CHIME 2.6

APPLICATION SETUP GUIDE

May 2017

Contact Information

See our Web site for Customer Support information.

http://www.instant-tech.com/

Microsoft CERTIFIED Partner

ISV/Software Solutions

CONTENTS

INTRODUCTION

This guide is designed to show new users of Chime how to set up the Admin section so that the application will be fully functioning. This includes adding dispatchers, people, SMTP settings, license keys for Queues to use, and setup sections for service desks as well as alerting instances.

If you have any questions during this process, please contact support@instant-tech.com.

OVERVIEW OF WHAT'S COVERED

This is a quick how-to guide for new users that will cover the following items:

- Accessing the Chime application URL
- Adding a new dispatcher account
- Adding a new person
- Adding in License Keys
- Configuring the SMTP Settings
- Setting up a service desk (optional)
    - Customize Web client
    - Add Routing Tags
    - Set up ChimeHub connection
- Setting up alerting (optional)
    - Enhanced alert prerequisites

CHIME 2.6 FOR OFFICE 365 AND ON PREMISE

Note: For this guide Chime must be installed and the account you are logging on to Chime with MUST have been picked as Admin in the installer.

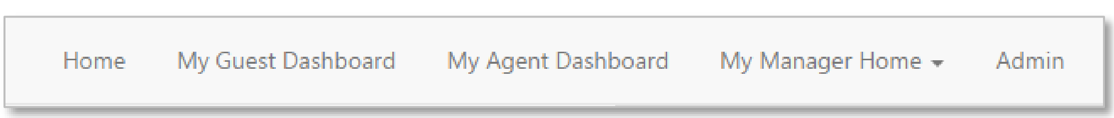
ACCESSING THE APPLICATION

Once Chime has been installed successfully, the application can be accessed through a web browser. The URL will be the address of the server that Chime is installed on.

Note: The format of the URL should be: http://[ServerName]/chime.

LAYOUT OF CHIME 2.6

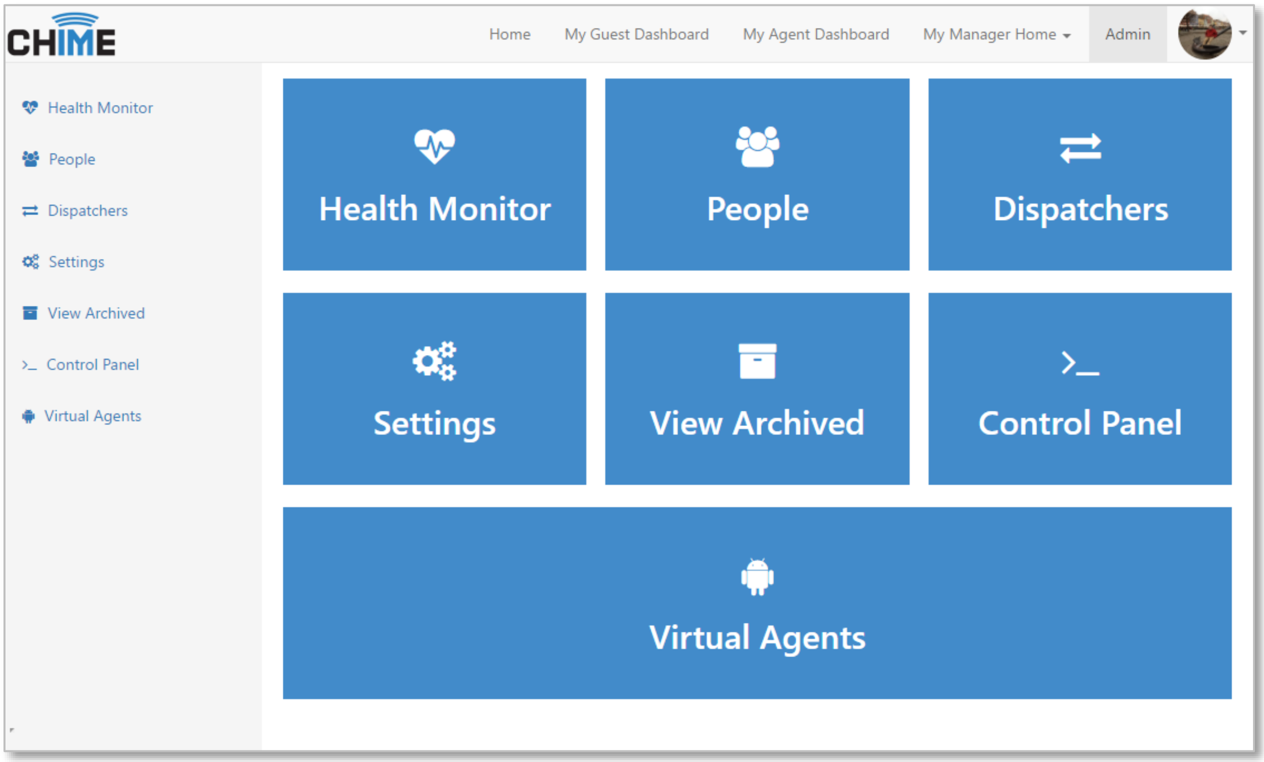
When you first log onto Chime, you will be brought to the Home page. For the purposes of this guide, you will not need to use this page. In the top-right of the page you will see that there is a navigation bar that allows you to navigate the Chime App. The options there are labeled: Home, My Guest Dashboard, My Agent Dashboard, My Manager Home, and Admin.



Click on the 'Admin' navigation button.

ADMIN SECTION

When you navigate to the Admin page, you will be on a page that allows you to easily navigate between the seven different sections of the Admin area.



Click on the 'Dispatchers' panel.

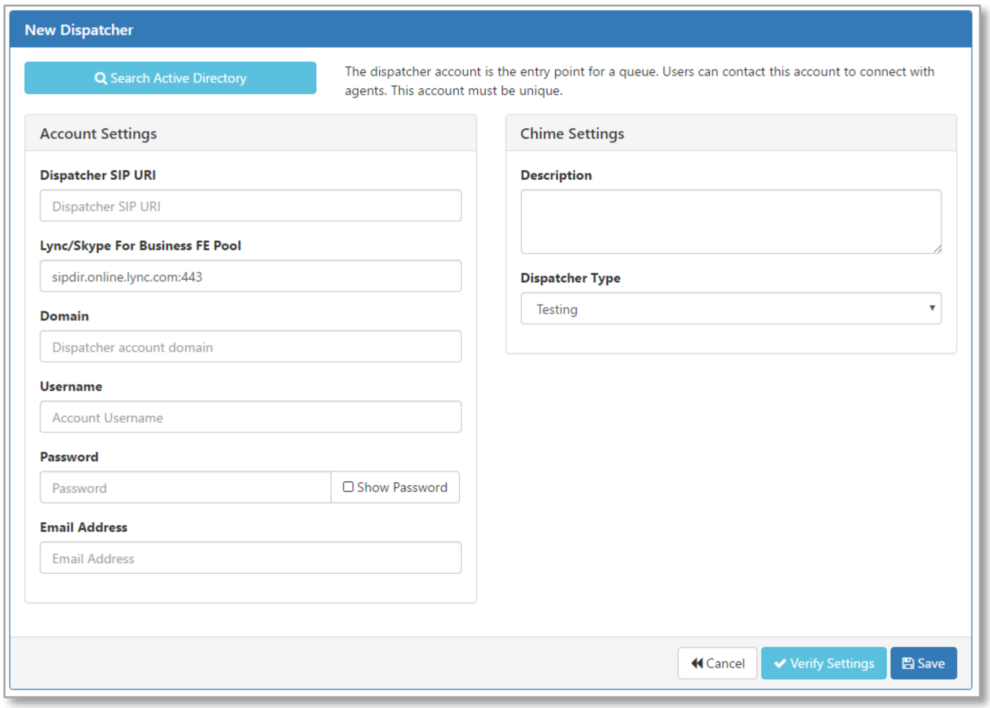
This will route you to the Dispatchers page where you will be able to add in new dispatchers.

ADDING A DISPATCHER

In order to create queues, route chats to agents, and send out alerts; Chime needs a Lync-enabled account that will be able to broker chats to agents and send out alerts. Each queue you create needs a dispatcher and the Lync-enabled account will act as the dispatcher.

1. On the Dispatchers page, click on the 

button in the upper right corner.
2. This will open the New Dispatcher window.



3. At this point you can either enter the information for the new dispatcher manually or search through Active Directory.

SEARCH THROUGH ACTIVE DIRECTORY

1. To search for a dispatcher to add, click on the 'Search Active Directory' button. This will bring up a directory search.
2. Type in the partial or full name of the dispatcher you want to add.
3. Click Search.

4. Once you've found the person you want to add, click on the blue plus button on the right side of the grid.
5. This will autofill in the account information in the form.
6. Pick a Dispatcher Type (Development, Testing, or Production). Note: this is just for labeling purposes.
7. Click on 'Test connection' to verify the account settings.
8. Once a notification appears that shows the connection was successful, click on 'Save'

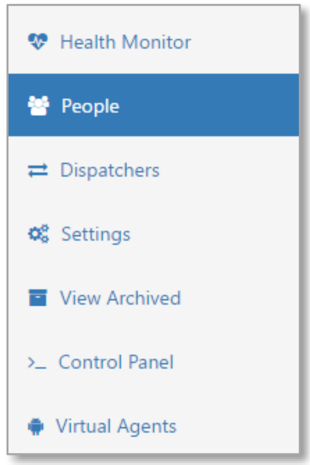
ENTER DISPATCHER MANUALLY

1. Enter the SIP ID of the Lync-enabled account that will act as the dispatcher.
2. Enter in the Skype For Business FE Pool address
3. Enter the name of the domain that the dispatcher account belongs to.
4. Enter the username and password of the dispatcher account.
5. Enter a description for the new Dispatcher (optional).
6. Enter in the Email Address for the dispatcher account (optional).
7. Pick a Dispatcher Type (Development, Testing, or Production). Note: this is just for labeling purposes.
8. Click on 'Test connection' to verify the account settings.
9. Once a notification appears that shows the connection was successful, click on 'Save'

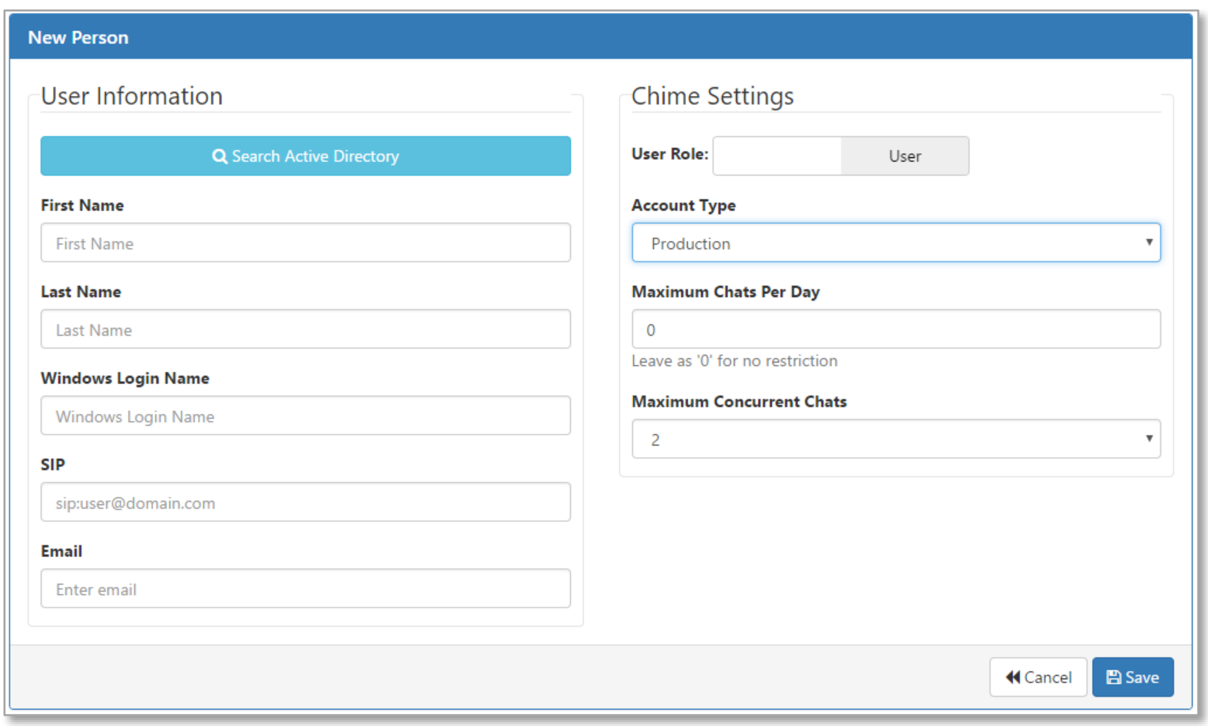
ADDING PEOPLE

Once a new dispatcher has been created, you are almost ready to set up your first queue. To add some additional people into Chime as agents and/or administrators, follow these steps.

1. From the Admin section, on the left-hand side menu click on People.



2. To add a new person, click on the  button. This will bring up the New Person window.



3. At this point you can either enter the information for the new person manually or search through Active Directory.

SEARCH THROUGH ACTIVE DIRECTORY

1. To search for someone to add, click on the ‘Search Active Directory’ button. This will bring up a directory search.
2. Type in the partial or full name of the person you want to add.
3. Click Search.

4. Once you’ve found the person you want to add, click on the blue plus button on the right side of the grid.
5. The New Person window will be populated with the person’s First and Last name, Windows Login Name, SIP, and Email.
6. If this person will be an administrator, click the toggle next to ‘User Role’
7. Choose the following options for this person: (optional)
    a. Account Type
    b. Max/Day
    c. Max concurrent

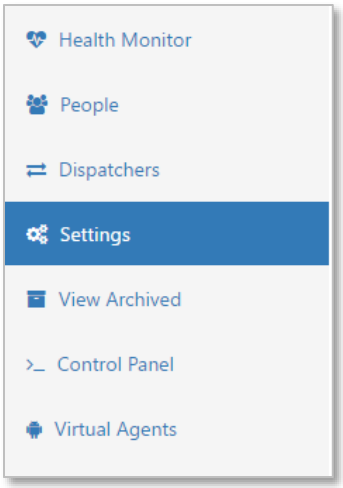
ENTER PERSON MANUALLY

1. To add someone manually, simply enter in all of the user information (First and Last name, Windows Login Name, SIP, and Email)
   Note: Windows Login Name and SIP must be valid. If they are left blank or are incorrect, you will get a warning message.
2. Then, if this person will be an administrator, click the toggle next to ‘User Role’
3. Choose the following options for this person: (optional)
    a. Account Type
    b. Max/Day
    c. Max concurrent

CONFIGURING THE SMTP SETTINGS

Once a new dispatcher has been created, you are able to configure all of the SMTP settings. Enabling SMTP settings on Chime is very important because many Chime features require SMTP to be properly functioning.

1. From the Admin section, on the left-hand side menu click on Settings
2. Next, confirm that you are on the ‘Server’ tab



3. On the bottom left of the page there is a panel labeled ‘Email Settings’. This is where all of the SMTP information will be input:
   a. Enter in the SMTP server address in the ‘SMTP Server Address’ field
   b. Enter in the SMTP port number in the ‘SMTP Server Port’ field
   c. Fill out the username for the SMTP account you are using in the ‘SMTP Username’ field
   d. In the ‘SMTP Server Password’ field, enter the password for the account you just filled out

   Optional Settings:

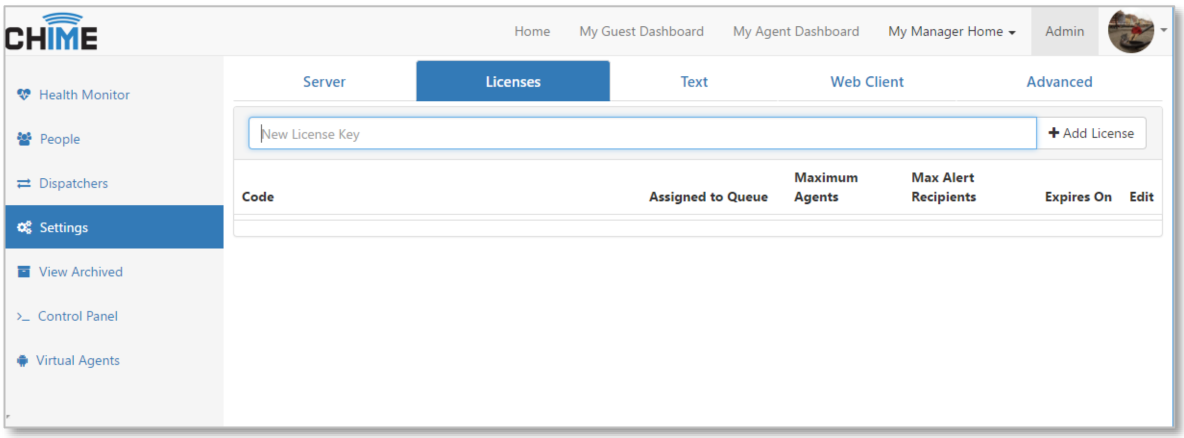
   e. Click the checkbox for ‘Send Email Alerts On Critical Failures’ to enable this setting
   f. Select the checkbox next to ‘Include support@instant-tech.com’ to enable this setting
   g. Click the checkbox next to the ‘Use SSL’ label to enable SSL on all emails sent

ADDING IN LICENSE KEYS

Once a new dispatcher has been created, you are able to add in Licenses for queues that you will create in the future.

1. From the Admin section, on the left-hand side menu click on Settings
2. Next, click on the Licenses tab

Note: For this next step, you will need to have aquired a license key for Chime

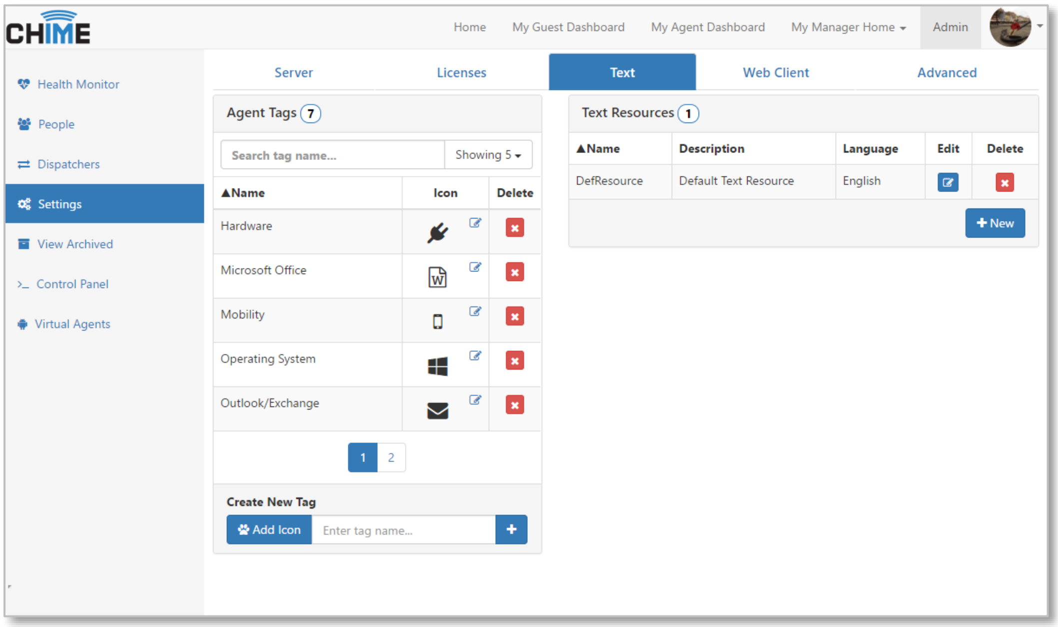


3. Enter the license key into the field labeled ‘New Lixense Key’
4. Click the Add Liscense Button
5. Confirm that the license is added and

SETTING UP A SERVICE DESK (OPTIONAL)

ADD ROUTING TAGS

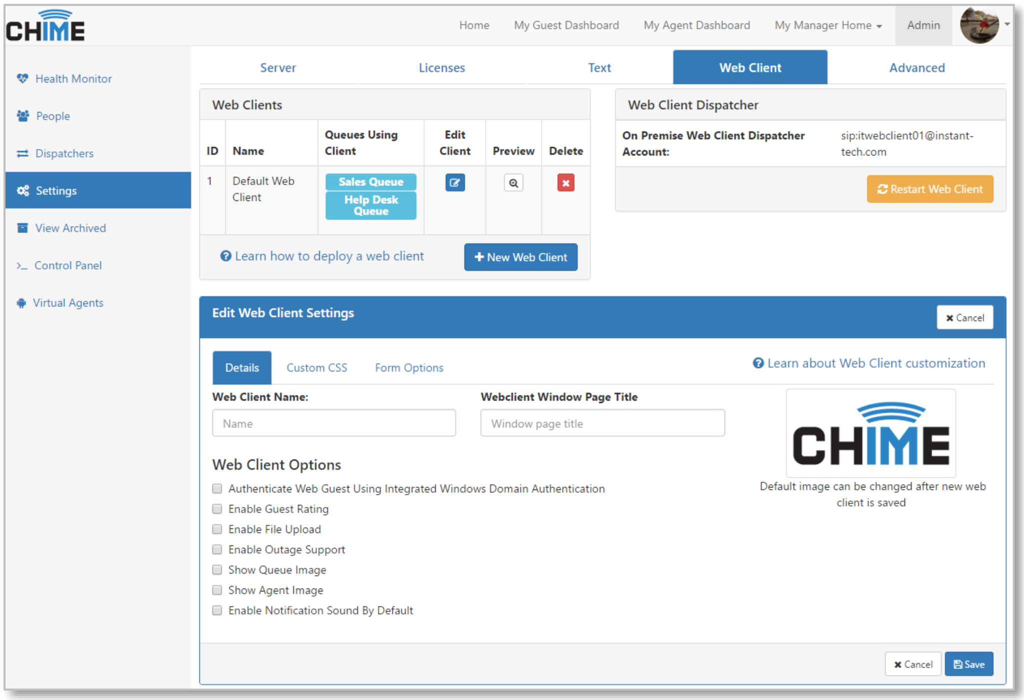
To set up Routing Tags for your service desk, first navigate to the ‘Text’ tab in the Settings section.



1. Enter a name into the ‘Enter tag name…’ field
2. Click on the ‘Add Icon’ button
3. Select an icon from the list that pops up
4. Click ‘OK’
5. Click the blue **+** button and the tag will be added to the list of tags
6. Repeat steps 1-5 for each tag to be added to Chime

CUSTOMIZE WEB CLIENT

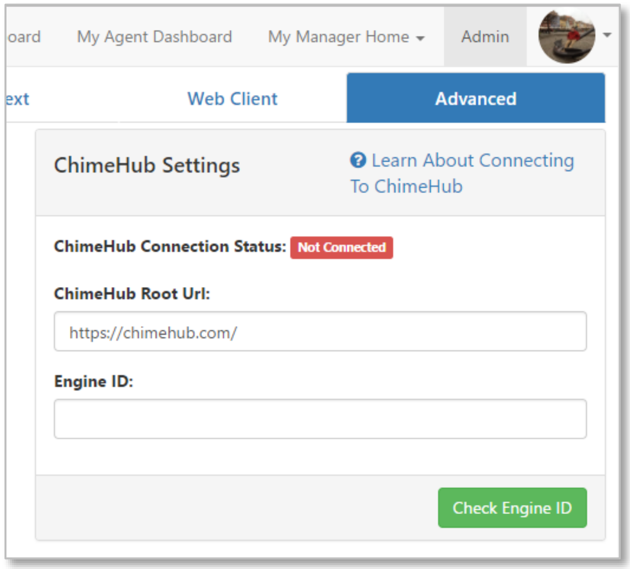
To set up Routing Tags for your service desk, first navigate to the ‘Web Client’ tab in the Settings section.



1. At this point you can either edit the default web client or create your own web client
   a. To edit the existing client, click the button in the ‘Edit Client’ column
   b. To add a new Web Client, click the + New Web Client button
2. A window will appear below that allows you to customize the settings of the Web Client
3. In this window there are three tabs. Details. Custom CSS and Form Options
4. Go through each of the tabs and choose the settings you want or add in the custom settings you want to use

SET UP CHIMEHUB CONNECTION

To set up the ChimeHub connection for your service desk, first navigate to the 'Advanced' tab in the Settings section.



1. Leave the *https://chimehub.com/* as it is
2. Enter in the Engine ID you wish to use for your ChimeHub account.
3. For naming the Engine ID it is highly recommended to use your company name (as one word) or an abreviated version of the company name.
4. Click the 'Check Engine ID' button
5. This will send a notification to the Instant-tech team, who will activate your ChimeHub account

SETTING UP ALERTING (OPTIONAL)

ENHANCED ALERT PREREQUISITES

To support Enhanced alerts there are a few features you must set up:

- In the installer, SSL must be set up
- There must be a dispatcher installed
- SMTP must be set up
- A license with alert recipients must be added
- People must be added that can be assigned to the queue