



iceVerify User Guide

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iceVerify for ice server version 14+

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Welcome to iceVerify

As email and web-based communications become more common in today's business world, many call centers are evolving into **contact centers**. Contact centers manage interactions across multiple channels, including telephone, email, and web-based communications such as live chat.

ice is a powerful contact center solution that allows for the integrated handling of **contacts** (calls, email messages, chat requests, etc.) that are directed to your contact center.

iceVerify is a multi-factor authentication (MFA) solution designed to strengthen security in contact centers. It allows agents to authenticate customers using a one-time verification code sent via email or SMS.

iceVerify supports both CRM-integrated and non-CRM integrated ice implementations.

iceVerify can integrate with your existing CRM system to retrieve the customer's phone number and/or email address, or allows for the agent to search within the CRM for the customer's details. Without a CRM integration, agents can use iceVerify to manually confirm the caller's access to their phone number or email address during an interaction.

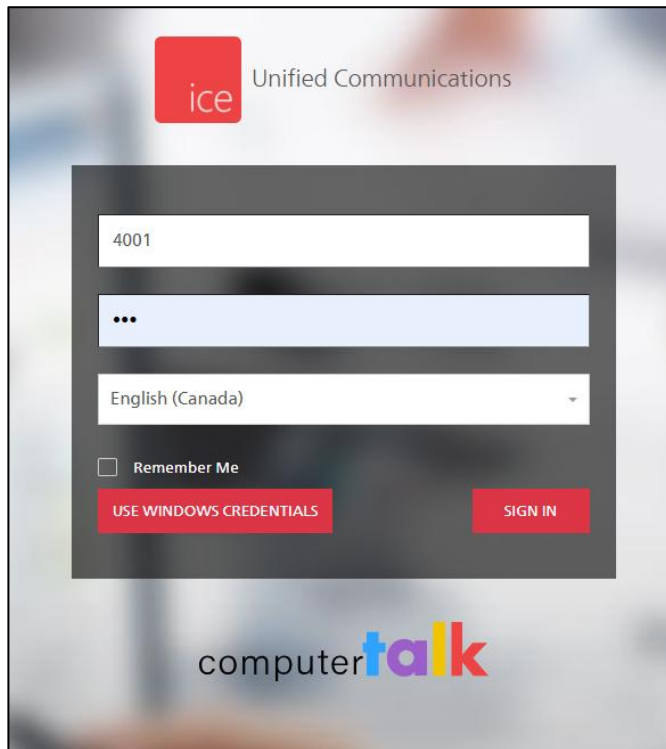
Getting started

To access iceVerify, you must first log onto iceManager.

iceManager is a web-based application and can be used on any computer that is running a web browser. To sign in, you must provide a user ID and password. Contact your administrator if you do not have this information.

To sign into iceManager

1. Open your web browser and go to your iceManager site.

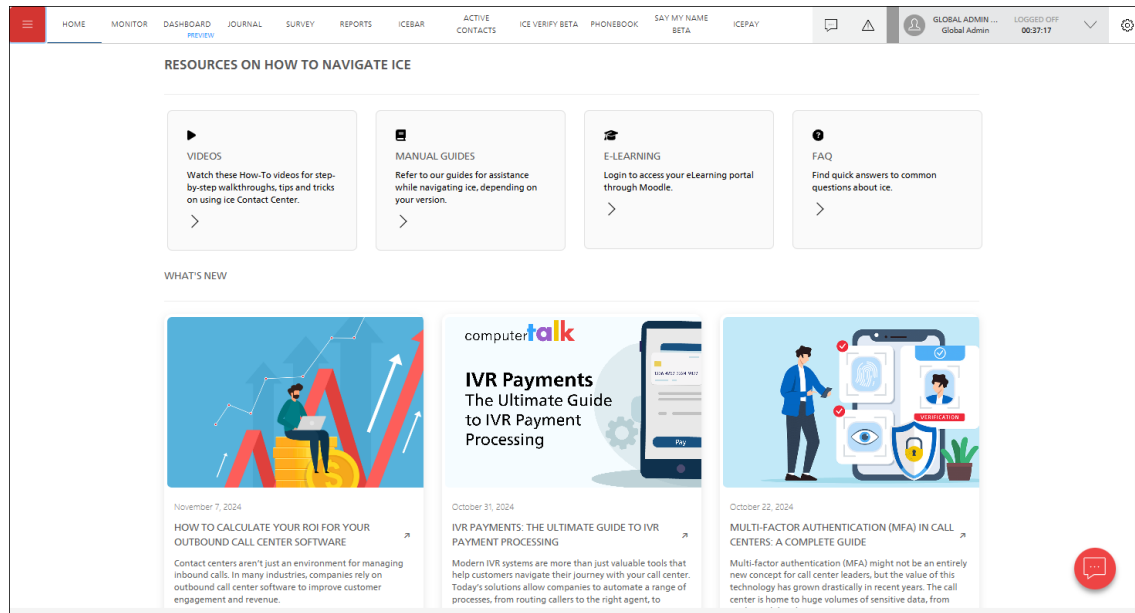


2. In the 'Username' field, enter your four-digit user ID.
3. In the 'Password' field, enter your password.
4. If you wish to view iceManager in a language other than English, click the drop-down and select the language of choice.
5. Select the 'Remember Me' check box if you want your Username to be pre-populated the next time you go to the Sign In page

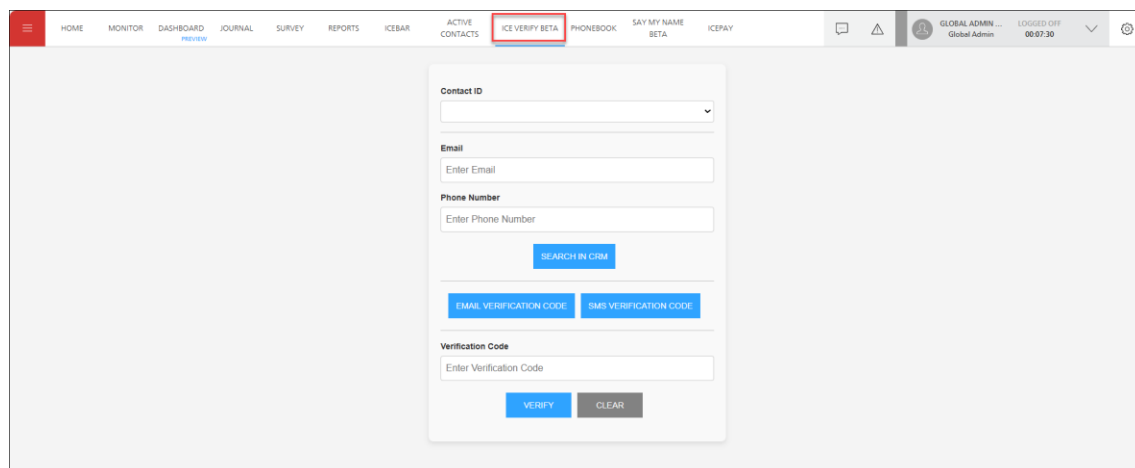
Note: this option is not recommended for shared computers.

6. Click Sign In.
7. Once you have signed in, you will see the home page.

Below is a screenshot of a sample home page.



8. Click on the iceVerify tab in the Navigation Panel.



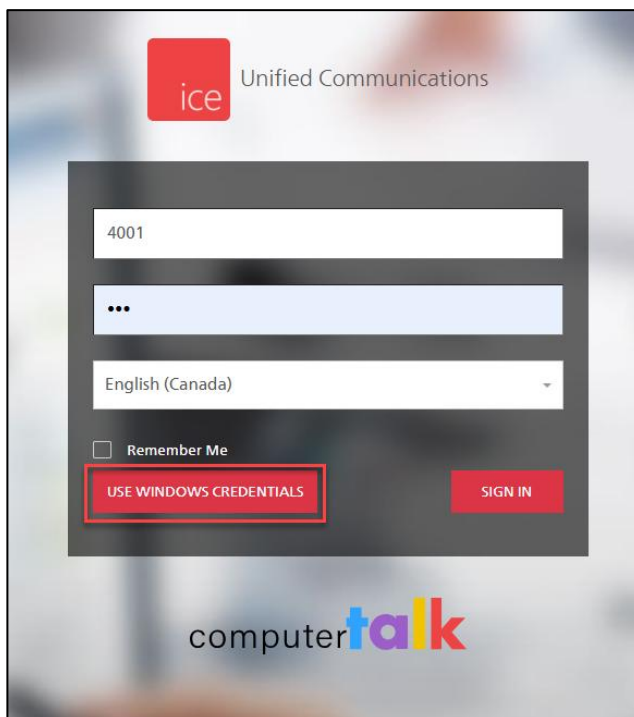
Single Sign-On

If your organization has enabled Single Sign-On for iceManager, you will be able to sign in using your Windows credentials.

Note: To enable Single Sign-On, it must be configured using Active Directory in iceAdministrator. For further information on how to enable Single Sign-On, please refer to the *iceAdministrator User Manual*.

Signing In with Single Sign-On

Once Single Sign-On is properly configured, launch the iceManager website, and click Use Windows Credentials button rather than manually entering your username and password.



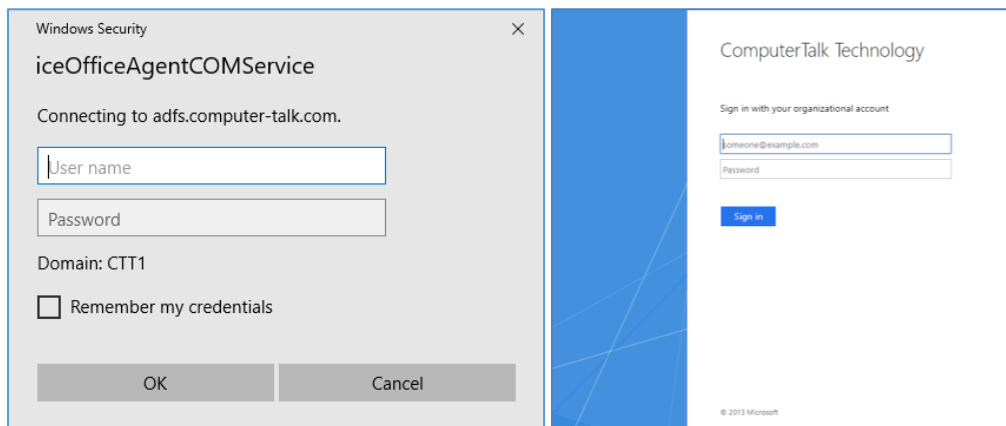
The screenshot shows the iceManager login interface. At the top left is the 'ice' logo, and to its right is the text 'Unified Communications'. Below this is a dark grey login box containing several fields: a text input with '4001', a blue dropdown menu with three dots, and a text input with 'English (Canada)' and a dropdown arrow. Below these fields is a checkbox labeled 'Remember Me'. At the bottom of the login box are two red buttons: 'USE WINDOWS CREDENTIALS' (which is highlighted with a red rectangular box) and 'SIGN IN'. The 'computer**talk**' logo is visible at the bottom center of the page.

1. When you click *OK*, the Single Sign-On dialog box will appear.

Note: If you wish to skip this step for future logins, check the box for *Remember Me*. This way, you will not have to enter your user ID each time you sign in.

2. To sign in with this method, you will use the same credentials that you use to log on to your computer or your company email. Enter your username and password in the appropriate fields.

Note: This dialog box may look different, depending on the way your administrator has configured the system.



Using iceVerify

To use iceVerify, you must have access to both iceManager, and iceBar for Desktop or iceBar for web. As iceVerify allows agents to authenticate users during interactions, agents must be actively handling a call or chat through iceBar to use the tool. For more information on contact handling, please refer to the *iceBar for Desktop User Manual*.

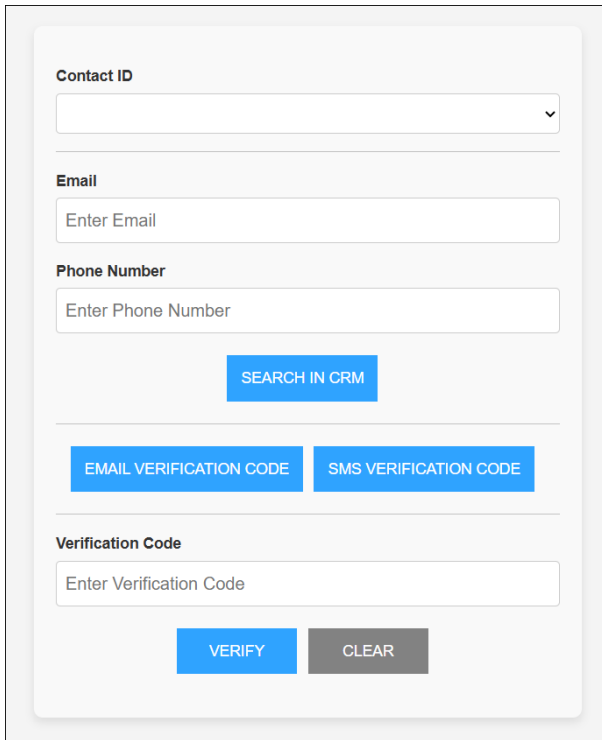
iceVerify is supported for customers both with and without CRM integration. For customers with a CRM, iceVerify integrates with your existing CRM system to retrieve the customer's phone number, and/or email address. For customers without a CRM integration, iceVerify allows agents to confirm the caller's phone number or email address while handling a contact.

The next section will provide the steps agents can use to authenticate a customer's details through iceVerify, for environments with and without a CRM integration.

iceVerify with a CRM Integration

Follow the steps below to authenticate a caller or chat customer through iceVerify.

1. Ensure that you are actively handling a call or a chat contact through iceBar for Desktop or iceBar for Web. iceVerify will not populate with the required information if you are not currently handling a supported contact.
2. Launch iceVerify from the iceManager Navigation Panel.

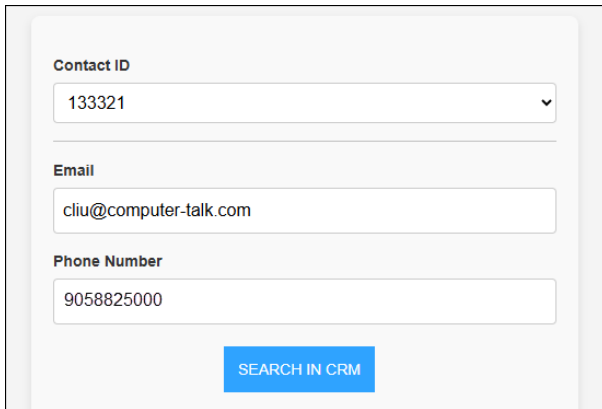


The screenshot shows a web form for contact verification. It includes a 'Contact ID' dropdown menu, an 'Email' text field, a 'Phone Number' text field, a blue 'SEARCH IN CRM' button, two blue buttons for 'EMAIL VERIFICATION CODE' and 'SMS VERIFICATION CODE', a 'Verification Code' text field, and two buttons at the bottom: 'VERIFY' (blue) and 'CLEAR' (grey).

3. If you are handling a single contact, open the drop-down menu. The page will refresh and the Contact ID field will populate with the contact ID of your contact.

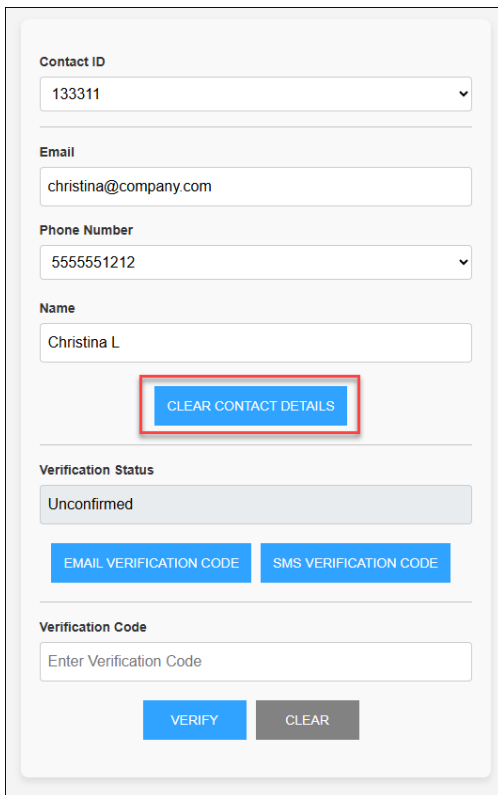
Note: If you are handling multiple contacts through Multi-Contact Handling, select the appropriate contact ID from the drop-down list.

4. If there is a match in the CRM, the available contact information associated with the customer will populate the corresponding fields in iceVerify.



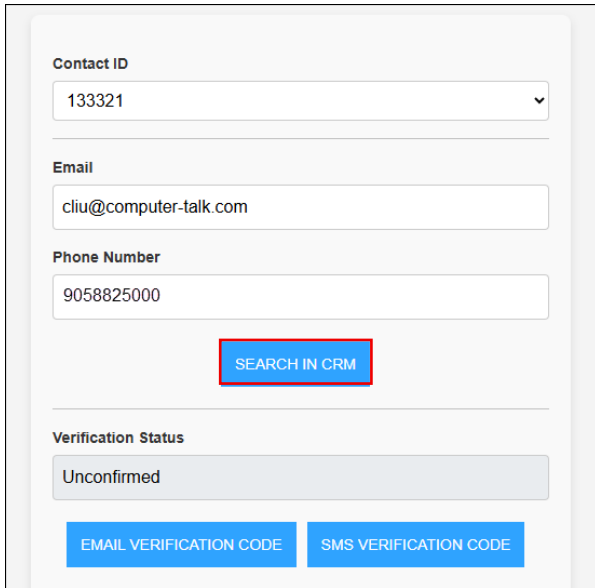
A form for searching in the CRM. It contains three input fields: 'Contact ID' with the value '133321', 'Email' with the value 'cliu@computer-talk.com', and 'Phone Number' with the value '9058825000'. Below these fields is a blue button labeled 'SEARCH IN CRM'.

5. If the details returned are incorrect, or if no match is found in the CRM, click the Clear Contact Details button to remove the information. You may then manually input the email or phone number provided by the customer.



A form for managing contact details. It includes fields for 'Contact ID' (133311), 'Email' (christina@company.com), 'Phone Number' (5555551212), and 'Name' (Christina L.). A blue button labeled 'CLEAR CONTACT DETAILS' is highlighted with a red rectangle. Below these fields is a 'Verification Status' section with a dropdown menu set to 'Unconfirmed'. There are two buttons: 'EMAIL VERIFICATION CODE' and 'SMS VERIFICATION CODE'. At the bottom is a 'Verification Code' section with a text input field labeled 'Enter Verification Code' and two buttons: 'VERIFY' and 'CLEAR'.

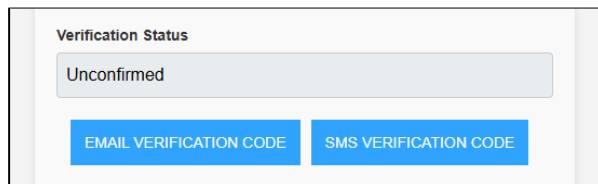
When you are ready to search, click the Search in CRM button.



A screenshot of a CRM search form. It contains the following fields and buttons:

- Contact ID:** A dropdown menu with the value "133321" and a downward arrow.
- Email:** A text input field containing "cliu@computer-talk.com".
- Phone Number:** A text input field containing "9058825000".
- SEARCH IN CRM:** A blue button with white text, outlined in red.
- Verification Status:** A dropdown menu with the value "Unconfirmed".
- EMAIL VERIFICATION CODE:** A blue button with white text.
- SMS VERIFICATION CODE:** A blue button with white text.

- Once you have confirmed that the correct customer has been identified, send the verification code using the customer's preferred method. Click Email Verification Code to send by email, or SMS Verification Code to send by text message.



A screenshot of a form showing the verification status and buttons. It contains the following elements:

- Verification Status:** A dropdown menu with the value "Unconfirmed".
- EMAIL VERIFICATION CODE:** A blue button with white text.
- SMS VERIFICATION CODE:** A blue button with white text.

- A message will appear to indicate that the verification code has been successfully sent to the customer.

Contact ID
133321

Email
cliu@computer-talk.com

Phone Number
9058825000

SEARCH IN CRM

Verification Status
Unconfirmed

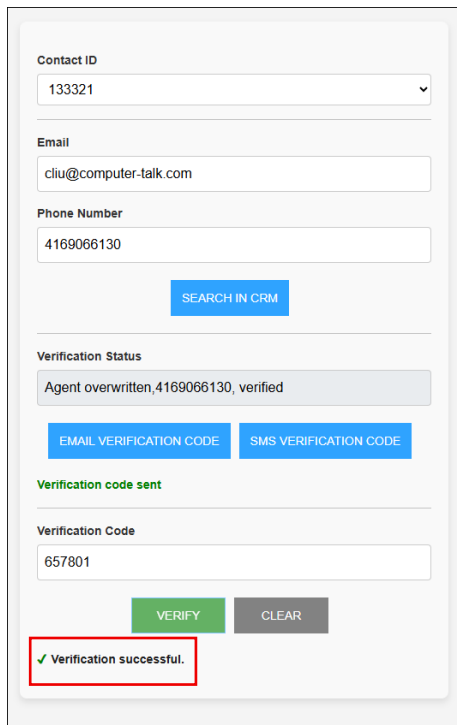
EMAIL VERIFICATION CODE
SMS VERIFICATION CODE

Verification code sent

Verification Code
Enter Verification Code

VERIFY
CLEAR

8. Once the code has been sent to the customer, they will need to share the code they received with you to complete the verification process.
9. Enter the customer's code in the *Verification Code* field and click Verify. If the code is correct, you will see the "Verification successful" message.



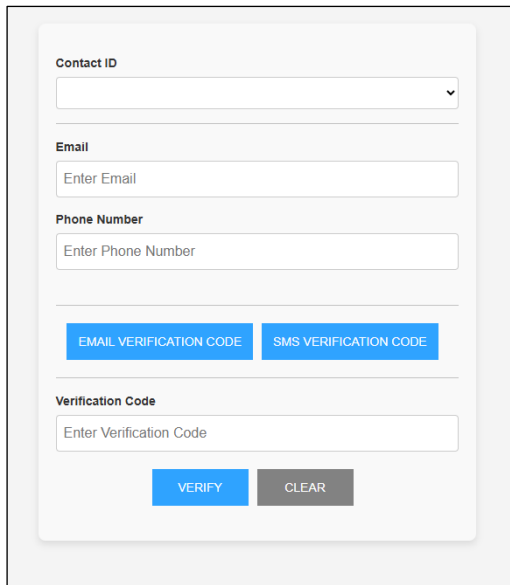
The screenshot shows the iceVerify interface with the following fields and buttons:

- Contact ID:** A dropdown menu showing "133321".
- Email:** A text input field containing "cliu@computer-talk.com".
- Phone Number:** A text input field containing "4169066130".
- SEARCH IN CRM:** A blue button.
- Verification Status:** A text area showing "Agent overwritten, 4169066130, verified".
- EMAIL VERIFICATION CODE:** A blue button.
- SMS VERIFICATION CODE:** A blue button.
- Verification code sent:** A green status message.
- Verification Code:** A text input field containing "657801".
- VERIFY:** A green button.
- CLEAR:** A grey button.
- Verification successful:** A green checkmark and text message, highlighted with a red box.

10. The results of the verification will be stored in a contact insights field in Journal. For more information, refer to Verification Results.

iceVerify without a CRM integration

1. Ensure that you are actively handling a call or a chat contact through iceBar for Desktop or iceBar for Web. iceVerify will not populate the Contact ID if you are not handling a contact.
2. Launch iceVerify from the tab in the iceManager Navigation Panel.

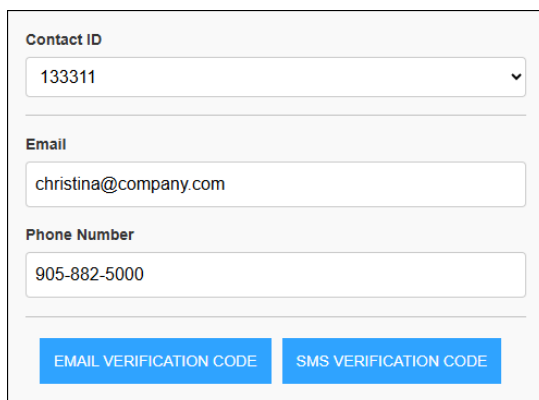


A screenshot of a web form for contact verification. The form is titled 'Contact ID' and has a dropdown menu. Below it are three input fields: 'Email' with the placeholder 'Enter Email', 'Phone Number' with the placeholder 'Enter Phone Number', and 'Verification Code' with the placeholder 'Enter Verification Code'. There are two buttons: 'EMAIL VERIFICATION CODE' and 'SMS VERIFICATION CODE'. At the bottom are 'VERIFY' and 'CLEAR' buttons.

3. If you are handling a single contact, open the drop-down menu. The page will refresh, and the Contact ID field will populate with the contact ID of your contact.

Note: If you are handling multiple contacts through Multi-Contact Handling, select the appropriate contact ID from the drop-down list.

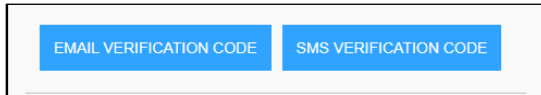
4. Enter the email or phone number provided by the customer in the appropriate field.



A screenshot of the same web form, but now with data entered. The 'Contact ID' dropdown menu shows '133311'. The 'Email' field contains 'christina@company.com' and the 'Phone Number' field contains '905-882-5000'. The 'EMAIL VERIFICATION CODE' and 'SMS VERIFICATION CODE' buttons are still present, along with 'VERIFY' and 'CLEAR' buttons at the bottom.

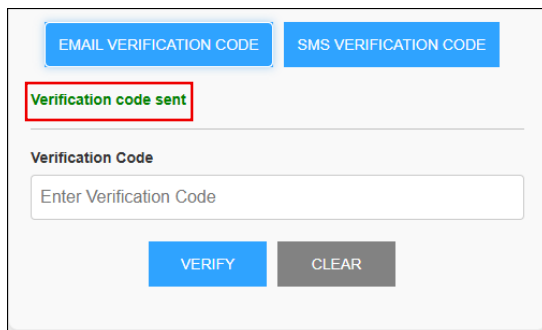
5. Send the verification code using the customer's preferred method of communication. Click Email Verification Code to send by email, or SMS

Verification Code to send by text message.



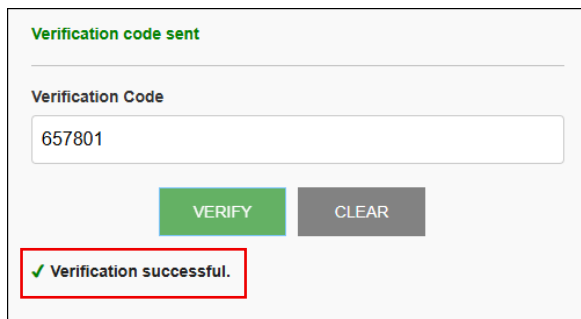
A screenshot of a web interface showing two blue buttons side-by-side: "EMAIL VERIFICATION CODE" and "SMS VERIFICATION CODE".

- You will see a message to indicate that the code has been successfully sent to the customer.



A screenshot of a web interface. At the top, there are two blue buttons: "EMAIL VERIFICATION CODE" and "SMS VERIFICATION CODE". Below them is a green message box with the text "Verification code sent". Underneath is a section titled "Verification Code" containing a text input field with the placeholder "Enter Verification Code". At the bottom are two buttons: a blue "VERIFY" button and a grey "CLEAR" button.

- Once the code has been sent to the customer, they will need to share the code they received with you to complete the verification process.
- Enter the customer's code in the *Verification Code* field and click Verify. If the code is correct, you will see the "Verification successful" message.



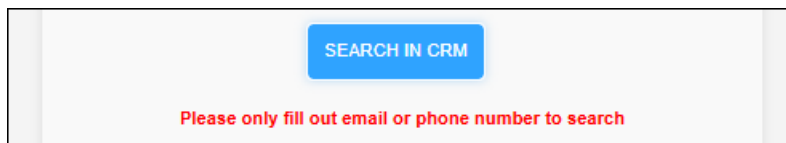
A screenshot of a web interface. At the top, there is a green message box with the text "Verification code sent". Below it is a section titled "Verification Code" containing a text input field with the value "657801". At the bottom are two buttons: a green "VERIFY" button and a grey "CLEAR" button. Below the buttons is a green message box with a checkmark icon and the text "Verification successful."

- The results of the verification will be stored in a contact insights field in Journal. For more information, refer to Verification Results.

Common Error Messages

Please only fill out email or phone number to search

When searching in the CRM, enter either the email or phone number. If you enter both the email and the phone number, you will see the following error message:

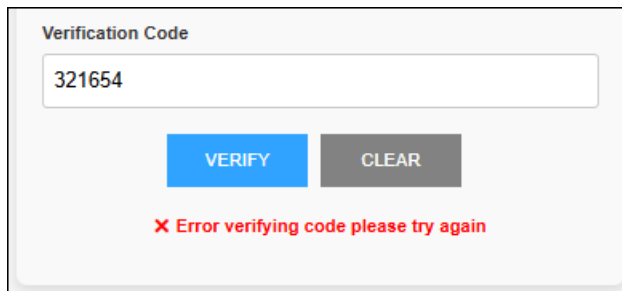


A screenshot of a CRM search interface. At the top, there is a blue button labeled "SEARCH IN CRM". Below the button, a red error message is displayed: "Please only fill out email or phone number to search".

Please remove one of the values, and click the Search in CRM button again.

Error verifying code please try again

If the code provided by the customer is incorrect, you will see the following error message:



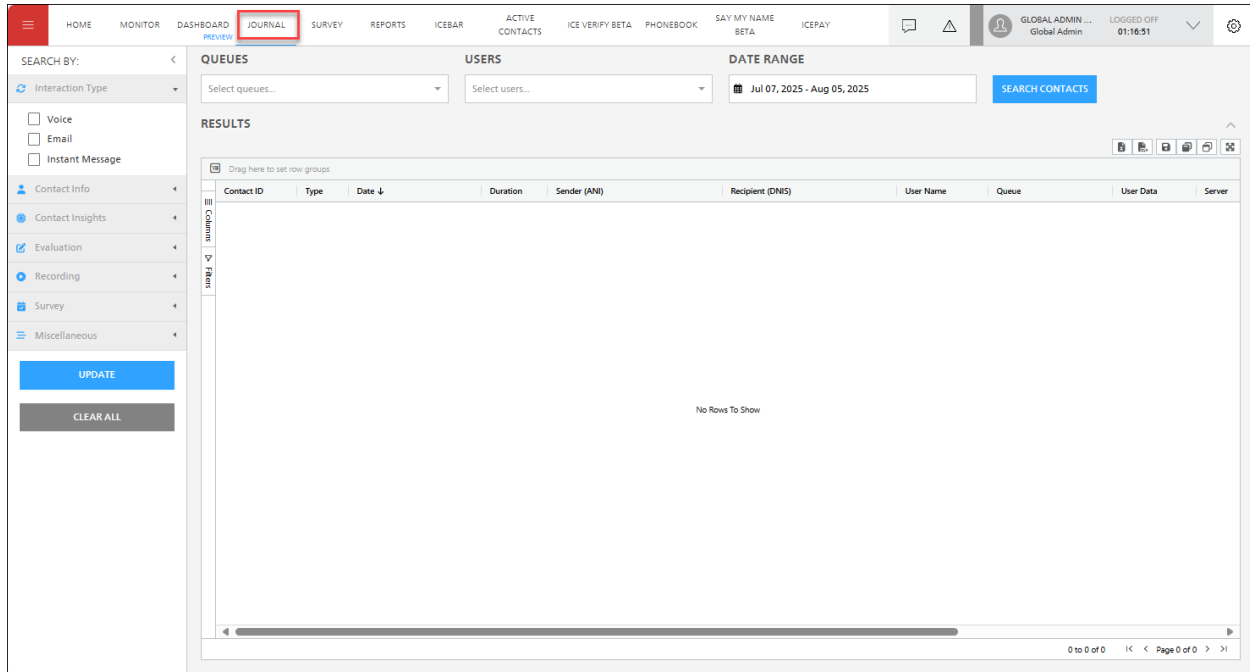
A screenshot of a verification code interface. At the top, it says "Verification Code". Below this is a text input field containing the code "321654". Underneath the input field are two buttons: a blue "VERIFY" button and a grey "CLEAR" button. At the bottom, a red error message is displayed: "X Error verifying code please try again".

Confirm that the customer provided the correct code, and try again.

Verification Results

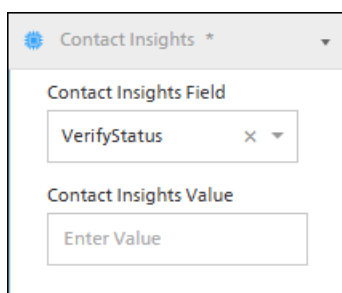
The verification results are stored in a new Contact Insights field: "VerifyStatus". This information is available in the Journal tool in iceManager.

To access Journal, click on the Journal tab in the Navigation Panel.



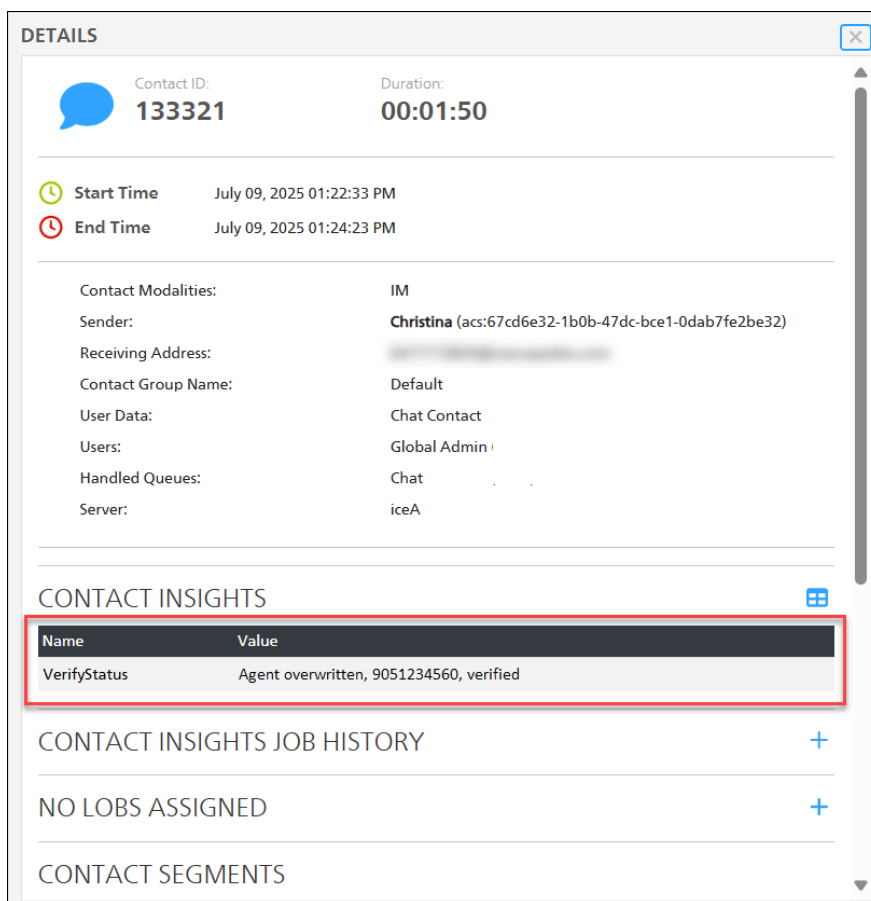
To view verification results for a specific contact, search for the contact in Journal. Use the available filters to search for the contact by handling queue, handling user, and date range.

Additionally, you can use the Contact Insights filter to search for contacts with a specific value in the *VerifyStatus* field.



The following screenshots provide examples of contacts in journal that have completed the verification process.

The first screenshot shows a contact that has been successfully verified. The VerifyStatus value shows that the customer's contact details were inputted manually by the agent as indicated by the *Agent overwritten* value. This value is followed by the phone number or email address entered, and confirmation that the verification was successful.



The screenshot displays a 'DETAILS' window for a contact. At the top, it shows 'Contact ID: 133321' and 'Duration: 00:01:50'. Below this, the 'Start Time' is 'July 09, 2025 01:22:33 PM' and the 'End Time' is 'July 09, 2025 01:24:23 PM'. The 'Contact Modalities' section lists 'IM' as the modality, 'Christina' as the sender, and 'Agent overwritten, 9051234560, verified' as the receiving address. Other details include 'Contact Group Name: Default', 'User Data: Chat Contact', 'Users: Global Admin', 'Handled Queues: Chat', and 'Server: iceA'. At the bottom, the 'CONTACT INSIGHTS' section is highlighted with a red box, showing a table with the following data:

Name	Value
VerifyStatus	Agent overwritten, 9051234560, verified

Below the insights, there are sections for 'CONTACT INSIGHTS JOB HISTORY' (with a plus icon), 'NO LOBS ASSIGNED' (with a plus icon), and 'CONTACT SEGMENTS'.

The second screenshot shows a contact that has not been verified. The VerifyStatus value is *Unconfirmed*.

DETAILS



Contact ID:

161901

Duration:

00:18:21



Start Time

July 30, 2025 02:18:42 PM



End Time

July 30, 2025 02:37:03 PM

Contact Modalities:

IM

Sender:

Fred (acs:6e0ad8f0-48be-4700-9862-4069971e7845)

Receiving Address:

Contact Group Name:

Default

User Data:

Chat Contact

Users:

Mike (1041)

Handled Queues:

Chat - Team 4

Server:

iceA

CONTACT INSIGHTS

Name	Value
VerifyStatus	Unconfirmed

CONTACT INSIGHTS JOB HISTORY

+

NO LOBS ASSIGNED

+

CONTACT SEGMENTS

The third screenshot shows a contact that has been verified through CRM search. The value shows the customer's name, GUID, and verification status.

DETAILS



Contact ID:
104321

Duration:

00:02:03


Start Time

February 11, 2025 09:57:42 AM


End Time

February 11, 2025 09:59:45 AM

Contact Modalities:

IM

Sender:

Sam Smith (acs:200b29f1-4b62-439d-835c-2c2c23ee6d9c)

Receiving Address:

Contact Group Name:

Default

User Data:

Chat Contact

Users:

Agent (1001)

Handled Queues:

Chat

Server:

iceA

CONTACT INSIGHTS



Name	Value
VerifyStatus	Sam Smith, 76d9df42-88e8-ef11-a731-7c1e520a2800, verified

CONTACT INSIGHTS JOB HISTORY



NO LOBS ASSIGNED

