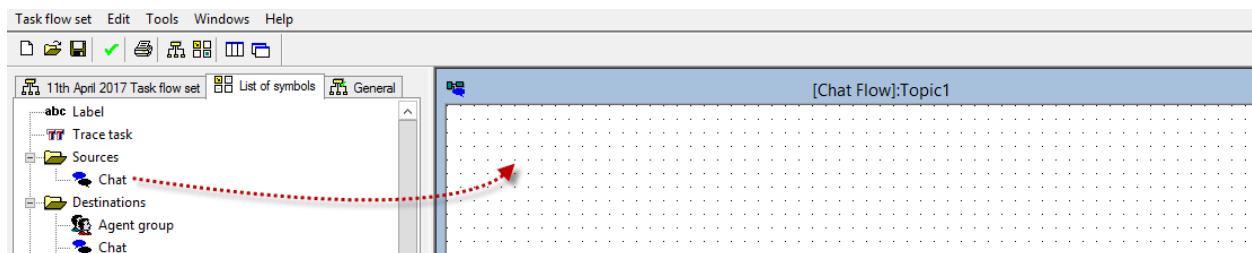
11. The Chat Flow is displayed.



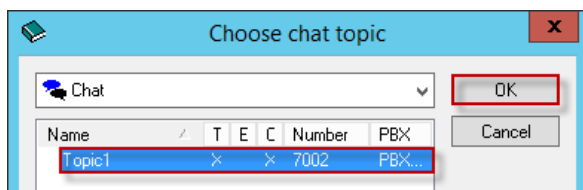
12. Click the **List of symbols** tab.



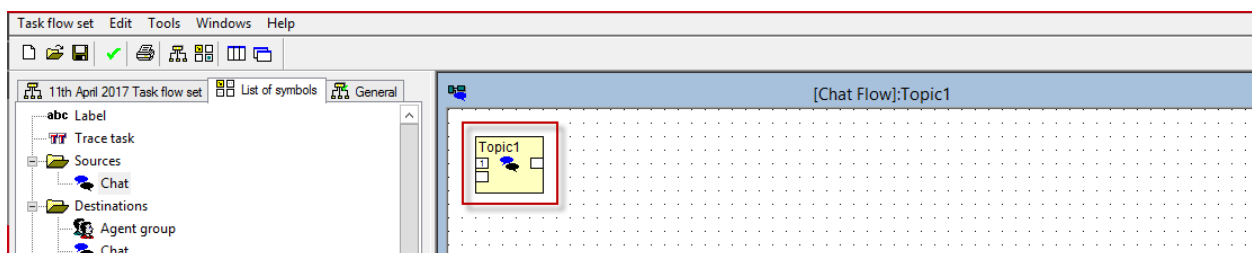
13. A start point for a Chat session is required. This can be achieved using a **Chat** element. Drag the element into the Chat Flow Working Area.



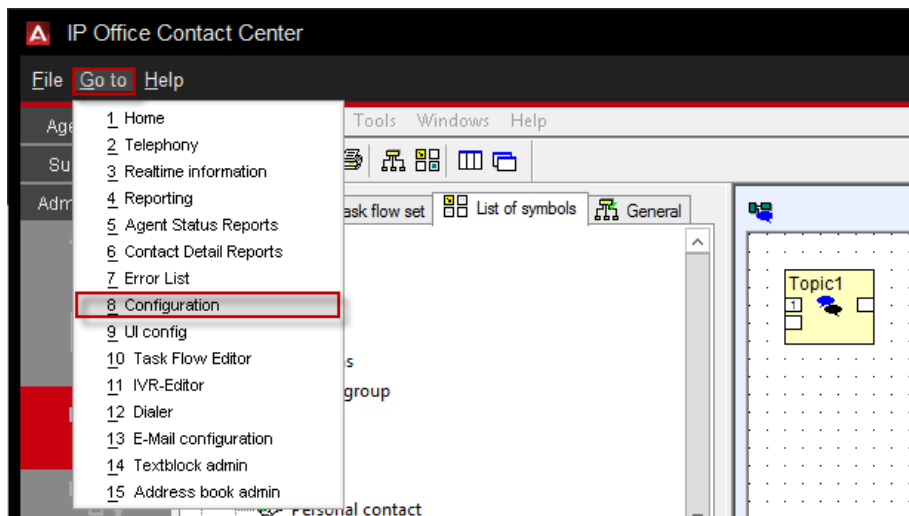
14. Click **Topic1** and then select the **OK** button.



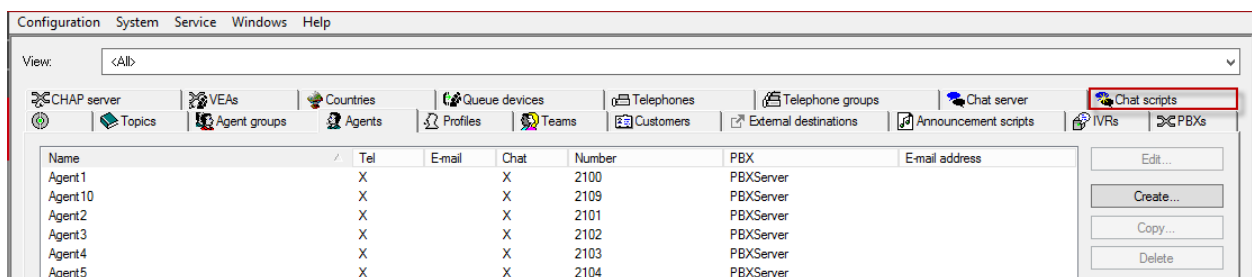
15. The configured element is displayed.



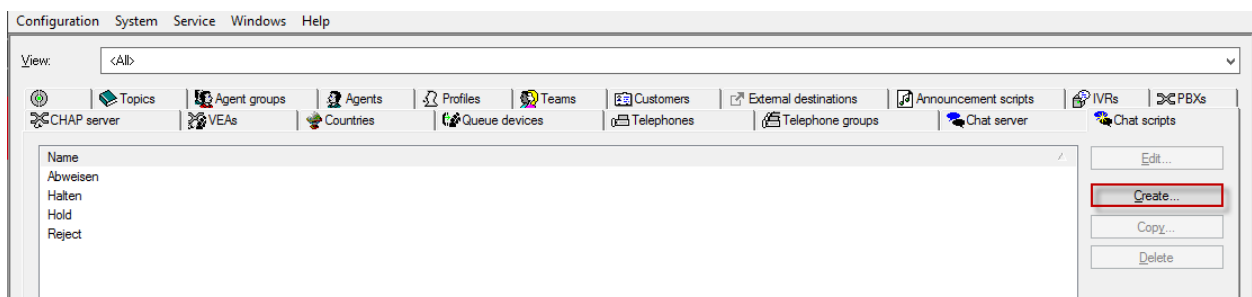
16. As Chat is only text based, if we wish to provide a Welcome greeting to the Chat customer a **Chat script** can be utilized. To create Chat scripts, click the **Go to** menu and then select **Configuration**.



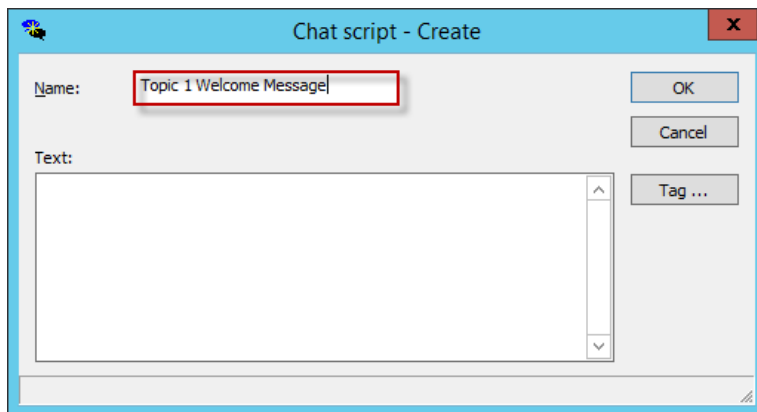
17. Click **Configuration** and then select **Chat script**.



18. Click the **Create** button.

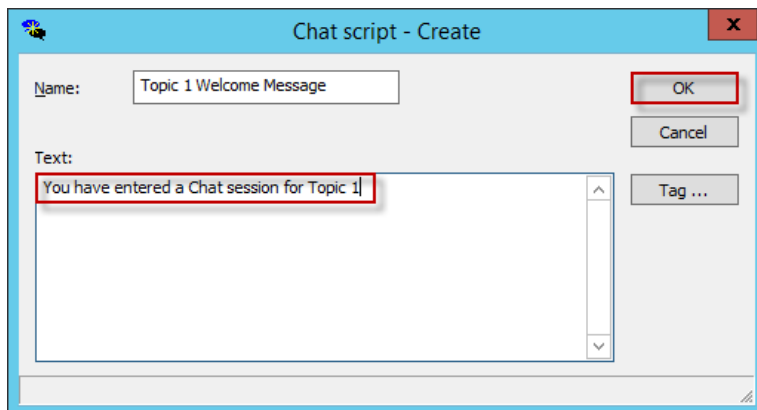


19. In the **Name** field type **Topic 1 Welcome Message**.



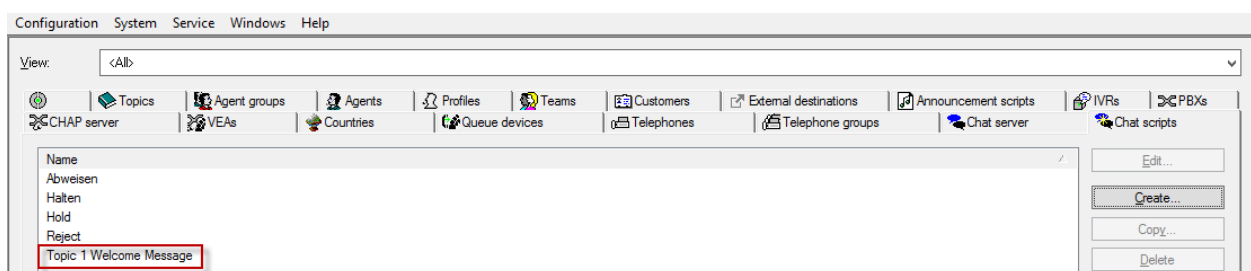
The screenshot shows a dialog box titled "Chat script - Create". It has a "Name:" label followed by a text input field containing "Topic 1 Welcome Message", which is highlighted with a red rectangle. Below this is a "Text:" label followed by a large empty text area. To the right of the text area are three buttons: "OK", "Cancel", and "Tag ...".

20. In the Text field type **You have entered a Chat session for Topic 1** and then select the **OK** button.



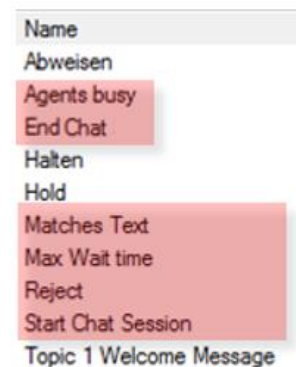
The screenshot shows the same "Chat script - Create" dialog box. The "Text:" field now contains the text "You have entered a Chat session for Topic 1", which is highlighted with a red rectangle. The "OK" button is also highlighted with a red rectangle.

21. The Chat script is displayed.

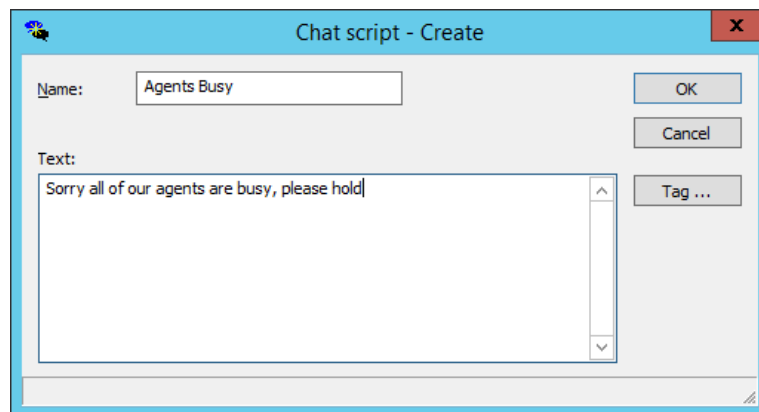


The screenshot shows the "Configuration" window with the "Chat scripts" tab selected. A list of chat scripts is displayed on the left, including "Name", "Abweisen", "Halten", "Hold", "Reject", and "Topic 1 Welcome Message". The "Topic 1 Welcome Message" entry is highlighted with a red rectangle. On the right side of the window, there are buttons for "Edit...", "Create...", "Copy...", and "Delete".

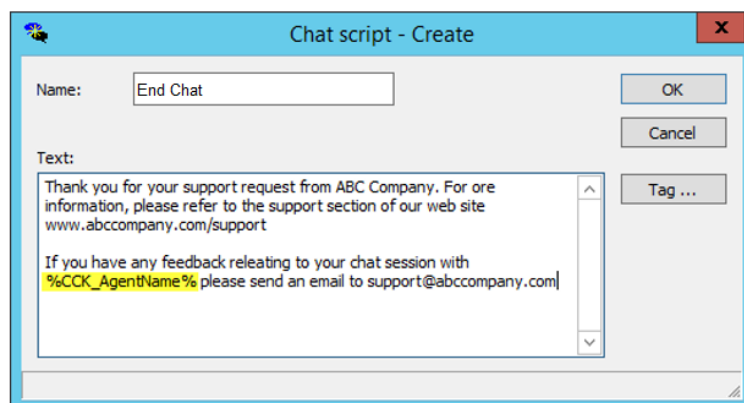
22. Repeat this process to create the following Chat scripts.



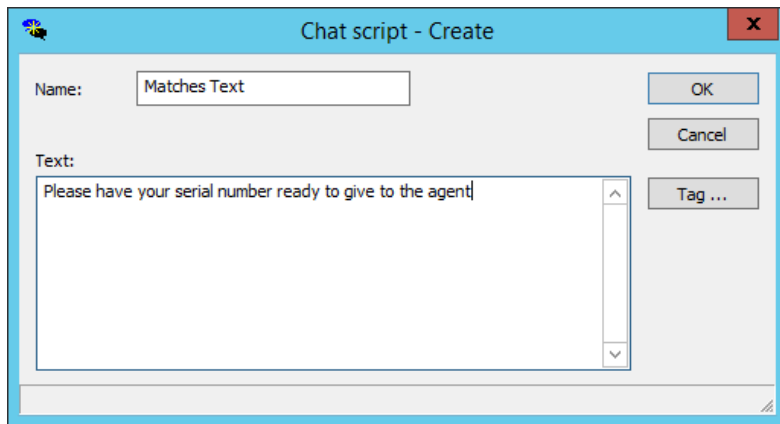
23. Create a Chat script to inform the chat customer that all of the Agents are busy.



24. Create a Chat script to inform the customer that the chat session has ended. It is possible to provide additional information to the Chat customer by using a call **Tag**. For example, **%CCK_AgentName%** within the Chat Script text. This will display the Agents name to the customer within the Chat script. The call tags are available under the **Tag...** button.



25. Create a Chat script to inform the chat customer that additional information is required to progress their chat request.



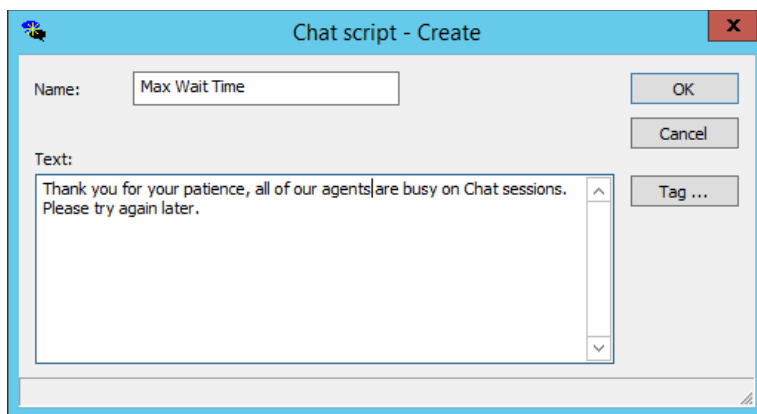
Chat script - Create

Name:

Text:

OK Cancel Tag ...

26. Create a Chat script to inform the chat customer, they have waited too long for a Chat session.



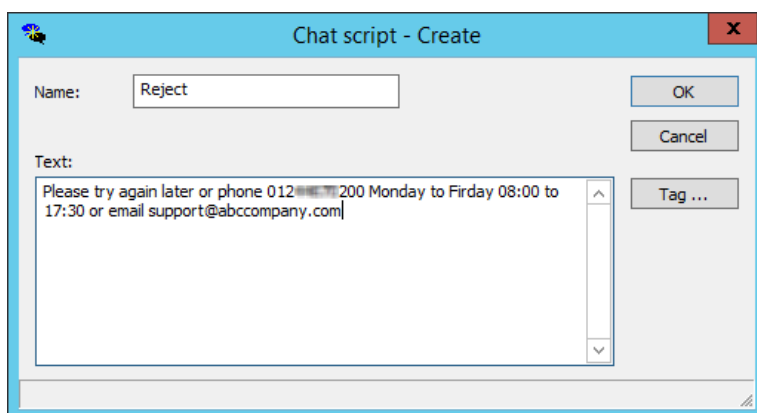
Chat script - Create

Name:

Text:

OK Cancel Tag ...

27. Create a Chat script to inform the chat customer that the chat session could not be connected and include additional information on how to call or email their request. If the Reject Chat script already exists then use edit to change.



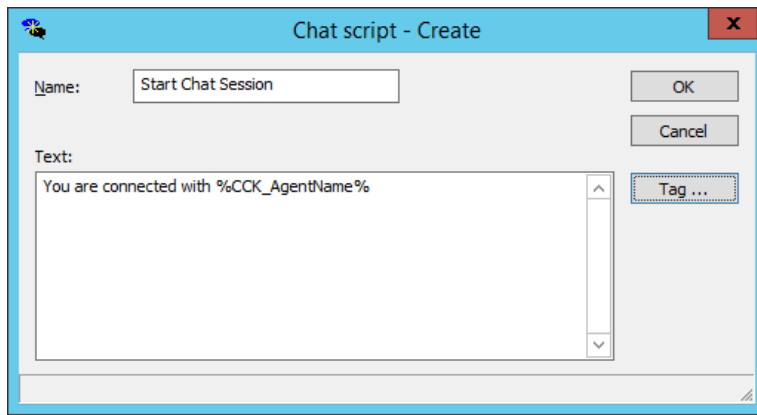
Chat script - Create

Name:

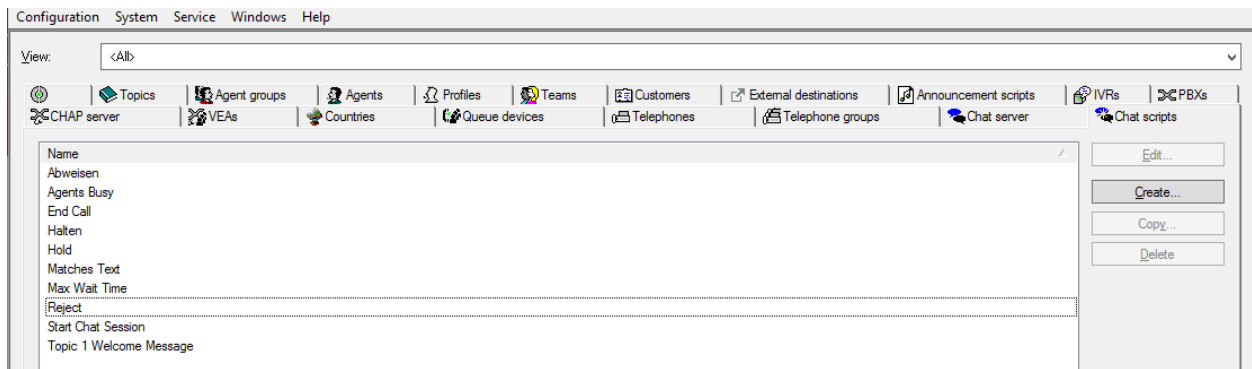
Text:

OK Cancel Tag ...

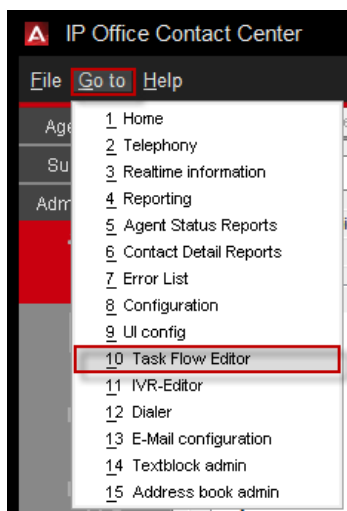
28. Create a Chat script to inform the chat customer which Agent they are connected to.



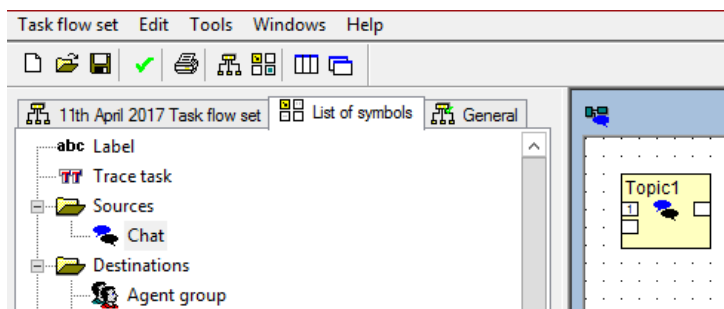
29. Now that all of the Chat scripts have been created, return to the Chat Flow.



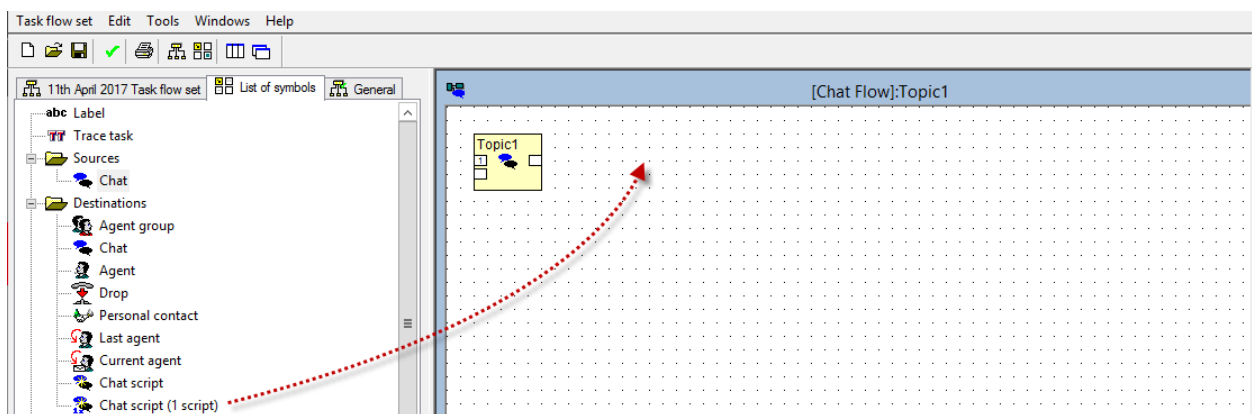
30. Click the **Go to** menu and select **Task flow Editor**.



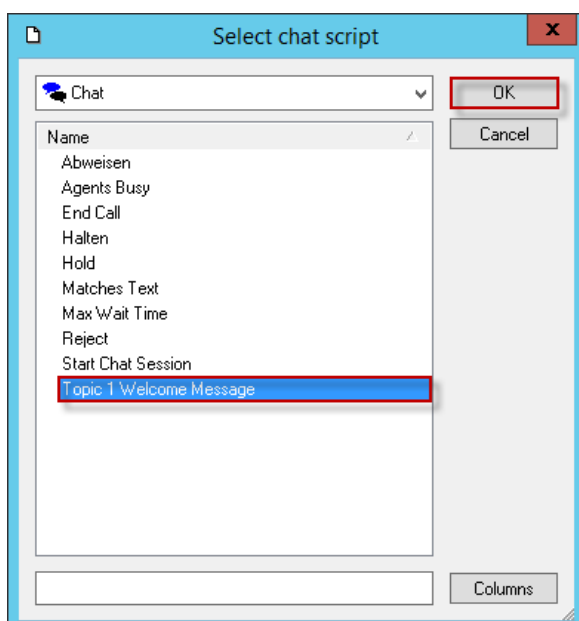
31. The Chat Flow created earlier should still be displayed.



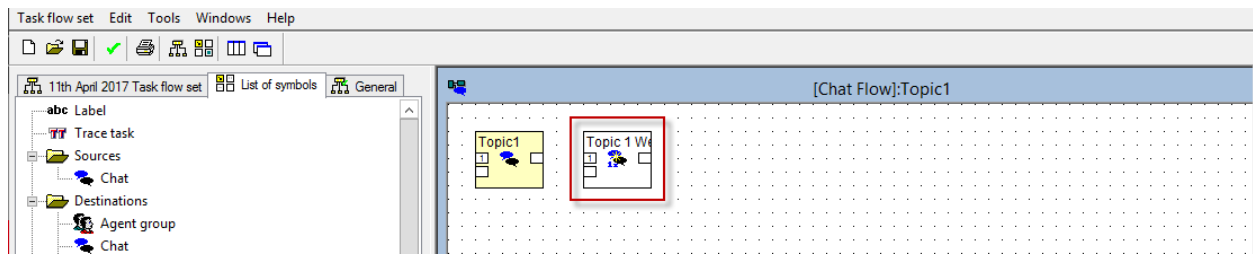
32. A **Chat script (1 script)** element will be used to provide information back to the Chat customers. Click the **List of Symbols** tab and then drag the **Chat script (1 script)** element to the Chat Flow working area.



33. Select **Topic 1 Welcome Message** and then select the **OK** button.

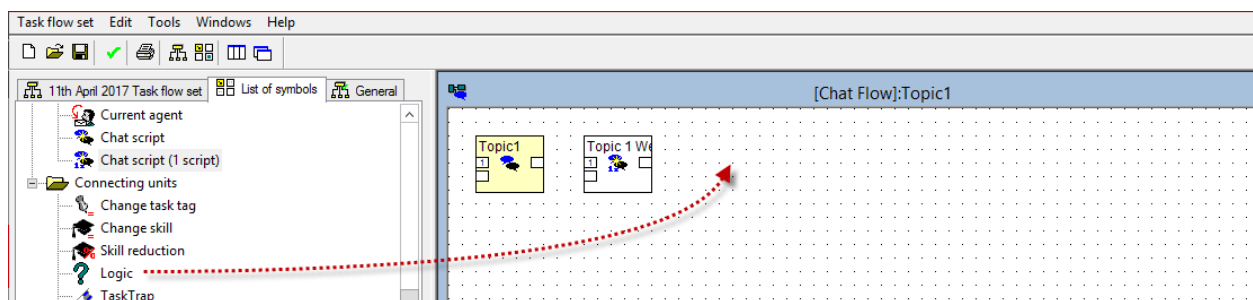


34. The configured element is displayed.

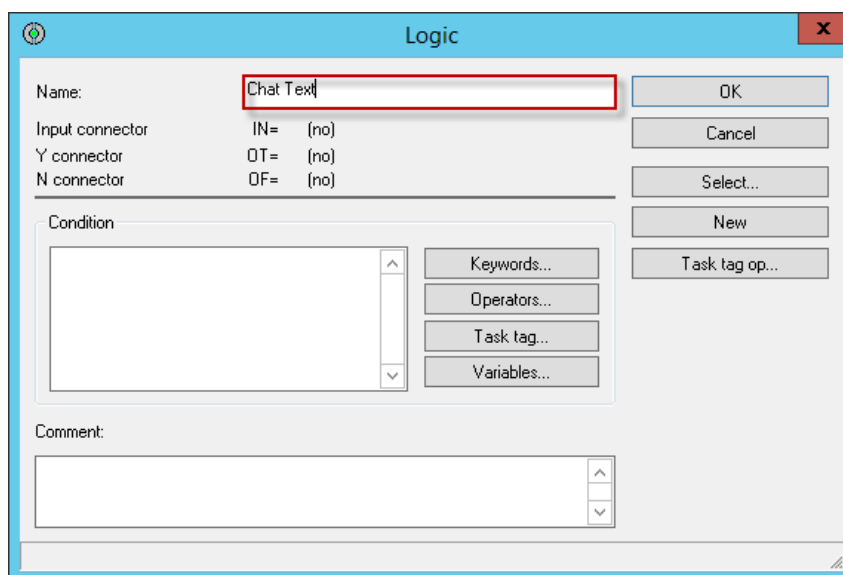


35. As the Chat customer requests the Chat session, they can enter text. This text can be checked for a key word(s). If a match is found with a keyword, the customer can be prompted to provide additional information. In this example we will prompt the Chat customer for their serial number, if they use the keywords “Desktop” or “Laptop”.

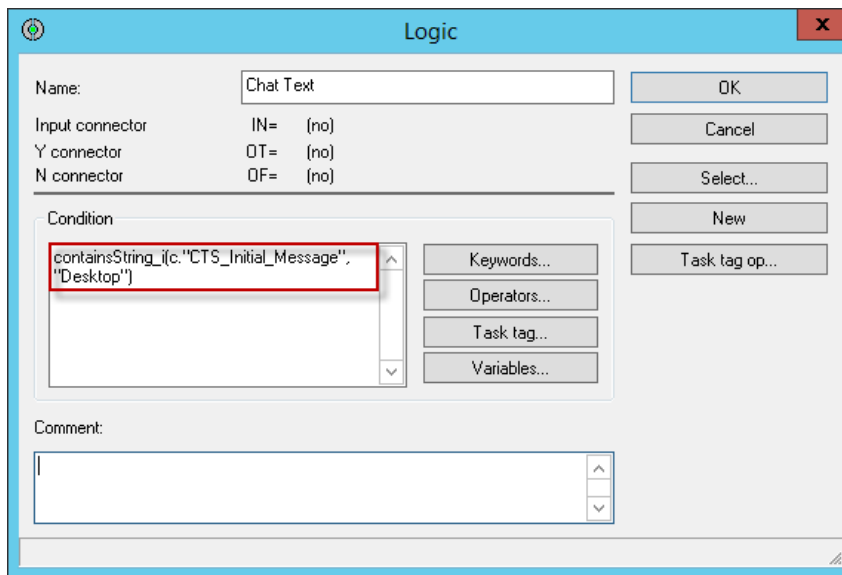
36. To query the Chat text, a **Logic** element can be used. Drag the Logic element into the Chat flow working area.



37. In the **Name** field type **Chat Text**.

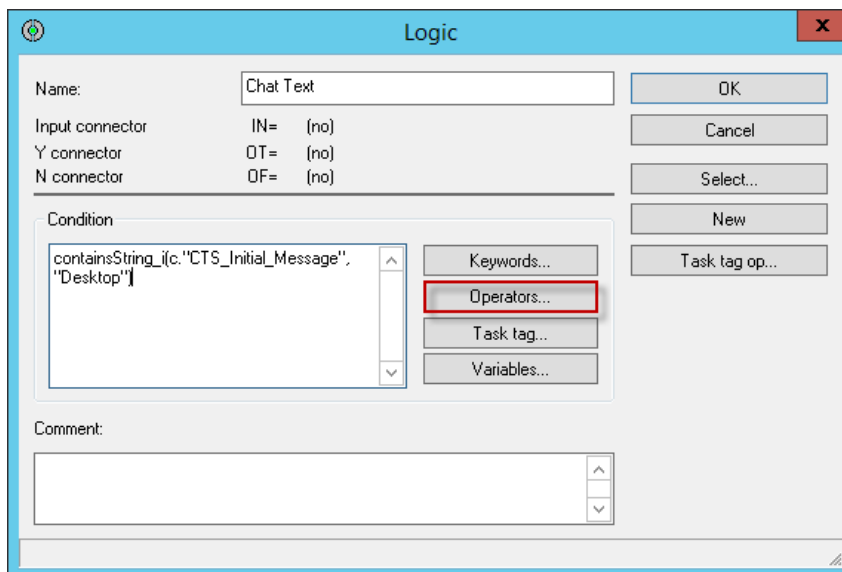


38. In the Condition field type containsString_i(c."CTS_Initial_Message", "Desktop")



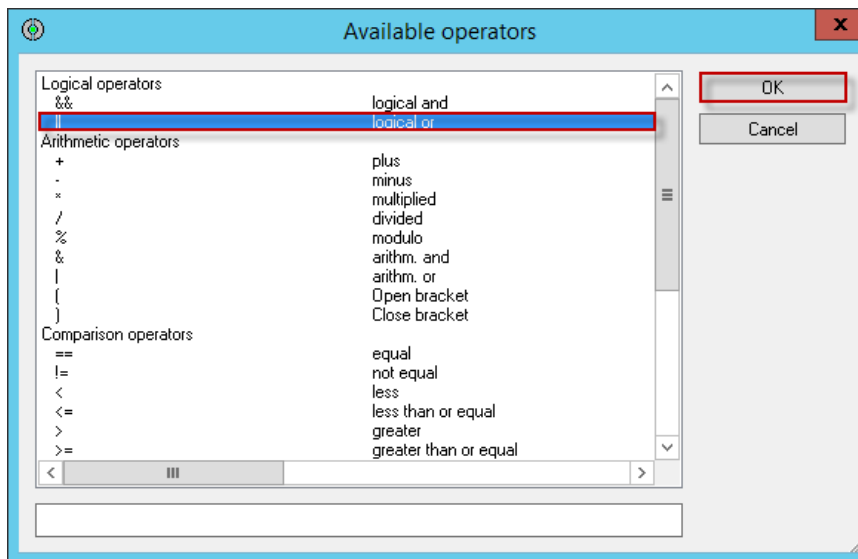
The screenshot shows the 'Logic' dialog box. The 'Name' field is 'Chat Text'. The 'Input connector' is 'IN=' with '(no)' next to it. The 'Y connector' is 'OT=' with '(no)' next to it. The 'N connector' is 'OF=' with '(no)' next to it. The 'Condition' field contains the text 'containsString_i(c."CTS_Initial_Message", "Desktop")', which is highlighted with a red box. To the right of the 'Condition' field are buttons for 'Keywords...', 'Operators...', 'Task tag...', and 'Variables...'. On the far right are buttons for 'OK', 'Cancel', 'Select...', 'New', and 'Task tag op...'. At the bottom is a 'Comment' field.

39. Another text search is required for the word "Laptop" that will utilize a OR Operator. Click after the text and click the Operators button.

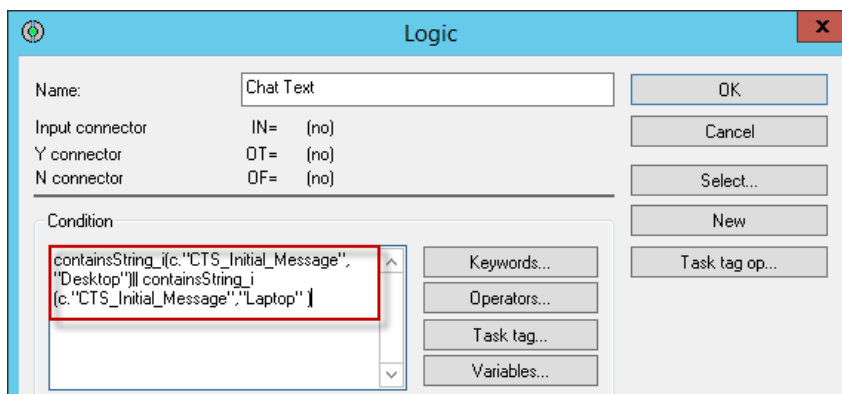


The screenshot shows the 'Logic' dialog box. The 'Name' field is 'Chat Text'. The 'Input connector' is 'IN=' with '(no)' next to it. The 'Y connector' is 'OT=' with '(no)' next to it. The 'N connector' is 'OF=' with '(no)' next to it. The 'Condition' field contains the text 'containsString_i(c."CTS_Initial_Message", "Desktop")'. To the right of the 'Condition' field are buttons for 'Keywords...', 'Operators...', 'Task tag...', and 'Variables...'. The 'Operators...' button is highlighted with a red box. On the far right are buttons for 'OK', 'Cancel', 'Select...', 'New', and 'Task tag op...'. At the bottom is a 'Comment' field.

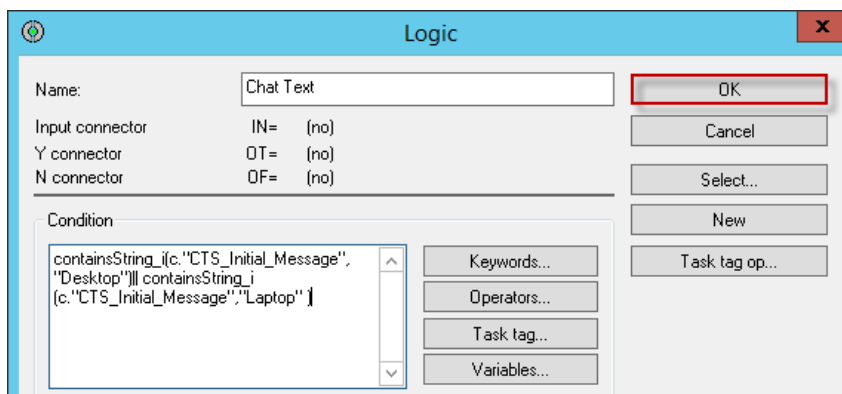
40. Select the **logical or** operator and then click the **OK** button.



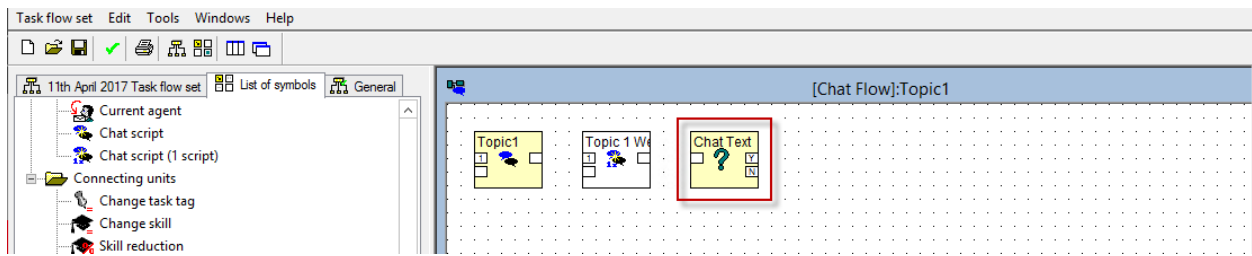
41. In the **Condition** field type
containsString_i(c."CTS_Initial_Message","Laptop")



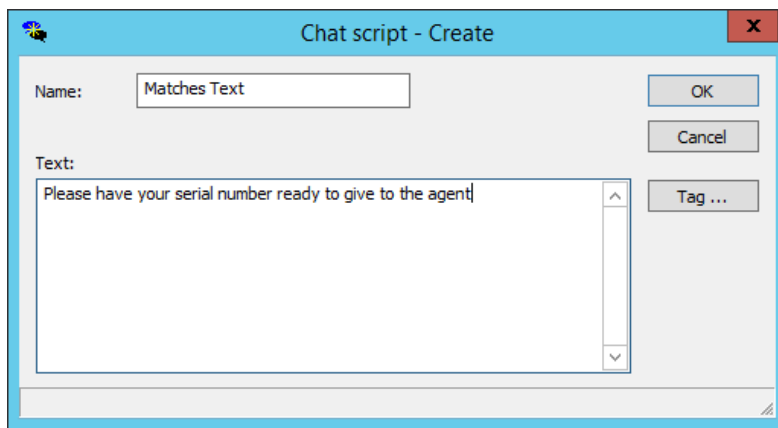
42. Then click the **OK** button.



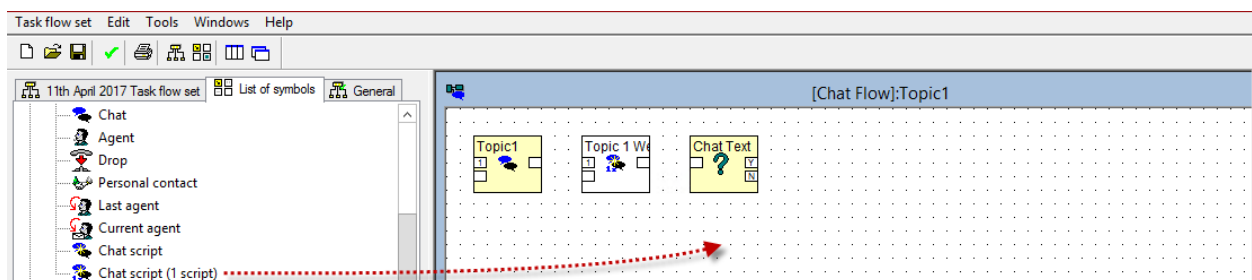
43. The configured element is displayed.



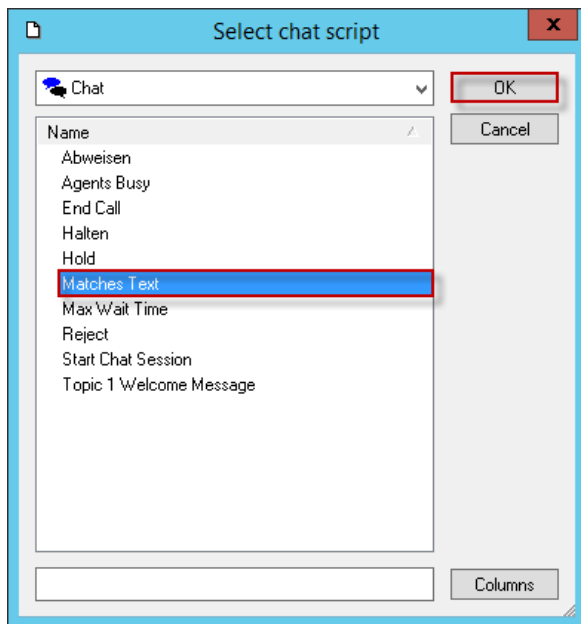
44. The customer will be prompted if their text matches the text defined in the Logic element.



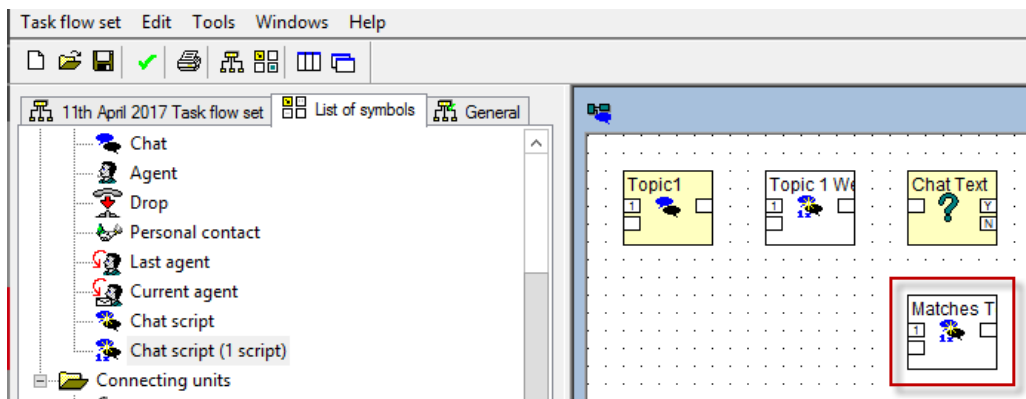
45. A **Chat script (1 script)** element will be used to reference the “Matches Text” Chat script created earlier. Drag the **Chat script (1 script)** element into the Chat Flow working area.



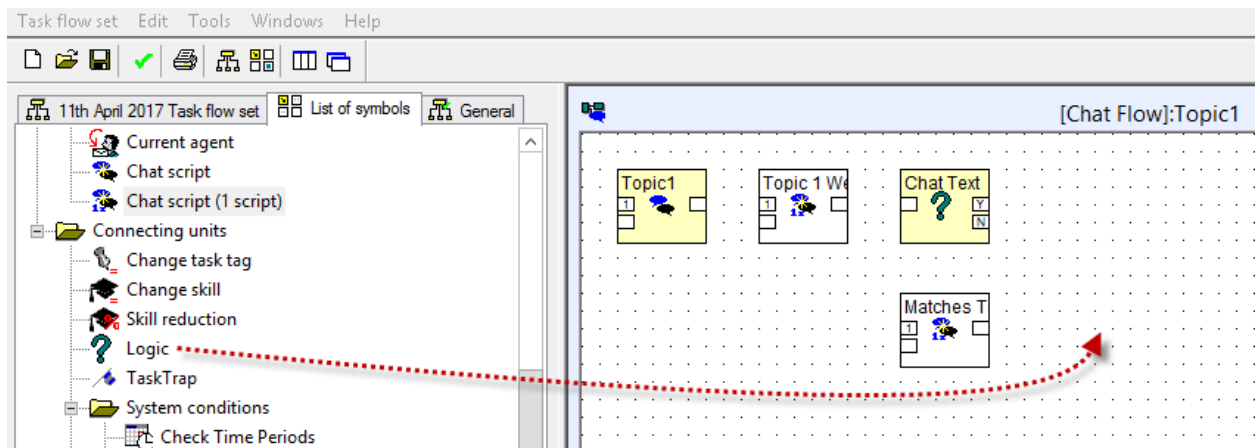
46. Click **Matches Text** and then select the **OK** button.



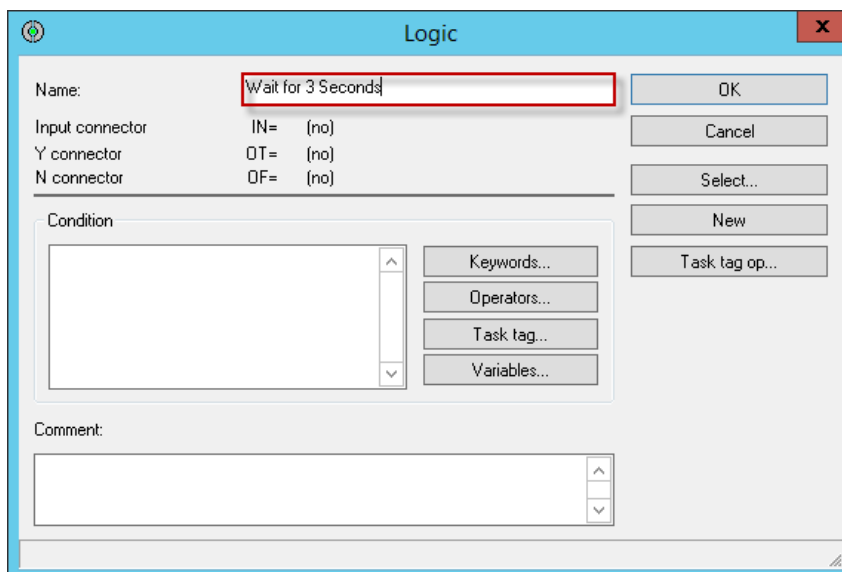
47. The configured element is displayed.



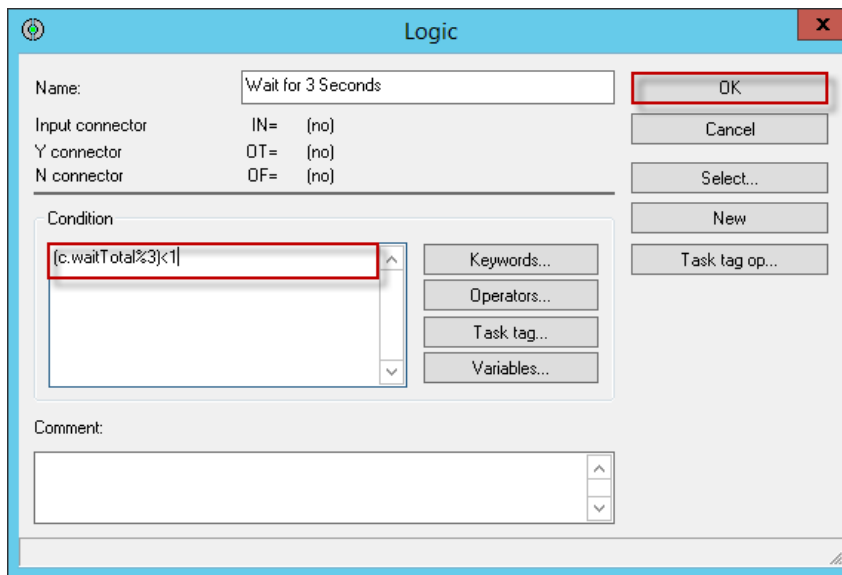
48. After sending the text back into the customer's chat session, there should be a pause of a few seconds before the customer is connected to the Agent. This pause will allow the customer to obtain any information requested during the chat session, for example a serial number, order number etc. This pause can be configured using a **Logic** element. Drag a logic element into the Chat flow working area.



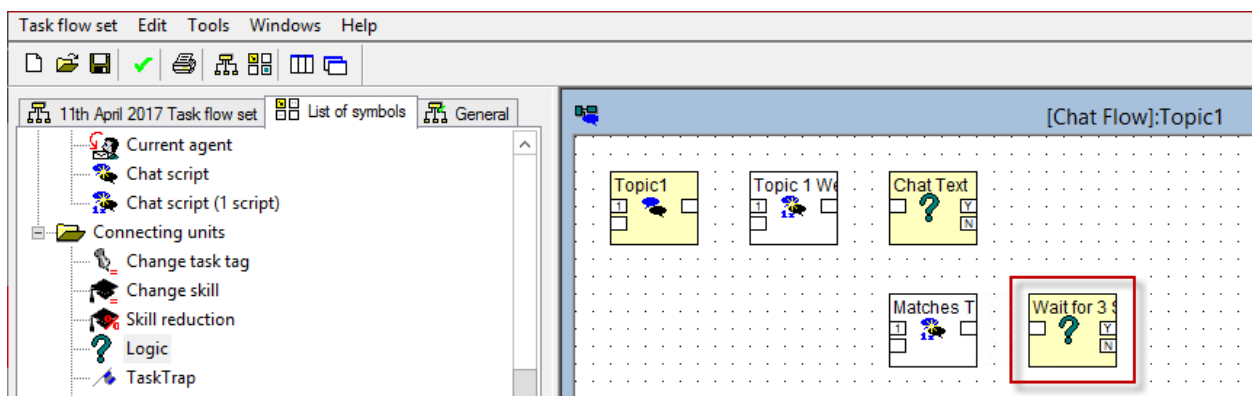
49. In the **Name** field type **Wait for 3 Seconds**.



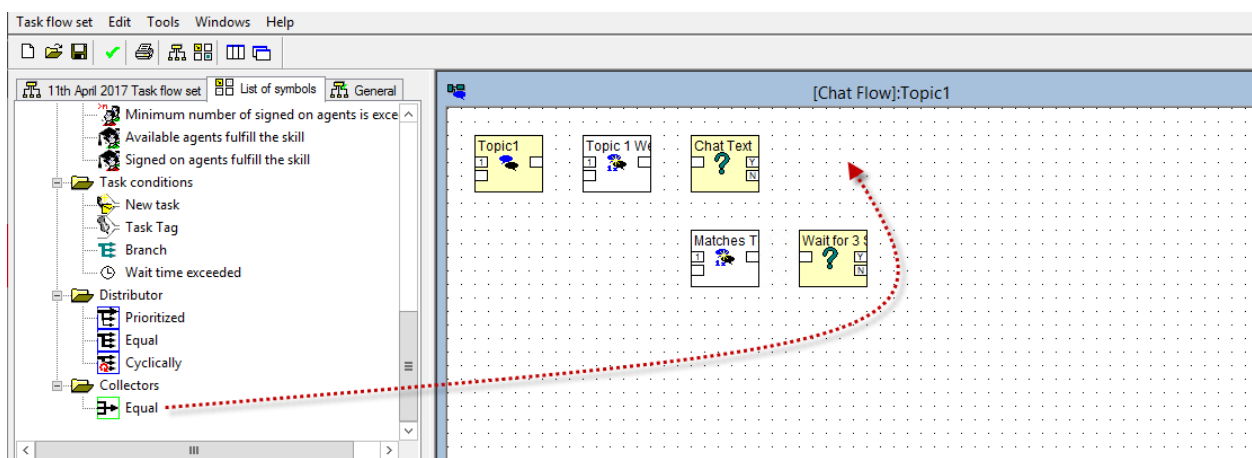
50. In the **Condition** field type **(c.waitTotal%3)<1** and then select the **OK** button.



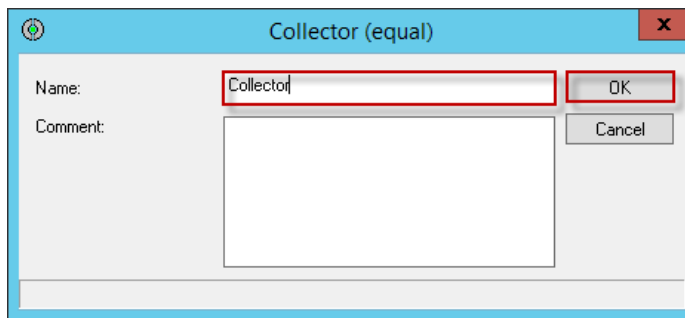
51. The configured element is displayed.



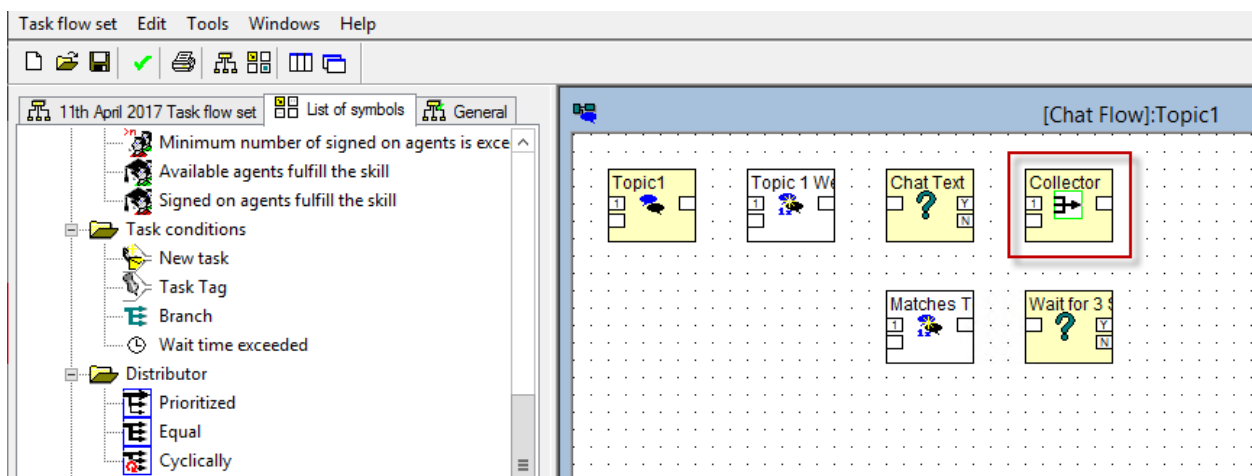
52. A **Collector – Equal** element will be used to link the two routes back together. Drag the element in to the Chat flow working area.



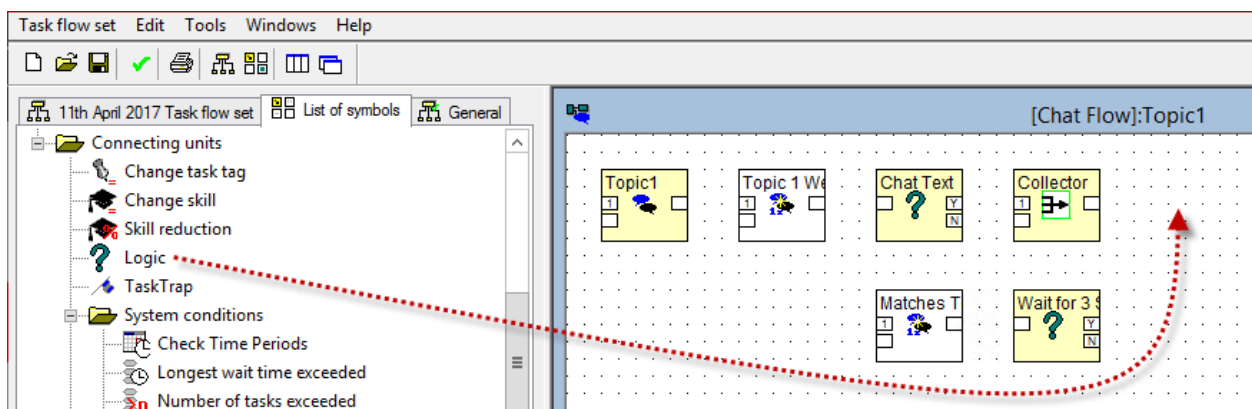
53. In the **Name** field type **Collector** and then select the **OK** button.



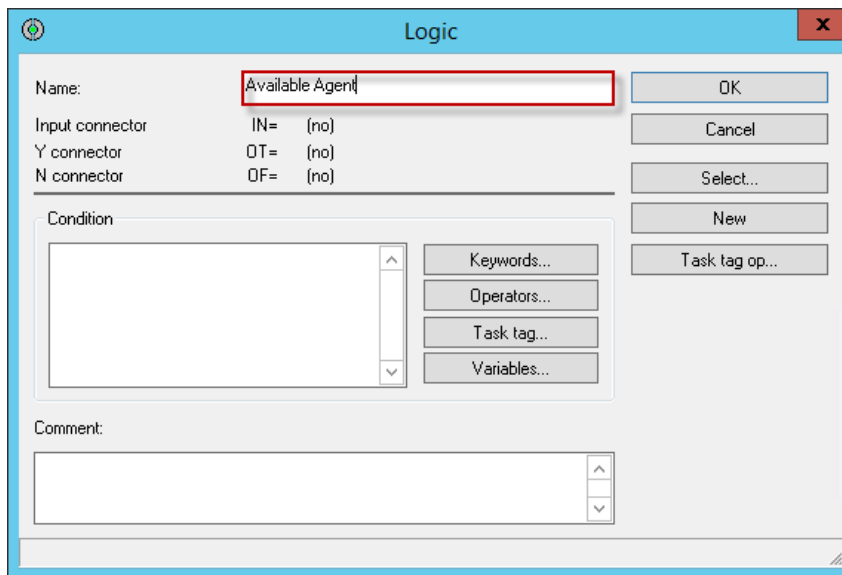
54. The configured element is displayed.



55. A **Logic** element will be used to check if there are any Agents available to take a Chat session. Drag the element into the Chat flow working area.

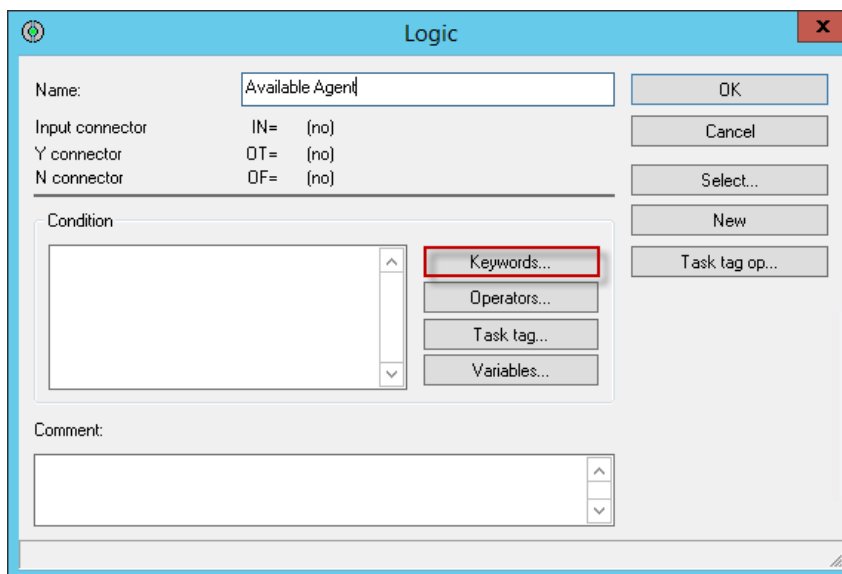


56. In the **Name** field type **Available Agents**.



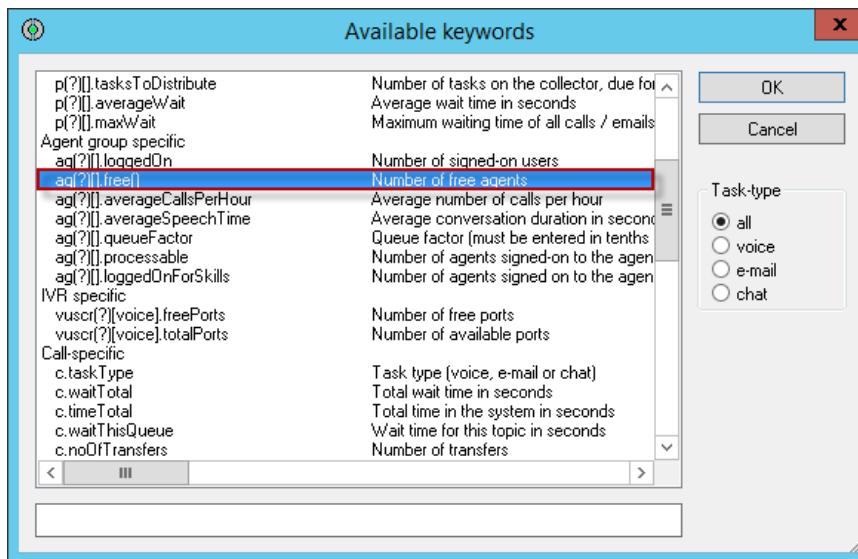
The screenshot shows the 'Logic' dialog box. The 'Name' field contains the text 'Available Agent'. Below the 'Name' field, there are three rows of connector information: 'Input connector' with 'IN=' and '(no)', 'Y connector' with 'OT=' and '(no)', and 'N connector' with 'OF=' and '(no)'. To the right of these fields are buttons for 'OK', 'Cancel', 'Select...', 'New', and 'Task tag op...'. Below the connector information is a 'Condition' section with a large text area and four buttons: 'Keywords...', 'Operators...', 'Task tag...', and 'Variables...'. At the bottom is a 'Comment' field with a text area and up/down arrow buttons.

57. Click the **Keywords...** button.

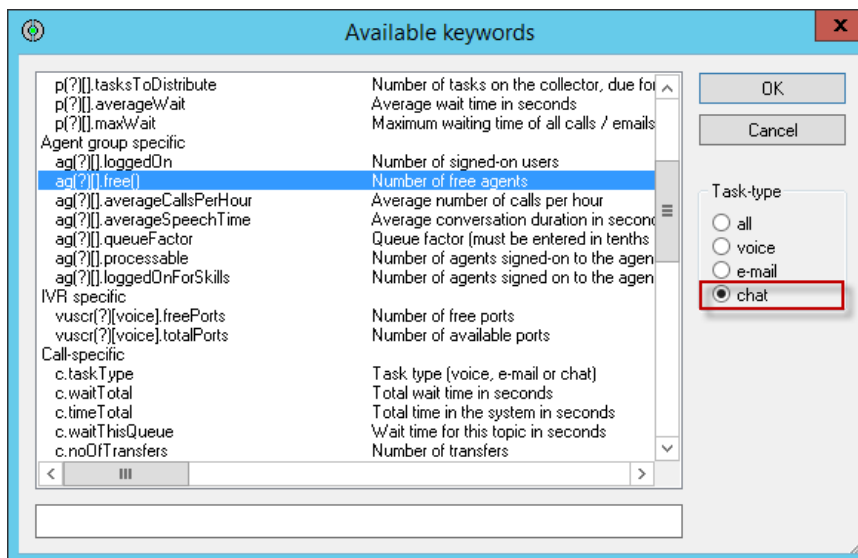


This screenshot is identical to the previous one, but the 'Keywords...' button in the 'Condition' section is highlighted with a red rectangle, indicating it should be clicked.

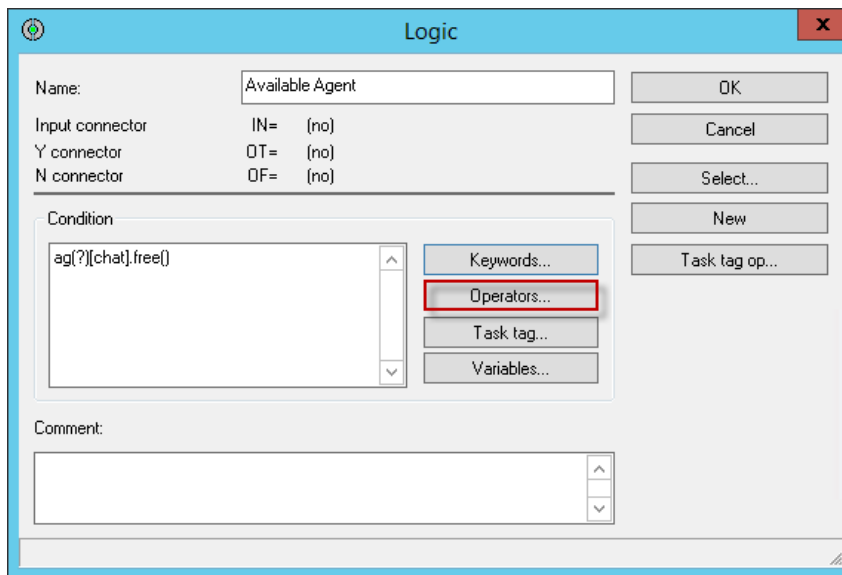
58. Select the **Number of Free agents** keyword.



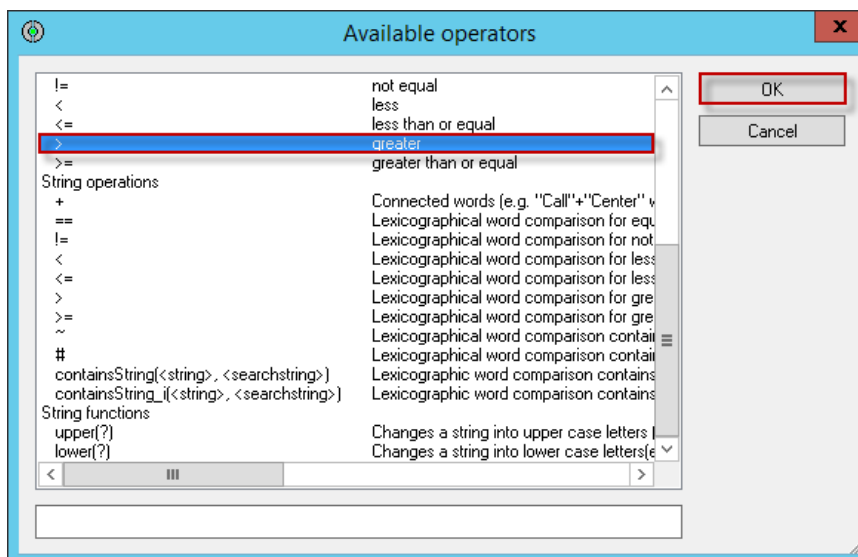
59. Select the Task-type **chat** radio button and then click the **OK** button.



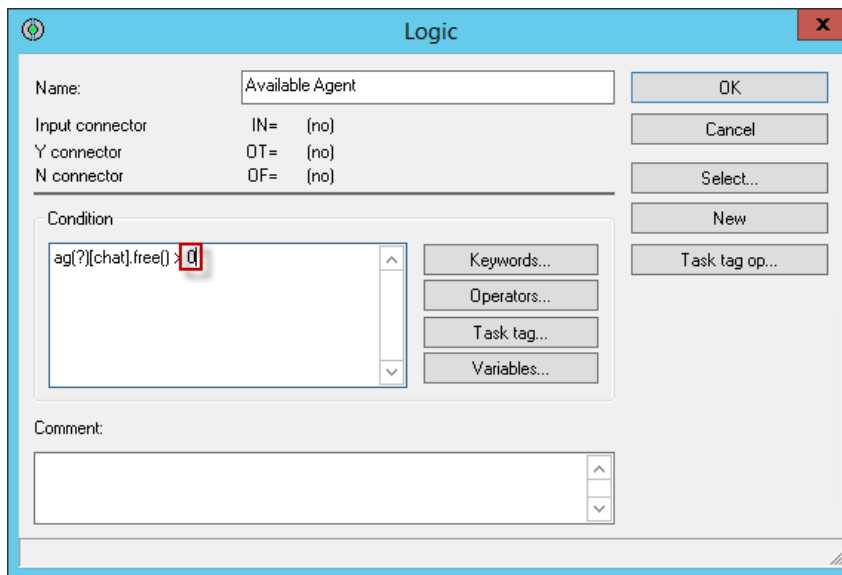
60. Click after the **Condition** text and then click the **Operators** button.



61. Click the **greater** operator and then select the **OK** button.

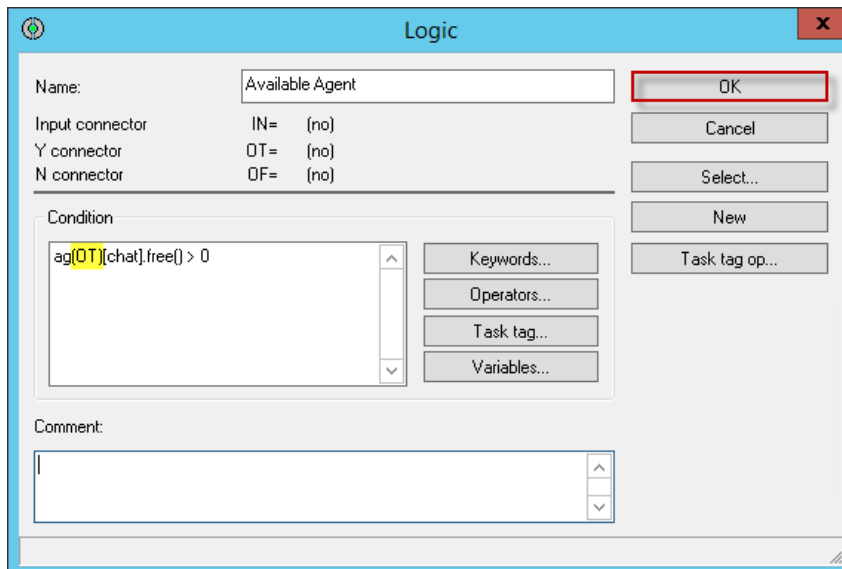


62. At the end of **Condition** type a **0**



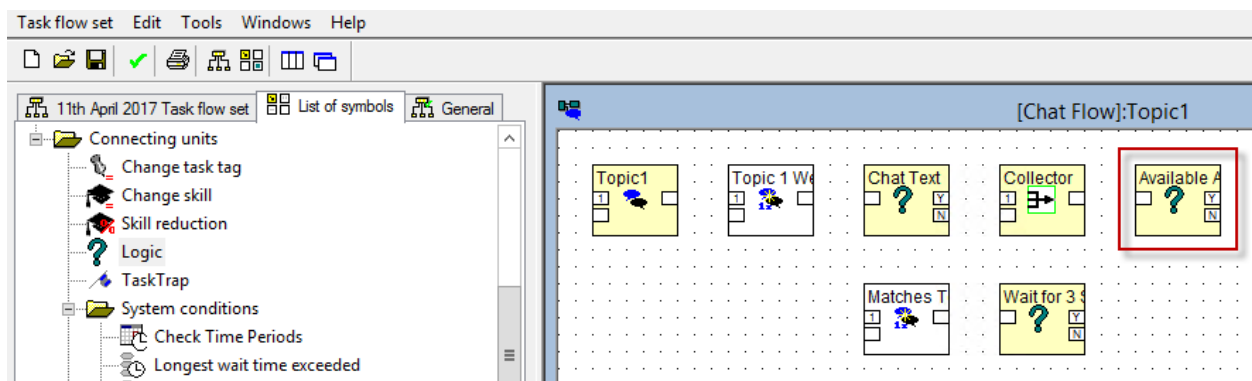
The screenshot shows the 'Logic' dialog box. The 'Name' field is 'Available Agent'. The 'Input connector' is 'IN= (no)', 'Y connector' is 'OT= (no)', and 'N connector' is 'OF= (no)'. The 'Condition' field contains the expression 'ag(?)([chat].free()) > 0', with a red box highlighting the '0' at the end. To the right of the condition field are buttons for 'Keywords...', 'Operators...', 'Task tag...', and 'Variables...'. On the far right are buttons for 'OK', 'Cancel', 'Select...', 'New', and 'Task tag op...'. A 'Comment' field is at the bottom.

63. Change the ? to a **OT** then click the **OK** button.

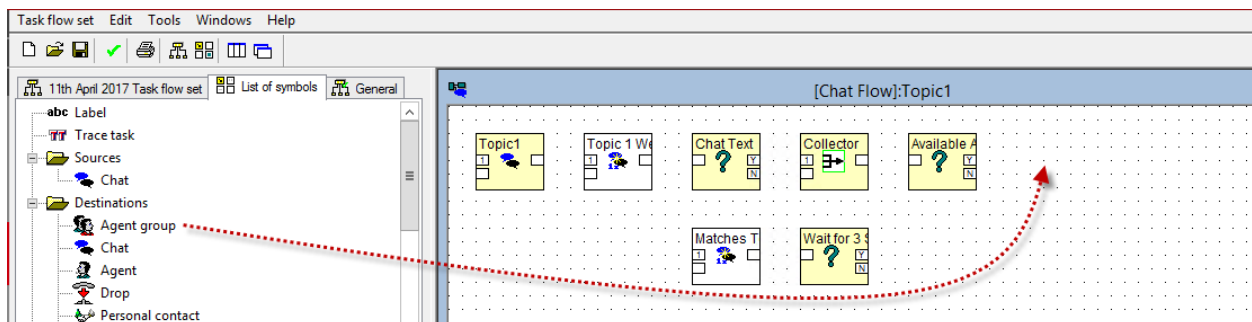


The screenshot shows the 'Logic' dialog box after the modification. The 'Condition' field now contains 'ag(OT)([chat].free()) > 0', with 'OT' highlighted in yellow. The 'OK' button on the right is now highlighted with a red border. All other elements, including the connector settings and buttons, remain the same as in the previous screenshot.

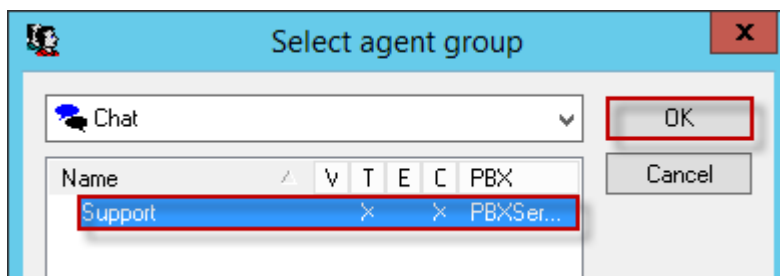
64. The configured element is displayed.



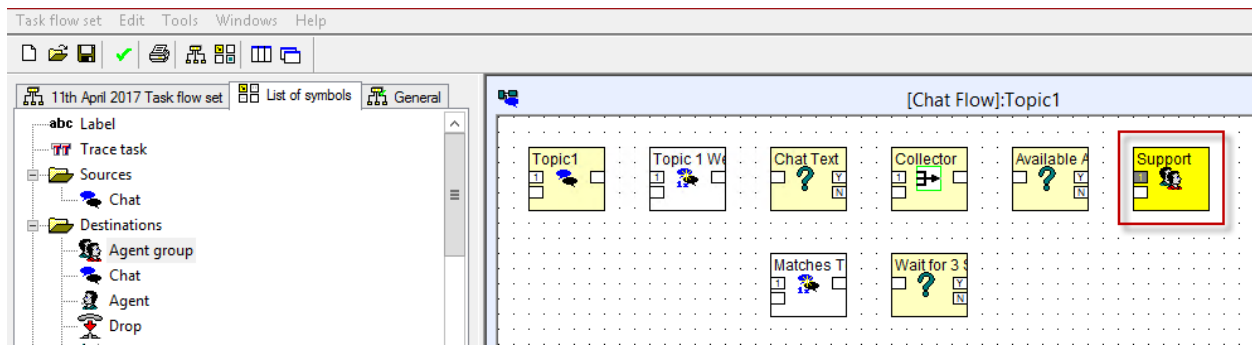
65. If Agents are available to Chat, the customer should be directed to the correct Agent Group destination. This can be achieved with an **Agent Group** element. Drag the element into the Chat flow window.



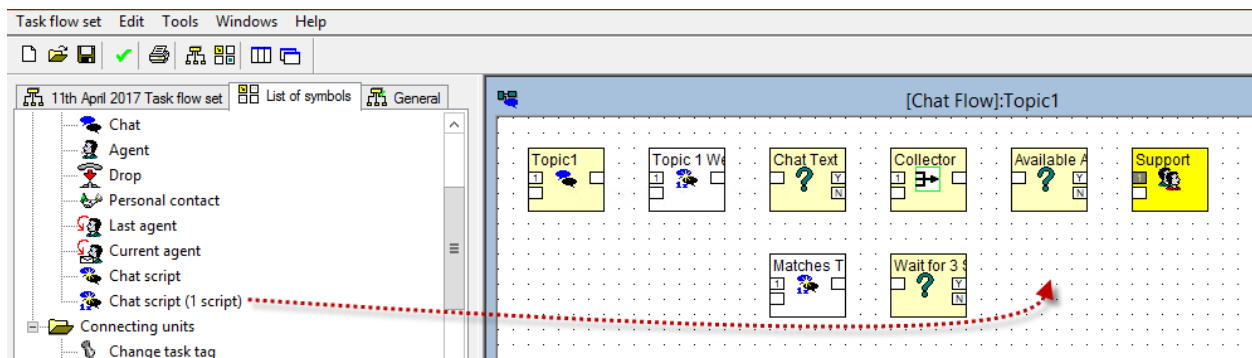
66. Click **Support** and then select the **OK** button.



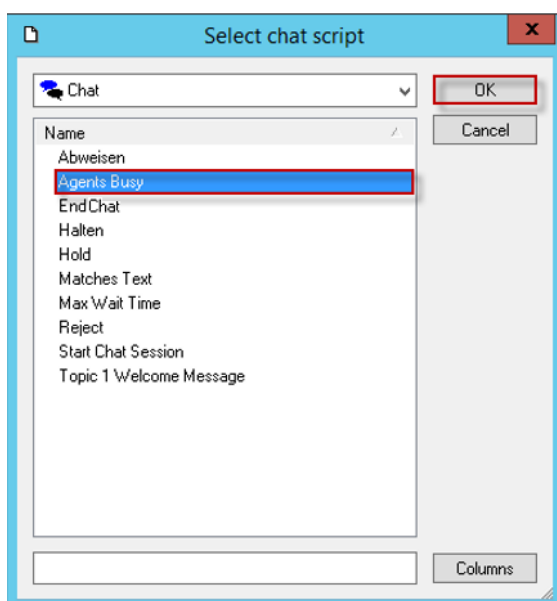
67. The configured element is displayed.



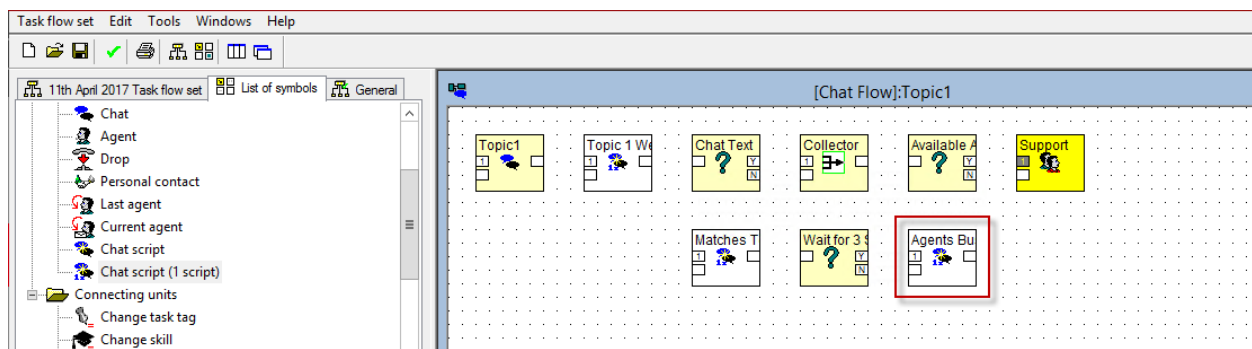
68. A message will be distributed to the chat customer informing them that all of the Agents are busy. This will be configured using a **Chat script (1 script)** element. Drag the element into the Chat flow working area.



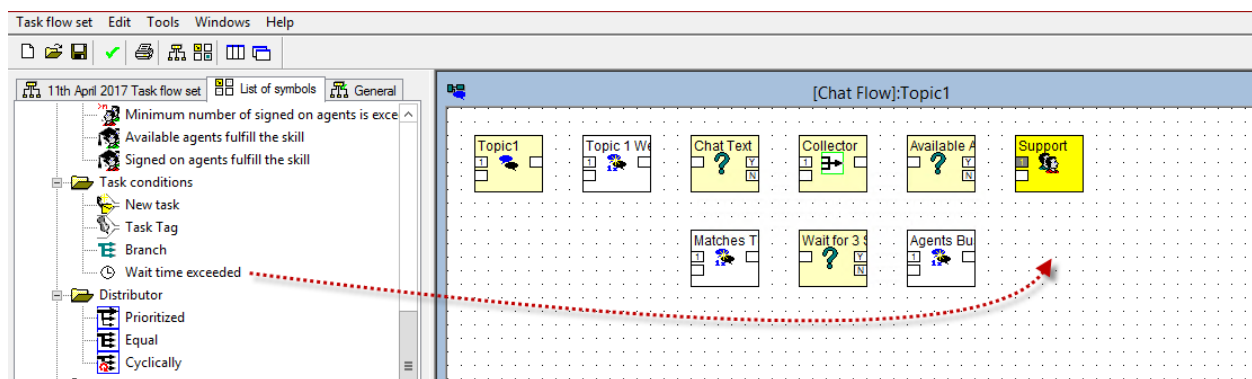
69. Click the Agent Busy chat script and then select the **OK** button.



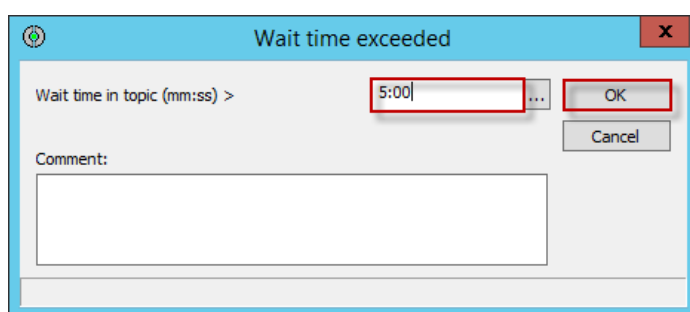
70. The configured element is displayed.



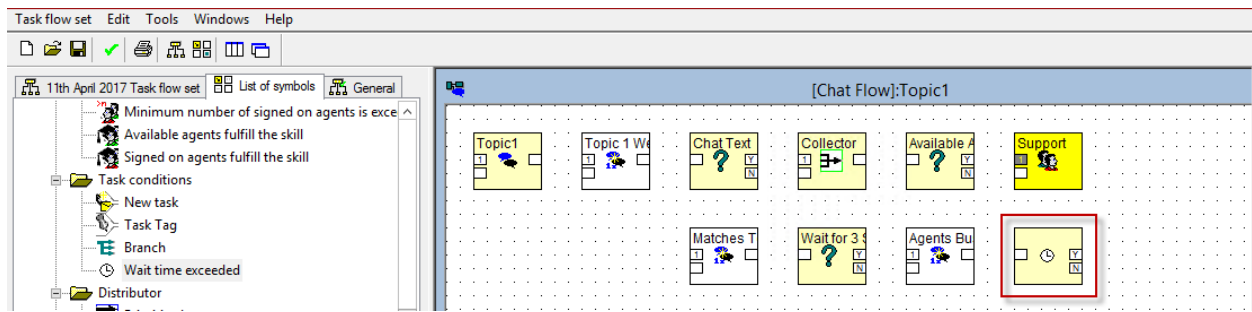
71. In this example, if all the agents are busy, the customer should not queue beyond five minutes for a Chat session. A **Wait time exceeded** element will be used to set the time period. Drag the element into the Chat Flow working area.



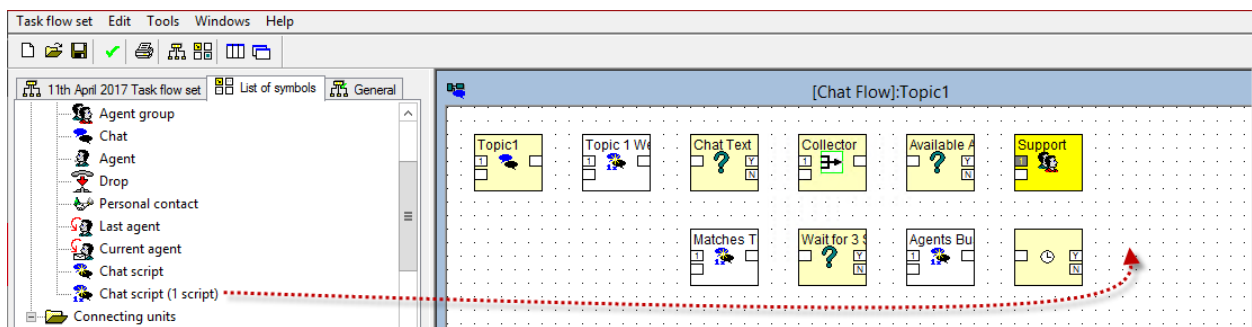
72. Enter a time of **5:00** and then select the **OK** button.



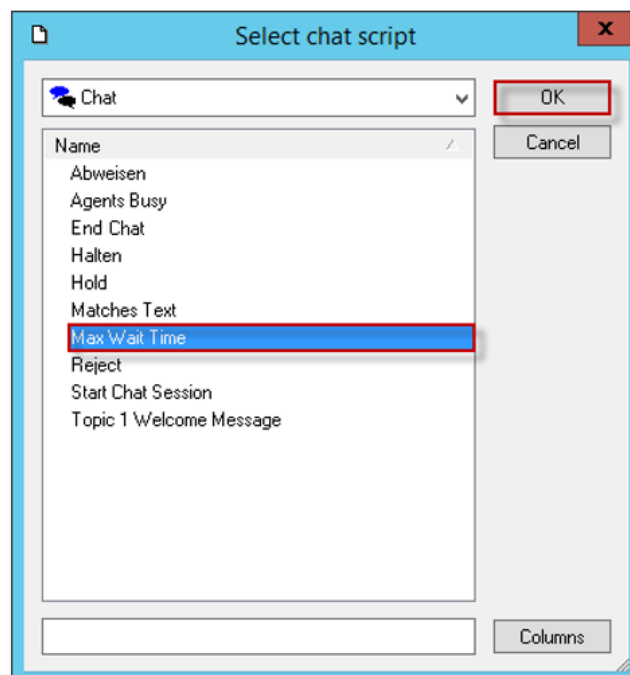
73. The configured element is displayed.



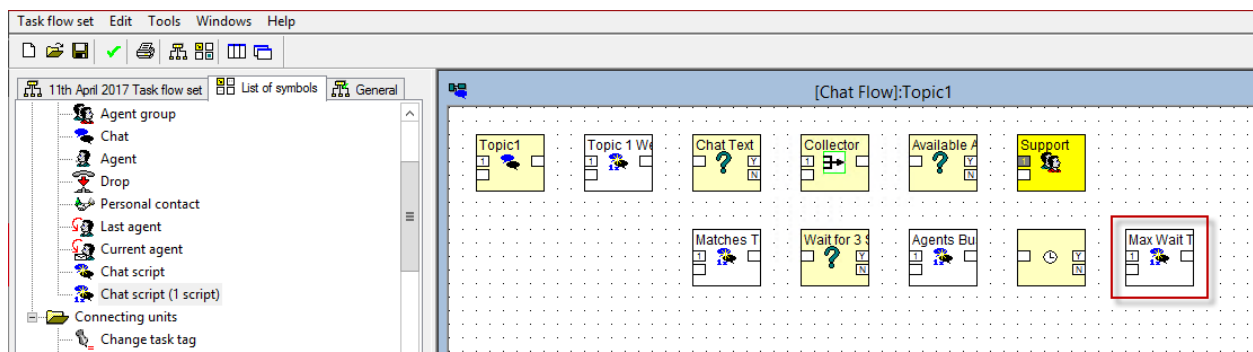
74. If the Chat customer waits over five minutes to be connected to an agent, they should receive a message to alert them that they will be disconnected and provide them with additional contact details. This can be achieved using a **Chat script (1 script)** element.



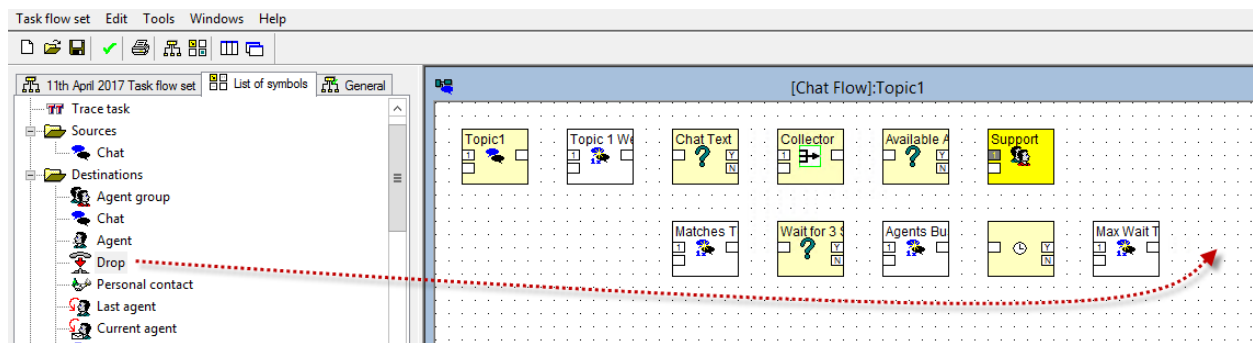
75. Select **Max wait time** and then click the **OK** button.



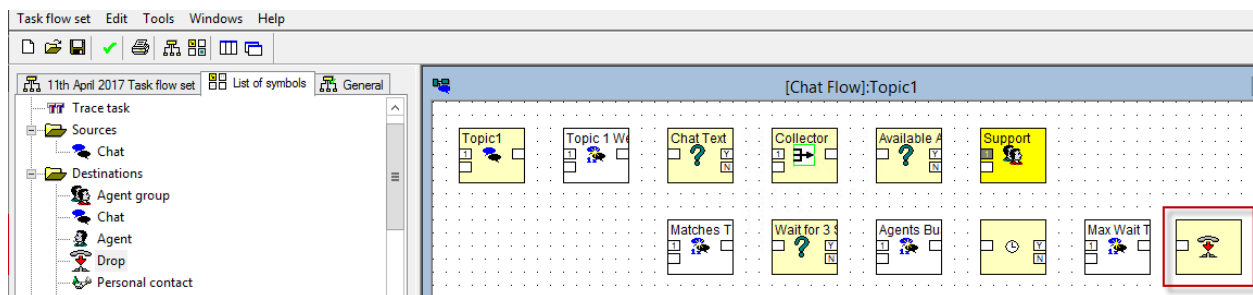
76. The configured element is displayed.



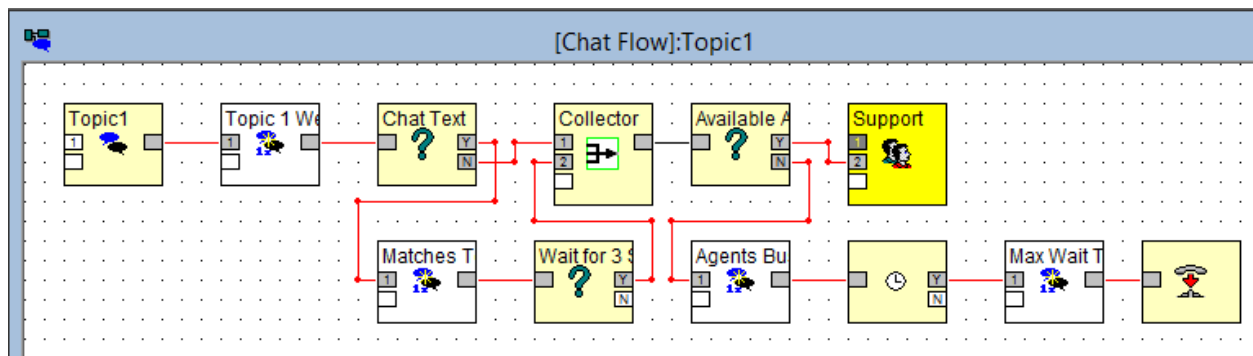
77. After the Max wait time Chat script, the Chat session should be disconnected. This can be completed using a **Drop** element. Drag the element into the Chat Flow working area.



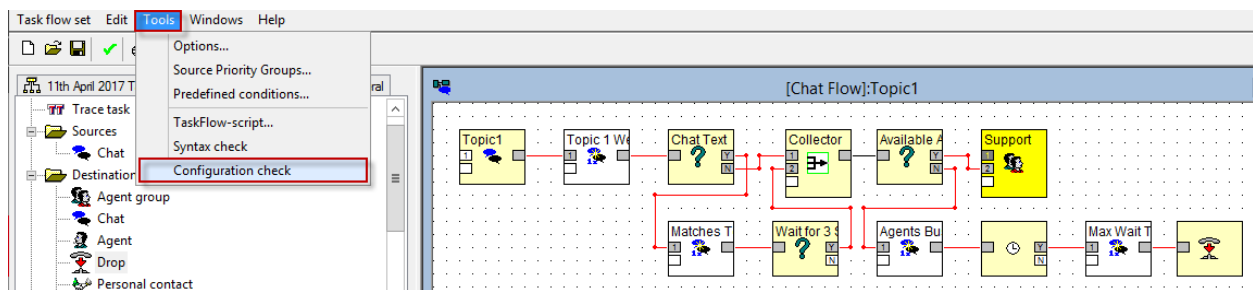
78. The configured element is displayed.



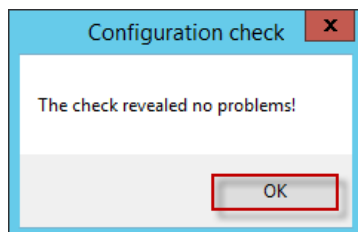
79. Link the elements together as illustrated below



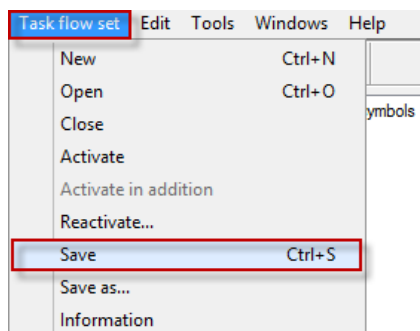
80. Choose **Tools** and then select **Configuration check**.



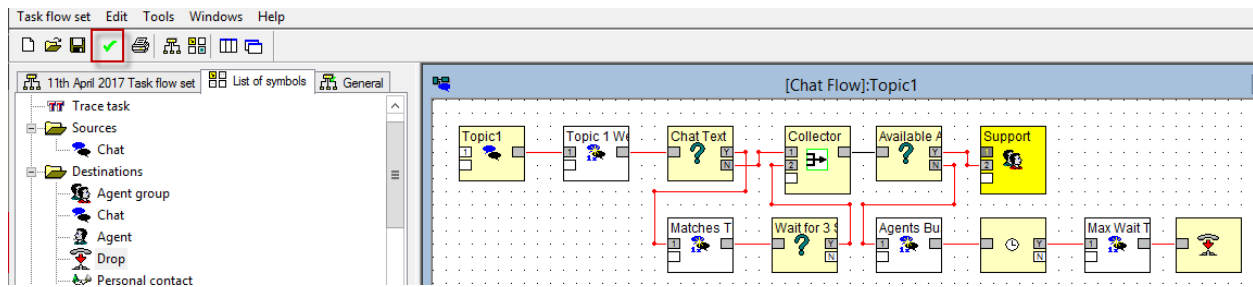
81. Click the **OK** button.



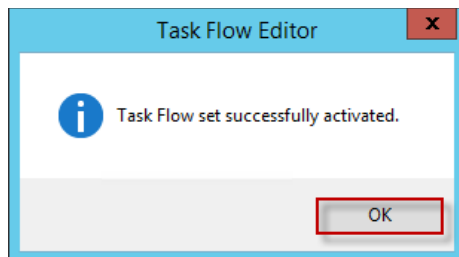
82. Select **Task flow set** and then click **Save**.



83. Click the **Activate** button.

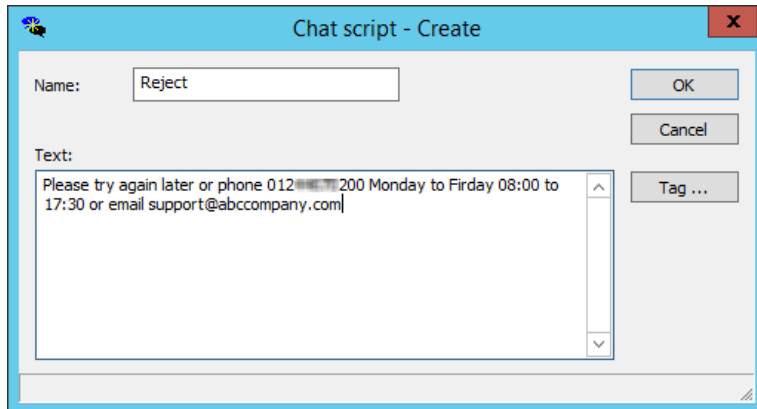


84. When prompted click the **OK** button.

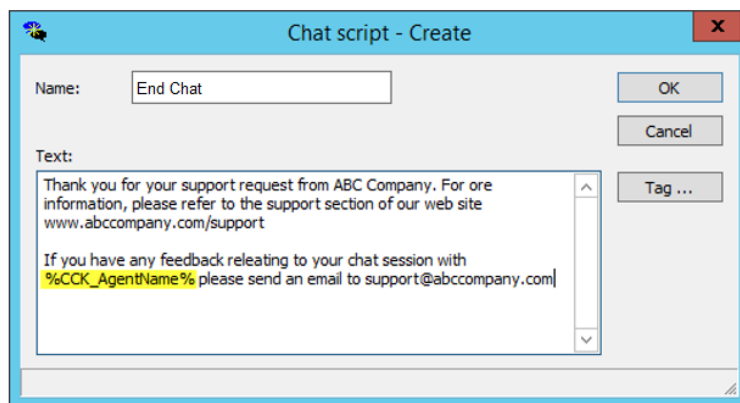


Setting Chat scripts against Chat topics

Chat scripts can now be assigned against the Chat Topics to inform the customer that their session has been rejected or ended. The required chat scripts were configured earlier in this guide, as illustrated below.

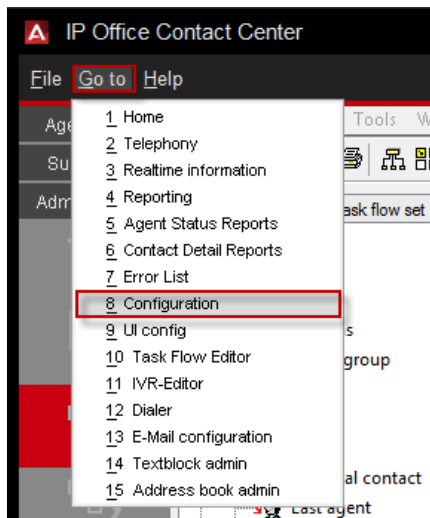


The screenshot shows a dialog box titled "Chat script - Create". It has a "Name:" field containing the text "Reject". To the right of the field are "OK", "Cancel", and "Tag ..." buttons. Below the "Name:" field is a "Text:" label followed by a large text area. The text area contains the following text: "Please try again later or phone 012 200 Monday to Friday 08:00 to 17:30 or email support@abccompany.com". The text area has a vertical scrollbar on the right side.

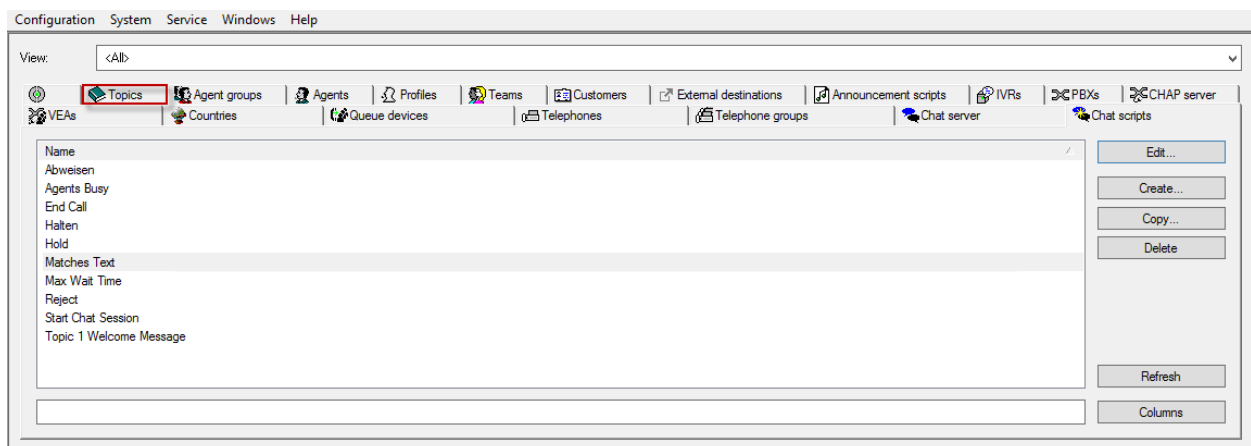


The screenshot shows a dialog box titled "Chat script - Create". It has a "Name:" field containing the text "End Chat". To the right of the field are "OK", "Cancel", and "Tag ..." buttons. Below the "Name:" field is a "Text:" label followed by a large text area. The text area contains the following text: "Thank you for your support request from ABC Company. For ore information, please refer to the support section of our web site www.abccompany.com/support". The text area has a vertical scrollbar on the right side. Below this text, there is a line of text: "If you have any feedback releating to your chat session with %CCK_AgentName% please send an email to support@abccompany.com". The text area has a vertical scrollbar on the right side.

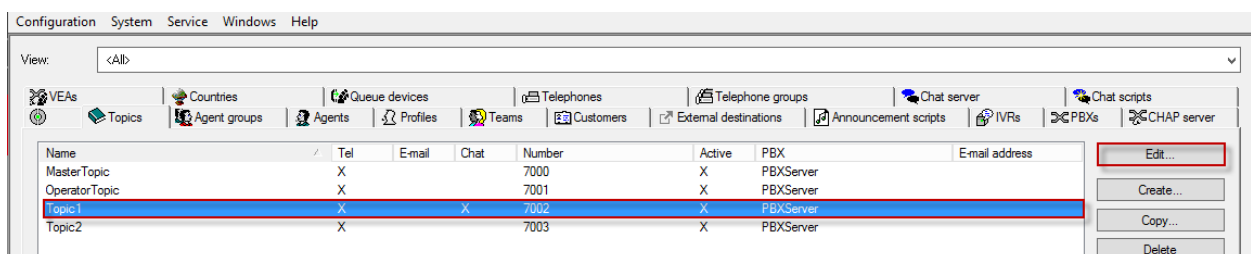
85. In this example, Topic 1 will be configured to provide a Chat scripts when the chat session has ended. Click the **Go to** menu and select **Configuration**.



86. Click the **Topics** tab.



87. Click **Topic1** and then select the **Edit** button.



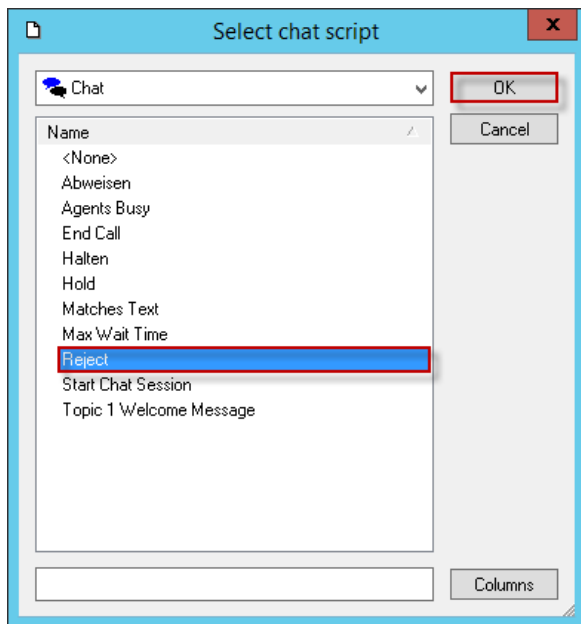
88. Click the **Chat** tab.

The screenshot shows the 'Topic1 - Edit' dialog box with the 'Chat' tab selected. The 'Name' field contains 'Topic1'. Under 'Task types', 'Telephony' and 'Chat' are checked, while 'E-mail' is unchecked. The 'Priority' is set to 0. The 'Display Last Topic' checkbox is checked. Under 'Use reporting values for routing', 'TSF', 'Accept Level', and 'Avg. Waiting Time' are all unchecked. On the right, there are buttons for '0 block. period...', 'Variables...', 'OK', and 'Cancel'.

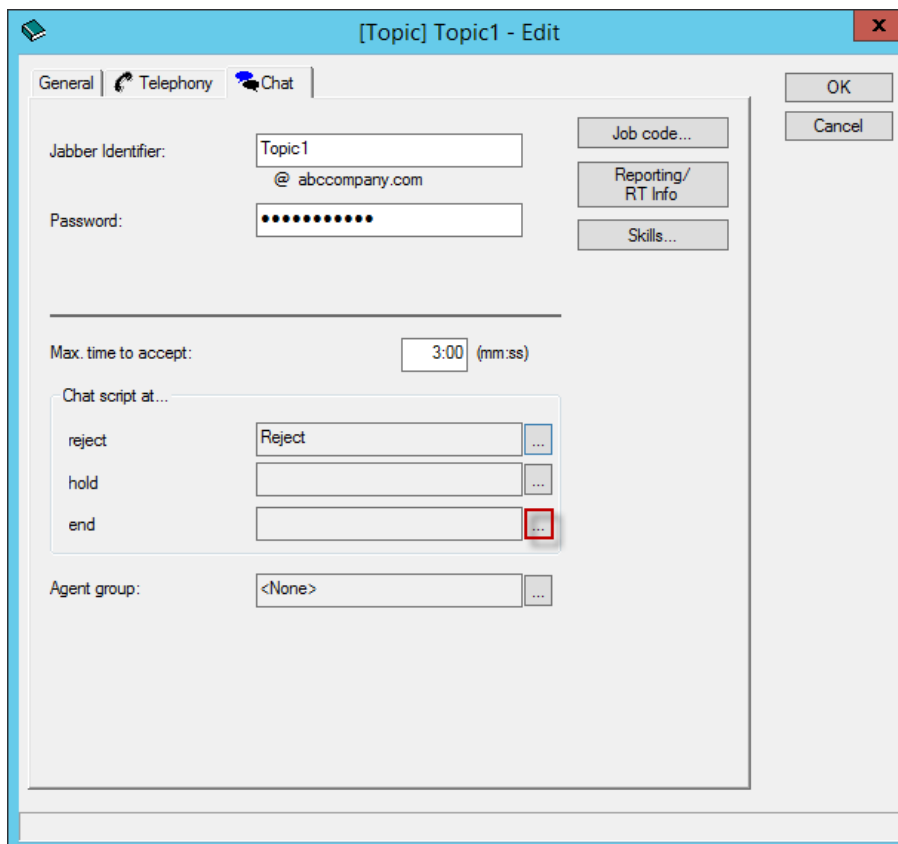
89. Click the **reject ...** browser button.

The screenshot shows the 'Topic1 - Edit' dialog box with the 'Chat' tab selected. The 'Jabber Identifier' field contains 'Topic1@abccompany.com' and the 'Password' field is masked with dots. On the right, there are buttons for 'Job code...', 'Reporting/RT Info', 'Skills...', 'OK', and 'Cancel'. The 'Max. time to accept' is set to 3:00 (mm:ss). Under 'Chat script at...', there are three rows: 'reject', 'hold', and 'end'. Each row has a text field and a browser button (three dots). The 'reject' browser button is highlighted with a red box. The 'Agent group' is set to '<None>'.

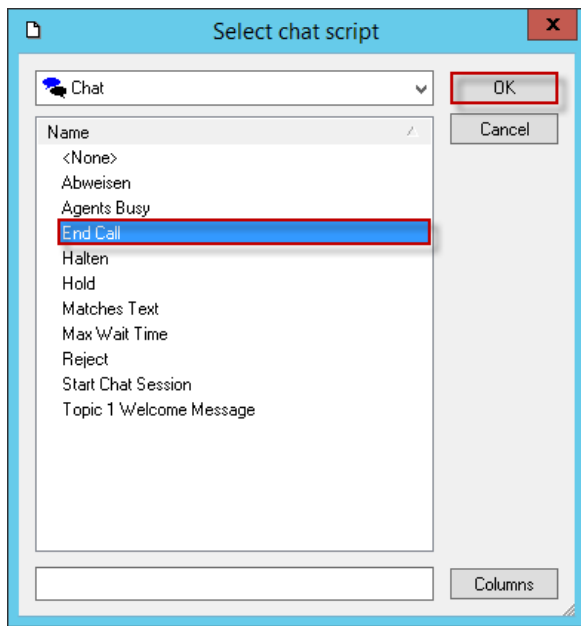
90. Select the **Reject** chat script and click the **OK** button.



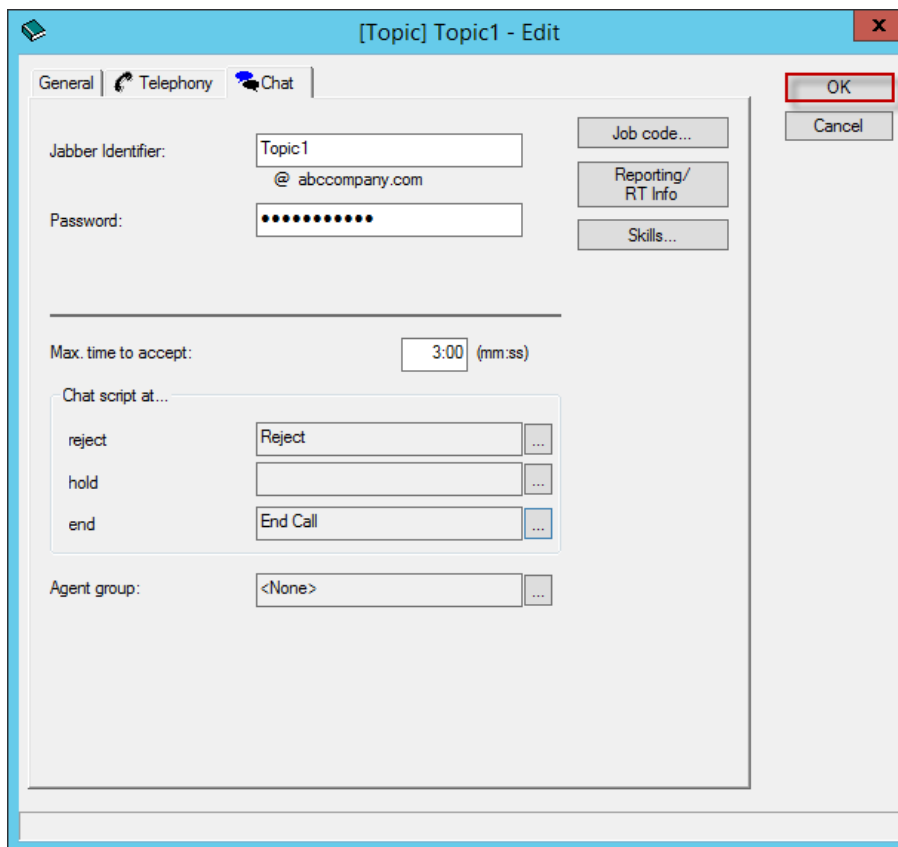
91. Click the **end ...** browser button.



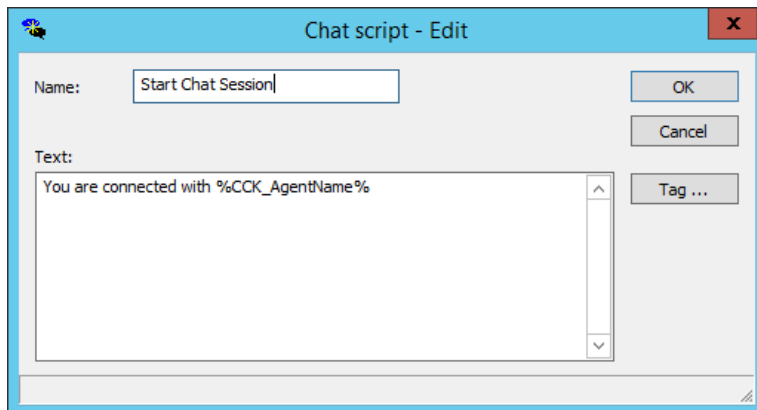
92. Click the **End Call** chat script and then click the **OK** button.



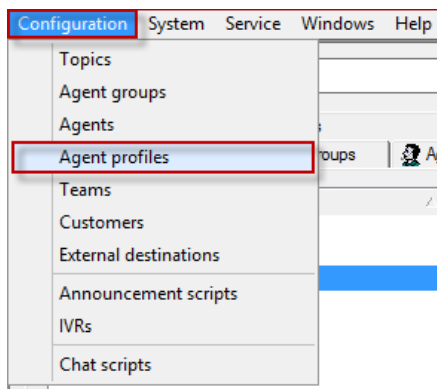
93. Click the **OK** button.



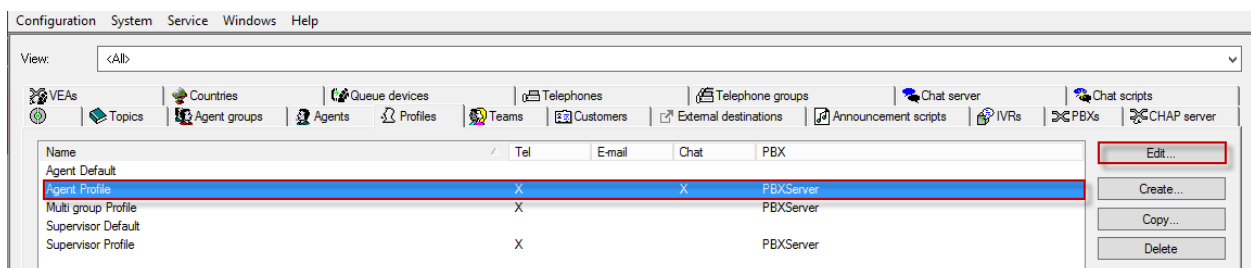
94. A Welcome script can now be added for each Agent. This will inform the customer which chat agent they are connected to. The chat script was configured earlier in this guide.



95. In this example, a Profile will be used. Click **Configuration** and then select **Agent profile**.



96. Click the required Agent Profile and then select the **Edit** button.



97. Click the **Chat** tab.

The screenshot shows the 'Chat' tab of the 'Agent Profile - Edit' dialog. The 'Name' field contains 'Agent Profile'. The 'Privileges' dropdown is set to 'Agent'. Under 'Task types', 'Telephony' and 'Chat' are checked, while 'E-mail' is unchecked. The 'Used for:' list contains 'Agent', 'Agent 1', 'Agent 10', 'Agent 2', 'Agent 3', 'Agent 4', and 'Agent 5'. The 'Authorization...' button is visible. 'OK' and 'Cancel' buttons are on the right.

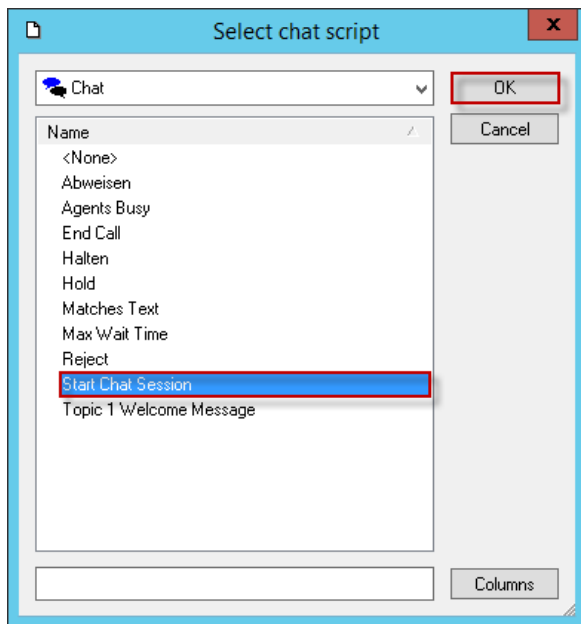
98. Click the **Welcome Text ...** browser button.

The screenshot shows the 'Welcome text' field with a red box around the '...' browser button. Below it is the 'Group assignment' section with a table and control buttons.

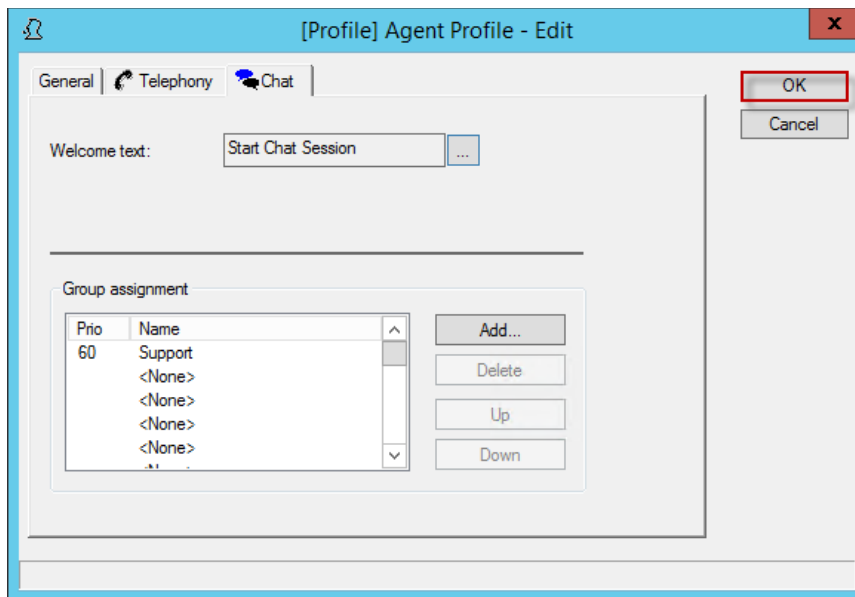
Prio	Name
60	Support
	<None>
	<None>
	<None>
	<None>

Buttons: Add..., Delete, Up, Down.

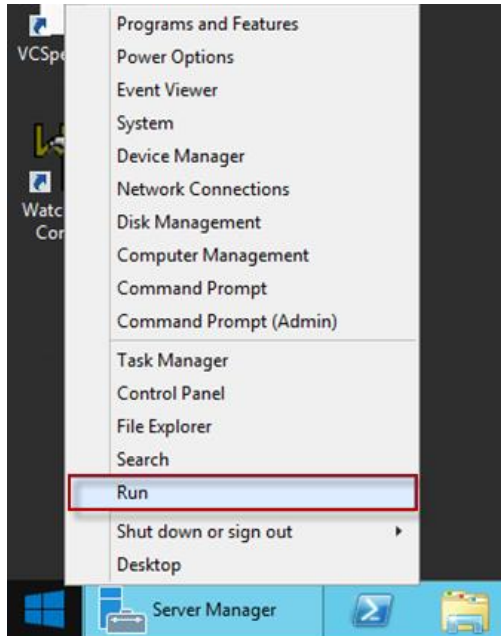
99. Click the **Start Chat Session** and select the OK button.



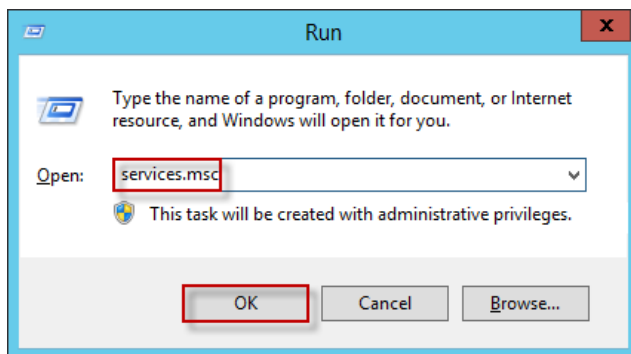
100. Click the **OK** button.



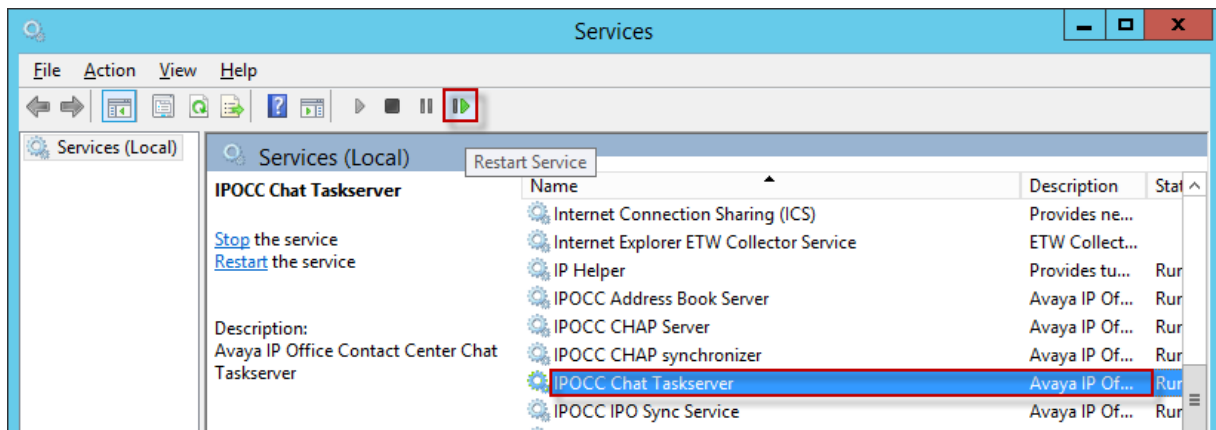
101. It is now necessary to restart two services. The IPOCC Chat Taskserver & the IPOCC Tomcat WWW must now be restarted (IPOCC Tomcat WWW restart is only required, if you are using the WebChat). Using the right mouse button click the windows icon and select **Run**.



102. Type **services.msc** and then click the **OK** button.

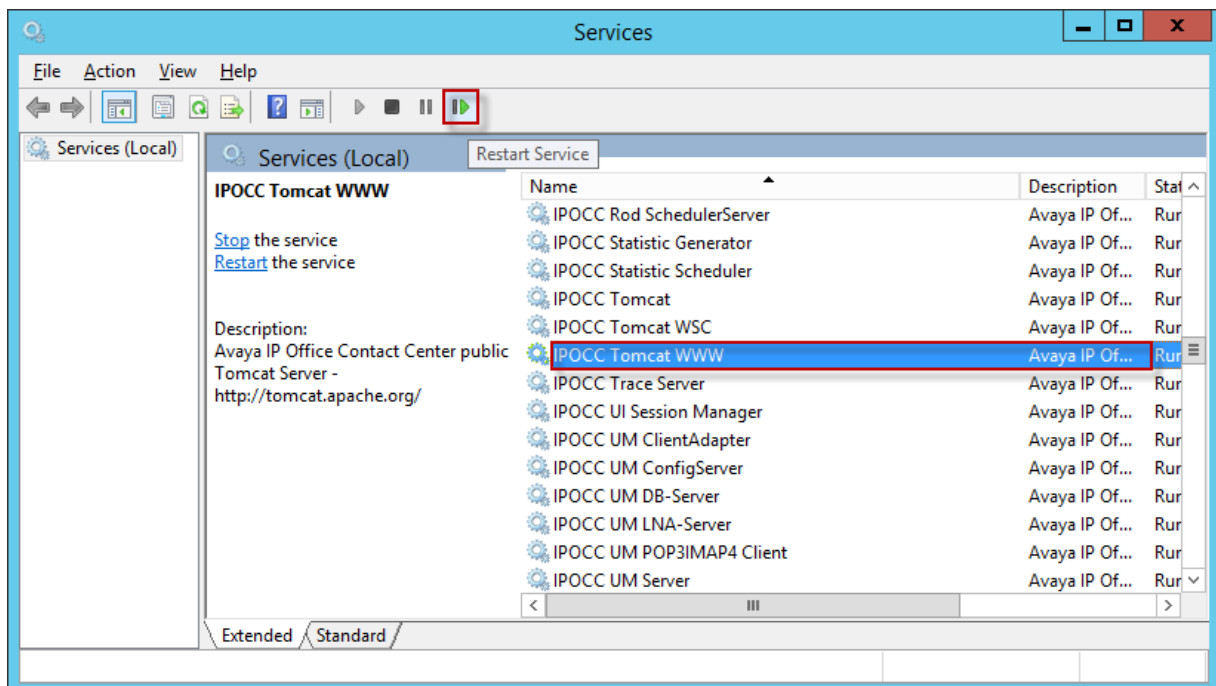


103. Choose the **IPOCC Chat Taskserver** and then select the **Restart Service** button.



104. If you are using WebChat, you need to restart the IPOCC Tomcat WWW service.

Choose the **IPOCC Tomcat WWW** service and then select the **Restart Service** button.



Configuring the one-X Portal XMPP service

As the one-X Portal service is installed as default onto the IP Office Server Edition and application server, it can be utilized to provide the XMPP service for Chat functionality.

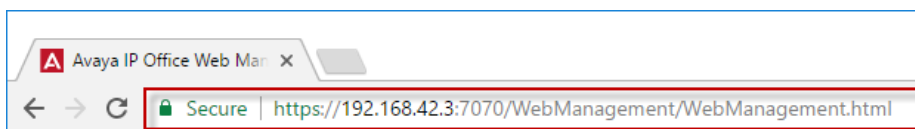
When following the instructions in this guide, it is assumed that the IP Office Contact Center, the IP Office and the One-X Portal service have been correctly configured.

To use the One-X Portal's XMPP service for the IP Office Contact Center, changes are required in all three components.

- i. one-X Portal
- ii. IP Office Manager
- iii. *IP Office Contact Center (Use sections Configuration an existing Topic to use Chat and Configuring an existing Agent group to use Chat)*

One-X Portal

1. Using a web browser, open <https://XXX.XXX.XXX.XXX:7070> (where XXX.XXX.XXX.XXX is the IP address of the IP Office Server Edition or application server).

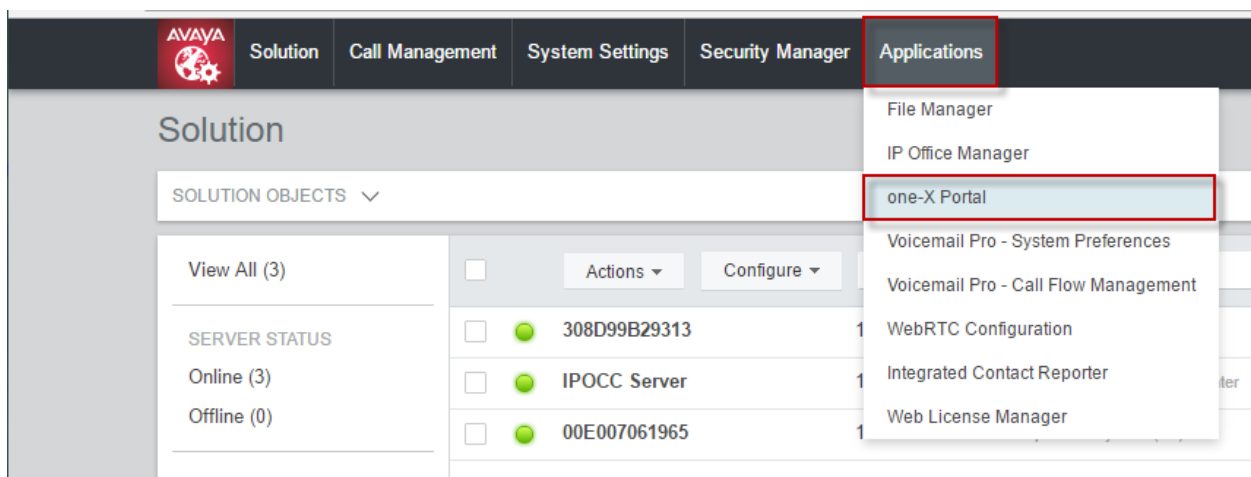


2. Enter the **Username** Administrator and the required **Password** and then select the **Login** button.



The image shows the Avaya IP Office Web Manager login interface. On the left is a red vertical banner with the 'AVAYA' logo. The main area has a title 'Avaya IP Office Web Manager'. Below the title are four input fields: 'User Name' with 'Administrator' entered, 'Password' with masked characters '.....', 'Select Language' with 'English' selected in a dropdown, and an 'Offline Mode' checkbox which is unchecked. Below these fields is a dark 'Login' button. At the bottom, there is a copyright notice: '© 2017 Avaya Inc. All Rights Reserved.'

3. Click **Applications** and then select **one-X Portal**.



The image shows the Avaya IP Office Web Manager interface with the 'Applications' menu open. The top navigation bar includes 'Solution', 'Call Management', 'System Settings', 'Security Manager', and 'Applications' (which is highlighted with a red box). The 'Applications' dropdown menu is visible, listing several options: 'File Manager', 'IP Office Manager', 'one-X Portal' (highlighted with a red box), 'Voicemail Pro - System Preferences', 'Voicemail Pro - Call Flow Management', 'WebRTC Configuration', 'Integrated Contact Reporter', and 'Web License Manager'. The main content area shows a 'Solution' section with 'SOLUTION OBJECTS' and a table of server status.

View All (3)		Actions	Configure
SERVER STATUS			
Online (3)	☐	☒	308D99B29313
Offline (0)	☐	☒	IPOCC Server
	☐	☒	00E007061965

4. Click **Configuration**.

The screenshot shows the Avaya IP Office One-X Portal for IP Office. The left sidebar contains a menu with the following items: Health, Dashboard, Component Status, IM/Presence Server Status, Key Recent Events, Active Sessions, Environment, **Configuration** (highlighted with a red box), Security, Diagnostics, Directory Integration, Gadgets Configuration, IM Archive, Web Conferences, and Help & Support. The main content area displays the following sections:

- IP Office/Expansions**: A gauge showing 100% status. A legend indicates: Available: 100% (1), Starting: 0% (0), Failed: 0% (0). A link for [Component Status](#) is present. A red link for [Other Failures\(1\)](#) is at the bottom right.
- Health**: A gauge showing 7% status. A box on the right displays: JVM Max. Memory 6.91 GB, JVM Allocated Memory 505.81 MB. A link for [Environment](#) is at the top right.
- User Details**: A table showing user statistics.

Logged In Users	Total Users
0	15

 A link for [System Directory](#) is at the top right.
- IM/Presence Server**: A box showing the XMPP Domain Name as IPOSE750CR and the Status as Available. A link for [IM/Preser](#) is at the top right.

5. Click **IM Presence**.

The screenshot shows the Avaya IP Office One-X Portal for IP Office. The left sidebar contains a menu with the following items: Health, Configuration, Providers, Users, CSV, Branding, **IM/Presence** (highlighted with a red box), Exchange service, SMTP Configuration, Conference Dial-in, Host Domain Name, Conference Clean Up, Central CTI Link, Security, Diagnostics, Directory Integration, Gadgets Configuration, IM Archive, Web Conferences, and Help & Support. The main content area displays the following sections:

- IP Office/Expansions**: A gauge showing 100% status. A legend indicates: Available: 100% (1), Starting: 0% (0), Failed: 0% (0). A link for [Component Status](#) is present. A red link for [Other Failures\(1\)](#) is at the bottom right.
- Health**: A gauge showing 7% status. A box on the right displays: JVM Max. Memory 6.91 GB, JVM Allocated Memory 505.81 MB. A link for [Environment](#) is at the top right.
- User Details**: A table showing user statistics.

Logged In Users	Total Users
0	15

 A link for [System Directory](#) is at the top right.
- IM/Presence Server**: A box showing the XMPP Domain Name as IPOSE750CR and the Status as Available. A link for [IM/Preser](#) is at the top right.

6. In the **XMPP Domain Name** field, enter the Customer's XMPP **Domain Name** and then select the **Save** button.

AVAYA one-X Portal for IP Office Welcome **Administrator** | [Help](#) | [Logout](#) | Version: 10.1.0.0.0 build 211

Configuration

- Providers
- Users
- CSV
- Branding
- IM/Presence**
- Exchange service
- SMTP Configuration
- Conference Dial-in
- Host Domain Name
- Conference Clean Up
- Central CTI Link

IM/Presence Server

Server to Server Federation	☒
Disconnect on Idle	☐
Anyone can connect	☒
Port number	5269
Idle timeout	3600
MyBuddy user name	mybuddy
XMPP Domain Name	abccompany.com
Days to archive IMs	182

Note:
Days to archive IMs field will be disabled until IM/Presence server is available.

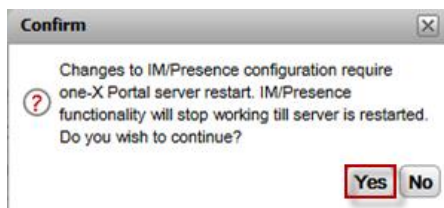
Save **Clear** **Refresh**

IM/Presence Exchange Service

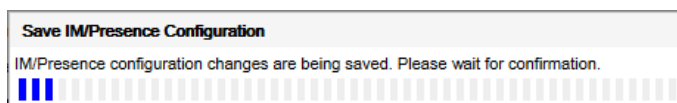
SMTP Configuration

Conference Dial-in Information

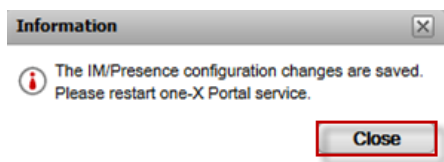
7. A message is displayed stating that the one-X Portal service will require a restart. Click the **Yes** button (This will not restart one-X Portal).



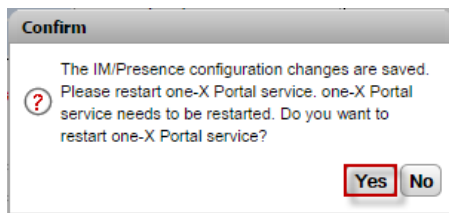
8. A Save IM/Presence Configuration message will appear.



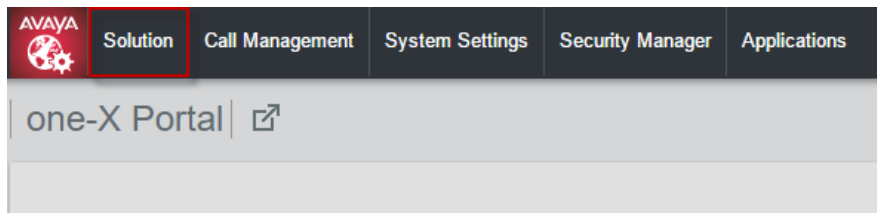
9. Click the **Close** button.



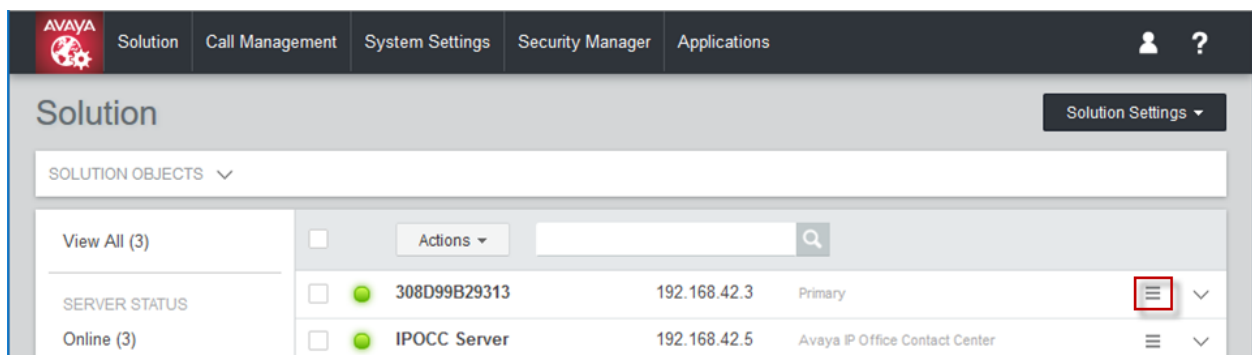
10. Click **Yes** to restart the one-X Portal service.



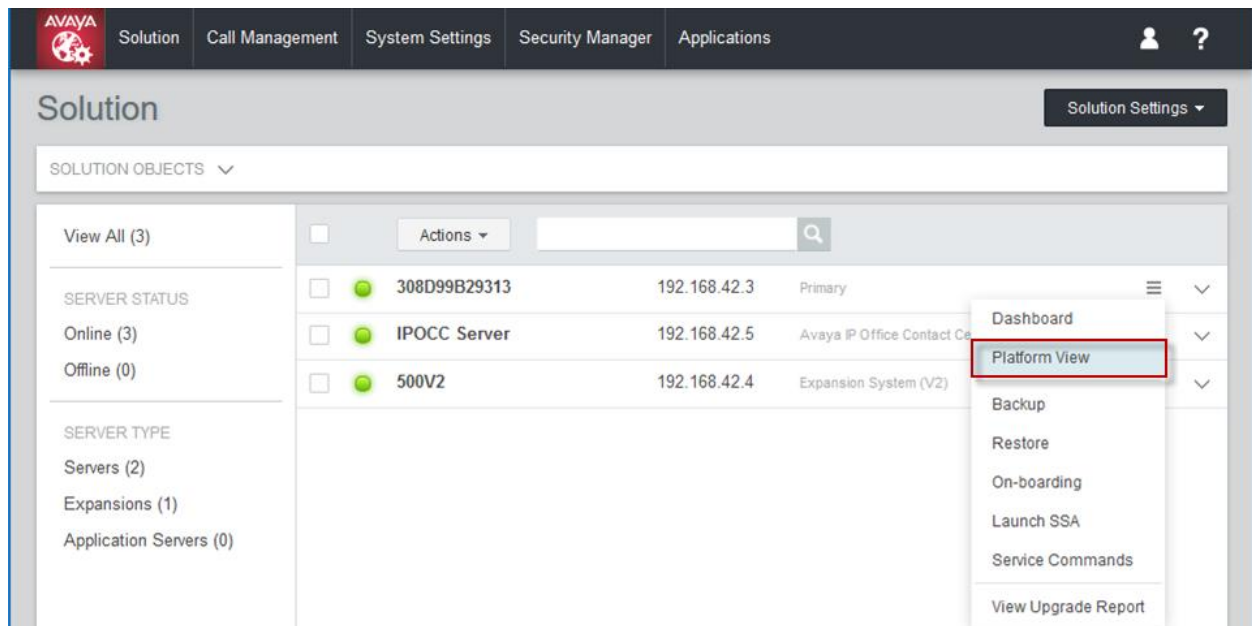
11. Click the **Solution** button.



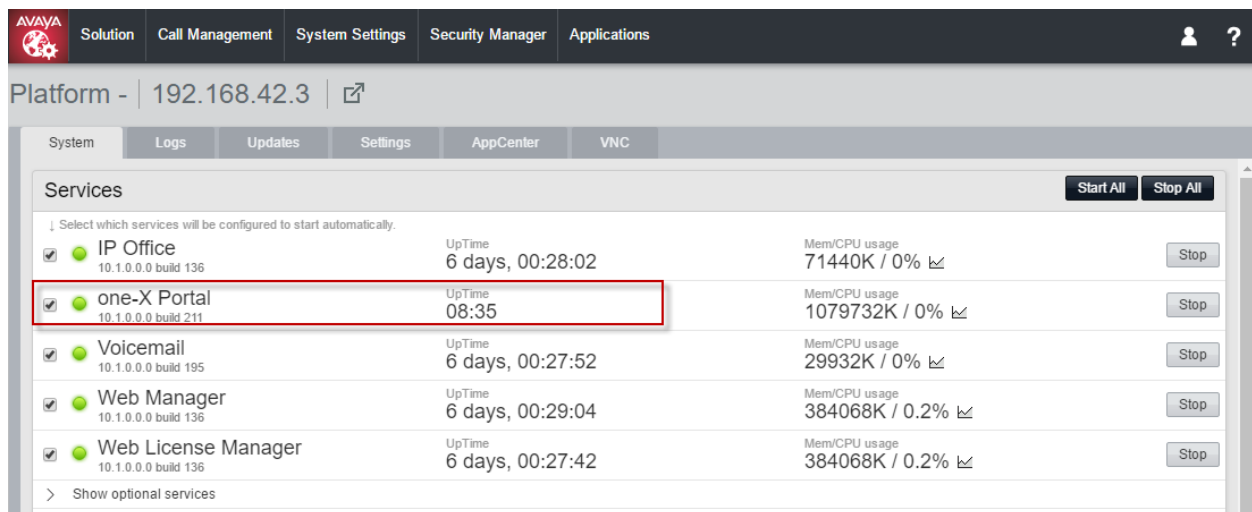
12. Click the  button.



13. Click **Platform View**.

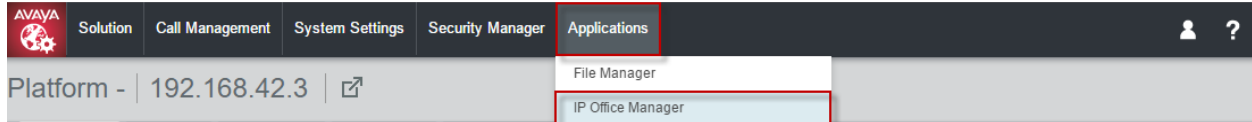


14. Check that the one-X Portal light returns to **green**.

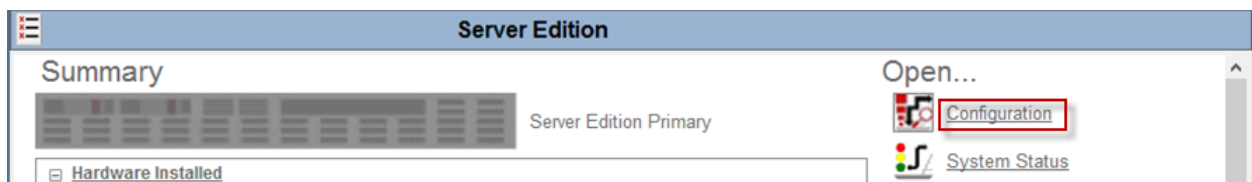


IP Office Web Manager

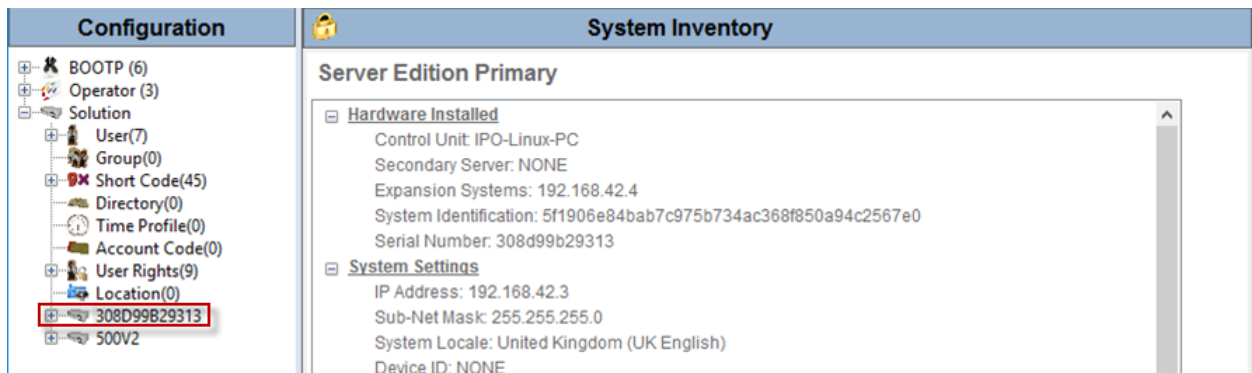
1. Open the **Web Manager** and click **Applications** followed by **IP Office Manager**.



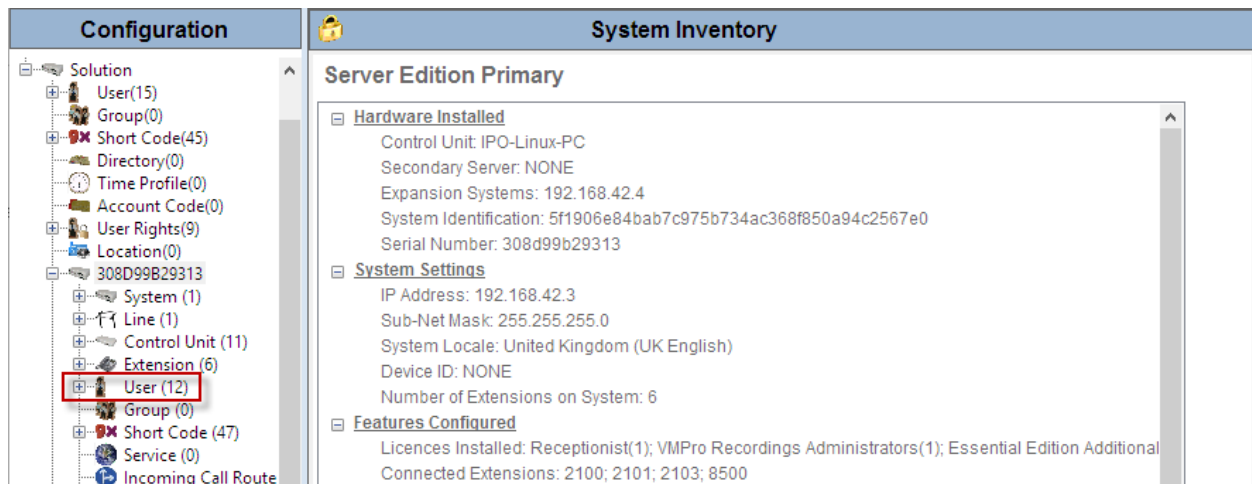
2. Click **Configuration**.



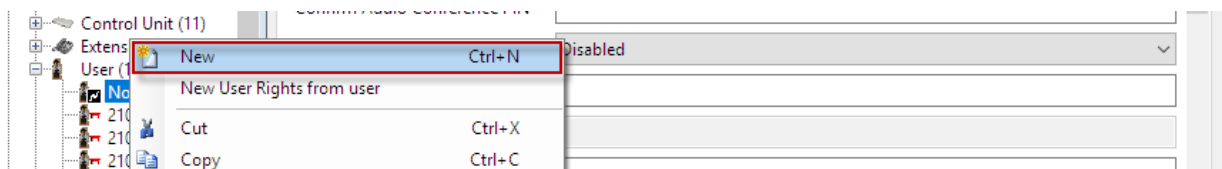
3. **Expand** the Primary Server menu.



4. Using the **Right mouse button** select **User**



5. Click **New**.



6. In the New User record enter the below and then choose the **OK** button:

- Name = Jabber Identifier in IP Office Contact Center for the Topic
- Password = password In IP Office Contact Center for the Topic
- Confirm Password = password In IP Office Contact Center for the Topic
- Extension = If the topic is not configured for telephony it will not have an extension in IP Office Contact Center. The extension entered for the new IP Office user has to be unique from other extensions in IP Office and from telephony topics extension range from IP Office Contact Center. If the topic also has telephony in IPOCC, the extension entered for the IPO user doesn't have to be the same.
- Profile = Choose Basic user. (If you want to test the Chat topic using a one-X Portal user, it will only work if you select a Power User. If Basic users are used, the Chat option is not available).

<User:0>: *

User Voicemail DND ShortCodes Source Numbers Telephony Forwarding Dial In Voice Recording

Name **A** Topic1

Password **B**

Confirm Password **C**

Unique Identity

Audio Conference PIN

Confirm Audio Conference PIN

Account Status Enabled

Full Name

Extension **D** 8901

Email Address

Locale

Priority 5

System Phone Rights None

Profile **E** Basic User

☐ Receptionist

☐ Enable Softphone

☐ Enable one-X Portal Services

☐ Enable one-X TeleCommuter

OK Cancel Help

7. Choose the default **None** and the click the **OK** button.

Avaya IP Office Manager

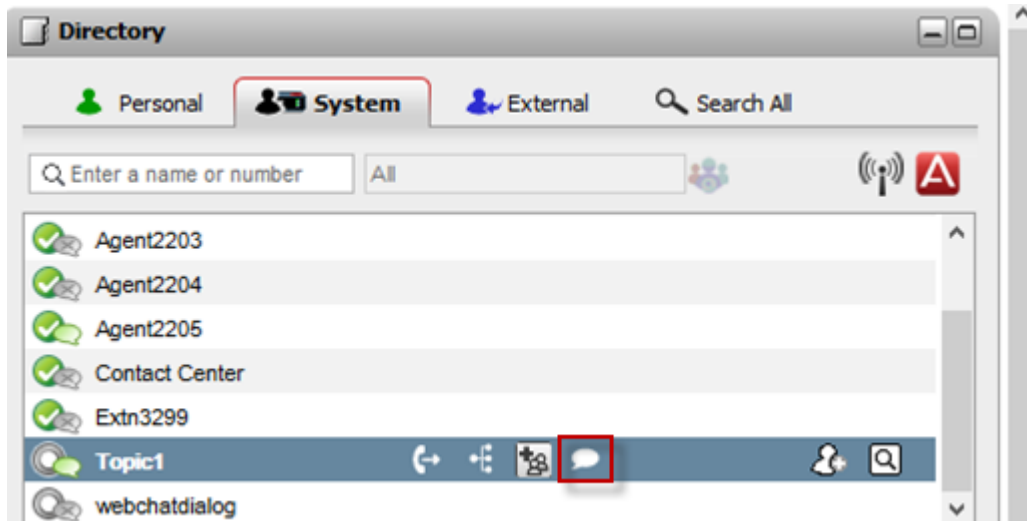
Would you like a new VoIP extension created with this number?

☒ None

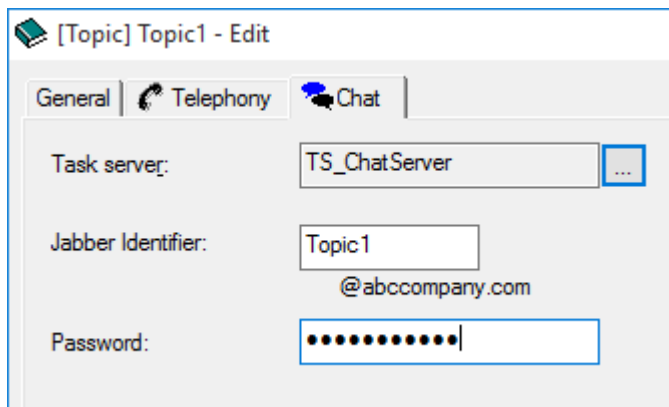
☐ H323 Extension

☐ SIP Extension

OK



IP Office Contact Center Chat Topic details



8. Repeat the process for each topic that is to be used for Chat.

Step 9-12 should only be used if you require the inbuilt IP Office Contact Center WebChatDialog.

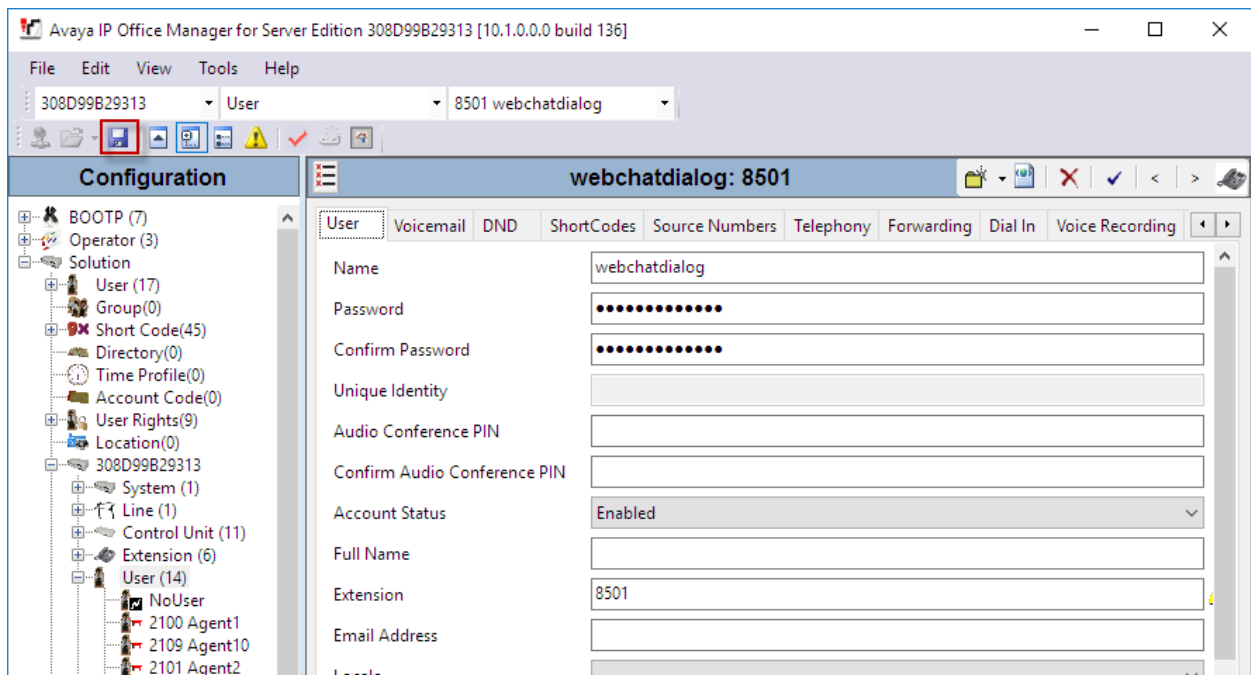
9. Create another new user and in the **Name** field enter **webchatdialog** with the Password and Confirm Password fields using **DialogChatWeb**. Enter an extension number away from the User extension numbers. Then click the **OK** button to create the user.

The screenshot shows the 'Add User' dialog box in Avaya IP Office Manager. The 'Name' field is set to 'webchatdialog'. The 'Password' and 'Confirm Password' fields are both set to 'DialogChatWeb'. The 'Extension' field is set to '8501'. The 'Account Status' is set to 'Enabled'. The 'Full Name' field is empty. The 'Email Address' field is empty. The 'Locale' is set to 'None'. The 'Priority' is set to '5'. The 'System Phone Rights' are set to 'None'. The 'Profile' is set to 'Basic User'. The 'OK' button is highlighted with a red box.

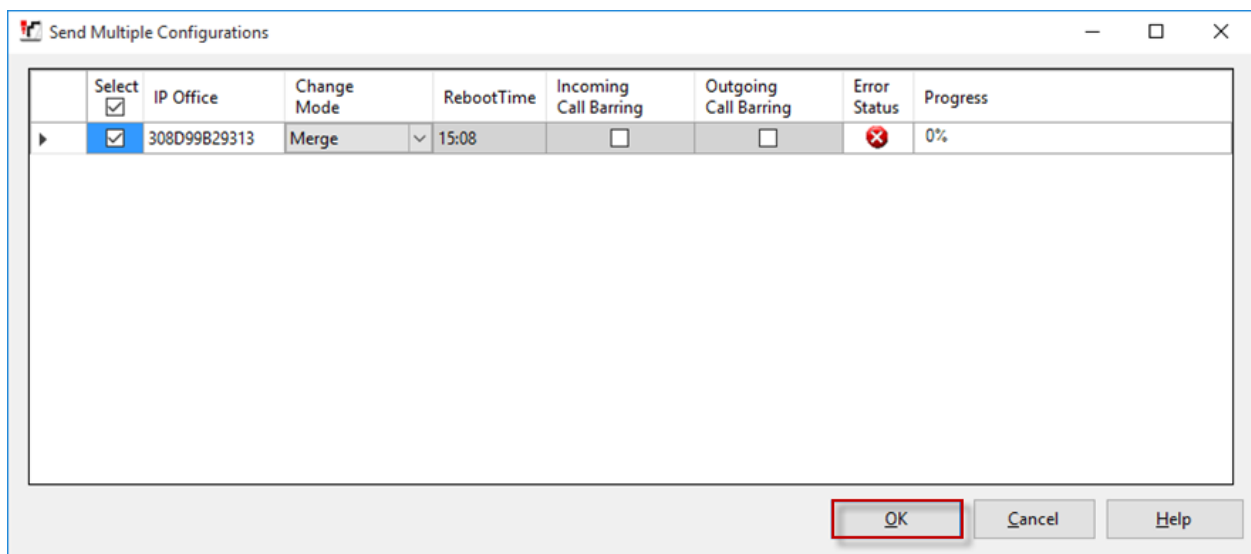
10. Choose the default **None** and then click the **OK** button.

The screenshot shows a dialog box titled 'Avaya IP Office Manager' with the question 'Would you like a new VoIP extension created with this number?'. There are three radio buttons: 'None' (selected and highlighted with a red box), 'H323 Extension', and 'SIP Extension'. The 'OK' button is highlighted with a red box.

11. Click the **Save** icon.



12. Click the **OK** button.



Verifying Web Chat Integration before customer implementation.

The following process allows the customer to insert a Chat session link into their webpage. Before asking the customers web developer to insert the new content, a test page can first be used to validate the process.

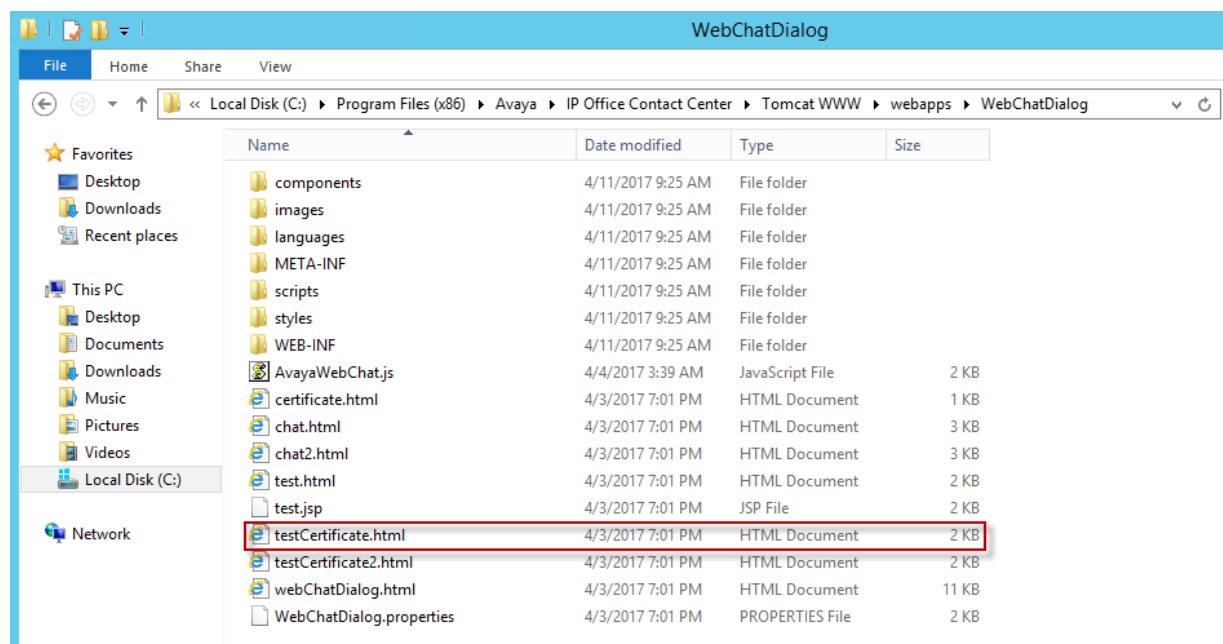
Default Test page

1. On the IP Office Contact Center server, browse to the location **C:\Program files (x86)\Avaya \ IP Office Contact Center \ Tomcat WWW \ webapps \ WebChatDialog**

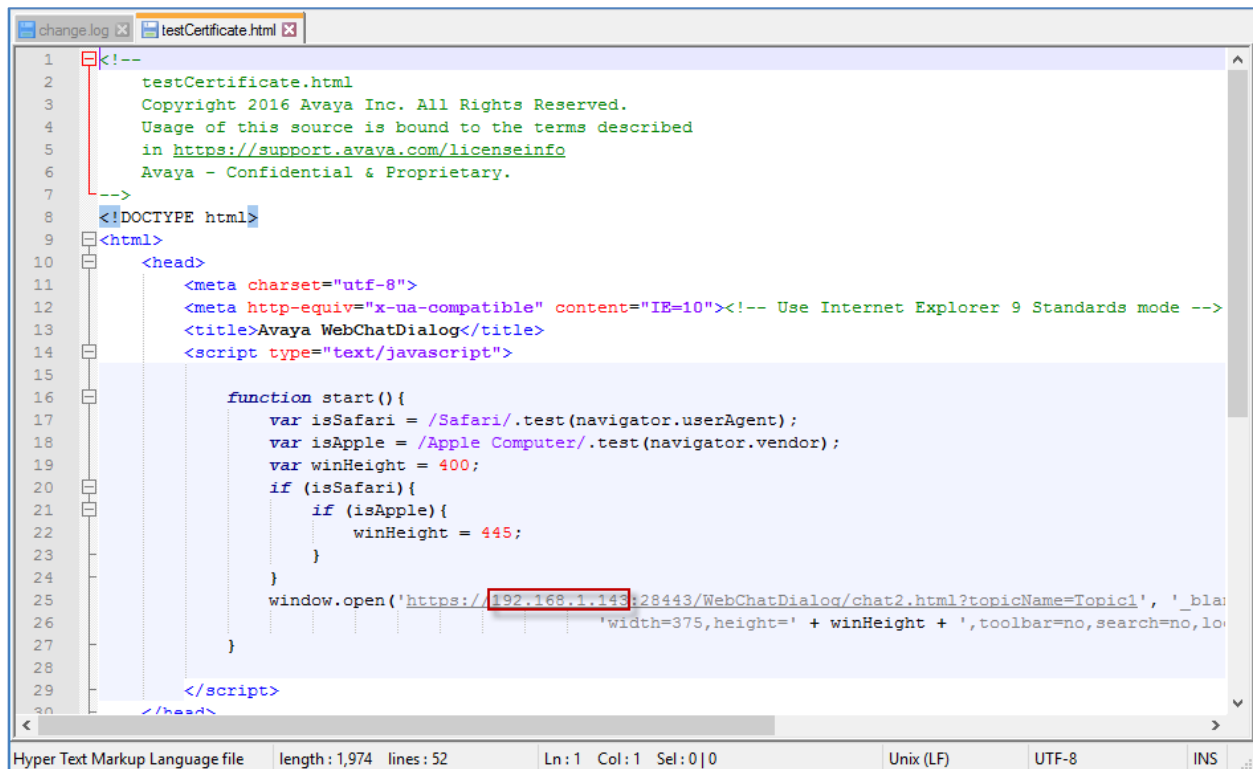
« Local Disk (C:) » Program Files (x86) » Avaya » IP Office Contact Center » Tomcat WWW » webapps » WebChatDialog

2. Select and edit the **testCertificate.html** file.

NOTE: If the server does not have an html editor installed, then you are advised to copy the file and edit on the technician's laptop/desktop where an html editor is installed.



- The default IP address of 192.168.1.143 needs to be updated to the **IP address of the IP Office Contact Center server**.



```

1  <!--
2  testCertificate.html
3  Copyright 2016 Avaya Inc. All Rights Reserved.
4  Usage of this source is bound to the terms described
5  in https://support.avaya.com/licenseinfo
6  Avaya - Confidential & Proprietary.
7  -->
8  <!DOCTYPE html>
9  <html>
10 <head>
11 <meta charset="utf-8">
12 <meta http-equiv="x-ua-compatible" content="IE=10"><!-- Use Internet Explorer 9 Standards mode -->
13 <title>Avaya WebChatDialog</title>
14 <script type="text/javascript">
15
16     function start(){
17         var isSafari = /Safari/.test(navigator.userAgent);
18         var isApple = /Apple Computer/.test(navigator.vendor);
19         var winHeight = 400;
20         if (isSafari){
21             if (isApple){
22                 winHeight = 445;
23             }
24         }
25         window.open('https://192.168.1.143:28443/WebChatDialog/chat2.html?topicName=Topic1', '_blank',
26                     'width=375,height=' + winHeight + ',toolbar=no,search=no,location=no,status=no,menubar=no,scrollbars=yes,resizable=yes');
27     }
28 </script>
29 </head>
30 </html>

```

Hyper Text Markup Language file length: 1,974 lines: 52 Ln: 1 Col: 1 Sel: 0 | 0 Unix (LF) UTF-8 INS

- Now we need to update the name of the **Topic** to be tested. Change **Topic1** to the **Topic name** (Not the Jabber Identifier) to be used by the customer. When finished **Save** the changes and if necessary copy the file back to the IP Office Contact Center server.



```

<!DOCTYPE html>
<html>
<head>
<meta charset="utf-8">
<meta http-equiv="x-ua-compatible" content="IE=10"><!-- Use Internet Explorer 9 Standards mode -->
<title>Avaya WebChatDialog</title>
<script type="text/javascript">

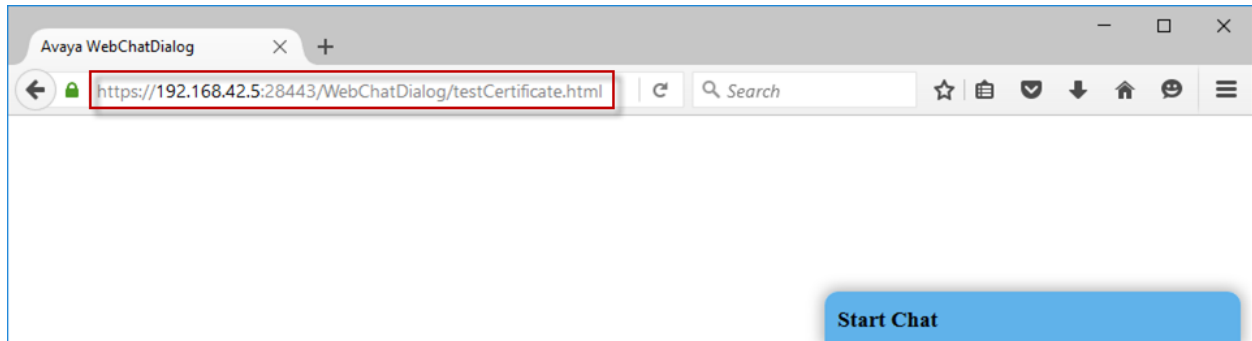
    function start(){
        var isSafari = /Safari/.test(navigator.userAgent);
        var isApple = /Apple Computer/.test(navigator.vendor);
        var winHeight = 400;
        if (isSafari){
            if (isApple){
                winHeight = 445;
            }
        }
        window.open('https://192.168.5.143:28443/WebChatDialog/chat2.html?topicName=Topic1', '_blank',
                    'width=375,height=' + winHeight + ',toolbar=no,search=no,location=no,status=no,menubar=no,scrollbars=yes,resizable=yes');
    }

```

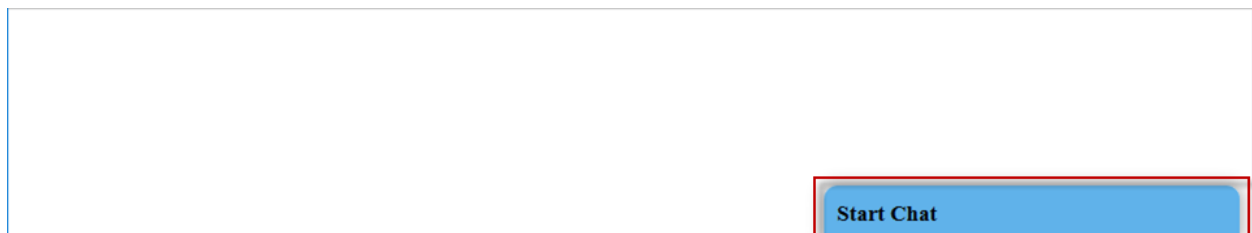
5. Using an Internet browser, browse to

<https://XXX.XXX.XXX.XXX:28443/WebChatDialog/testCertificate.html>

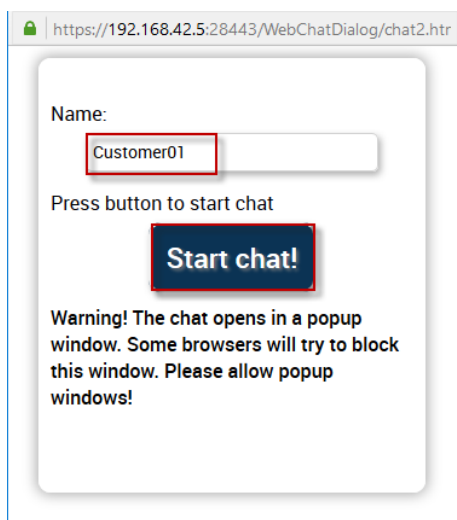
Where XXX.XXX.XXX.XXX is the IP address of your IP Office Contact Center server



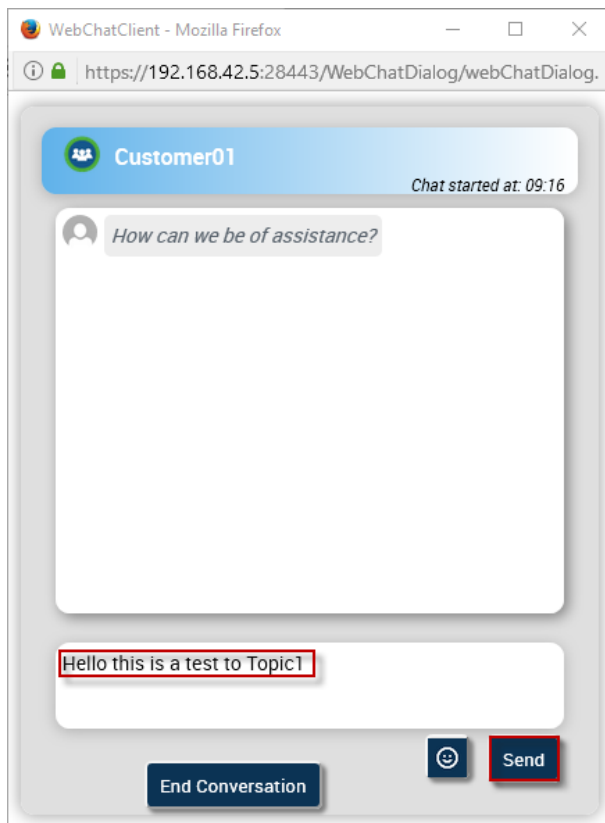
6. Click the **Start Chat** button.



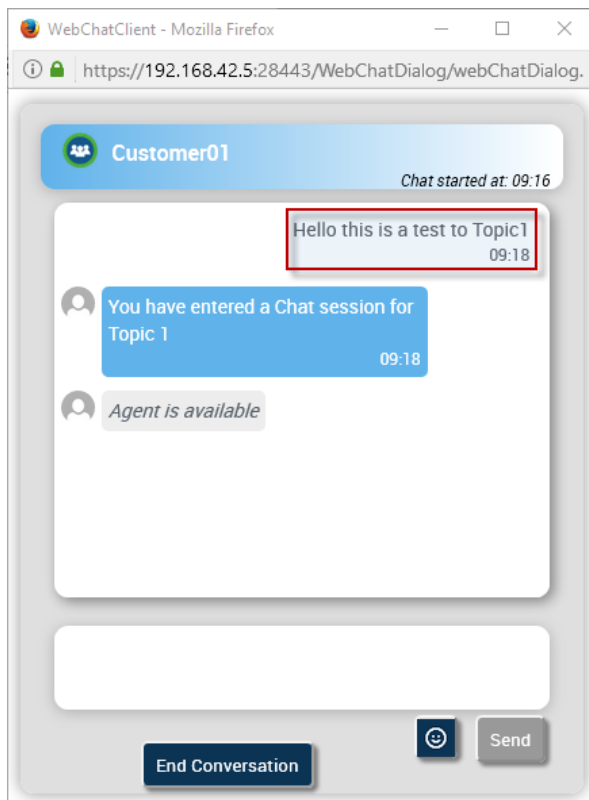
7. Type in a **Name** for example. Customer01 and then click the **Start chat!** button.



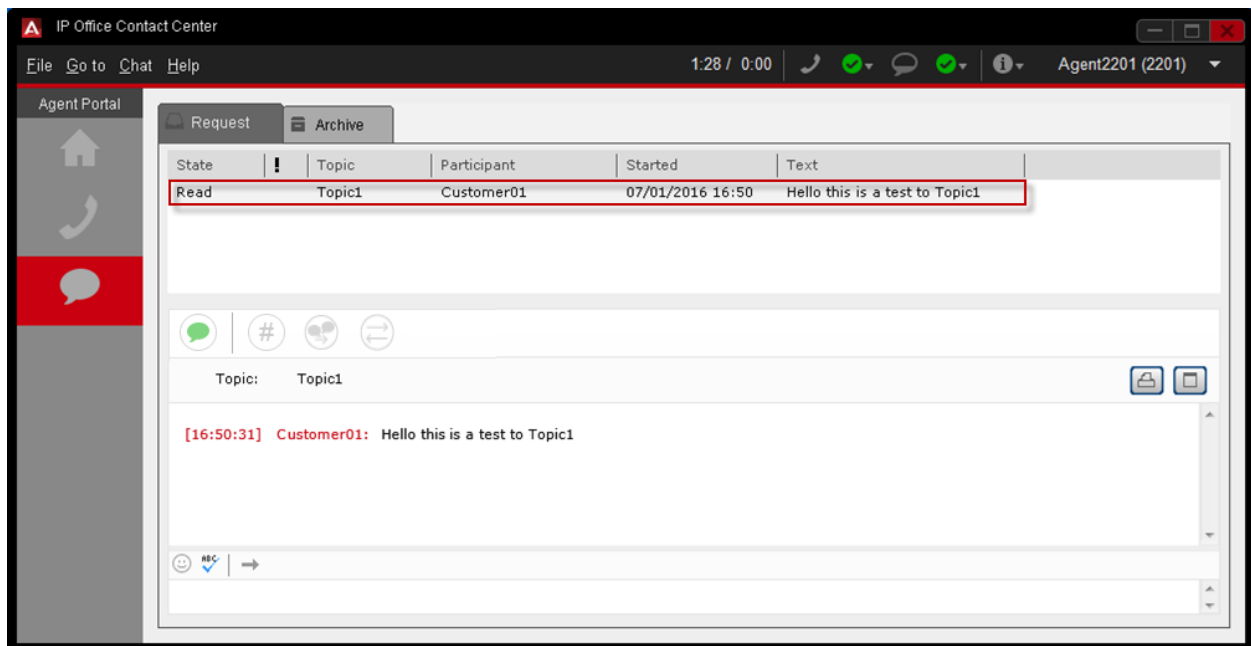
8. In the bottom field, type the text to be sent to the topic and select the **Send** button.



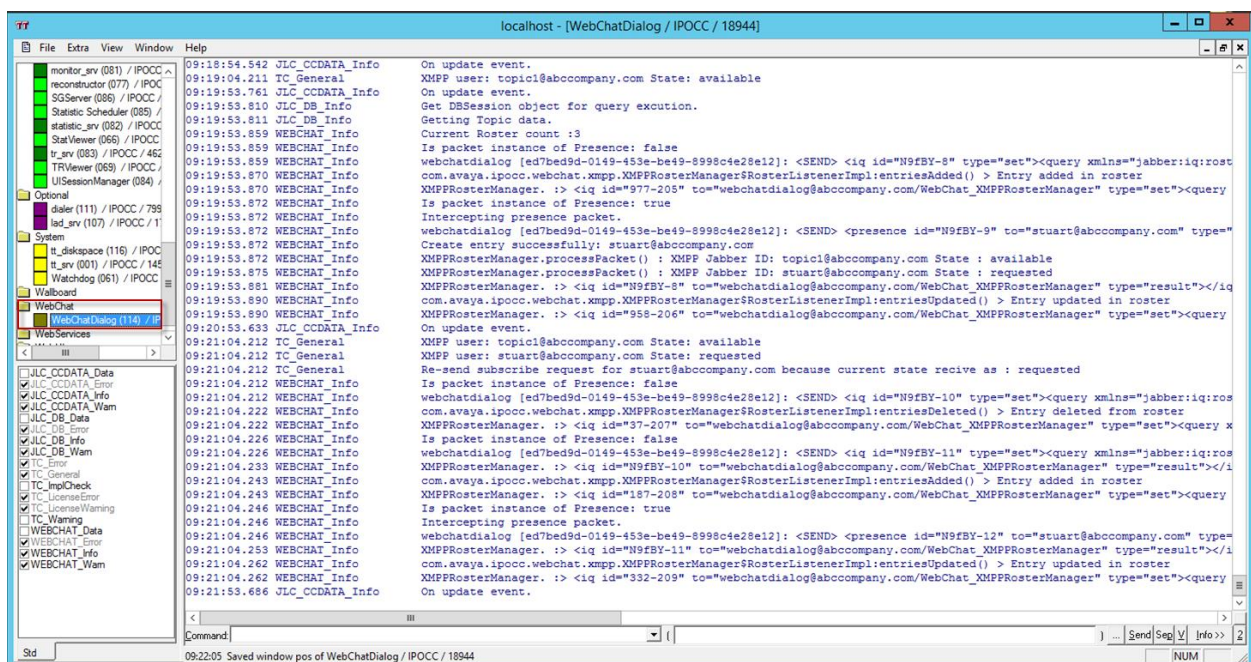
9. The text is sent to the Topic as illustrated below.



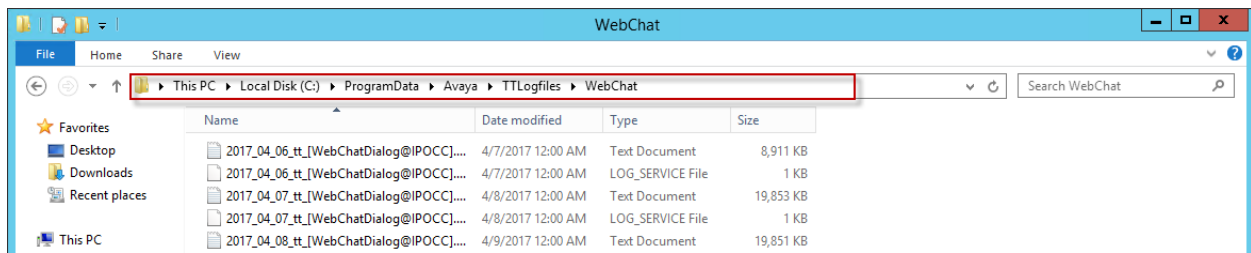
10. The Chat request, can now be seen in the Agent's Chat Window.



11. To assist any support queries, the TTConsole – WebChat – WebChatDialog can be used to view information.



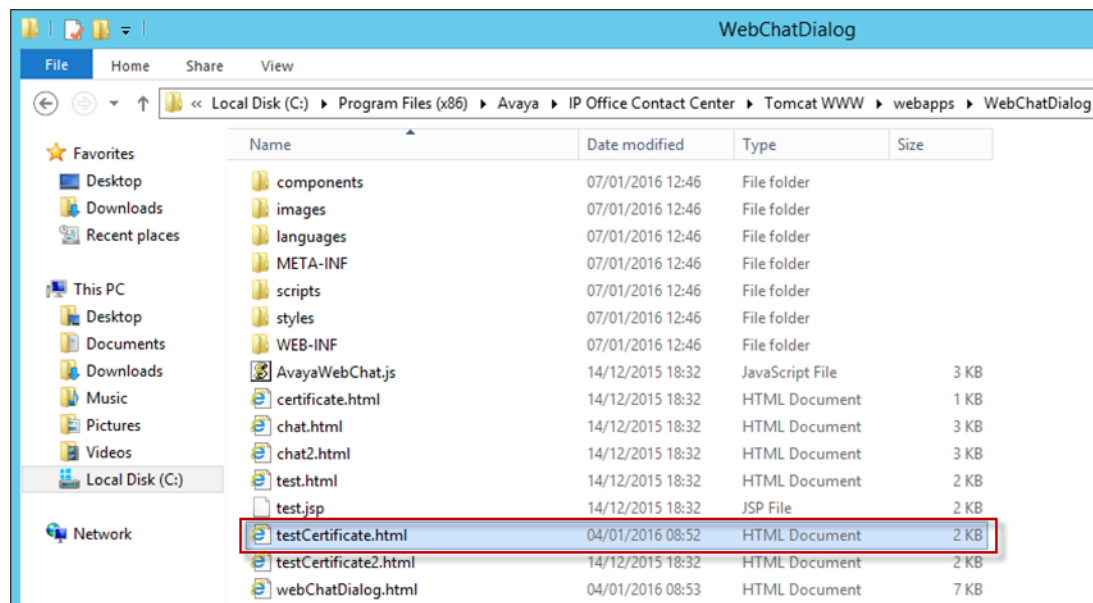
12. The TTrace logs can be found in ProgramData \ Avaya \ TTLogfiles \ WebChat.



Creating the HTML to be used for the customer's web page.

For each customer web page where a Chat link is required, the customer must add information in the head and the body of the html web page.

A copy of this text can be found in the file testCertificate.html at the IP Office Contact Center server location: C:\Program Files (x86)\Avaya\IP Office Contact Center\Tomcat WWW\webapps\WebChatDialog



After copying the file from the IP Office Contact Center server, you can edit the file before adding the content to the relevant webpages.

To customize this for your installation, the location of your IP Office Contact Center server must be defined in the html script.

Change the details in the html as detailed below;

<https://192.168.1.143:28443/WebChatDialog/chat2.html?topicName=Topic1>

Change 192.168.1.143 to the **IP address of the IP Office Contact Center server** and **Topic1** to the **Topic name** (Not the Jabber Identifier) to be used by the customer.

```
<!DOCTYPE html>
<html>
  <head>
    <meta charset="utf-8">
    <meta http-equiv="x-ua-compatible" content="IE=10"><!-- Use Internet Explorer 9 Standards mode -->
    <title>Avaya WebChatDialog</title>
    <script type="text/javascript">

      function start(){
        var isSafari = /Safari/.test(navigator.userAgent);
        var isApple = /Apple Computer/.test(navigator.vendor);
        var winHeight = 400;
        if (isSafari){
          if (isApple){
            winHeight = 445;
          }
        }
        window.open('https://192.168.1.143:28443/WebChatDialog/chat2.html?topicName=Topic1', '_blank',
                    'width=375,height=' + winHeight +
                    ',toolbar=no,search=no,location=no,status=no,menubar=no,scrollbars=yes,resizable=yes');
      }
    </script>
  </head>
  <body>
  </body>
</html>
```



The details of the **Start Chat** button can also be changed. For example, Text, colors and size.

```
<body>
  <div id="chat_container_small">
    <div id="start_chat_small_background" style="width: 300px;
      height: 20px;
      background-color: #60b2ea;
      position: fixed;
      border-top-left-radius: 10px;
      border-top-right-radius: 10px;
      -webkit-box-shadow: 0px 0px 10px 2px #B0B0B0; /* Safari 3-4, iOS 4.0.2 - 4.2, Android
      2.3+ */
      -moz-box-shadow: 0px 0px 10px 2px #B0B0B0; /* Firefox 3.5 - 3.6 */
      box-shadow: 0px 0px 10px 2px #B0B0B0; /* Opera 10.5, IE 9, Firefox 4+, Chrome 6+,
      iOS 5 */
      padding: 10px;
      font-size: 17px;
      font-family: 'robotobold';
      color: #000005;
      cursor: pointer;right:10px;bottom:0px" onclick="start()"><b>Start Chat</b></div>
    </div>
  </body>
</html>
```

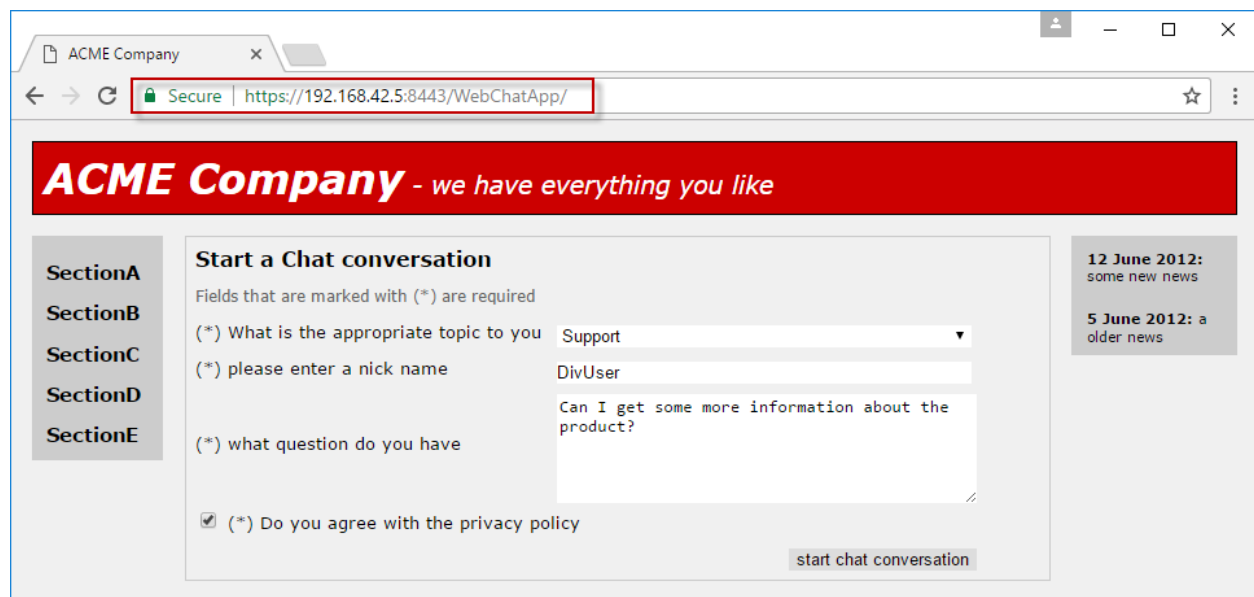
This can then match the look and feel of the customer's own webpages. (See example below).



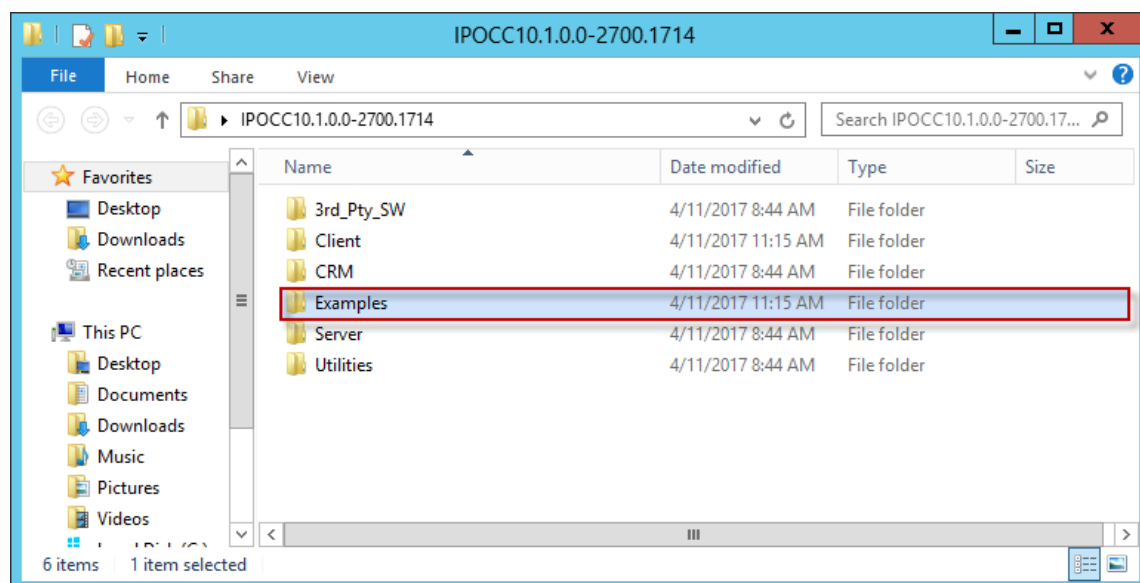
```
'width=375,height=' + winHeight +
',toolbar=no,search=no,location=no,status=no,menubar=no,scrollbars=yes,resizable=yes');
}
</script>
</head>
<body>
  <div id="chat_container_small">
    <div id="start_chat_small_background" style="width: 300px;
      height: 20px;
      background-color: #bcbec0;
      position: fixed;
      border-top-left-radius: 10px;
      border-top-right-radius: 10px;
      -webkit-box-shadow: 0px 0px 10px 2px #565a5c; /* Safari 3-4, iOS 4.0.2 - 4.2, Android
      2.3+ */
      -moz-box-shadow: 0px 0px 10px 2px #565a5c; /* Firefox 3.5 - 3.6 */
      box-shadow: 0px 0px 10px 2px #565a5c; /* Opera 10.5, IE 9, Firefox 4+, Chrome 6+,
      iOS 5 */
      padding: 10px;
      font-size: 17px;
      font-family: 'robotobold';
      color: #000000;
      cursor: pointer;right:10px;bottom:0px" onclick="start()" "><b>Chat with an Agent</b></div>
    </div>
  </body>
</html>
```

Using the 'CHAT web Java' example

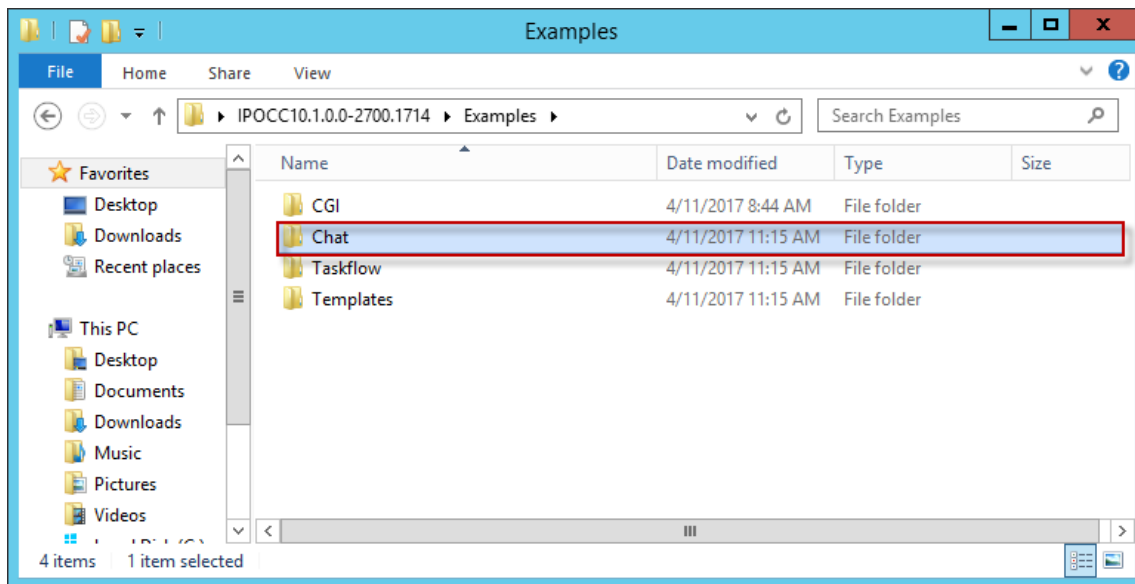
The IP Office Contact Center installation DVD image contains web page examples that can be used to create custom webpages that will interact with the Chat topics.



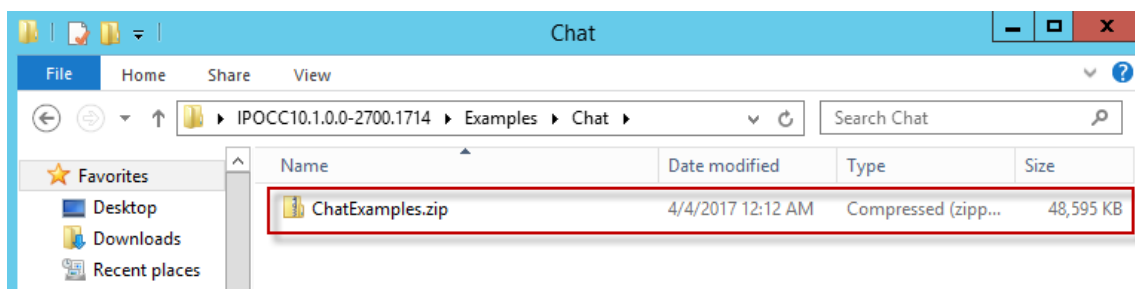
1. Open the **Examples** folder on the IP Office Contact Center ISO DVD.



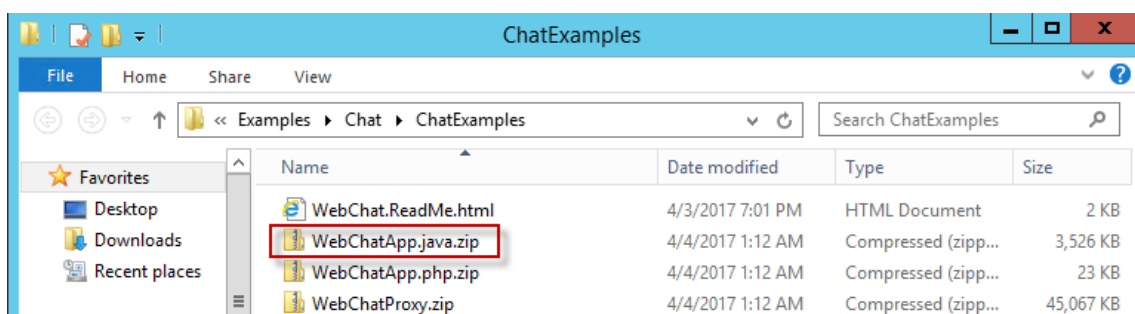
2. Open the **Chat** folder.



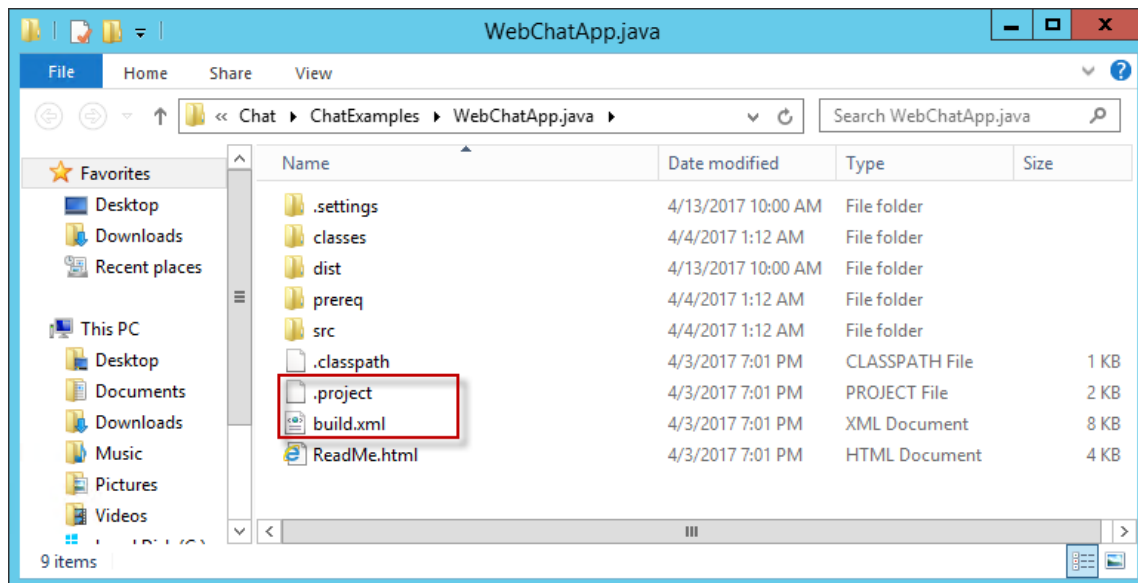
3. Extract the **ChatExamples.zip**.



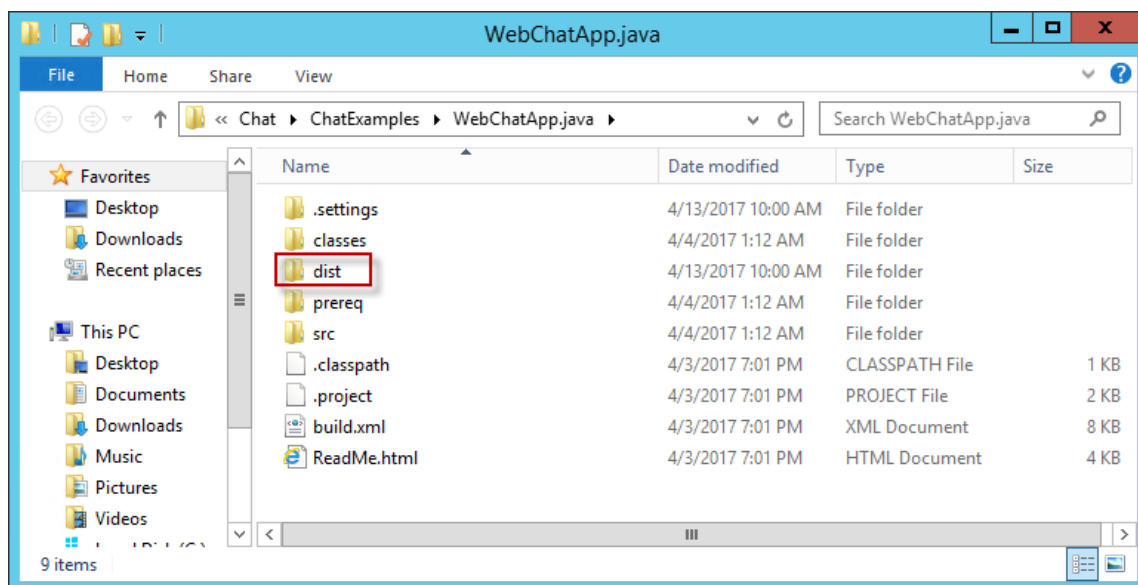
4. There are three Chat examples. In this example, the WebChatApp.java files will be used. Extract the **WebChatApp.java** files.



- Here you will find an **Eclipse project** file and a **build script** that can be used by the customer developer to create a custom Web interface that will link back to the IP Office Contact Center for Chat from their Web site.



- To use the default Avaya compiled Java webpage with TomCat, open the **dist** folder.



7. Edit the **WebChatApp.properties** file.

```
#####
#
# WebChat Integration Sample © 2012 Avaya, All rights reserved.      #
#                                                                    #
#####

#####
## WebChatApp settings
#####

# here the location of the ttrace server is specified
# when left empty, localhost on 10300 is connected
TTraceServiceHost=vmw2003
TTraceServicePort=10300

# The list of topics that can be connected
# the format of the list is comma separated: <entry>,<entry>,...
# an entry has the format <TopicID>:<JabberID> where TopicID must not contain spaces
# keep in Mind, that the topicid must ONLY contain alpha numeric characters
Topics=Support:support@localhost,Sales:sales@localhost

#####
## WebChatProxy specific settings (in the app the proxy runs in internal mode)
#####

# Connecting to a XMPP Server and establishing a chat session requires a set of parameters
# Some of the parameters you specify here and the rest you will require to provide when using the
# Proxy's Webservice or API. The Parameters you specify here are constant for every chat session
#
# The Host name of a XMPP server
WebChatProxy.XMPPServerHost=localhost
# the port where the XMPP server waits for client connections
WebChatProxy.XMPPServerPort=5222
# the XMPP domain where the users reside which use the proxy to connect to the XMPP server
WebChatProxy.XMPPServerDomain=localhost
```

8. Change the topic names to match those on your IP Office Contact Center system. For example topic1@xmpp.abccompany.com

```
#####
#
# WebChat Integration Sample © 2012 Avaya, All rights reserved.
#
#####

#####
## WebChatApp settings
#####

# here the location of the ttrace server is specified
# when left empty, localhost on 10300 is connected
TTraceServiceHost=vmw2003
TTraceServicePort=10300

# The list of topics that can be connected
# the format of the list is comma separated: <entry>,<entry>,...
# an entry has the format <TopicID>:<JabberID> where TopicID must not contain spaces
# keep in Mind, that the topicid must ONLY contain alpha numeric characters
Topics=topic1:topic1@abccompany.com

#####
## WebChatProxy specific settings (in the app the proxy runs in internal mode)
#####

# Connecting to a XMPP Server and establishing a chat session requires a set of parameters
# Some of the parameters you specify here and the rest you will require to provide when using the
# Proxy's WebService or API. The Parameters you specify here are constant for every chat session
#
# The Host name of a XMPP server
WebChatProxy.XMPPServerHost=localhost
# the port where the XMPP server waits for client connections
WebChatProxy.XMPPServerPort=5222
# the XMPP domain where the users reside which use the proxy to connect to the XMPP server
WebChatProxy.XMPPServerDomain=localhost
```

9. If required, change the location of your XMPP service. In this example, the XMPP service is running on the same server as the TomCat service hence the use of localhost.

WebChatProxy.XMPPServerDomain=**localhost**.

```
#####
#
# WebChat Integration Sample © 2012 Avaya, All rights reserved.
#
#####

#####
## WebChatApp settings
#####

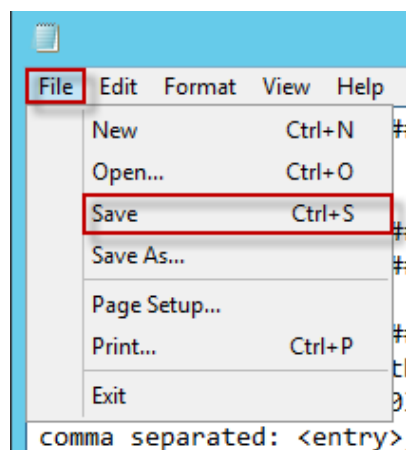
# here the location of the ttrace server is specified
# when left empty, localhost on 10300 is connected
TTraceServiceHost=vmw2003
TTraceServicePort=10300

# The list of topics that can be connected
# the format of the list is comma separated: <entry>,<entry>,...
# an entry has the format <TopicID>:<JabberID> where TopicID must not contain spaces
# keep in Mind, that the topicid must ONLY contain alpha numeric characters
Topics=topic1:topic1@abccompany.com

#####
## WebChatProxy specific settings (in the app the proxy runs in internal mode)
#####

# Connecting to a XMPP Server and establishing a chat session requires a set of parameters
# Some of the parameters you specify here and the rest you will require to provide when using the
# Proxy's Webservice or API. The Parameters you specify here are constant for every chat session
#
# The Host name of a XMPP server
WebChatProxy.XMPPServerHost=localhost
# the port where the XMPP server waits for client connections
WebChatProxy.XMPPServerPort=5222
# the XMPP domain where the users reside which use the proxy to connect to the XMPP server
WebChatProxy.XMPPServerDomain=localhost
```

10. Click **File** and **Save** to confirm the changes.

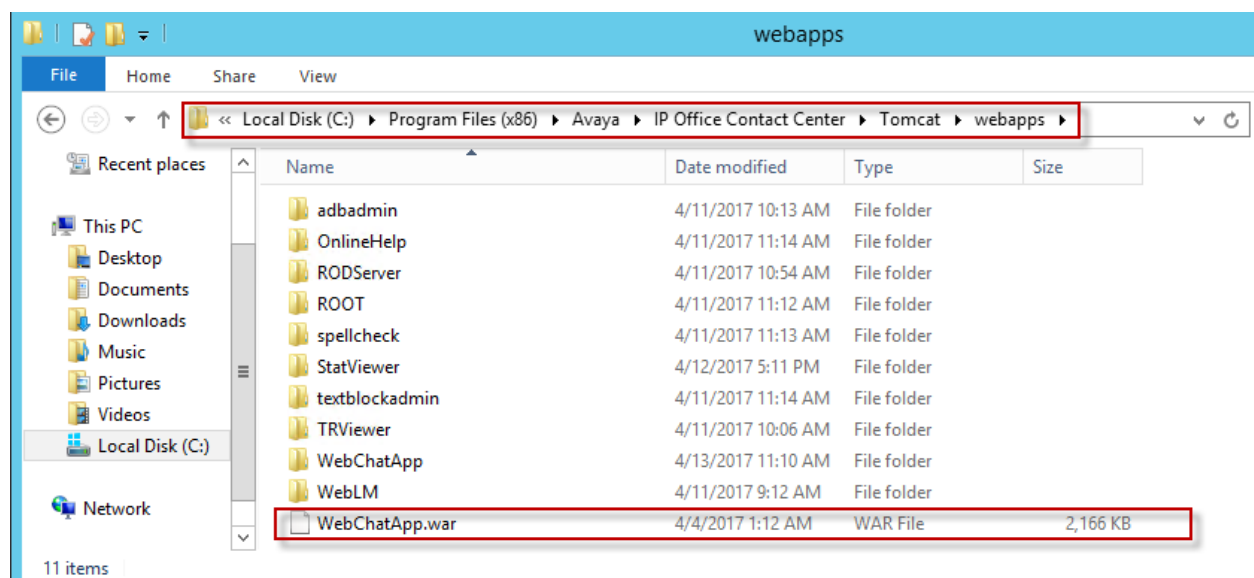


11. From R10.0 onwards, IPOffice XMPP server (OnexPortal XMPP Server) will not allow to connect anonymously. Username and password are mandatory to make XMPP connection with IP Office XMPP server. To use IP Office XMPP server with WebChatApp, the following configuration steps are required.

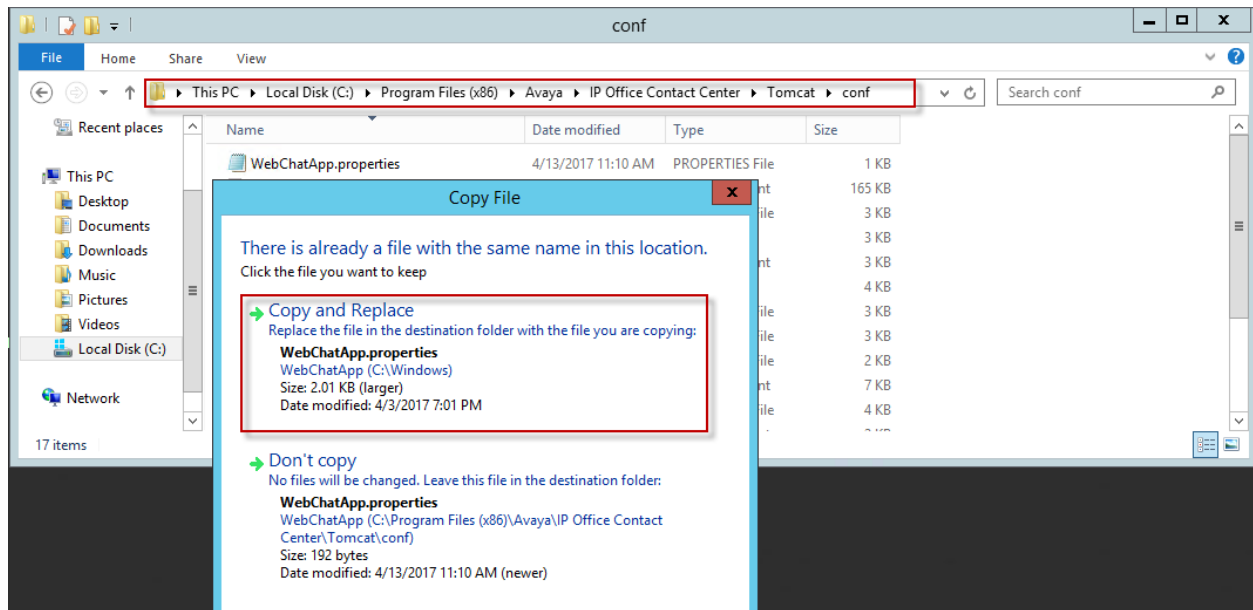
- A. Create XMPP user on IP Office XMPP Server e.g. Username: TestUser and Password: TestPassword.
- B. Provide the same username and password in the WebChatApp code. Open
\\java\sample\src\java\com\comergo\cc\webchatapp\servlet\WebChatBackendServlet.java in the Eclipse
- C. Go to line number 263 and provide username and password which is created on XMPP Server, as below,

```
String sessionIDString = a_Issue.m_Backend.createSession("TestUser",  
"TestPassword");
```
- D. Recompile the code and create war file and deploy it on tomcat.

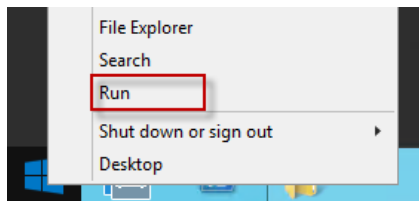
12. .Copy the **WebChatApp.war** file into the **C:\Program Files (x86)\Avaya\IP Office Contact Center\Tomcat\webapps** folder.



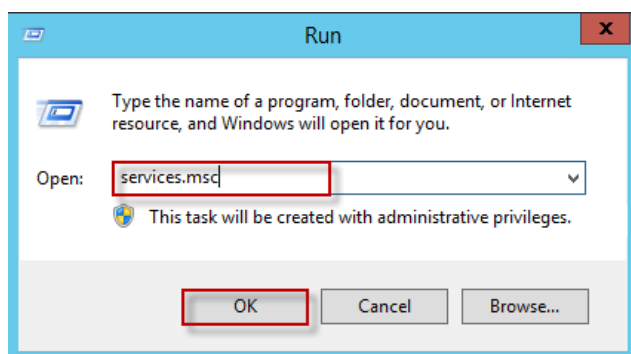
13. Copy the **WebChatApp.properties** file into the **C:\Program Files (x86)\Avaya\IP Office Contact Center\Tomcat\conf** folder. Click **Yes** to overwrite when prompted.



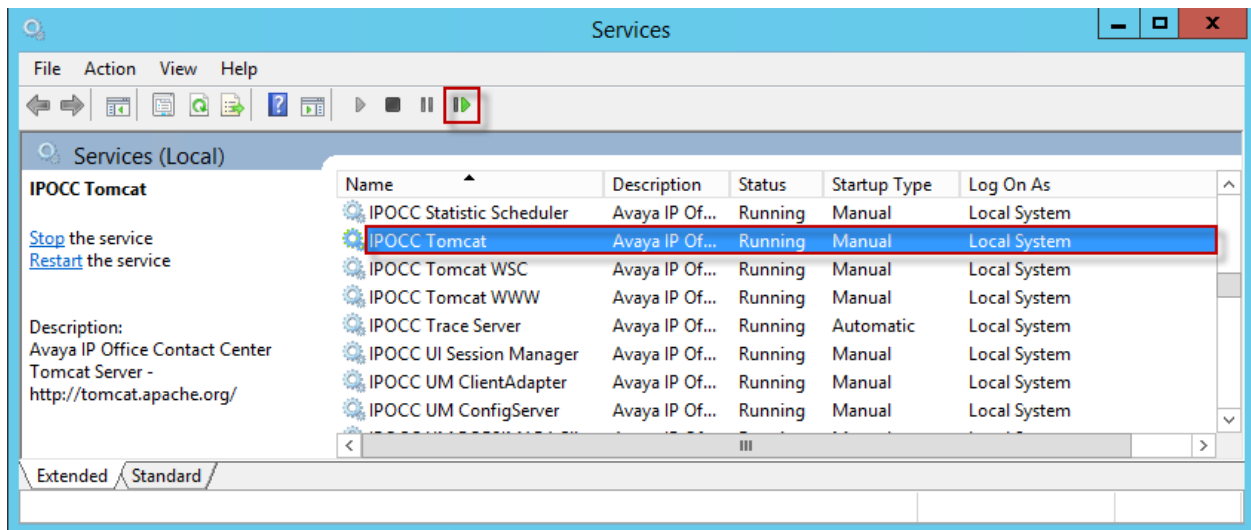
14. Restart the Tomcat service. Click the **Windows Icon** and choose **Run**.



15. Type **services.msc** and then choose the **OK** button.

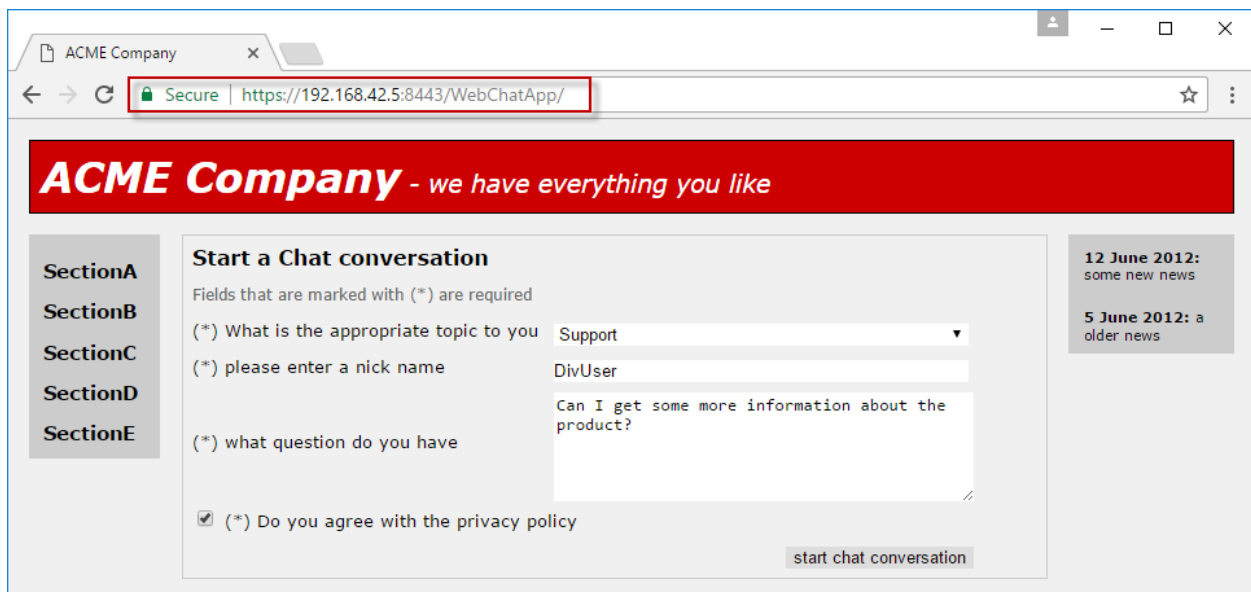


16. Select the **IPOCC Tomcat** Service and click the **Restart** icon.



17. The Chat Web page can now be accessed with the following link:

<https://server name:8443/WebChatApp/>

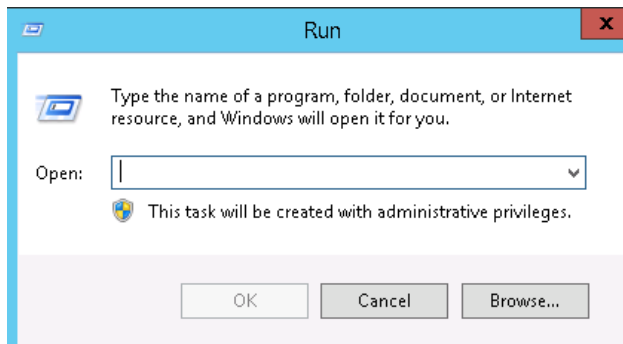


Installing and configuring the Open fire XMPP Service

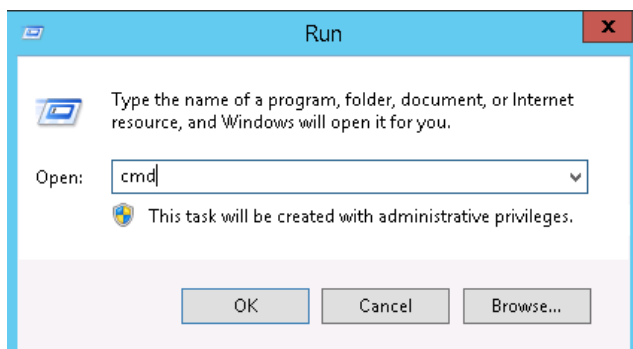
If one-X is not to be used for the XMPP service, the Open fire XMPP Service is freely available for use. However before the software is installed onto the Server, the FQDN (Fully Qualified Domain Name) of the server being used for the XMPP Service should be determined.

Determining the Server's Hostname

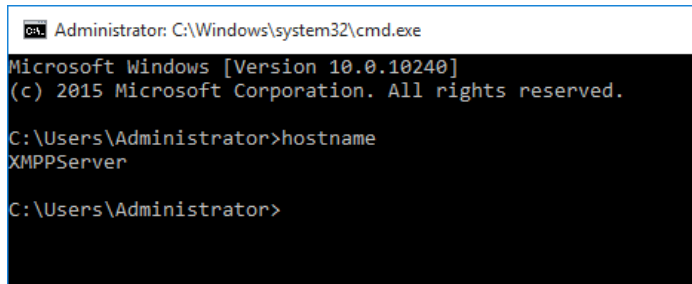
1. Open a command prompt on the Server by using the **Start – Run** option.



2. In the **Open** field enter **cmd** and then click the **OK** button.



3. Type **hostname** and press **Enter**.

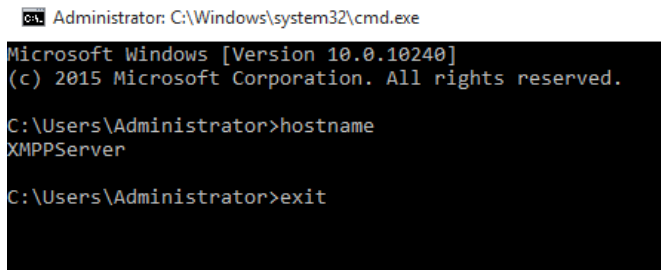


```
Administrator: C:\Windows\system32\cmd.exe
Microsoft Windows [Version 10.0.10240]
(c) 2015 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>hostname
XMPPServer

C:\Users\Administrator>
```

4. To close down the command prompt, type **exit** at the prompt and press the keyboard enter key.



```
Administrator: C:\Windows\system32\cmd.exe
Microsoft Windows [Version 10.0.10240]
(c) 2015 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>hostname
XMPPServer

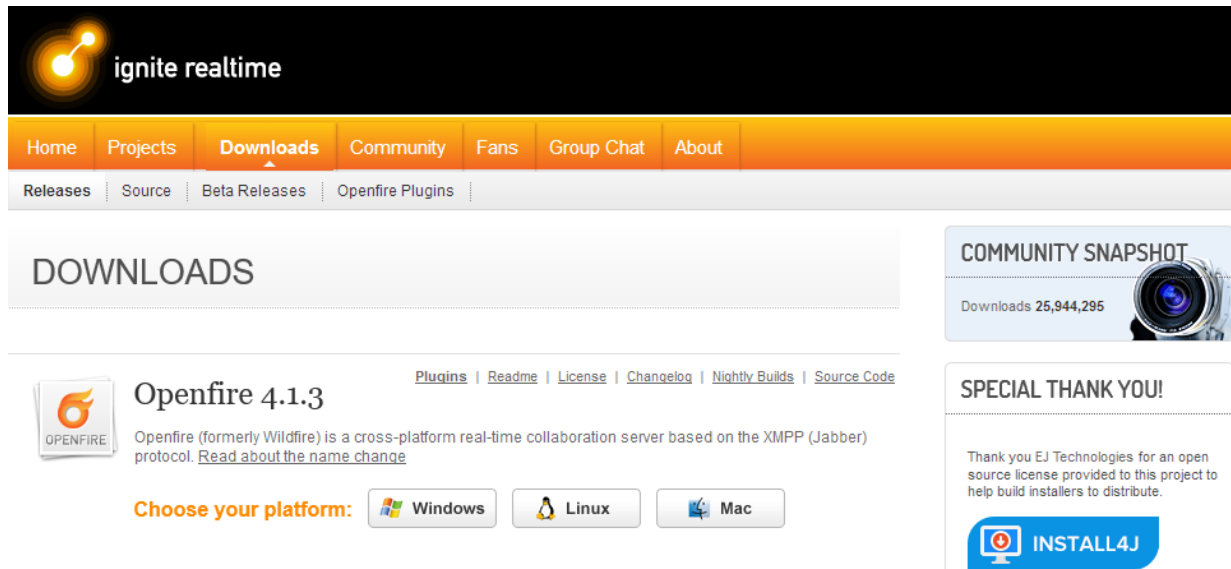
C:\Users\Administrator>exit
```

Installing Openfire

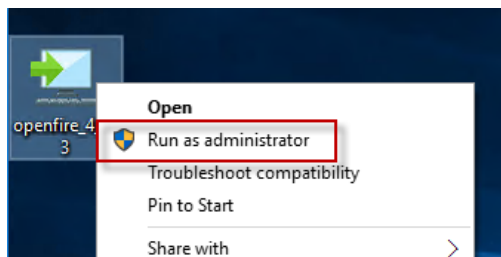
1. A copy of Openfire can be obtained from the following web site

<http://www.ignite realtime.org/downloads/index.jsp>

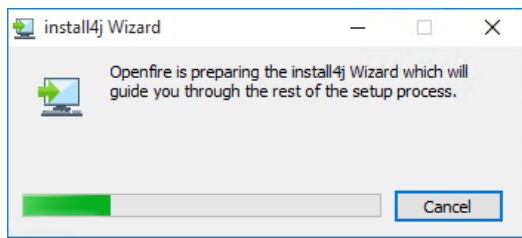
Save a copy on the desktop of the server to be used.



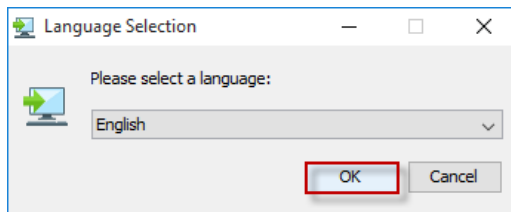
2. Right click on the Openfire installation file and click **Run as administrator**.



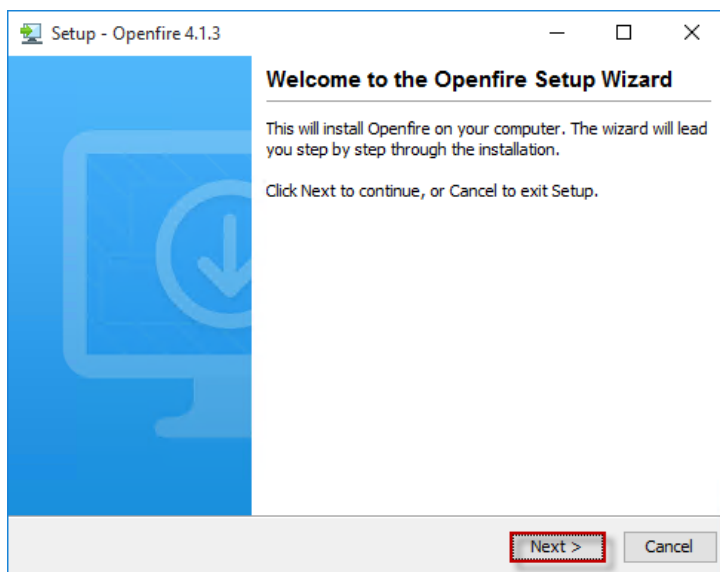
3. The software installation process will commence.



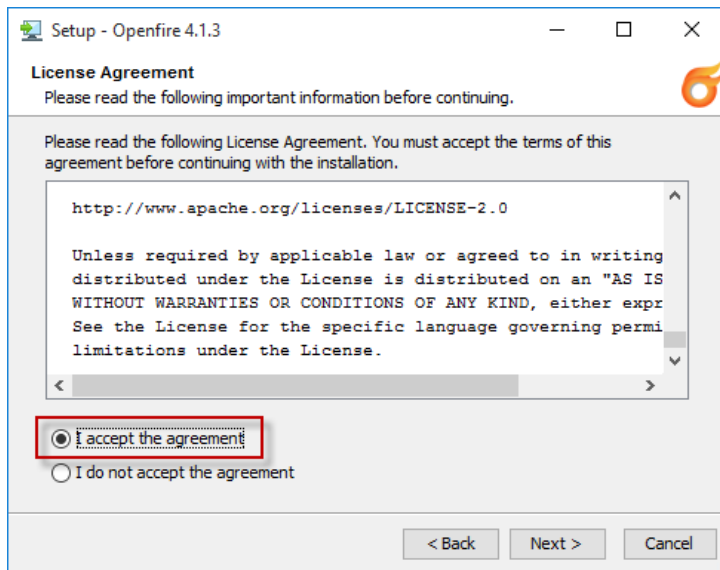
4. When prompted, click **English** and then select the **OK** button.



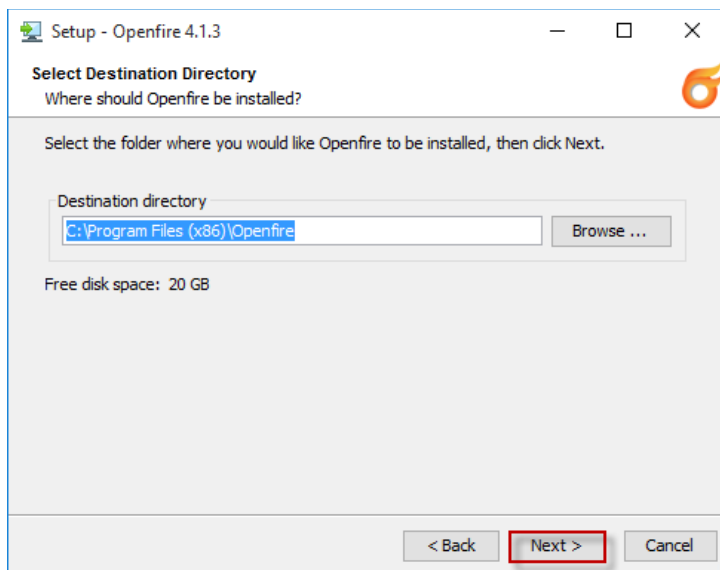
5. Click **Next** to continue.



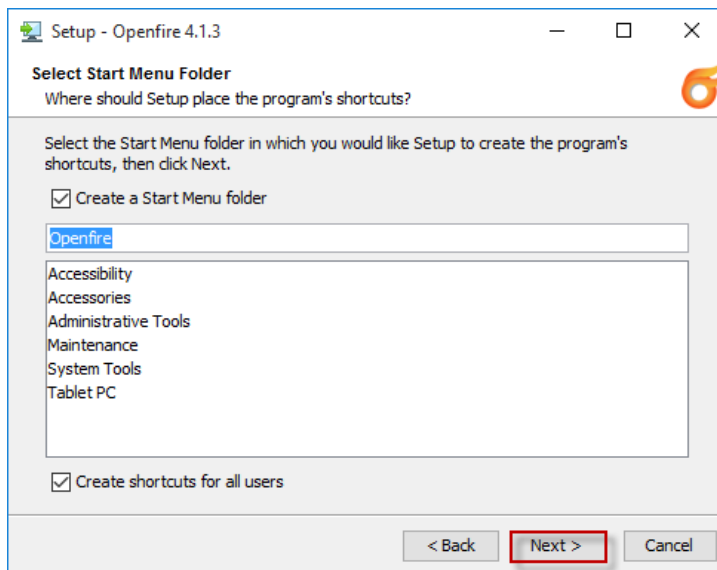
6. Read then license agreement and click **I accept the agreement** and then click the **Next** button.



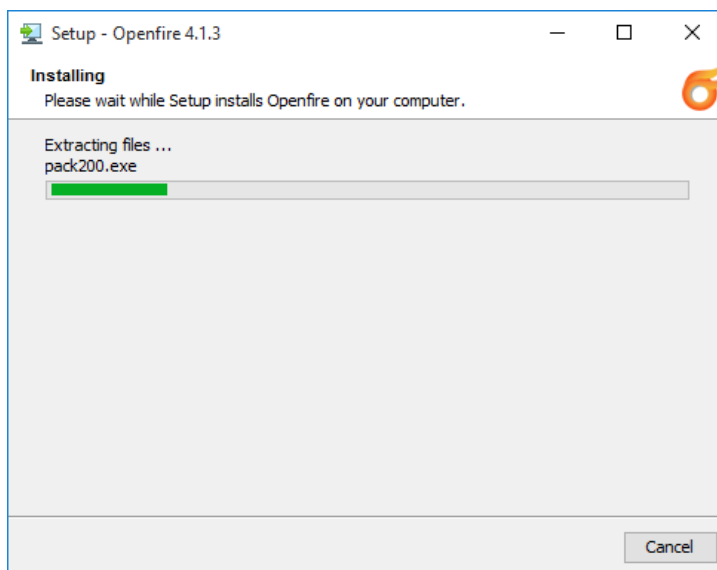
7. Click the **Next** button to install Openfire in the default directory.



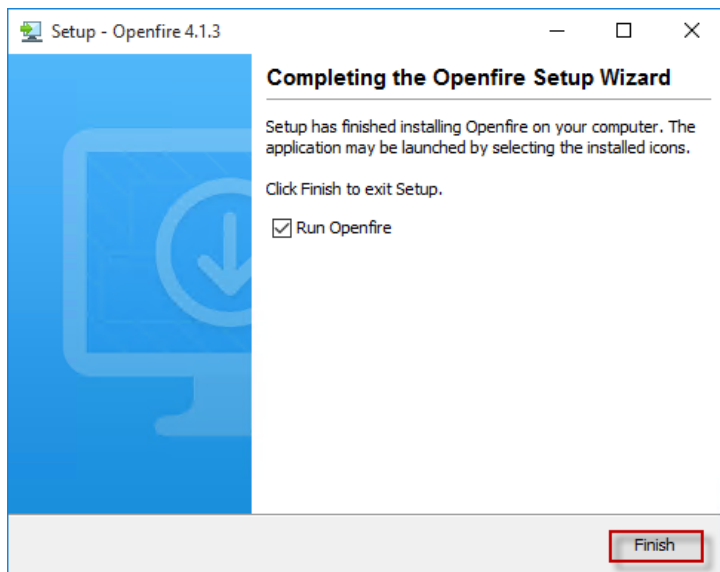
8. Click **Next** to Create an Openfire Menu folder.



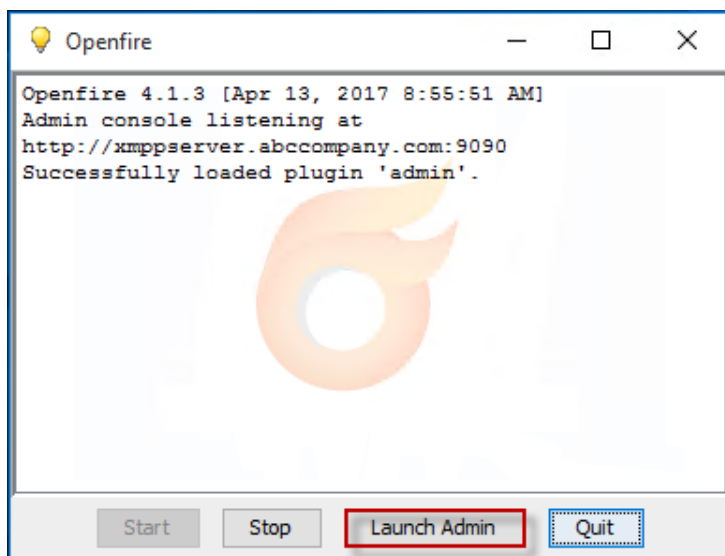
9. The Openfire installation process will continue.



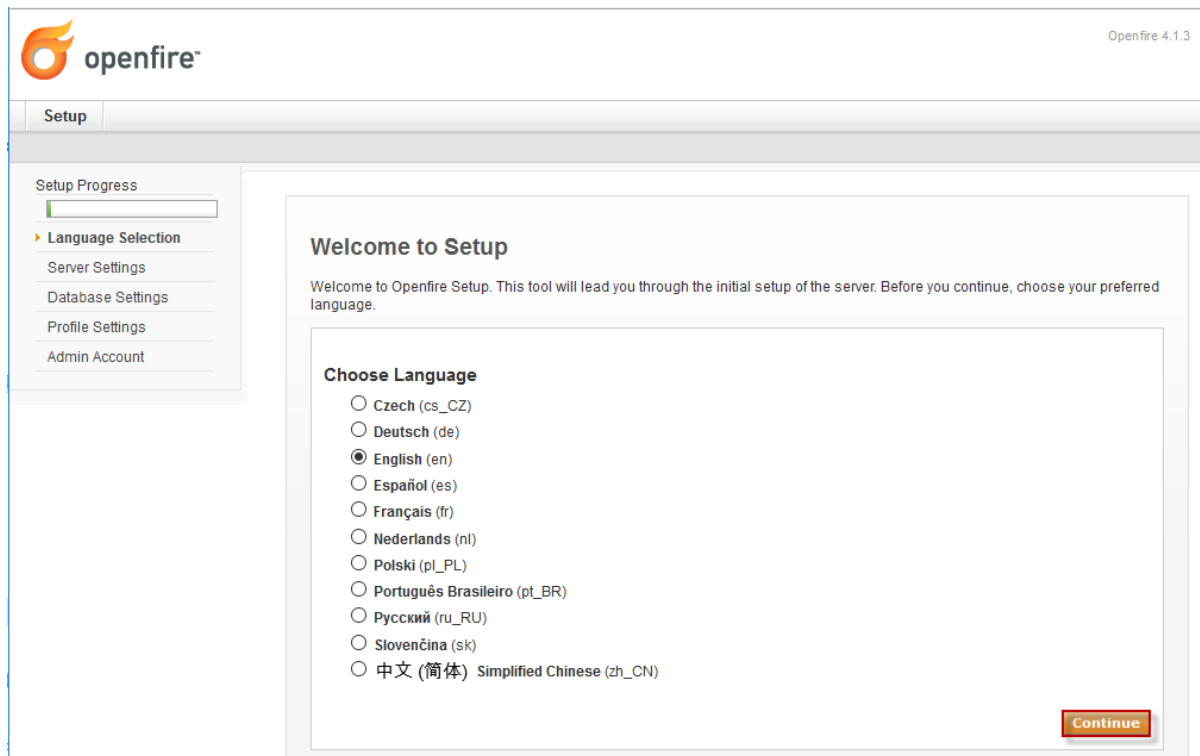
10. Click the **Finish** button to complete installation and run the Openfire software.



11. Click the **Launch Admin** button.



12. We will now go through a setup wizard. Select the required language. In this example **English** has been selected. Click the **Continue** button.



The screenshot shows the Openfire 4.1.3 Setup Wizard. The 'Setup' tab is active. On the left, the 'Setup Progress' bar shows 'Language Selection' as the current step. The main content area is titled 'Welcome to Setup' and contains a 'Choose Language' section with a list of languages. 'English (en)' is selected with a radio button. A 'Continue' button is located at the bottom right of the language selection area.

Welcome to Setup

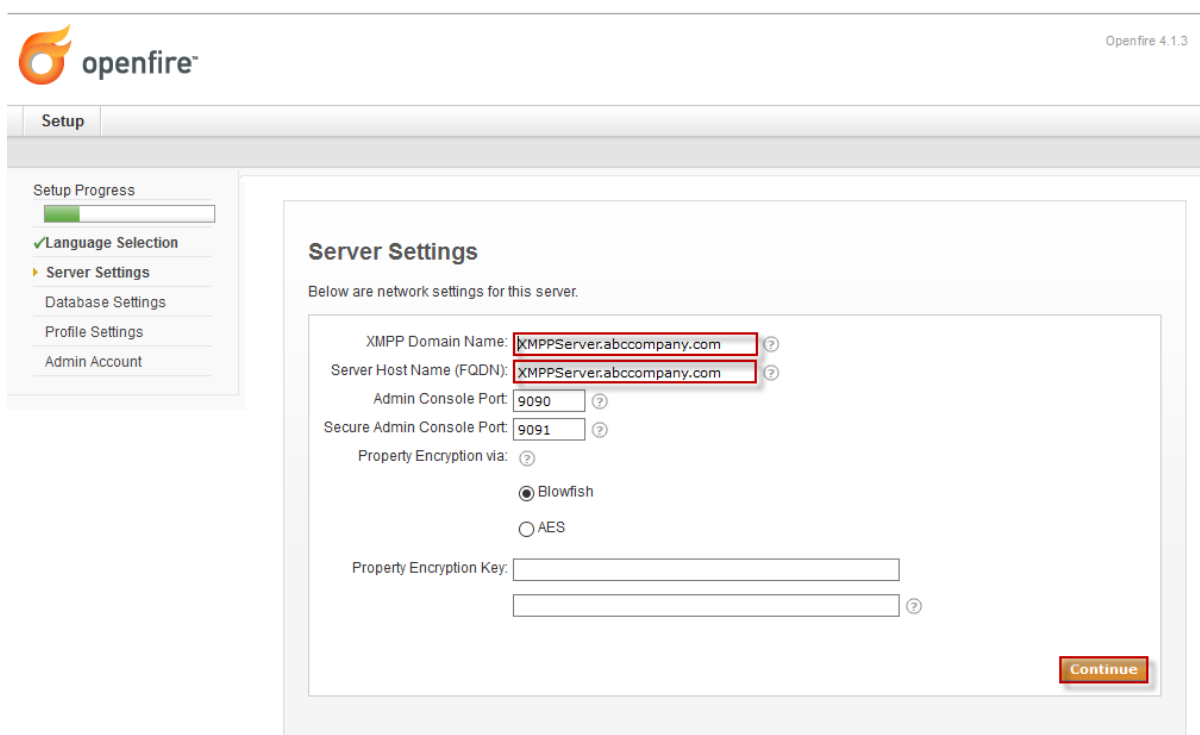
Welcome to Openfire Setup. This tool will lead you through the initial setup of the server. Before you continue, choose your preferred language.

Choose Language

- ☐ Czech (cs_CZ)
- ☐ Deutsch (de)
- ☒ English (en)
- ☐ Español (es)
- ☐ Français (fr)
- ☐ Nederlands (nl)
- ☐ Polski (pl_PL)
- ☐ Português Brasileiro (pt_BR)
- ☐ Русский (ru_RU)
- ☐ Slovenčina (sk)
- ☐ 中文 (简体) Simplified Chinese (zh_CN)

Continue

13. In the **Domain** field type the **Host Name.Domain Name** of the customer and then click the **Continue** button. The **Console Ports** can be left as default.



The screenshot shows the Openfire 4.1.3 Setup Wizard. The 'Setup' tab is active. On the left, the 'Setup Progress' bar shows 'Language Selection' as completed and 'Server Settings' as the current step. The main content area is titled 'Server Settings' and contains a section for network settings. The 'XMPP Domain Name' and 'Server Host Name (FQDN)' fields are highlighted with red boxes and contain the value 'XMPPServer.abccompany.com'. The 'Admin Console Port' is set to 9090 and the 'Secure Admin Console Port' is set to 9091. The 'Property Encryption via' section has 'Blowfish' selected. A 'Property Encryption Key' field is also present. A 'Continue' button is located at the bottom right of the settings area.

Server Settings

Below are network settings for this server.

XMPP Domain Name:

Server Host Name (FQDN):

Admin Console Port:

Secure Admin Console Port:

Property Encryption via: ☒ Blowfish ☐ AES

Property Encryption Key:

Continue

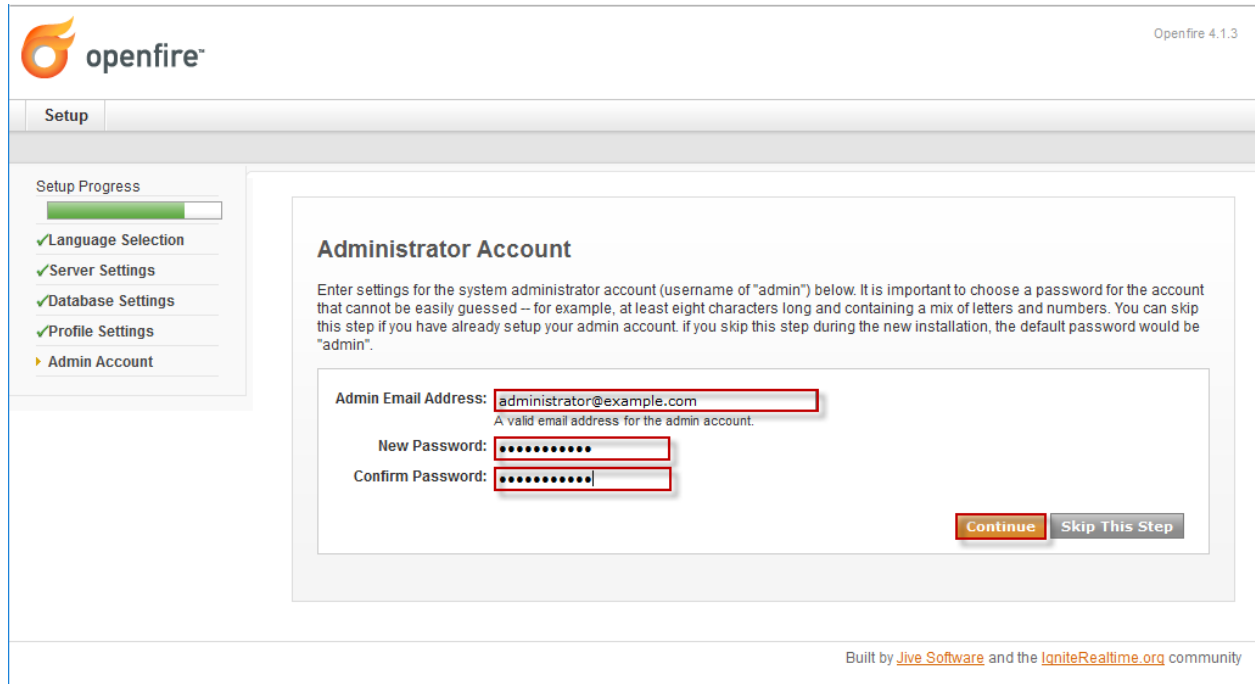
14. Change from Standard Database Connection to **Embedded Database**. Click the **Continue** button.

The screenshot shows the Openfire 4.1.3 Setup interface. On the left, a 'Setup Progress' sidebar lists: Language Selection (checked), Server Settings (checked), Database Settings (selected with a yellow arrow), Profile Settings, and Admin Account. The main area is titled 'Database Settings' and asks to 'Choose how you would like to connect to the Openfire database.' There are two radio button options: 'Standard Database Connection' (unselected) and 'Embedded Database' (selected). The 'Embedded Database' option is highlighted with a red rectangular box. Below the options is a 'Continue' button. At the bottom right, it says 'Built by [Jive Software](#) and the [IgniteRealtime.org](#) community'.

15. On the **Profile Settings** screen, click **Default** and then select the **Continue** button.

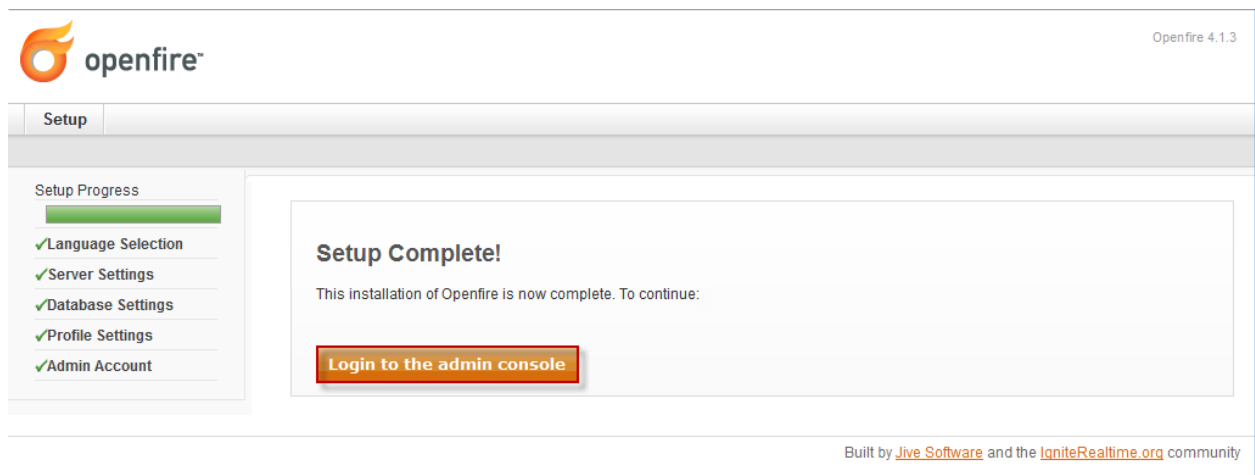
The screenshot shows the Openfire 4.1.3 Setup interface at the 'Profile Settings' step. The 'Setup Progress' sidebar on the left shows: Language Selection (checked), Server Settings (checked), Database Settings (checked), Profile Settings (selected with a yellow arrow), and Admin Account. The main area is titled 'Profile Settings' and asks to 'Choose the user and group system to use with the server.' There are three radio button options: 'Default' (selected), 'Only Hashed Passwords' (unchecked), and 'Directory Server (LDAP)' (unchecked). Each option has a brief description. Below the options is a 'Continue' button. At the bottom right, it says 'Built by [Jive Software](#) and the [IgniteRealtime.org](#) community'.

16. When prompted for the Administrator Account, change the Admin email Address to the customer Administrators email address. For example:
administrator@abccompany.com. Enter and confirm a system administrator **password** to be used with the administrator account on the Openfire software and then press the **Continue** button.



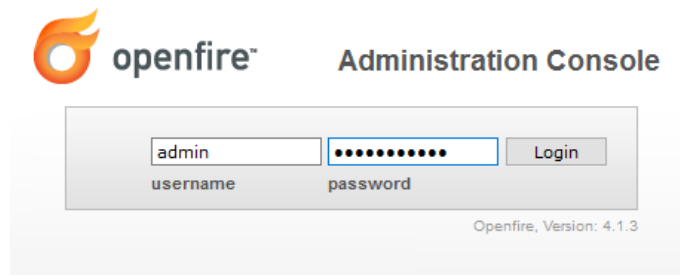
The screenshot shows the Openfire 4.1.3 Setup Wizard. The 'Setup' tab is selected. On the left, the 'Setup Progress' section shows a progress bar and a list of steps: Language Selection, Server Settings, Database Settings, Profile Settings, and Admin Account (which is currently selected). The main area is titled 'Administrator Account'. It contains instructions: 'Enter settings for the system administrator account (username of "admin") below. It is important to choose a password for the account that cannot be easily guessed -- for example, at least eight characters long and containing a mix of letters and numbers. You can skip this step if you have already setup your admin account. If you skip this step during the new installation, the default password would be "admin".' Below the instructions are three input fields: 'Admin Email Address' (containing 'administrator@example.com'), 'New Password' (masked with dots), and 'Confirm Password' (masked with dots). A red box highlights the email address field. At the bottom right are two buttons: 'Continue' and 'Skip This Step'. The footer text reads: 'Built by Jive Software and the IgniteRealtime.org community'.

17. The setup is now complete, click the **Login to the admin console** button.

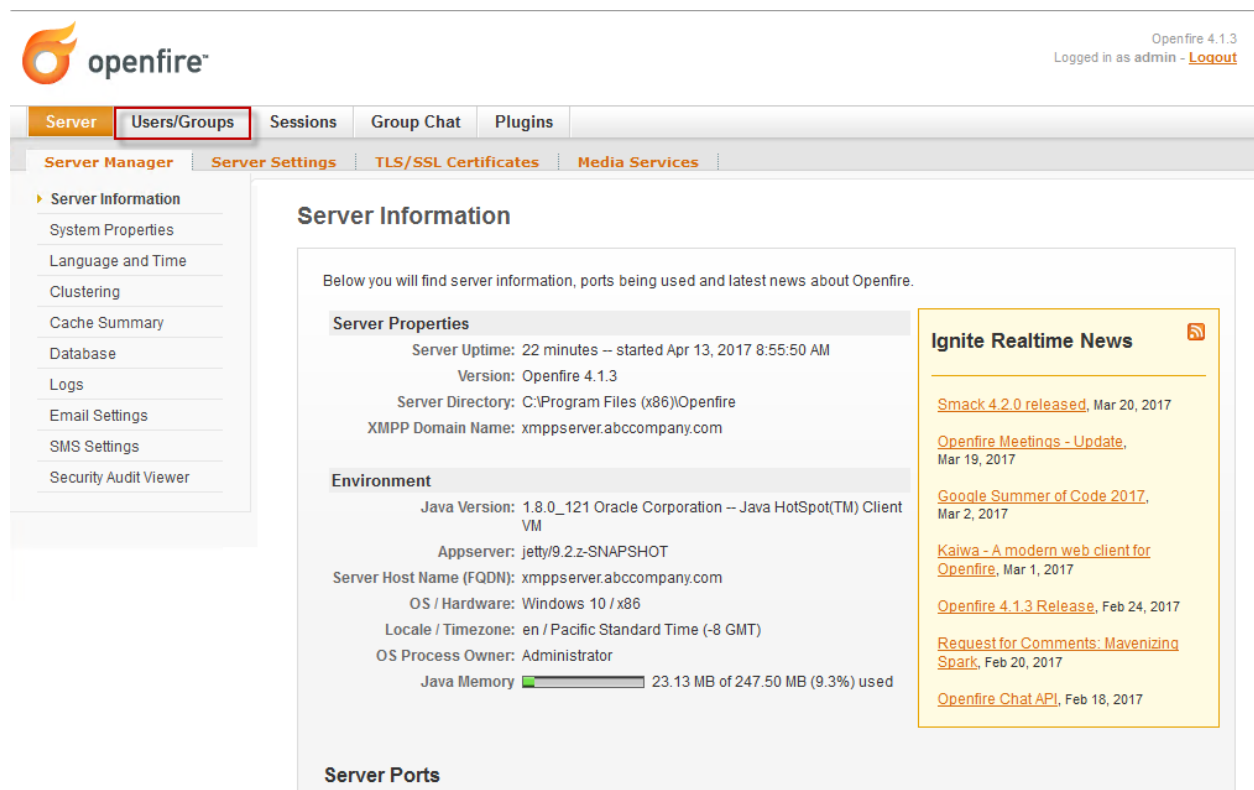


The screenshot shows the Openfire 4.1.3 Setup Wizard at the 'Setup Complete' screen. The 'Setup' tab is selected. On the left, the 'Setup Progress' section shows a progress bar and a list of steps: Language Selection, Server Settings, Database Settings, Profile Settings, and Admin Account (which is currently selected). The main area is titled 'Setup Complete!'. It contains the text: 'This installation of Openfire is now complete. To continue:'. Below this text is a single button labeled 'Login to the admin console'. The footer text reads: 'Built by Jive Software and the IgniteRealtime.org community'.

18. In the **username** field enter **admin** and in the password field enter the **Admin password** that was created earlier. Then click the **Login** button.

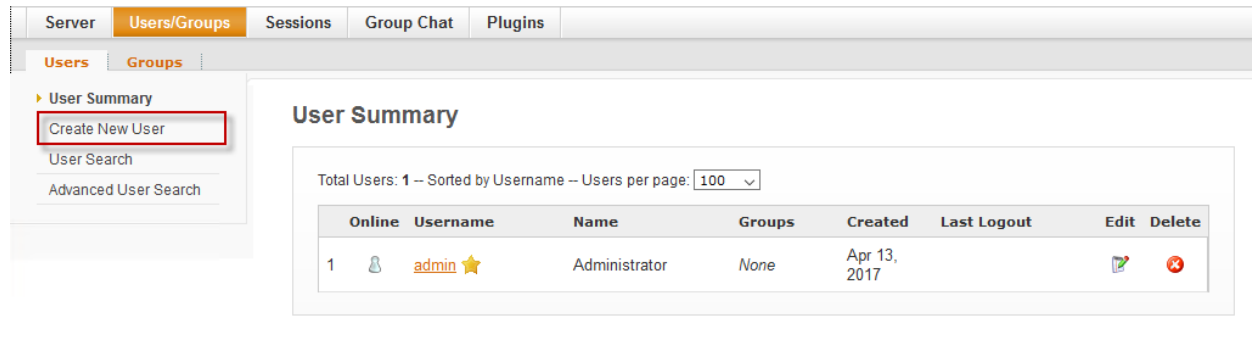


19. We will now add the account(s) to be used for the IP Office Contact Center CHAT topic(s). Click the **Users/Group** tab.



20. Click the **Create New User** option.

Note: Only CHAT topics require adding to the XMPP service, Agents do not need to be added.

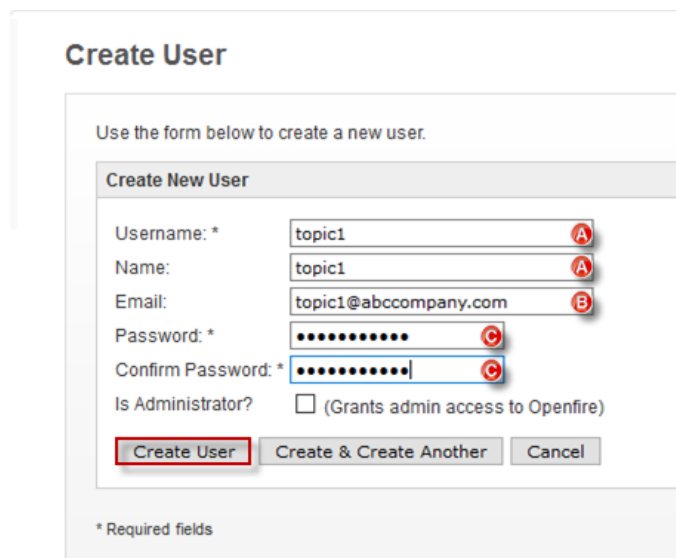


The screenshot shows the 'Users/Groups' management interface. The 'Users' tab is active, and the 'Create New User' option is highlighted in the left sidebar. The main area displays a 'User Summary' table with the following data:

Online	Username	Name	Groups	Created	Last Logout	Edit	Delete
1	admin	Administrator	None	Apr 13, 2017			

21. Enter the following and select the **Create User** button.

- Enter a **Username** for the topic as required. For example **topic1**.
- In this example, an email address is not required.
- Enter and confirm a **Password** for the topic and then select the **Create User** button.

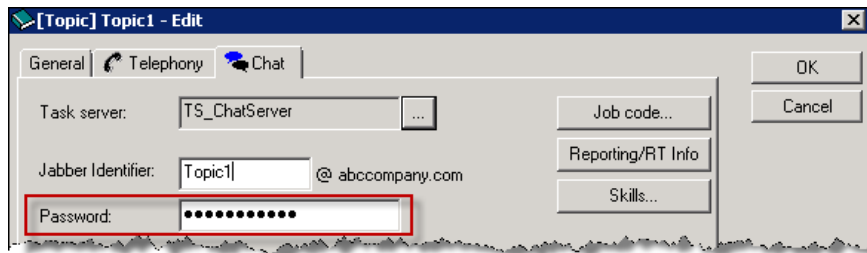


The screenshot shows the 'Create User' form. The form contains the following fields and options:

- Username: * (topic1)
- Name: (topic1)
- Email: (topic1@abccompany.com)
- Password: * (masked with dots)
- Confirm Password: * (masked with dots)
- Is Administrator? ☐ (Grants admin access to Openfire)
- Buttons: **Create User** (highlighted), Create & Create Another, Cancel

* Required fields

This password is initially set for the individually topic from the **Chat** tab in the IP Office Contact Center.



22. The new XMPP topic account is created.

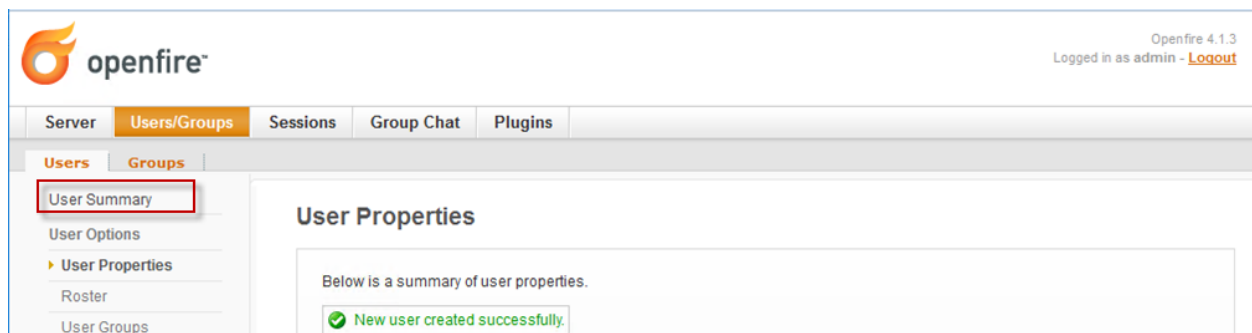
User Properties

Below is a summary of user properties.

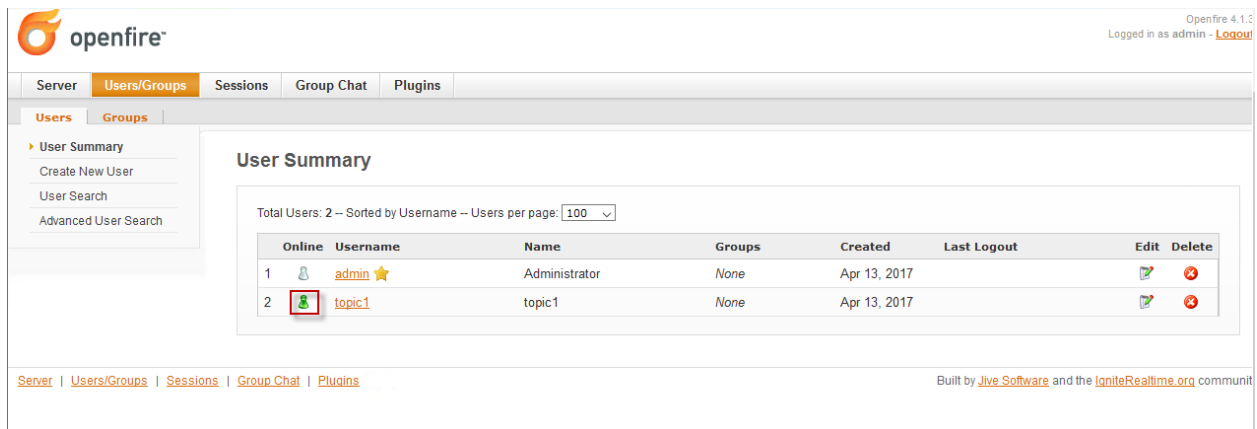
✓ New user created successfully.

User Properties	
Username:	topic1
Status:	👤 (Offline)
Is Administrator?:	No
Name:	topic1
Email:	topic1@abccompany.com
Registered:	Apr 13, 2017
Groups:	None

23. Click the **User Summary** link.



24. The Online presence will change to green when the setup has taken place in IP Office Contact Center. If the icon does not change to green, you can use tt_console – Chat – ChatTaskserver to look for error messages.



Openfire 4.1.3
Logged in as admin - [Logout](#)

Server | **Users/Groups** | Sessions | Group Chat | Plugins

Users | Groups

► User Summary
Create New User
User Search
Advanced User Search

User Summary

Total Users: 2 -- Sorted by Username -- Users per page: 100

	Online	Username	Name	Groups	Created	Last Logout	Edit	Delete
1		admin	Administrator	None	Apr 13, 2017			
2		topic1	topic1	None	Apr 13, 2017			

Server | Users/Groups | Sessions | Group Chat | Plugins

Built by [Jive Software](#) and the [IgniteRealtime.org](#) community

25. Once the icon is green. The configuration of Openfire is complete.

26. **(OPTIONAL)** You may wish to create another account on the Openfire that can be used to test the system internally e.g. 'customer'. Note that the 'customer' will only display as online when configured in IP Office Contact Center (as a topic) or connected with a chat client (For example. Pidgin).

Create New User

Username: *

customer

Name:

customer

Email:

customer@abccomany.com

Password: *

.....

Confirm Password: *

.....

Is Administrator?

☐ (Grants admin access to Openfire)

Create User

Create & Create Another

Cancel

Installing Openfire as a Service

Openfire can also be installed as a service. The openfire-service.exe is located in the bin directory of the installation.

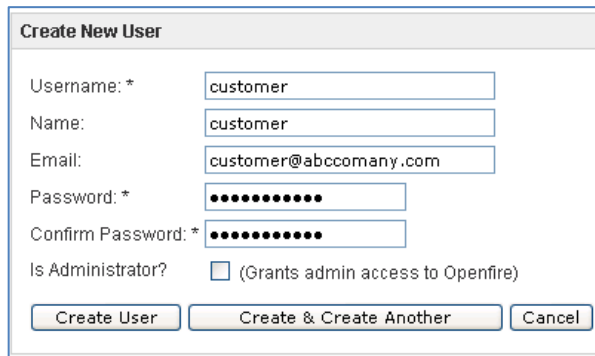
1. Open a command prompt.
2. Navigate to the folder of Openfire / bin.
3. Enter the following command.

openfire-service / install

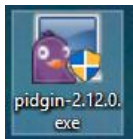
4. Openfire is registered as a service.
5. The startup type is set to **Automatic**.

Testing a Chat Session using Pidgin XMPP client

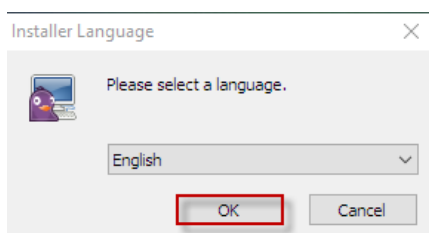
It would be good practice to test the Chat topics before they go live. This can be achieved using an XMPP client for example Pidgin. The account to be used would be the customer account which was previously created in Openfire.



1. The Pidgin software can be obtained from the following website <https://pidgin.im/>



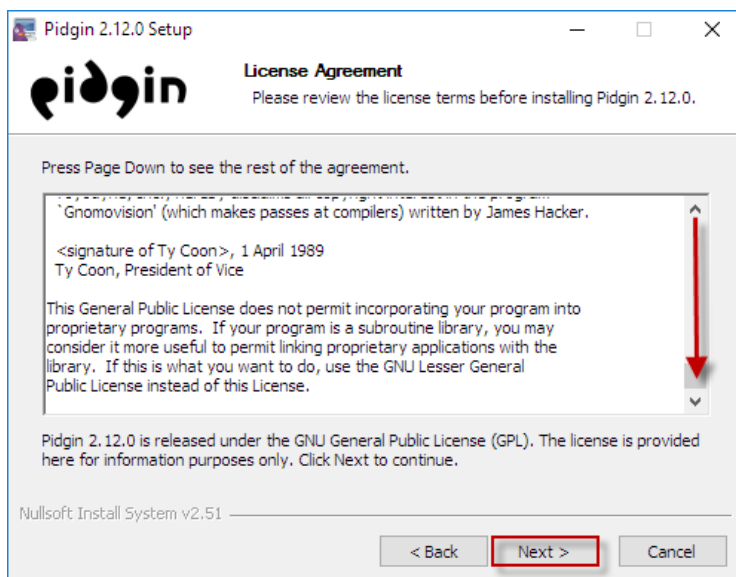
2. Download the Pidgin software and install it on the required PC. Select the Language and then click the **OK** button.



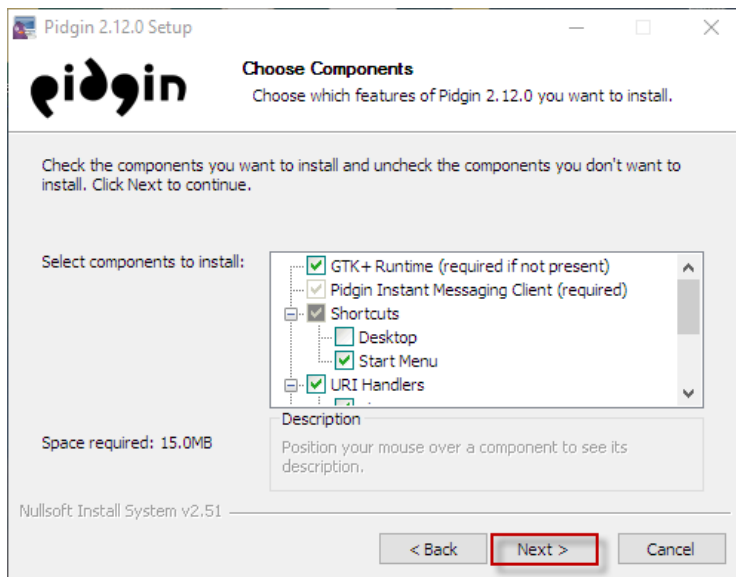
3. Click the **Next** button.



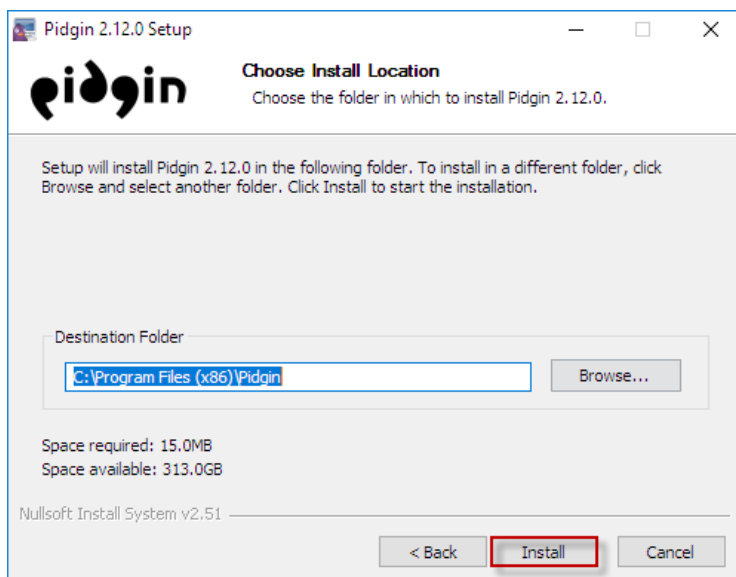
4. Read and agree to the **License agreement** and then select the **Next** button.



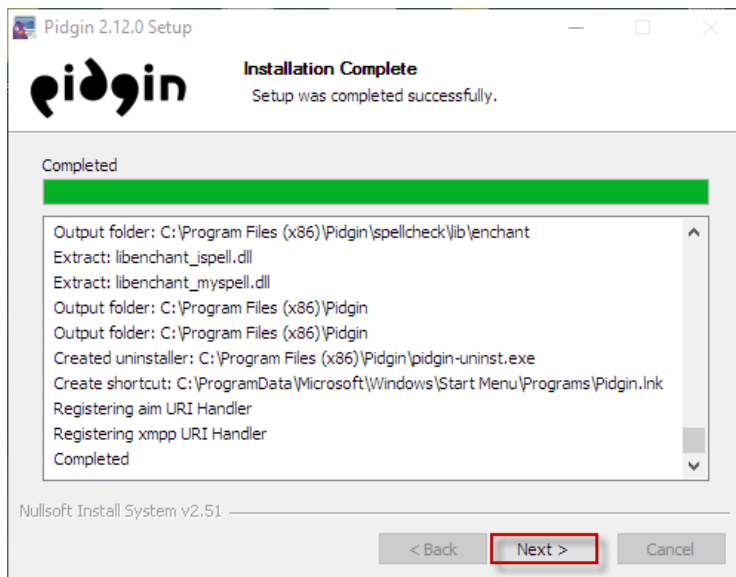
5. Click the **Next** button to install the defaults.



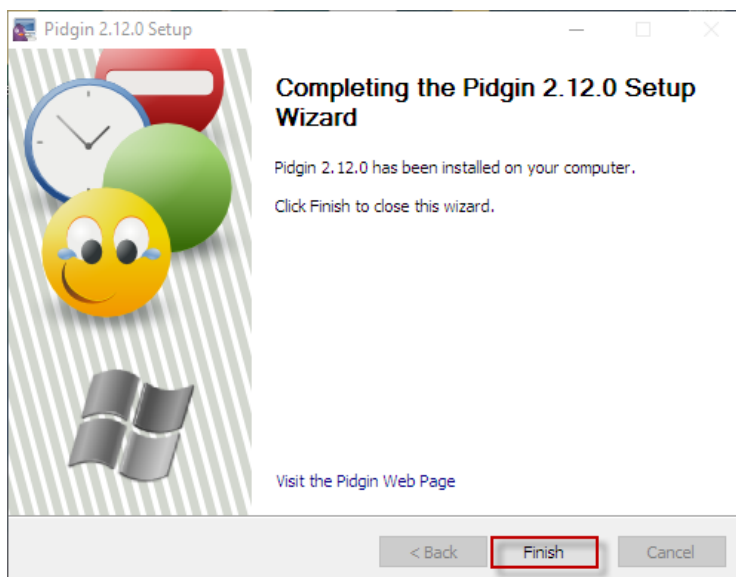
6. Click the **Install** button to install in the default location.



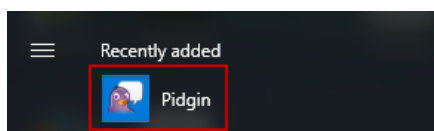
7. Click the **Next** button.



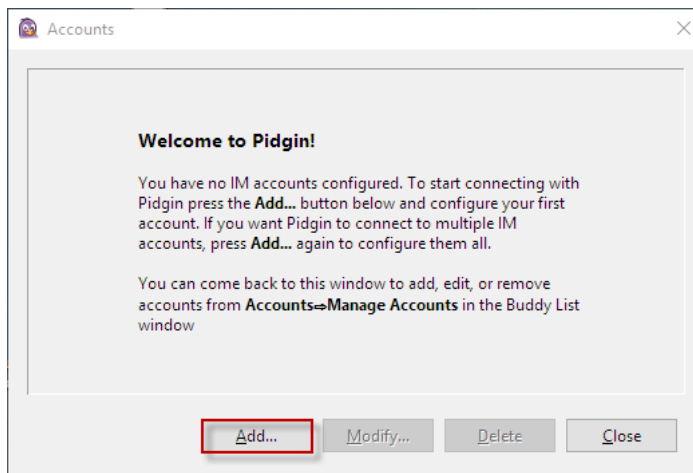
8. Click the **Finish** button to complete the installation.



9. Start the Pidgin application.

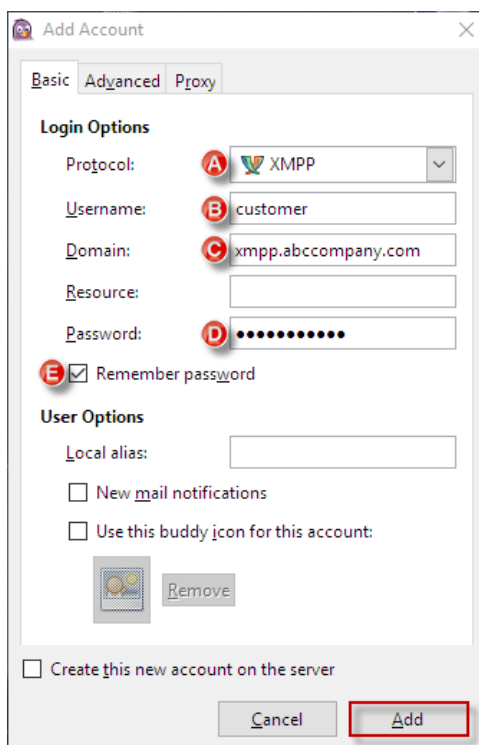


10. Click the **Add** button to add an account.

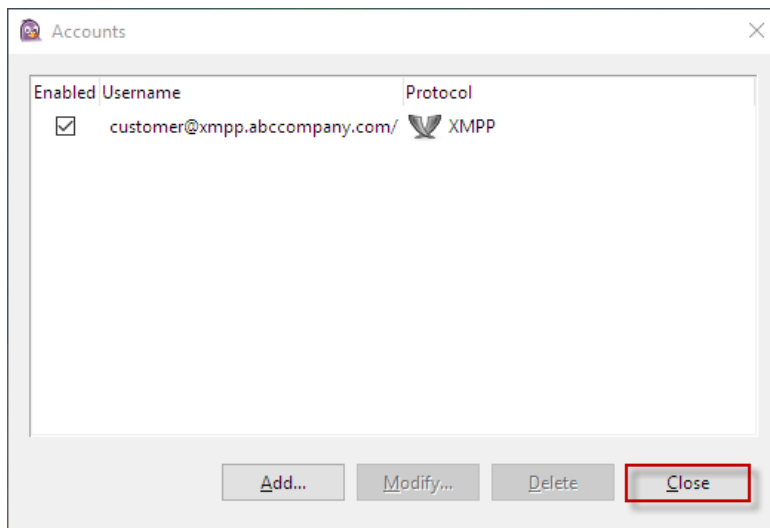


11. Enter the details for the customer account.

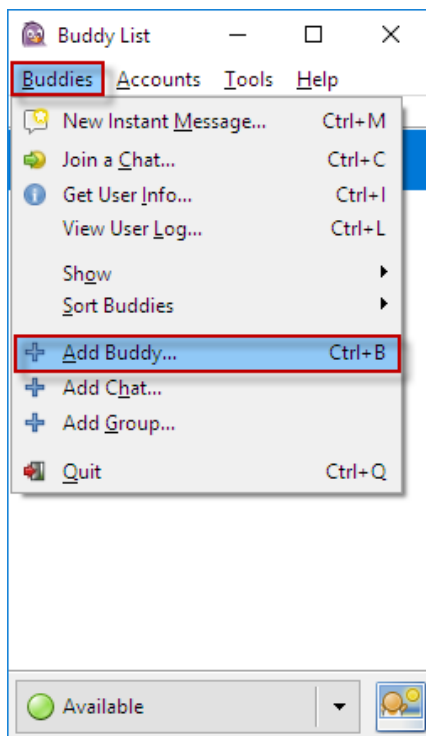
- A. Change the Protocol to **XMPP**.
- B. In the **Username** field type **customer**.
- C. In the **Domain** field type **xmpp.abccompany.com**. (The domain referenced is for illustrative purposes only and should be replaced with Domain to be utilized by the customer).
- D. In the **Password** field type in the password for the customer test account.
- E. Click the option to **Remember password** and then select the **Add** button.



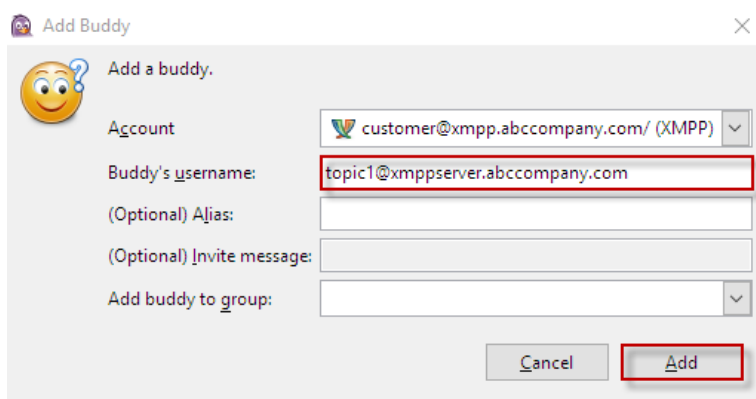
12. Make sure the account is **Enabled** and then select the **Close** button.



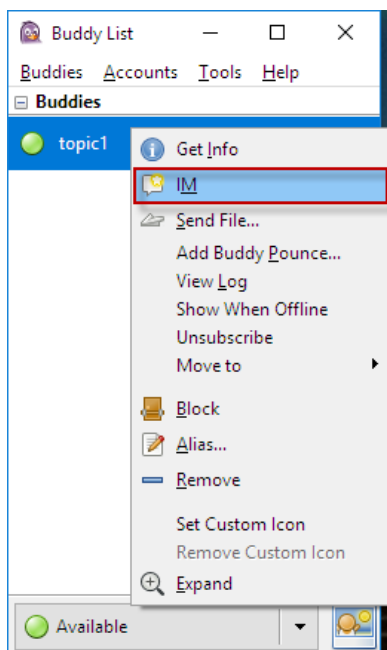
13. Choose **Buddies** and then select **Add Buddy**.



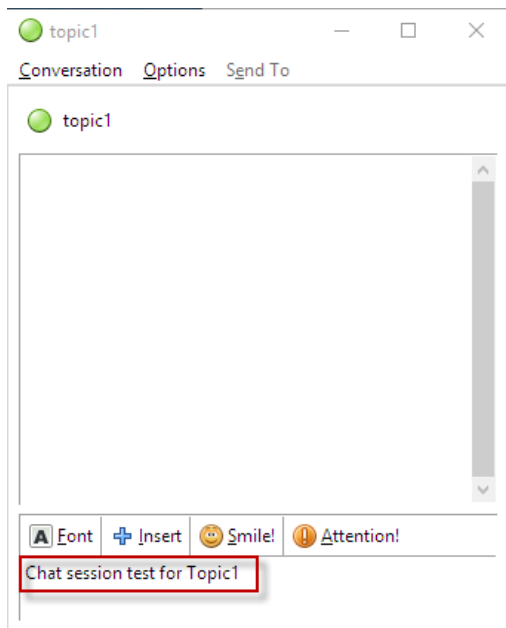
14. Type in the topics details under **Buddy's username** and then choose the **Add** button.



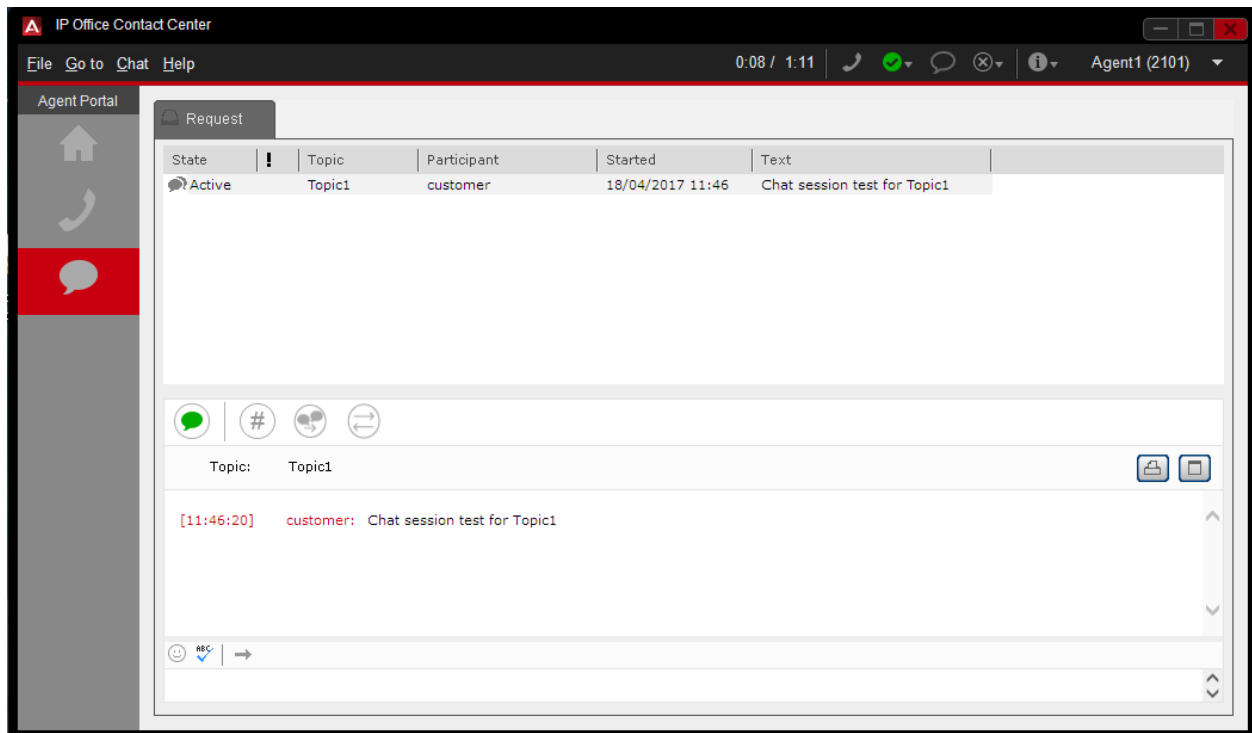
15. To create a Chat session right mouse click on the Topic and then select **IM**.



16. Enter text into the Chat window and press **Enter** on your keyboard.



17. The Chat session can now be answered by the Agent.



Avaya Documentation

- <http://support.avaya.com/>

Avaya IP Office Contact Center Task Based Guides

Avaya IP Office Contact Center Start Here First

Avaya IP Office Contact Center Task Based Guide - Core Installation

Avaya IP Office Contact Center Task Based Guide - Advanced Installation

Avaya IP Office Contact Center Task Based Guide - IVR Editor Scenarios

Avaya IP Office Contact Center Task Based Guide - Task-Flow Editor Telephony

Avaya IP Office Contact Center Task Based Guide - Telephony User Interface

Avaya IP Office Contact Center Task Based Guide - Reporting

Avaya IP Office Contact Center Task Based Guide - Dialer

Avaya Task Based Guide Configuring Call Recording with Avaya IP Office Contact Center

Avaya IP Office Contact Center Task Based Guide - Email and Chat Services

Avaya IP Office Contact Center Task Based Guide -Maintenance

Please note, only the Avaya IP Office Contact Center Task Based Guides listed above are available from Avaya. Further IP Office Task Based Guide documentation as listed below is available directly from ITEL. <http://www.iteluk.com/>

ITEL IP Office Task Based Guides

Initial Installation

1. IP Office Configuration Maps
2. IP Office Hardware Installation
3. IP Office Initialisation
4. IP Office Manager
5. IP Office Voicemail Pro Initial Installation Guide
6. IP Office Small Community Networking
7. IP Office Customer Call Reporter Initial Installation Guide
8. IP Office Server Edition Configuration
9. IP Office Security Policies

UCM

10. IP Office Unified Communications Module

Core Telephony

11. IP Office Telephony and Call Routing
12. IP Office Short Codes Summary
13. IP Office Hunt Group Setup and Operation
14. IP Office Conferencing
15. IP Office IP Telephony Guide
16. IP Office Computer Telephony Integration – 1st Party

Users, Telephone & Softphone Configuration

17. IP Office Configuring IP Office Phones and User Accounts
18. IP Office Call Handling
19. IP Office Configuring the IP Office Softphone

Auto Attendant & Voicemail

20. IP Office Embedded Voicemail (Intuity Mode) Flowchart
21. IP Office Auto-Attendant Setup and Operation

- 22. IP Office Embedded Voicemail
- 23. IP Office Embedded Voicemail Flowchart

Voicemail Pro

- 24. IP Office Voicemail Pro Summary Guide
- 25. IP Office Voicemail Pro – Voicemail User Guide

One X Portal & IP Office Applications

- 26. IP Office One X Portal Guide
- 27. IP Office One X Mobile Preferred Implementation
- 28. IP Office Plug-in for Microsoft® Outlook®
- 29. IP Office MS Lync Plugin
- 30. IP Office Avaya Flare
- 31. IP Office One X Mobile Essential

Customer Call Reporter – CCR

- 32. IP Office Customer Call Reporter Configuration Guide
- 33. IP Office Customer Call Reporter Wallboard Guide

Contact Store & Receptionist Console

- 34. IP Office Contact Store
- 35. IP Office Receptionist Console

Maintenance

- 36. IP Office Backup and Restore
- 37. IP Office System Status Application
- 38. IP Office Upgrade Guide

