iceChat

User Manual

Server Version 15.x

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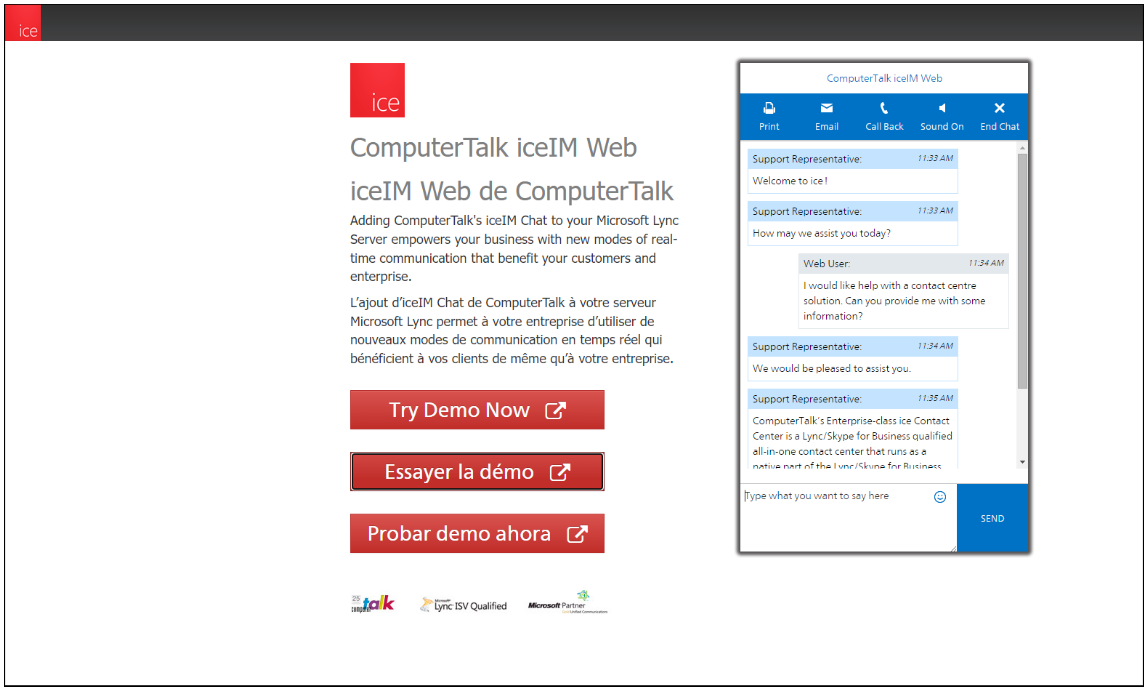
iceChat for ice server 15.x

Table of Contents

Welcome to iceChat

Companies use iceBar for web to connect with customers, partners, and prospective customers through instant messaging and web chat. iceChat allows anonymous users on the web to connect to instant message-enabled endpoints/addresses from a simple web page. iceChat's web integration is designed using simple HTML and JavaScript allowing it to be used by most browsers on the market without any issues.



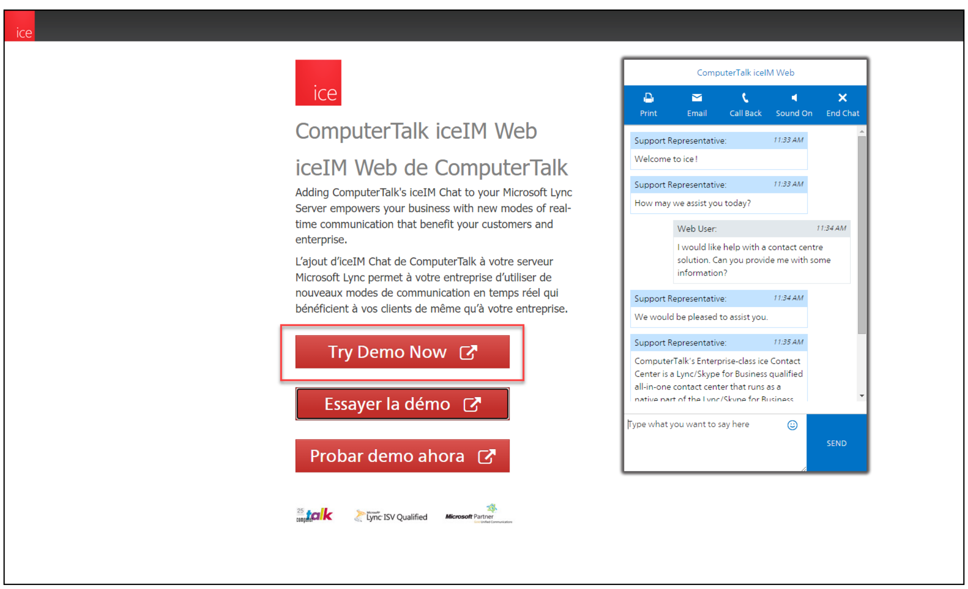
This user manual provides information on the user interface, the different tasks you can accomplish in the chat window and explains how to handle instant messages.

Chapter 1: Visitor Interface

Integration with current site

The iceChat login/chat window can open from any web page of your choosing. The chat will launch by a call to a Javascript function. You may use any control compatible with Javascript to trigger this call and the chat will launch. For example, a button, a hyperlink or an image. If you are integrating with a portal and want to pass along user information, you need to make sure that the appropriate information is populated in the page so that the scripts can pass it along when the chat is launched.

In the example below, Computer Talk provides a “Try Demo Now” button.

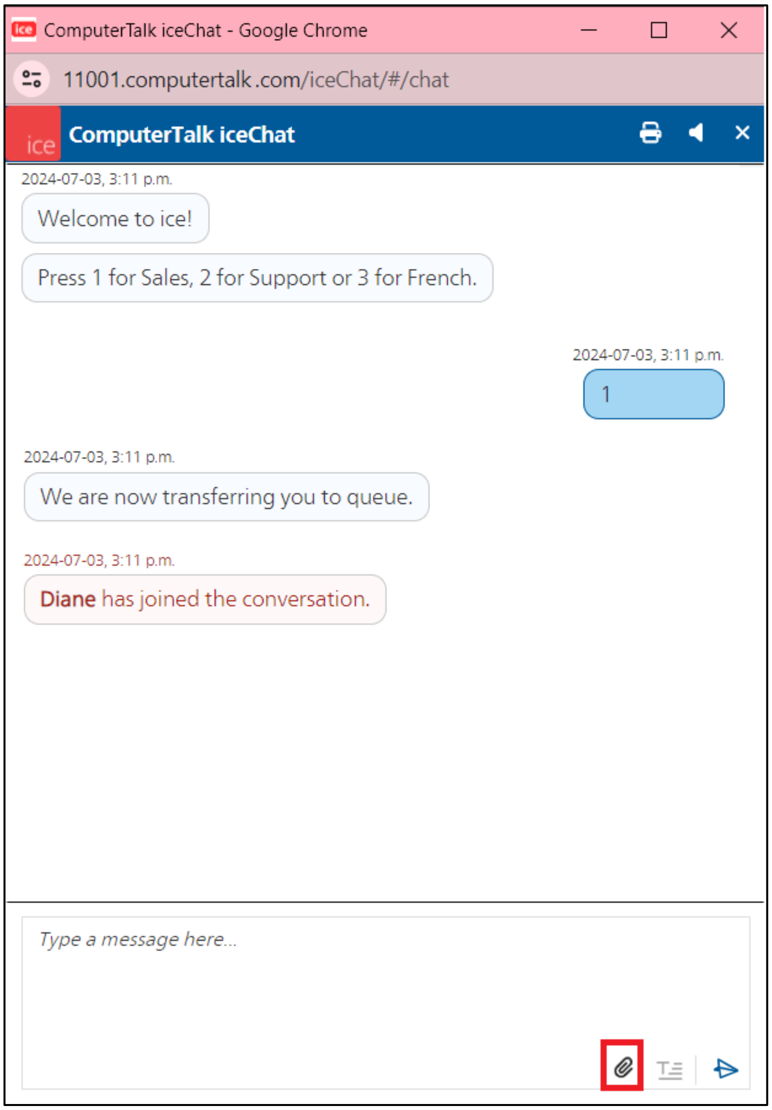


Chapter 2: The Chat Window

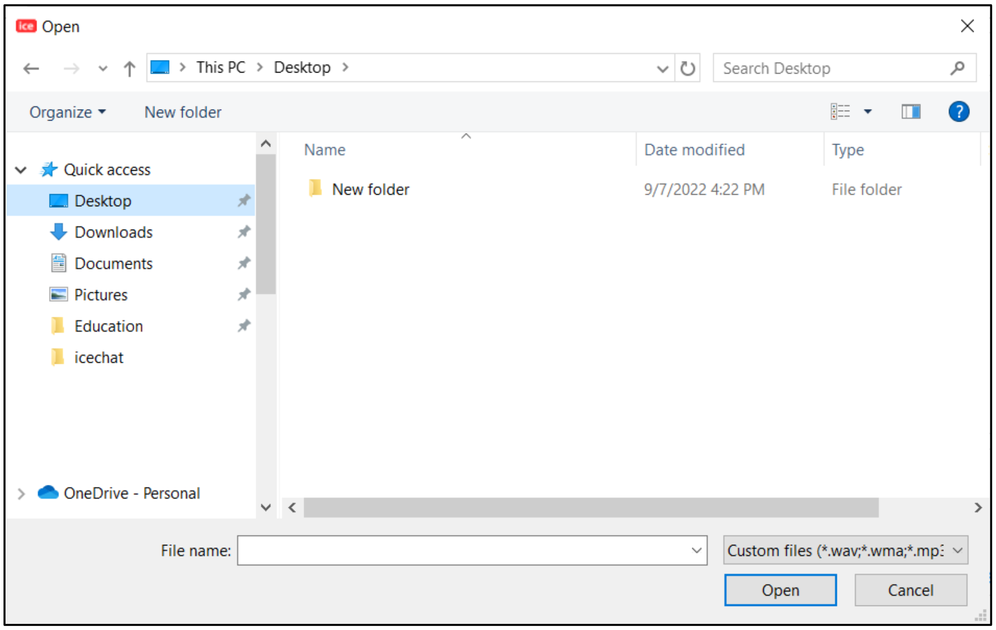
The chat conversation window has several features. Website visitors can upload attachments, print the chat transcript, and end the conversation.

Upload Contact Attachment

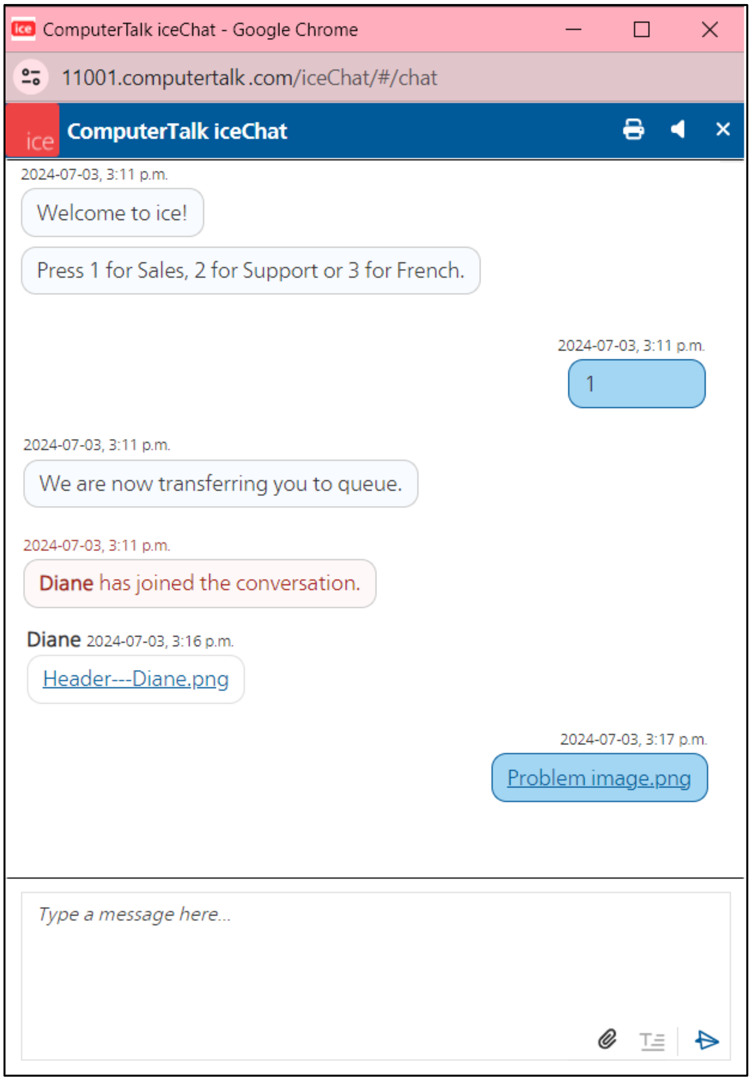
Website visitors can upload contact attachments in the chat by clicking the Contact Attachment button located on the bottom left of the chat window.



The file explorer window will open allowing the website visitor to select an attachment to upload in the chat.

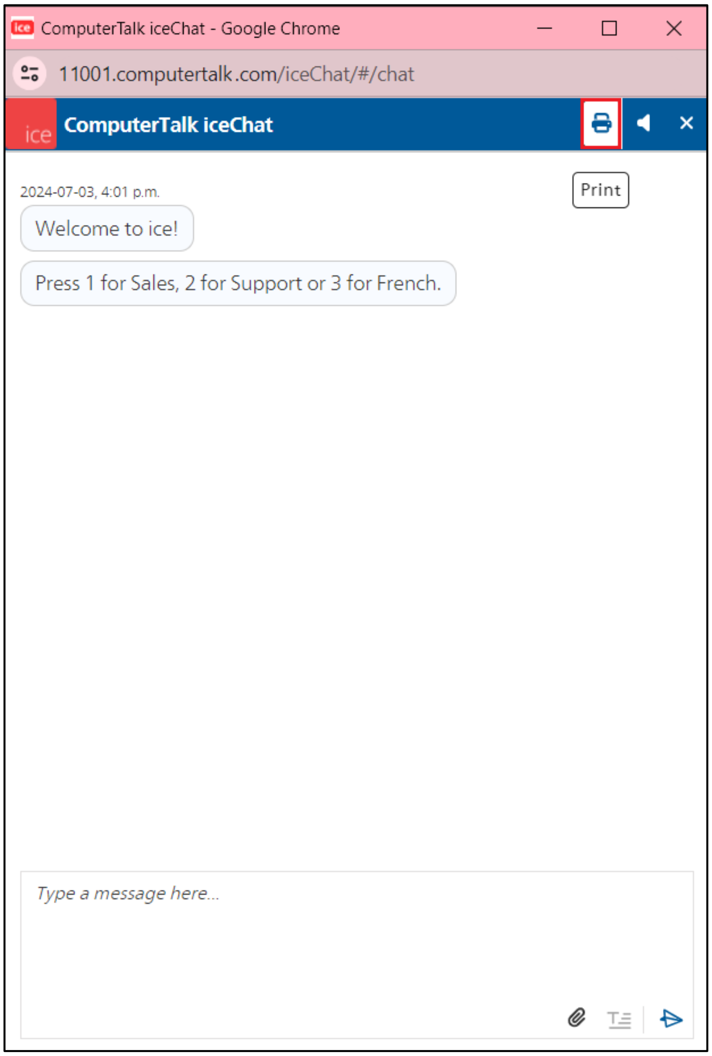


Once an attachment has been selected, it will be sent as a link in the chat for the agent to view.

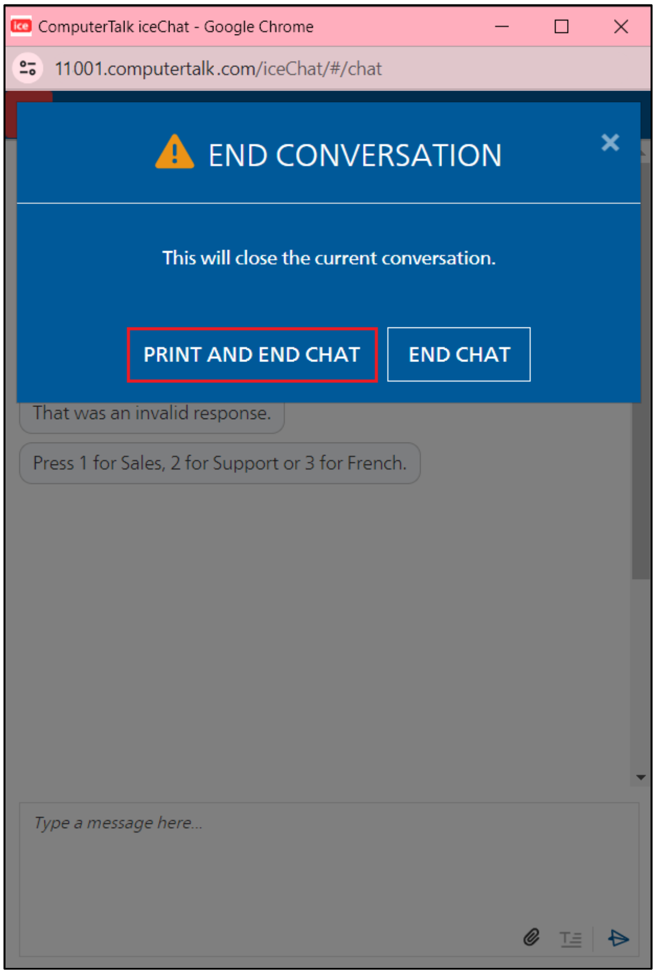


Print

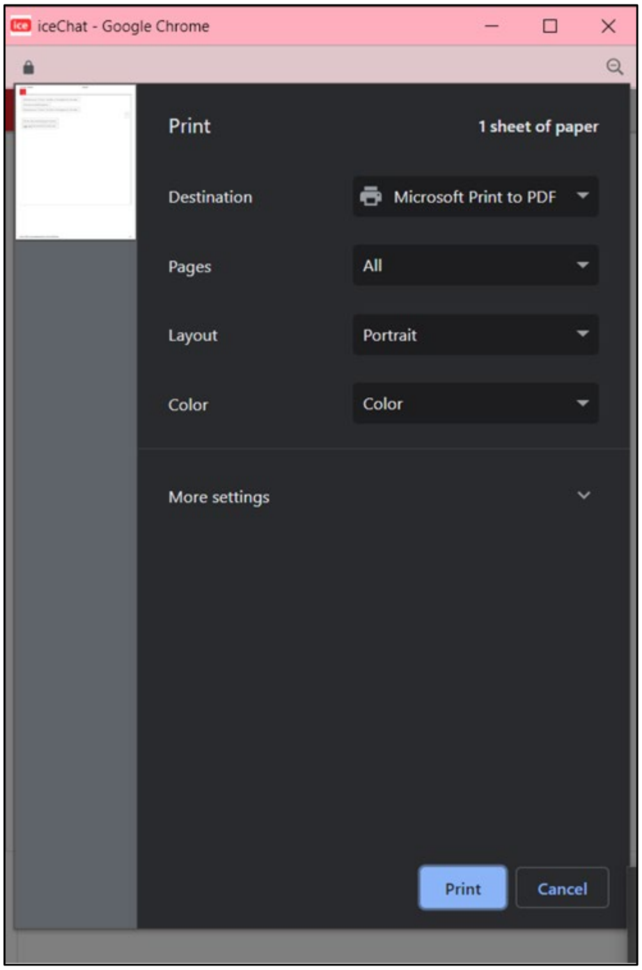
Website visitors can print the transcript of the conversation by clicking the Print button located on the top right of the chat window.



Website visitors can also print the chat after clicking the End Chat button.



Both methods will open the Print window.



Sound On/Off in Chat

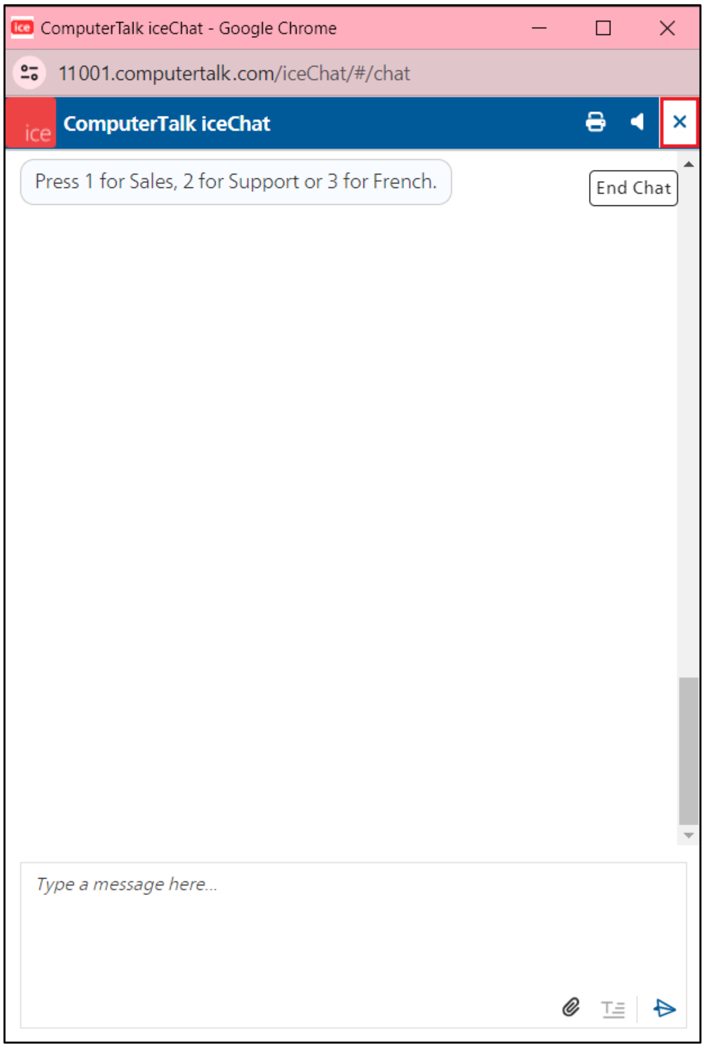
The Sound button allows the website visitor to enable or disable the alerting sound when they receive a message.

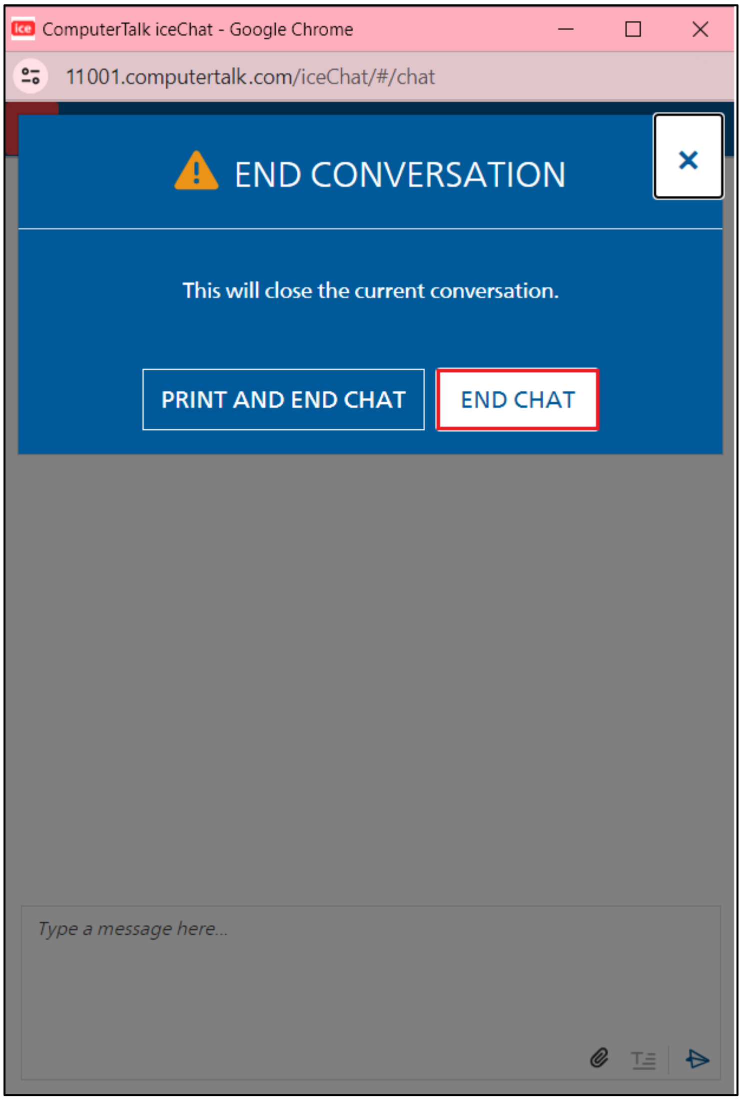
To enable the alerting sound, click the Sound button on the top right section of the chat window.

To disable the alerting sound, click the Sound button on the top right section of the chat window.

End Chat

The End Chat button allows the website visitor to gracefully close off the conversation. Before ending the conversation, they are given the opportunity to print the chat transcript.



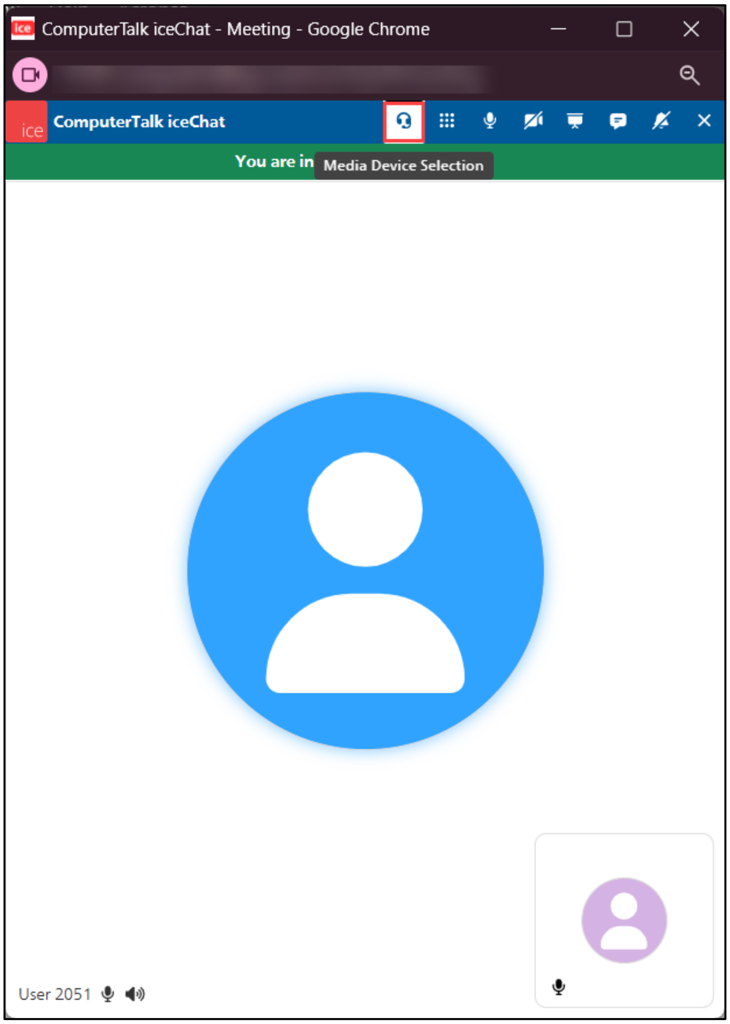


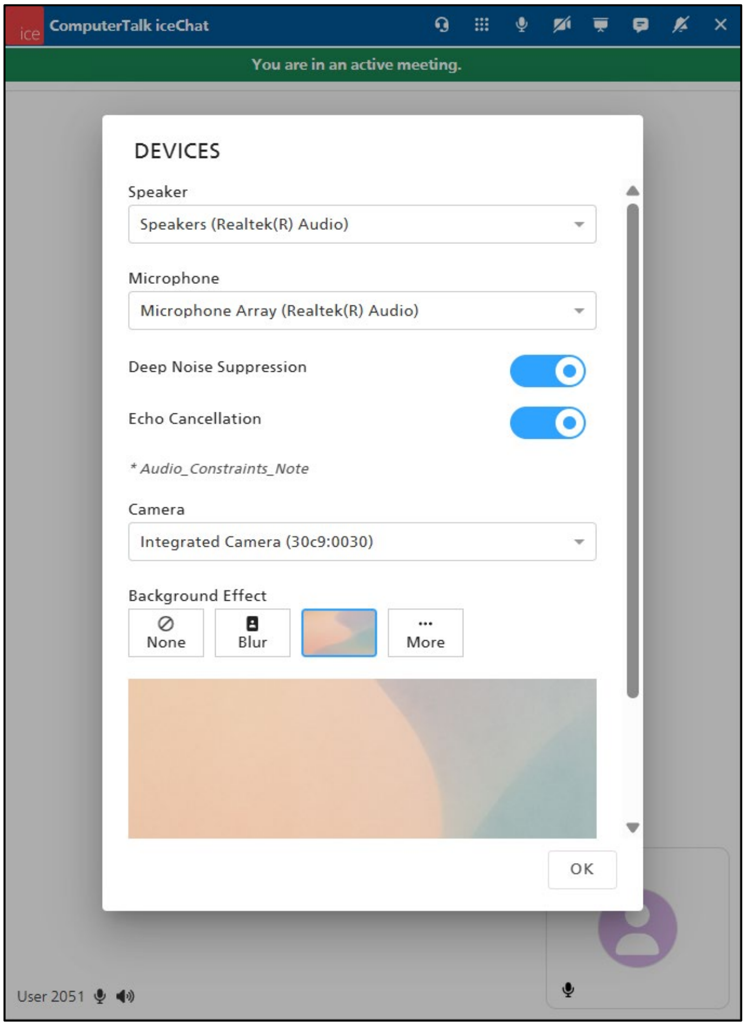
Elevate Buttons

The following buttons will be available to use if an agent starts a meeting with the website visitor.

Media Device Selection

The *Media Device Selection* button opens the *Devices* window allowing the website visitor to select their microphone, speaker, and camera preferences.


ComputerTalk iceChat - Meeting - Google Chrome
ice
ComputerTalk iceChat
You are in
Media Device Selection
User 2051



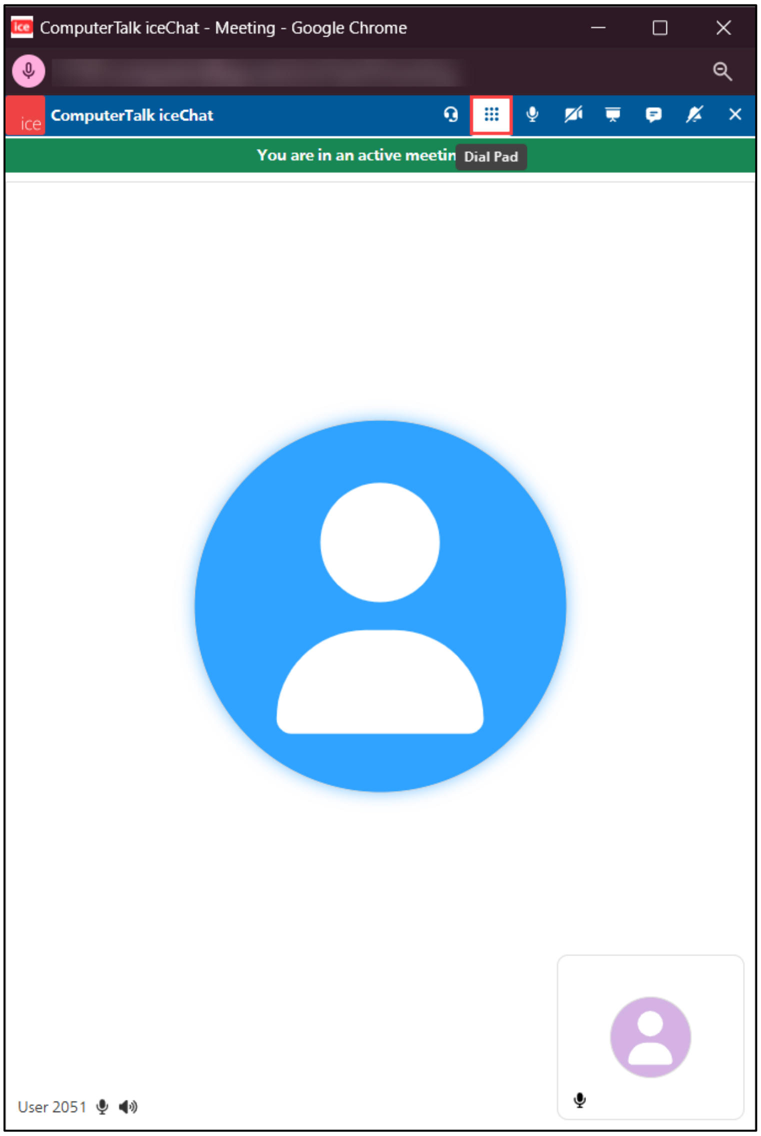
The *Deep Noise Suppression* toggle will filter out deep background noise.

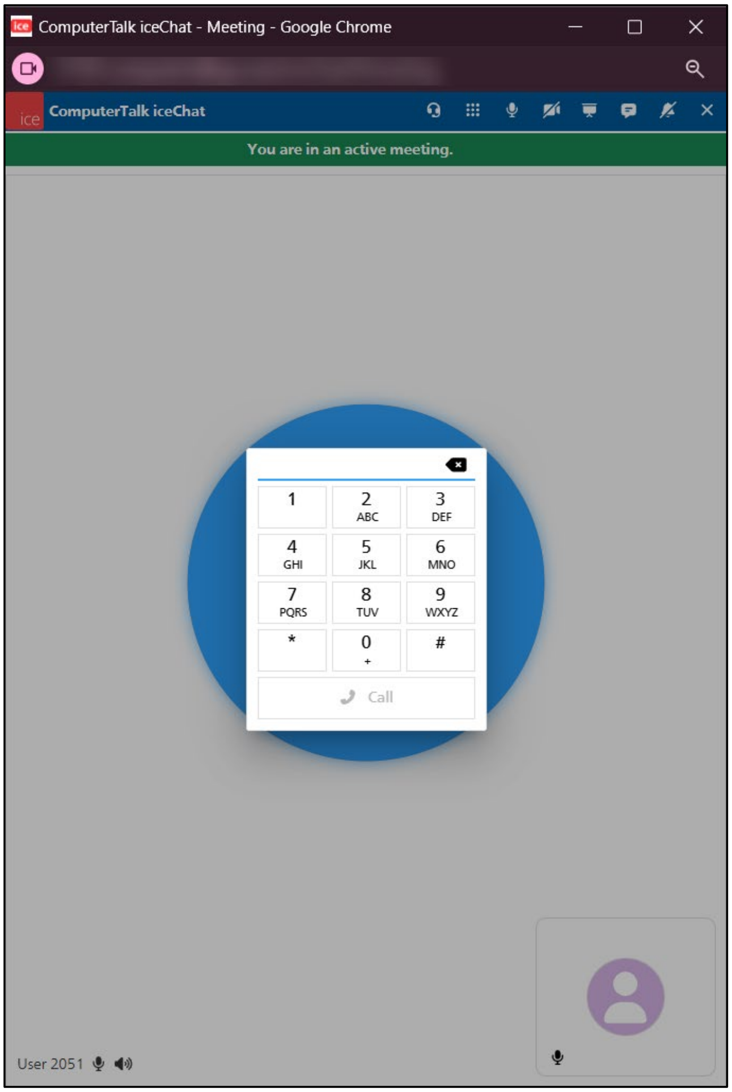
The *Echo Cancellation* toggle will prevent echoes caused by the visitor's audio or speaker from their microphone.

The camera and background effect can also be selected for video calls.

<u>Dial Pad</u>

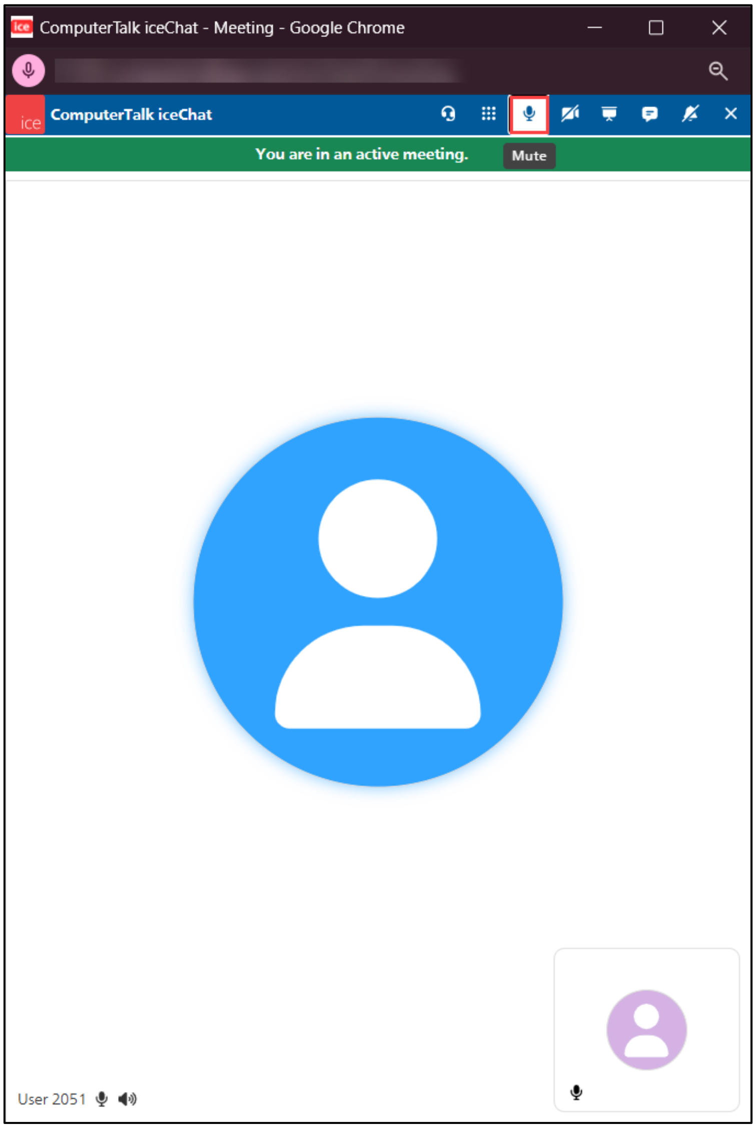
The dial pad lets the website visitor manually enter a phone number or extension. The *Call* button is unavailable while they are in a meeting.


ComputerTalk iceChat - Meeting - Google Chrome
ComputerTalk iceChat
You are in an active meetin
Dial Pad
User 2051

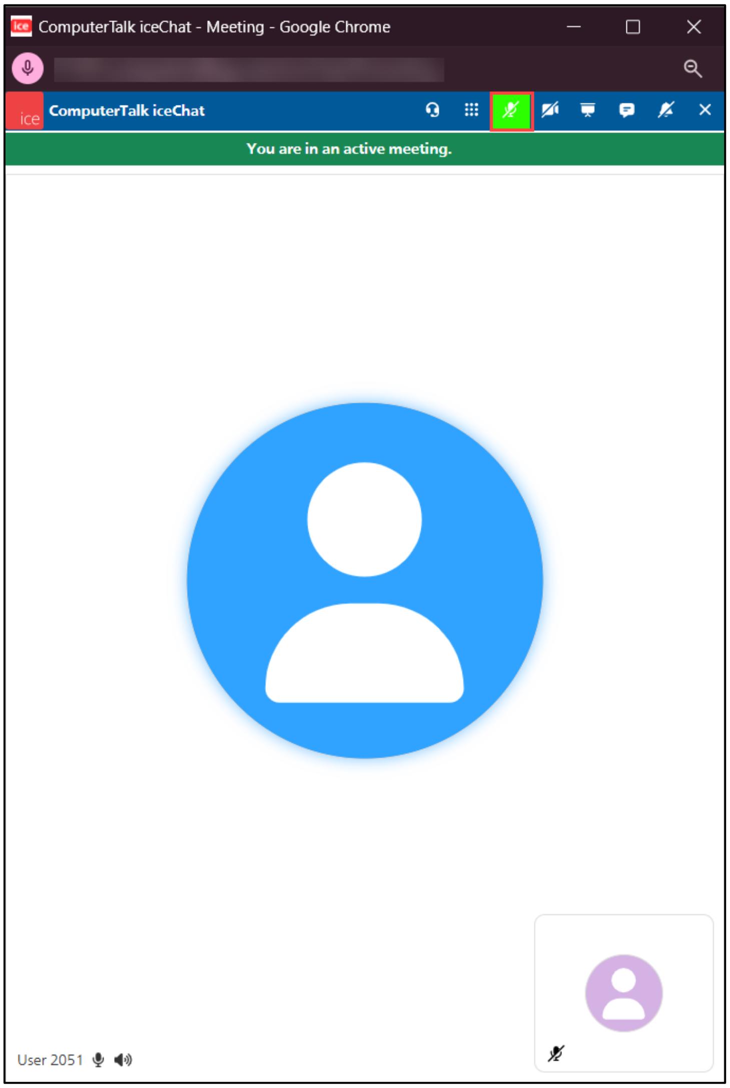


Mute

The *Mute* button allows the website visitor to turn their microphone on or off. When muted, the agent cannot hear the website visitor.

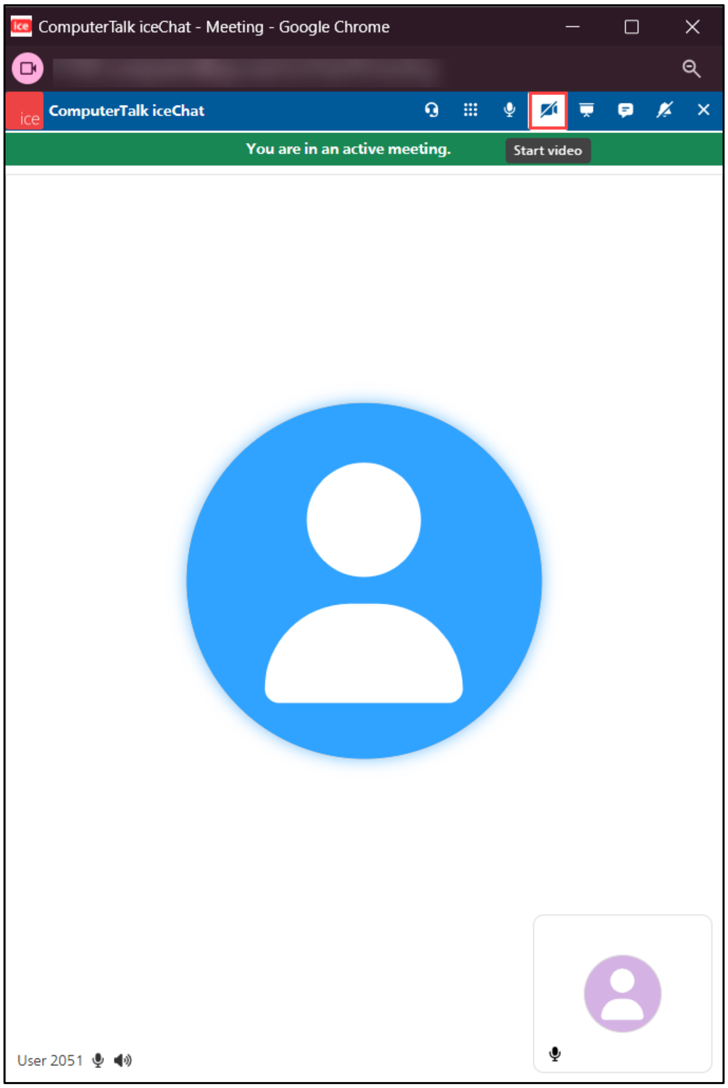


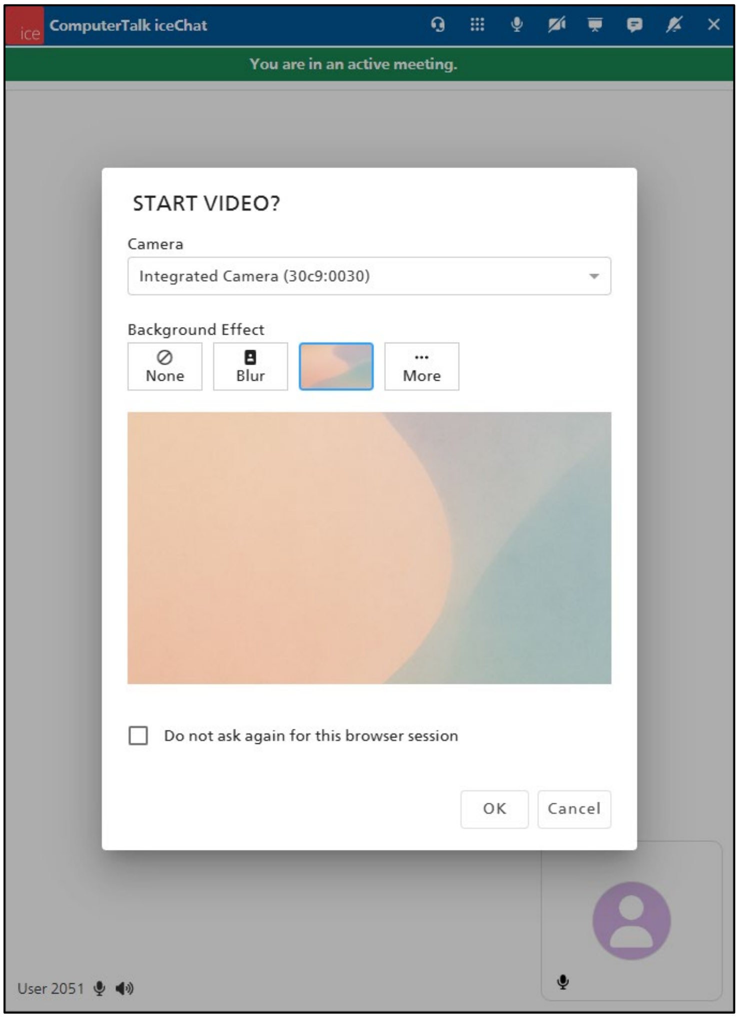
When the *Mute* button is enabled, the button turns green and changes to *Unmute*.



Start Video

The *Start Video* button allows the website visitor to enable their camera so that the agent can see their video.

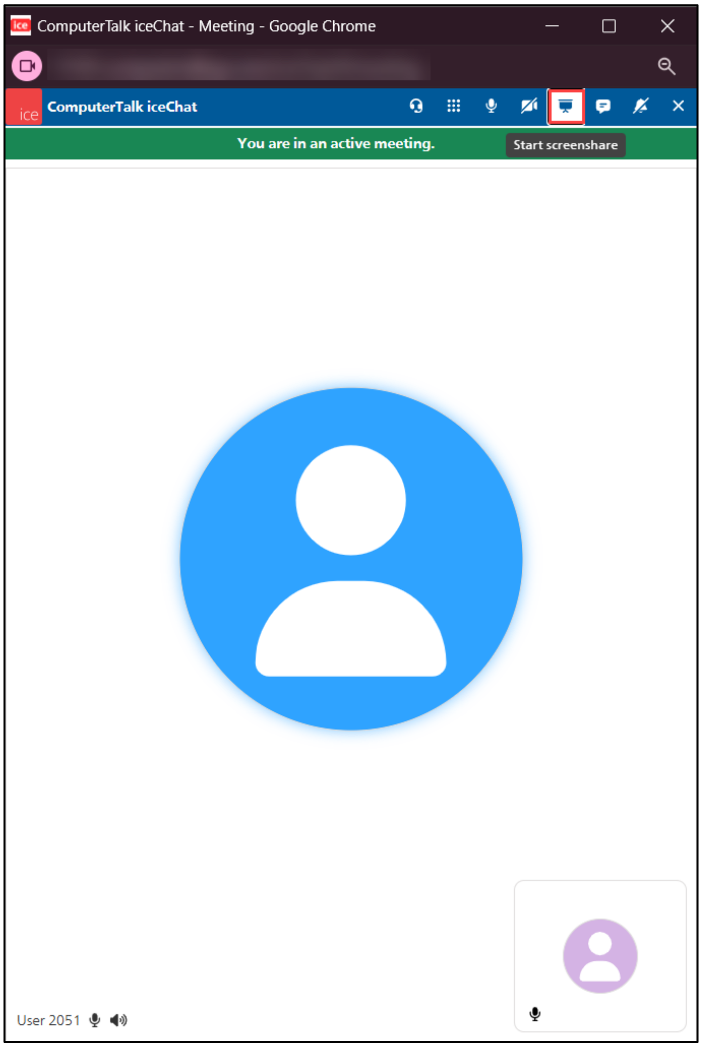

ComputerTalk iceChat - Meeting - Google Chrome
ComputerTalk iceChat
You are in an active meeting.
Start video
User 2051

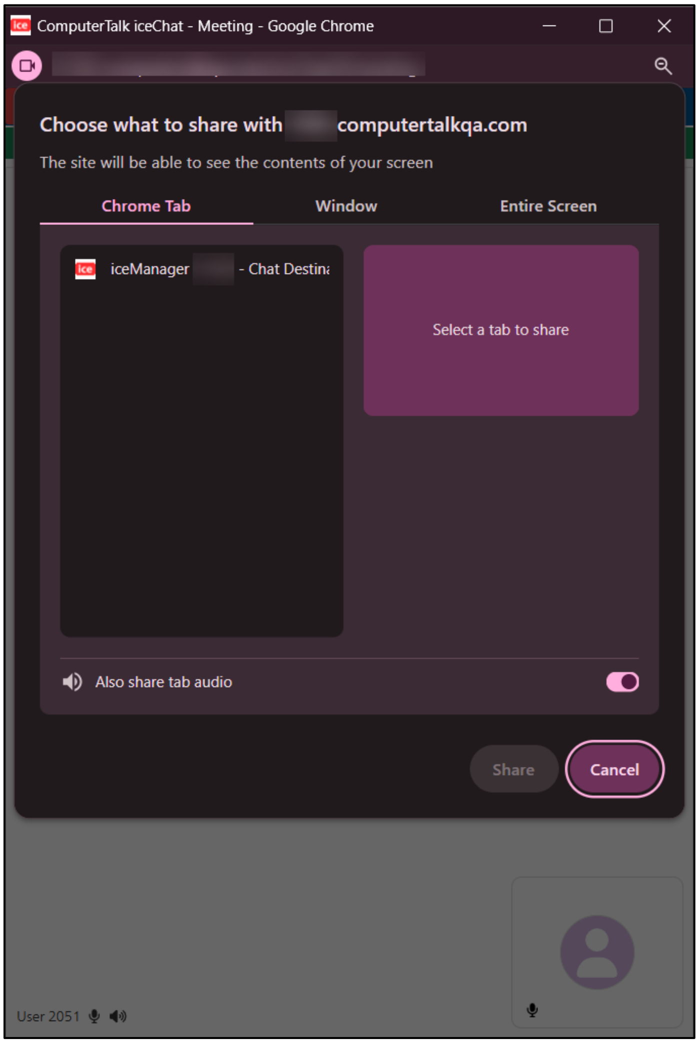


Note: Video settings and screenshare are only visible to the agent or customer once they have been enabled.

<u>Start Screenshare</u>

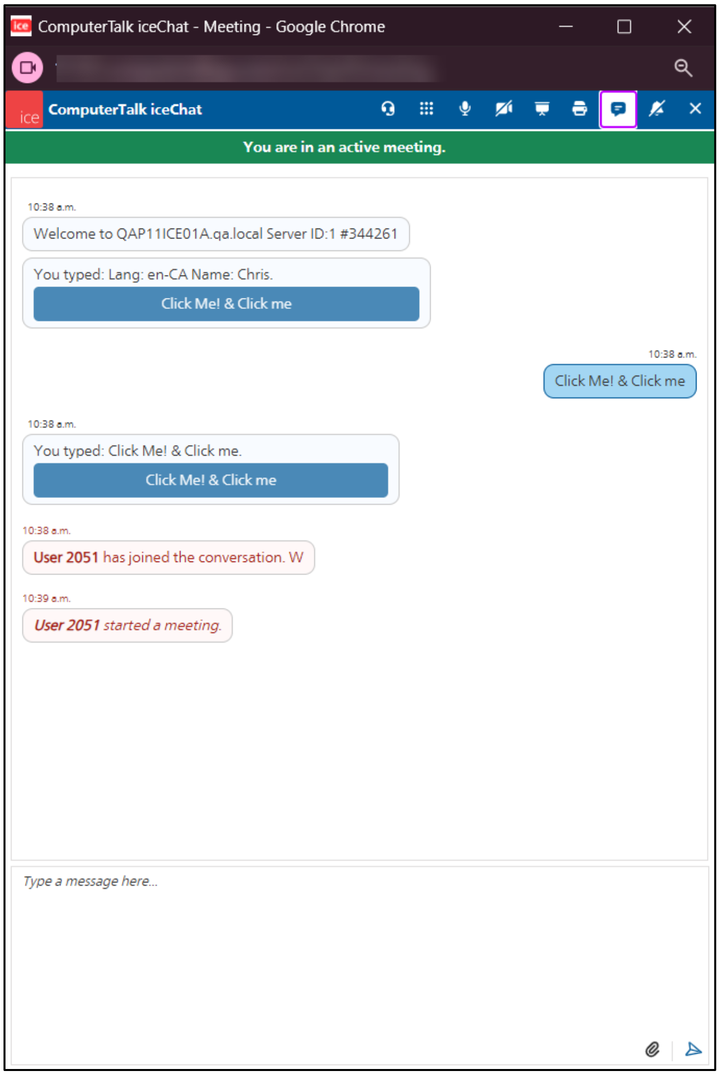
The *Start Screenshare* button allows the website visitor to select the tab, window, or screen they would like to share.


ComputerTalk iceChat - Meeting - Google Chrome
ice
ComputerTalk iceChat
You are in an active meeting.
Start screenshare
User 2051



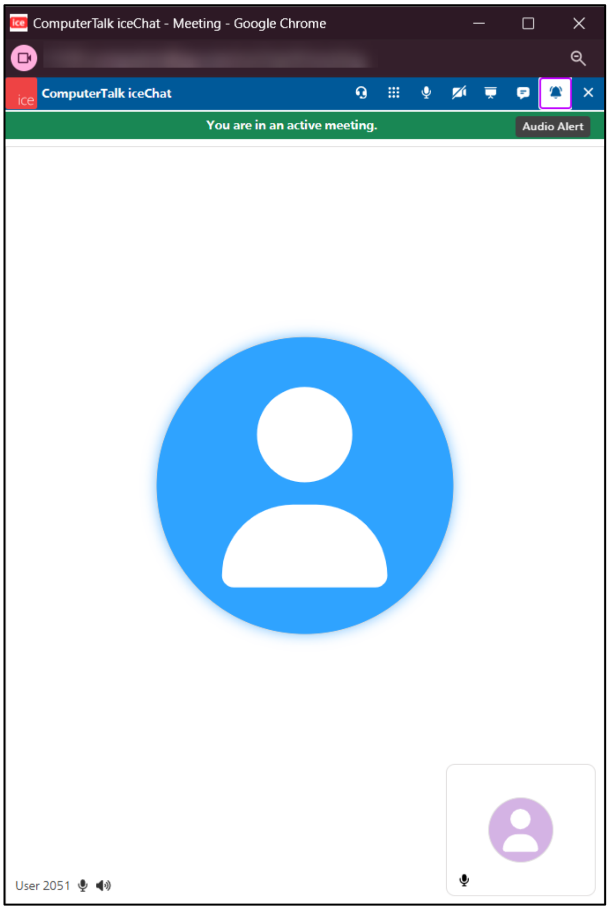
<u>Chat</u>

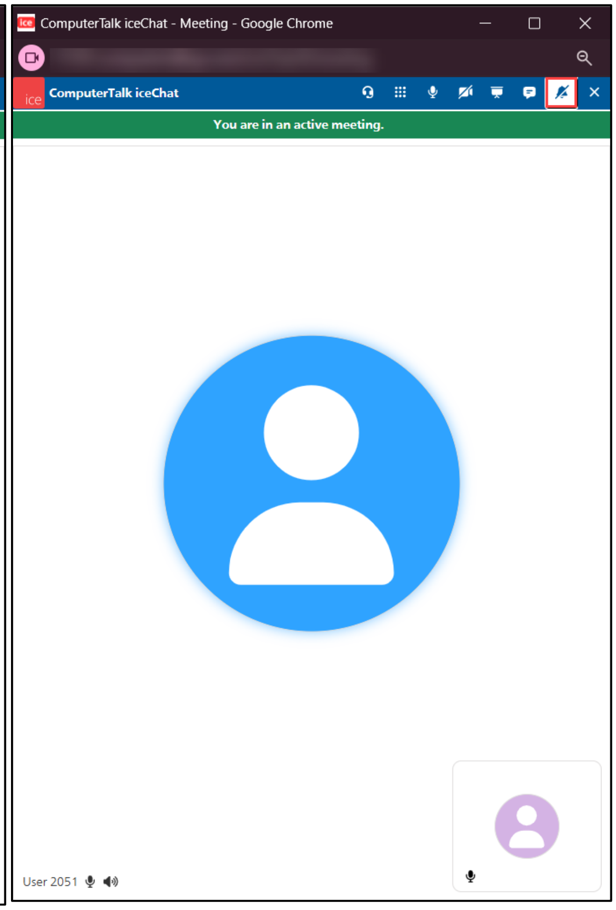
The *Chat* button allows the website visitor to see the chat conversation with the agent.



<u>Audio Alert</u>

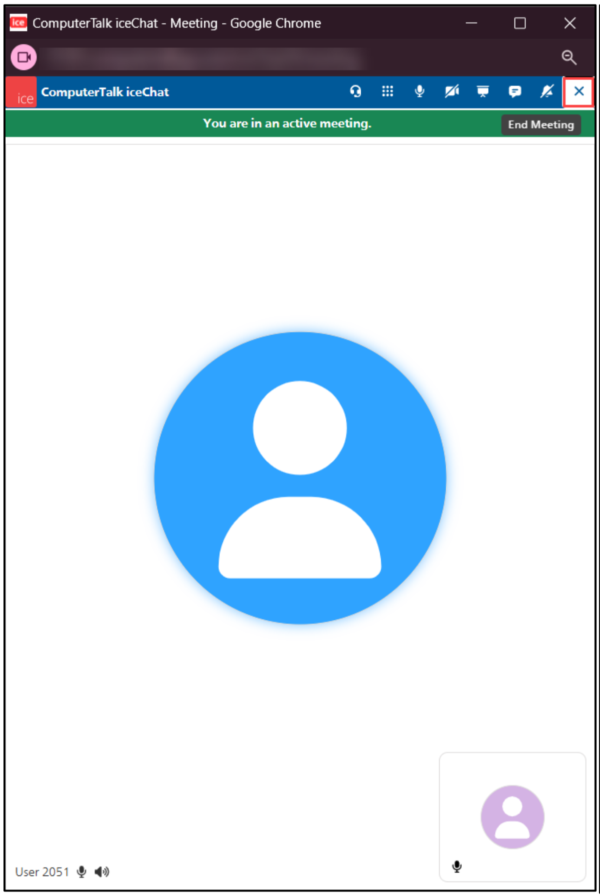
The *Audio Alert* button allows the website visitor to turn sound notifications on or off for new messages. When enabled, they will hear an alert when the new message is received.

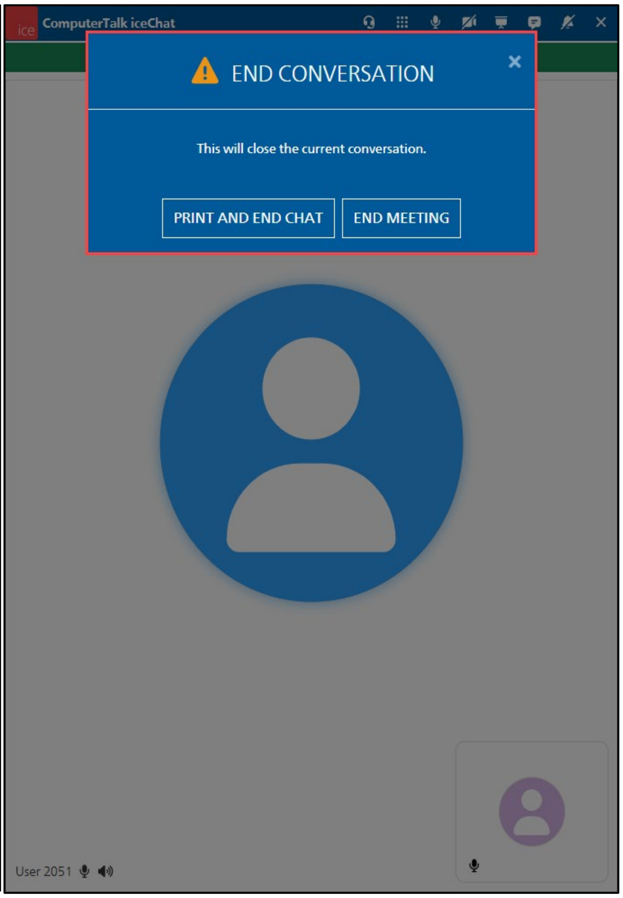




End Meeting

The End Meeting button allows the website visitor to end the meeting. Before ending the conversation, they are given the opportunity to print the chat transcript.


ComputerTalk iceChat - Meeting - Google Chrome
ComputerTalk iceChat
You are in an active meeting.
End Meeting
User 2051


ComputerTalk iceChat
END CONVERSATION
This will close the current conversation.
PRINT AND END CHAT
END MEETING
User 2051

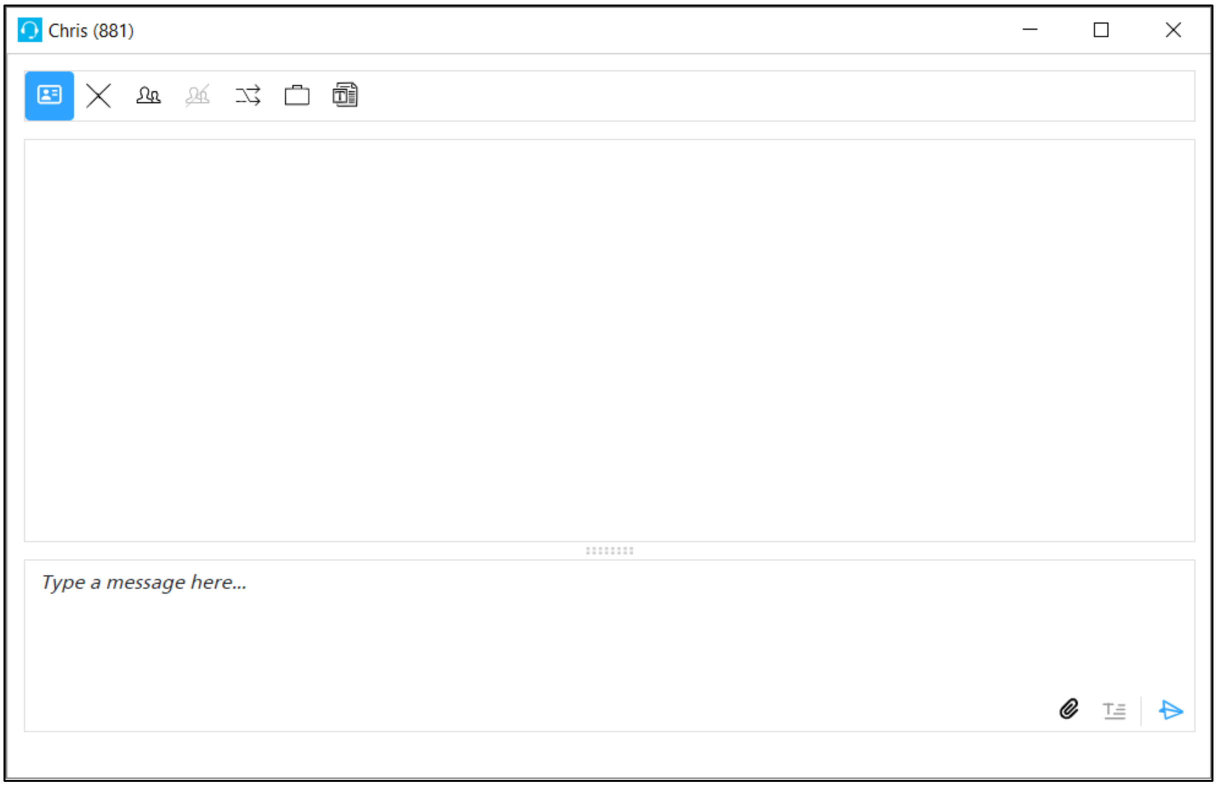
Chapter 3: icePhone Chat Client

The icePhone chat client allows agents to receive and handle interactions through one interface. Agents can handle and place chats from either the iceBar for Desktop or iceBar for Web without the use of a separate softphone, such as Teams.

To use the icePhone, ensure the icePhone class of service is enabled for chat contacts. For more information on how to configure the icePhone, please refer to the *iceAdministrator User Manual*.

Understanding the icePhone Chat Client

The icePhone chat client can be used to handle chat interactions. The client is composed of a content panel, where the chat conversations with your contacts are displayed and a set of buttons across the top of the client, to handle your contacts.



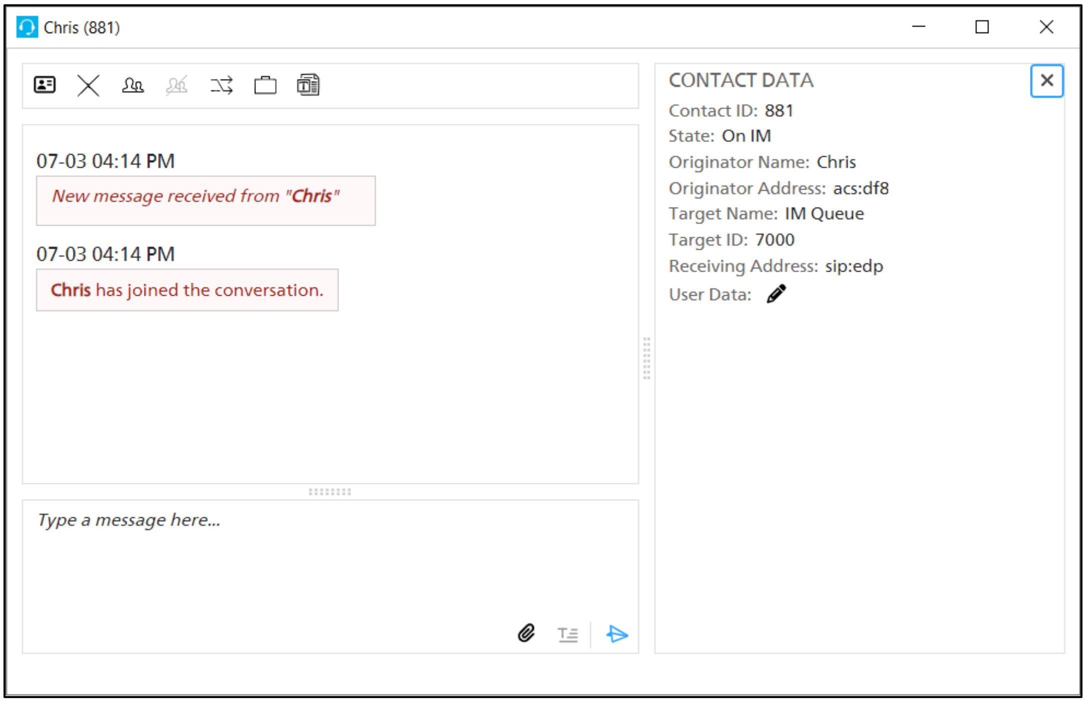
The bar of buttons across the top of the icePhone chat client window can be used to access additional contact handling functions.

ICEPHONE CHAT CLIENT BUTTONS	
Button	**Description**
Contact Data	Displays the contact data including: • Contact ID • State • Originator Name • Originator Address

	• Target Name • Target ID • Receiving Address • User Data
Release	Releases the contact and places the user on-hook.
Consult	Allows the user to consult with another user directly from the icePhone chat client.
End Consult	Allows the user to end the consult directly from the icePhone chat client.
Transfer	Allows the user to transfer the contact directly from the icePhone chat client.
LOB	Allows the user to select LOB code(s) directly from the icePhone chat client.
Canned Responses	Allows the user to open canned response in the icePhone chat client window.
Contact Attachments	Allows the user to attach an attachment in the icePhone chat client window.

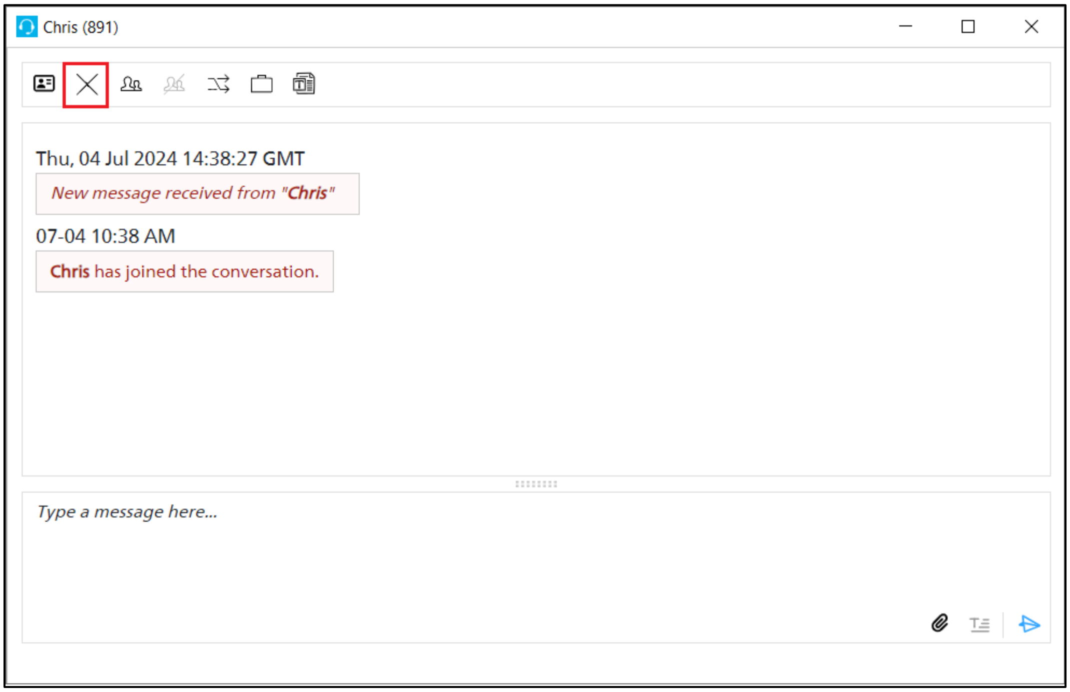
Contact Data

The contact data tab will display the contact ID, user data, originator name and address, target name and ID, receiving address, and user data. To close this tab, either click on the ‘x’ in the top right corner, or click the button again.



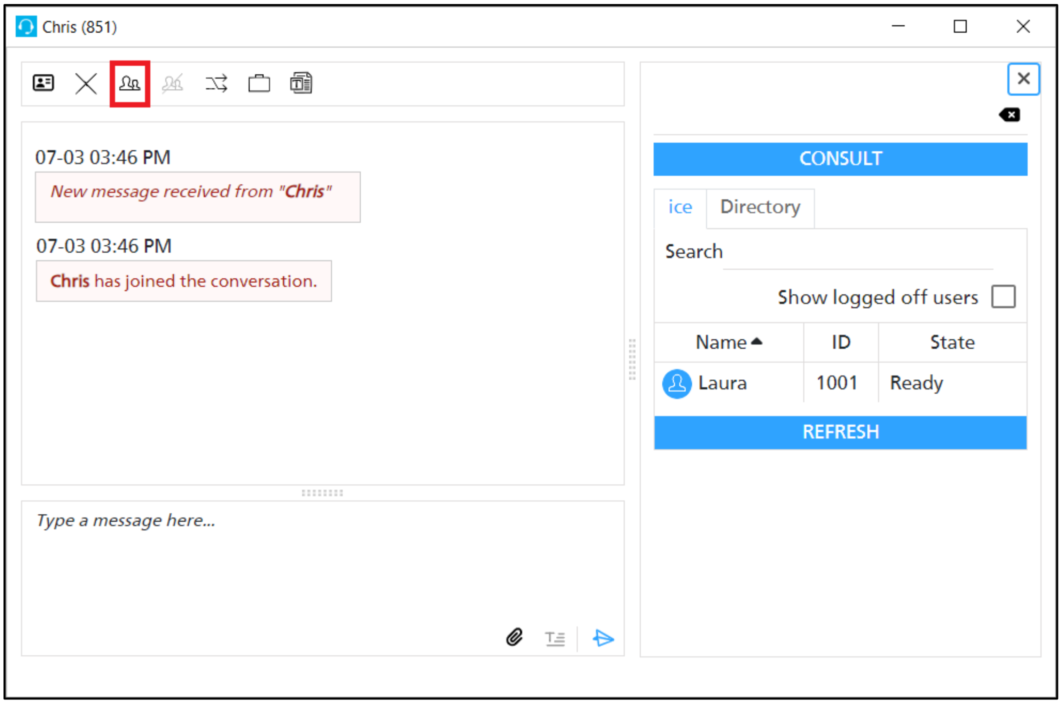
Release

The release button will release the contact and set the user on-hook.



Consult and End Consult

The consult button allows an agent to consult with an ice agent or any external IM address. When this button is selected, a new tab will open on the right side of the window with a text field to enter a sip address, the ice directory and if configured, the 365 tab. To close this tab, either click on the 'x' in the top right corner, or click the consult button again.



To consult a user:

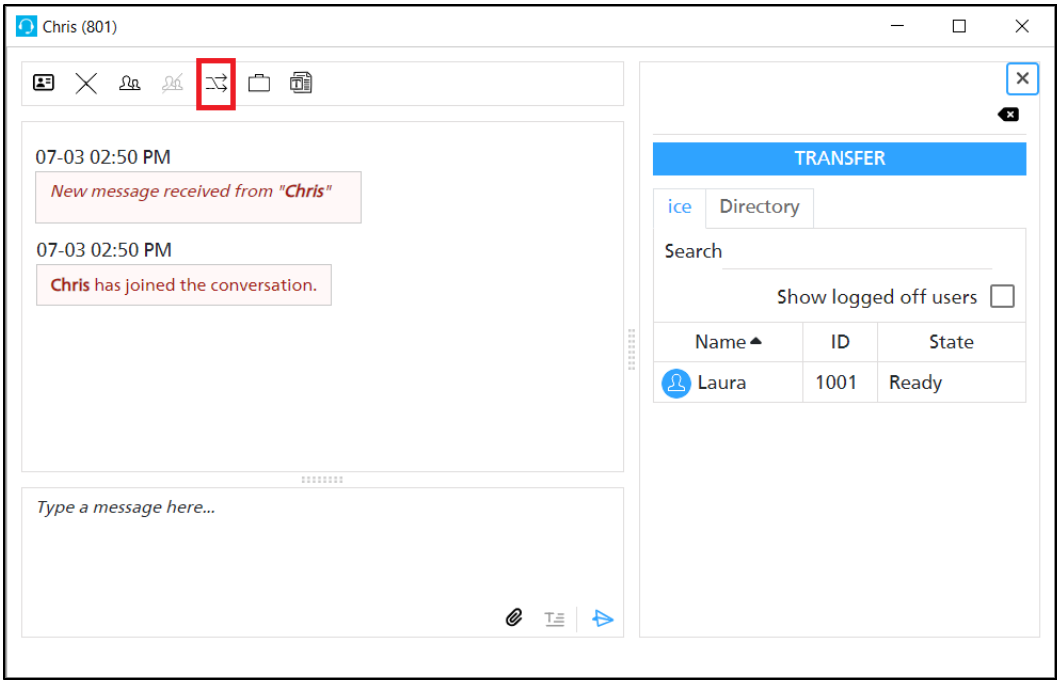
Step 1: Select the user or enter the sip address of the person you would like to consult.

Step 2: Click the Consult button. The consulting chat will be placed out.

To end the consult, click the End Consult button.

Transfer

The transfer button allows an agent to transfer the chat to another ice agent, 356 contact or any external IM address. When this button is selected, a new tab will open on the right side of the window with a text field to enter a sip address, the ice directory and if configured, the 365 tab. To close this tab, either click on the 'x' in the top right corner, or click the transfer button again.



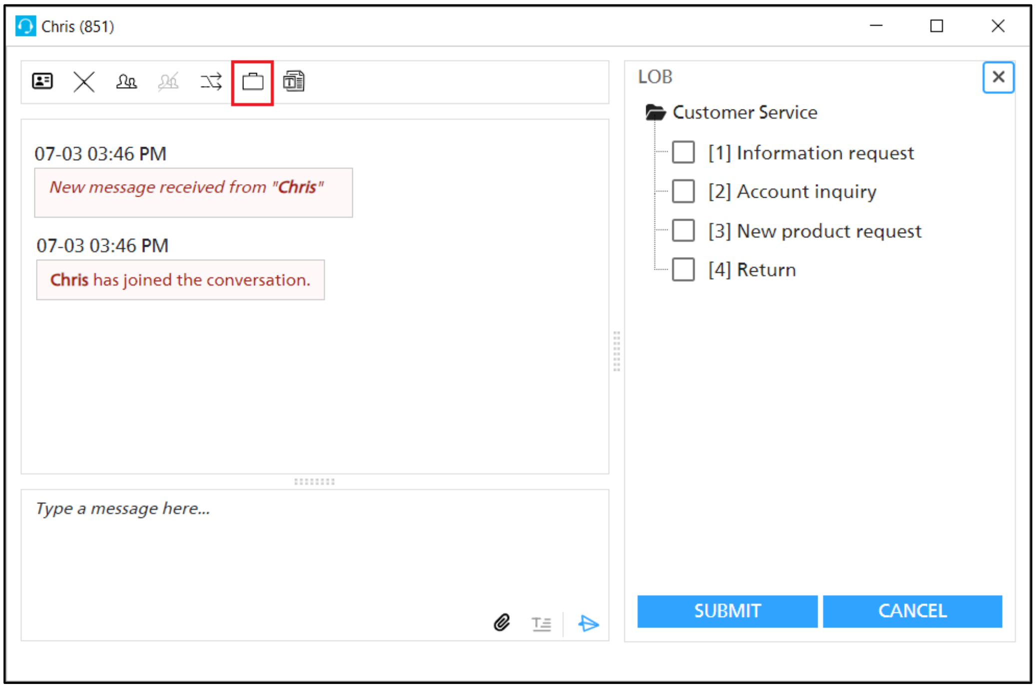
To transfer a call:

Step 1: Select the user or enter the sip address of the person you would like to transfer the chat to.

Step 2: Click the Transfer button. You will be put into wrap up mode if configured, or back into the ready state to handle your next contact.

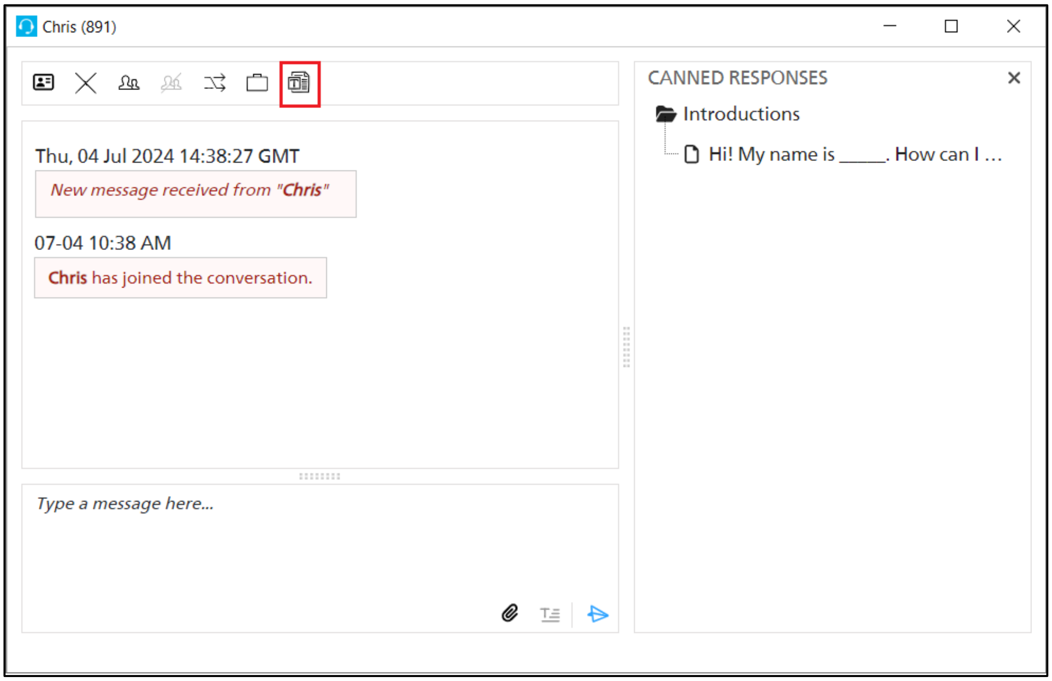
Line of Business (LOB)

The LOB button allows an agent to select the LOB code(s) for the contact. When this button is selected, a new tab will open on the right side of the window with a list of configured LOB codes. To close this tab, either click on the 'x' in the top right corner, or click the LOB button again.



Canned Responses

The canned responses button allows an agent to select a canned response to enter in the chat window. When this button is selected, a new tab will open on the right side of the window with a list of configured canned responses. To close this tab, either click on the 'x' in the top right corner, or click the button again.



Contact Attachments

If enabled, the contact attachments button allows the agent to select a file from their local machine to upload in the chat window. When this button is selected, iceBar will open the file explorer window which will allow the agent to select an attachment to upload in the chat.

icePhone Meeting Buttons

When you are in an ACS meeting, in addition to the regular icePhone buttons, you will see the *Start Video*, *Screenshare*, and *Add Participants* buttons. These allow you to further manage your meeting options and the meeting participants.

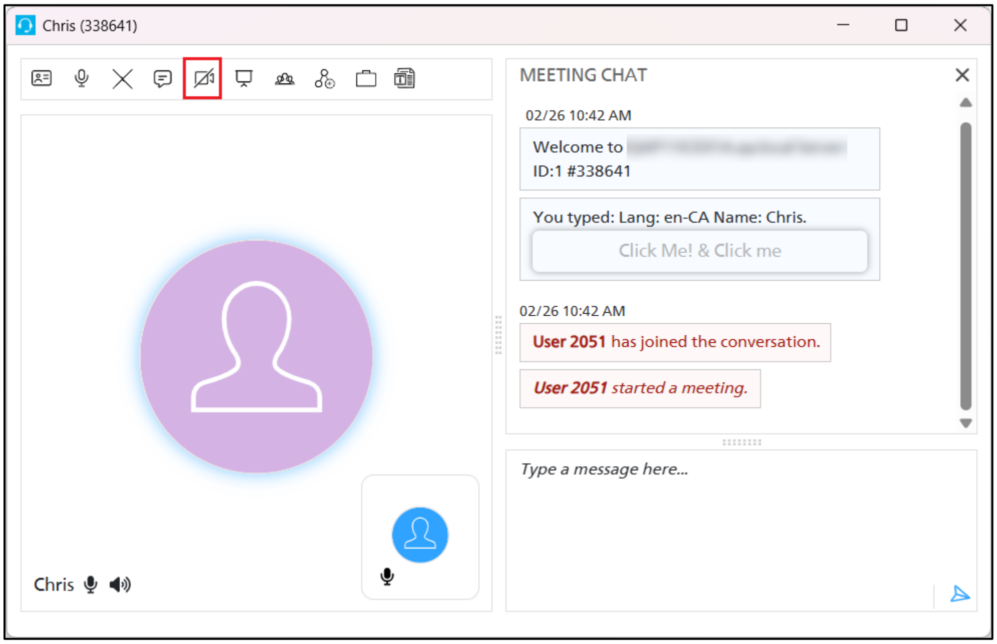
Note: Video settings and screenshare are only visible to the agent or customer once they have been enabled in *Chat Destinations*.

Start Video

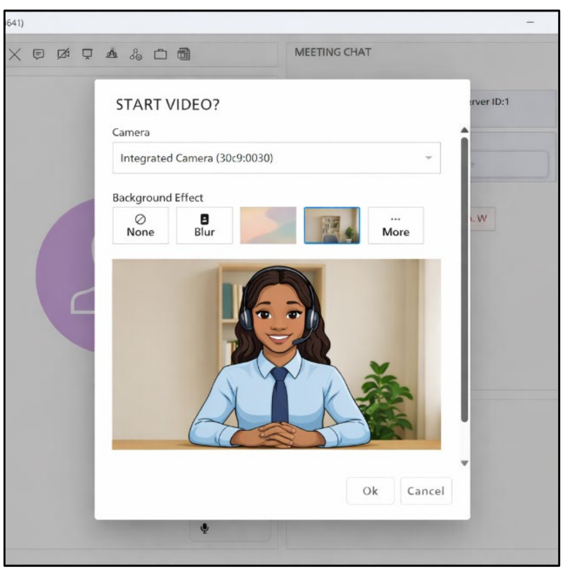
The *Start Video* button allows you to enable your camera so that the caller can see your video feed. Please note, the caller's camera will not automatically turn on. They can enable or disable video from their own meeting window.

To enable your camera, follow the steps below:

1. Click the *Start Video* button.



2. The following pop up will open to allow you to configure your video settings. From this window, select your camera and your background.



3. Click Ok to start your video. If you do not wish to turn on your camera, click Cancel.

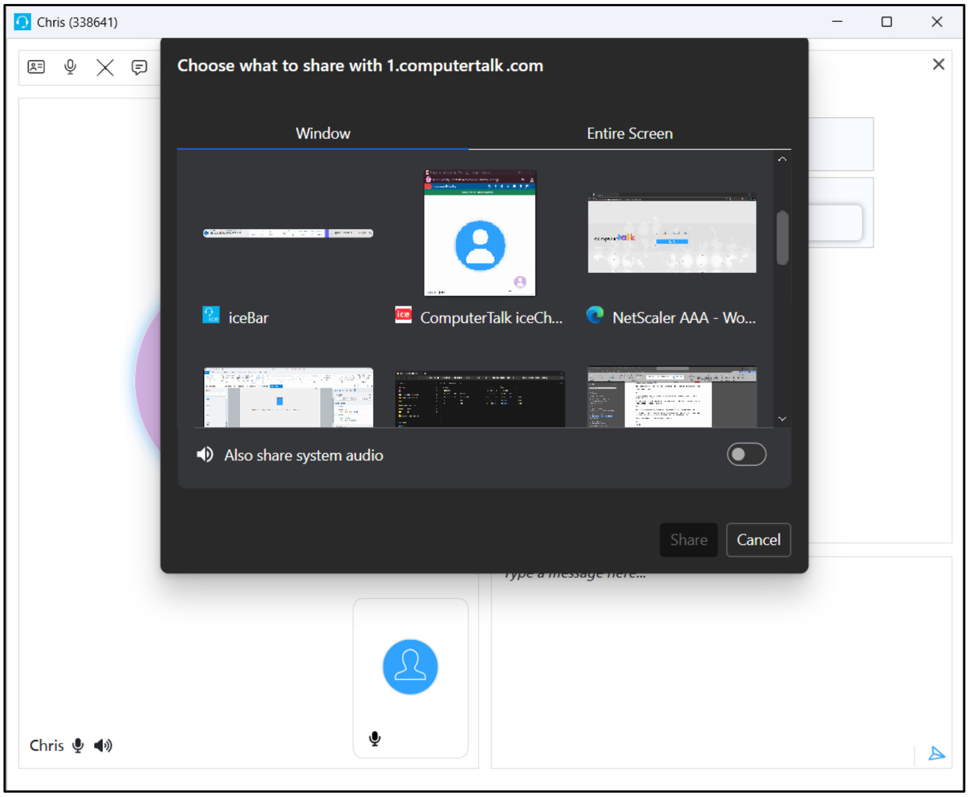
4. If you wish to turn off your camera, click the button again.

Start Screenshare

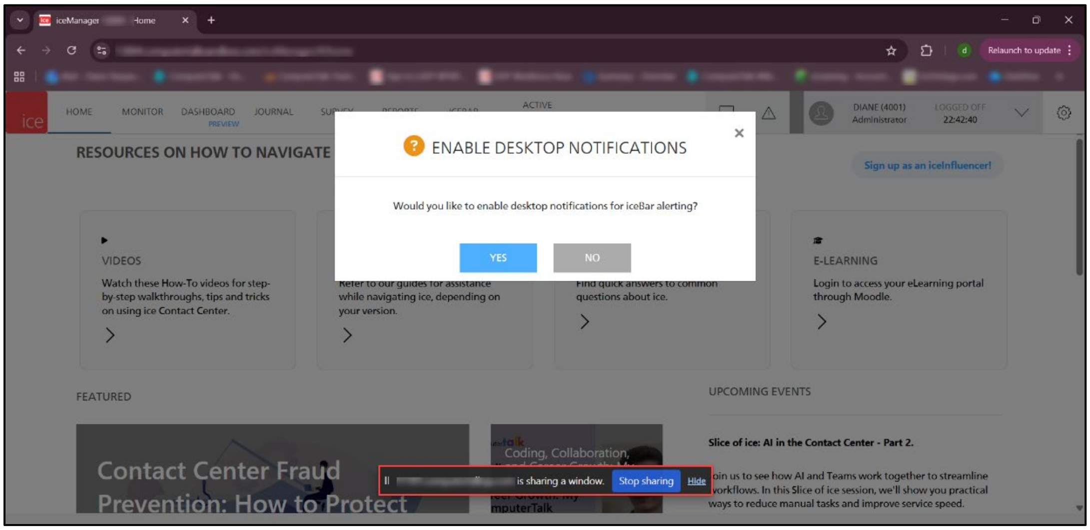
Start Screenshare allows you to select the tab, window or screen you would like to share and start sharing your screen. Your caller may also share their screen through the *Start Screenshare* button in their own meeting window. Only one screen may be shared at a time.

To share your screen, follow the steps below:

1. Click the *Start Screenshare* button.
2. The following pop-up will open, allowing you to select the tab, window or screen you wish to share.



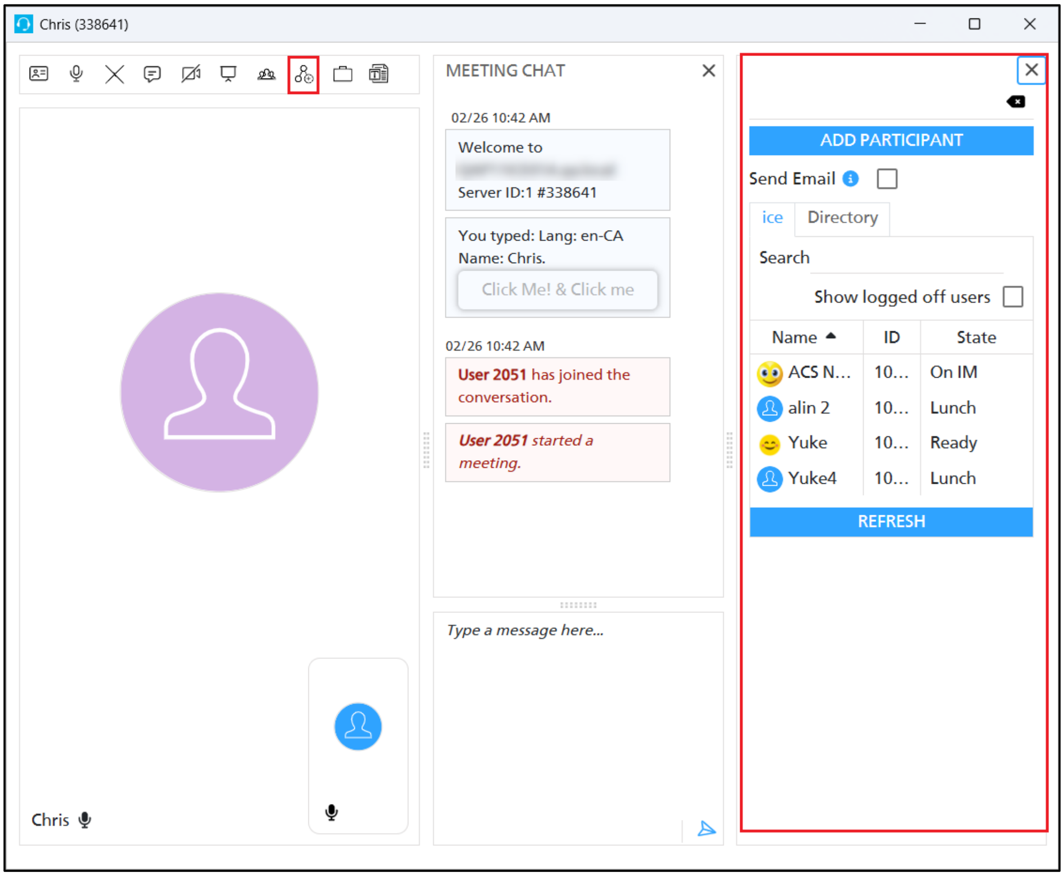
3. Select the option you wish to share. You may also share your browser audio. Click *Share*.
4. The other meeting participants will now be able to see your screen.
   Note: Only one screen can be shared at a time.



5. To stop sharing your screen, click the Stop Screenshare button.

<u>Add Participants</u>

While you are in a meeting, you may add additional participants through the *Add Participant* button.

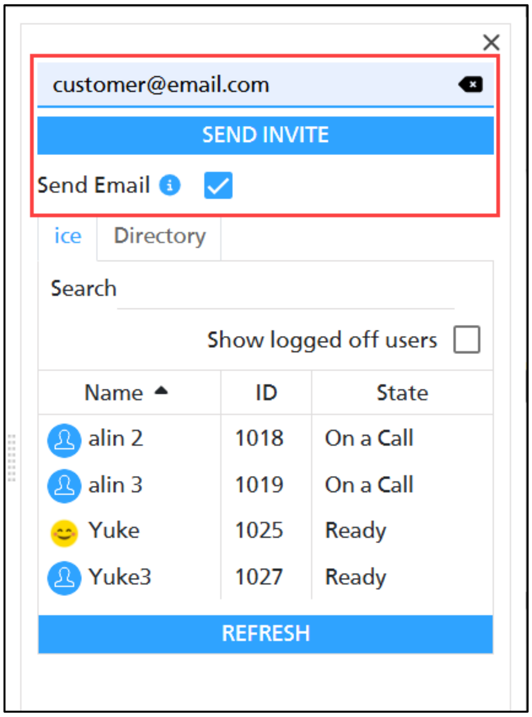


You may choose to add another ice user, a participant from your directory, or an external participant.

1. To add an ice user, select the user from the ice user directory, and click “Add Participant”.
2. To add a user from the directory, open the directory tab.
   a. If you are prompted to authenticate, follow the instructions in the new browser window that opens.
   b. Once your authentication is complete, open the directory tab again and select the participant you wish to add to the meeting.
   c. Click “Add Participant”.
3. There are two ways to add an external participant; through email or phone. Select your preferred option.

   Note: Participants who join by phone will not have access to screensharing and video options.
4. To send an email invitation, ensure the “Send Email” checkbox is enabled and enter the participant’s email address in the text field at the top.

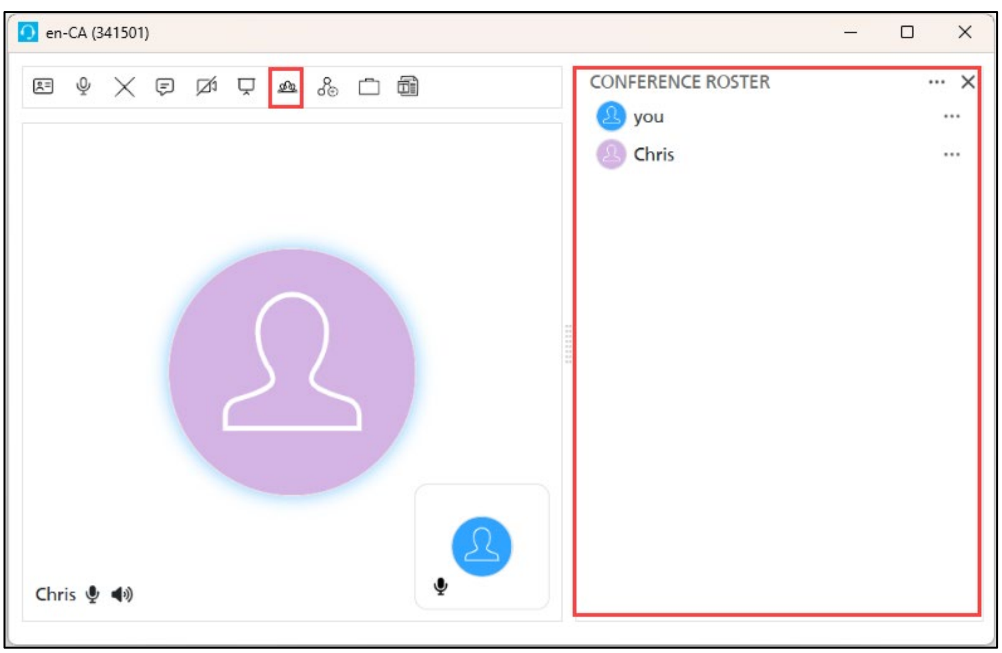
   Send email sends a meeting link to the provided email, allowing the participant to join with full video and screenshare access if permissions are enabled.



For more information on permissions, see the iceManager User Manual.

5. Alternatively, enter the participant's phone number in the text field. The participant will receive a call to join the meeting. When the participant answers the call, they will hear a message notifying them that they are joining a meeting.

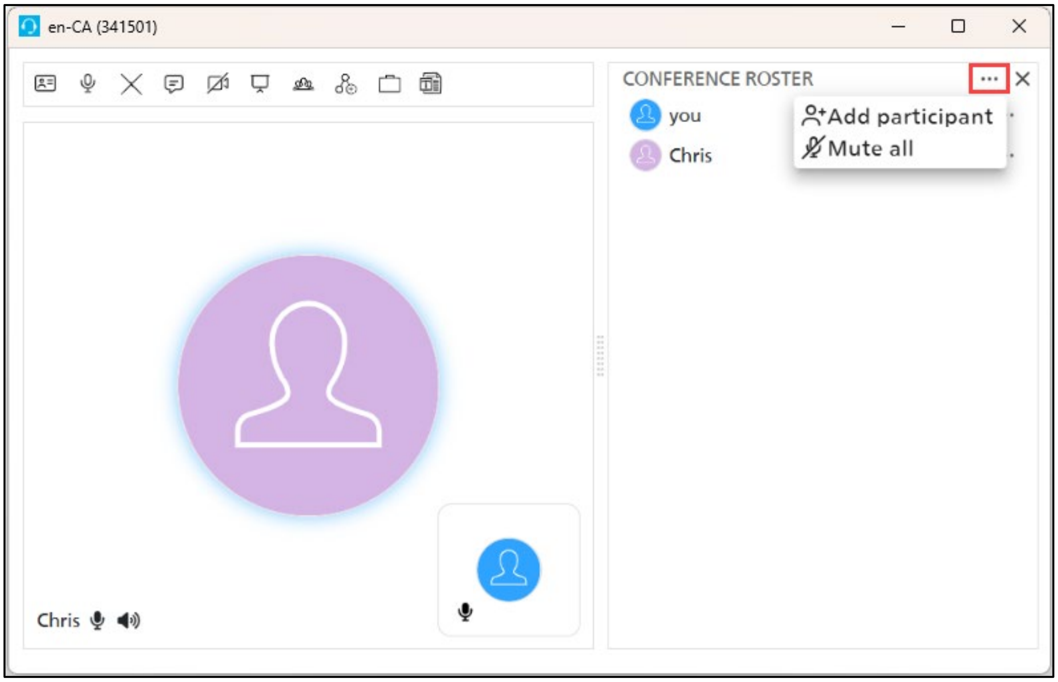
6. To see the list of participants in the meeting, click the *Conference Roster* button.



Note: Participants can re-join calls in progress through the same email link, allowing agents to handle connectivity interruptions or page reloads.

Conference Roster

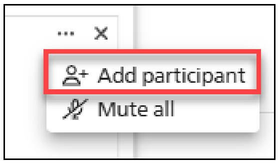
While you are in a meeting, you may view the list of participants in the meeting. From this tab, users may also add, remove and mute participants.



Click the ellipses in the top right-corner of the Participant field to see the options to manage meeting participants.

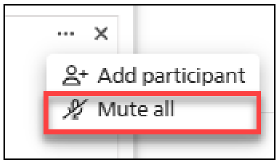
Add Participant

Additional participants can be added from the Add Participant button. Click on this button to open the Add Participant tab and add a new participant.

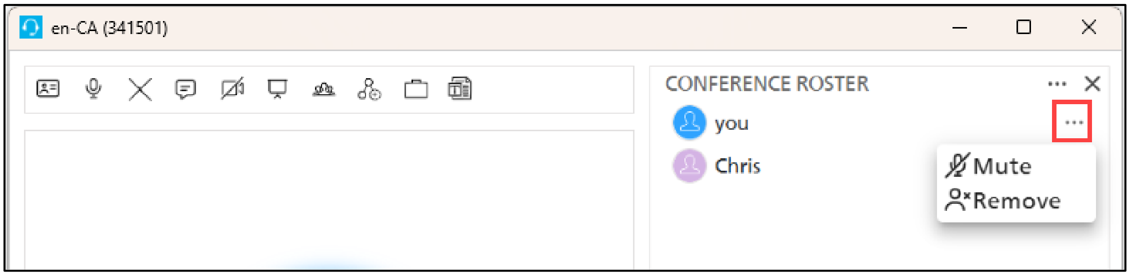


Mute All

The Mute All button allows you to mute all participants in the meeting.



You may also remove and mute individual participants using the options in line with each user. Click the ellipses next to the participant to see the options available.



Mute Button

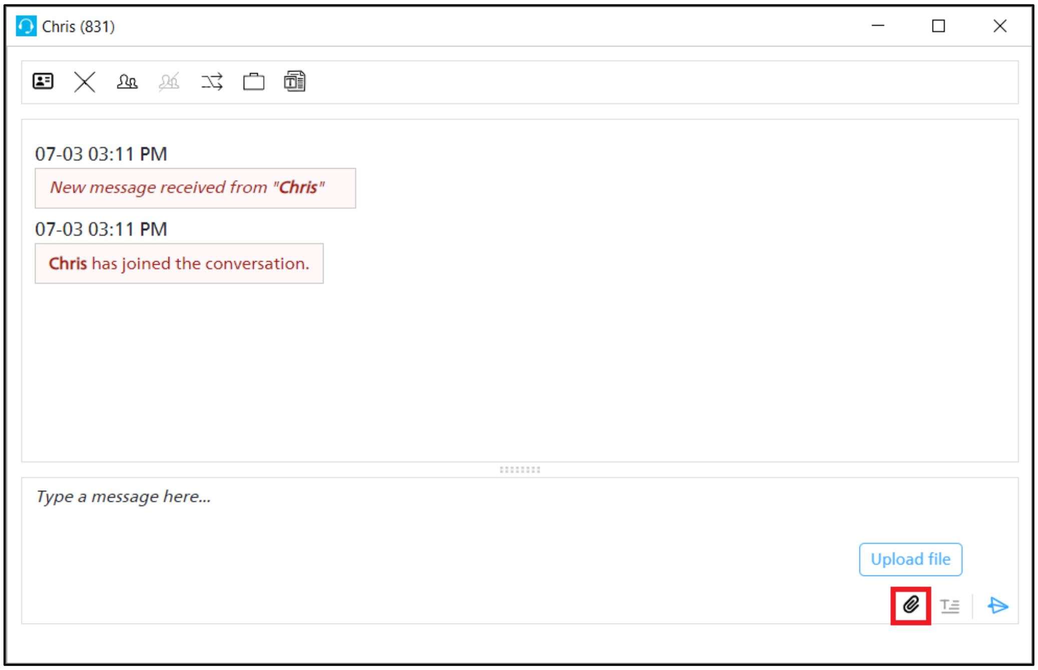
Click the mute button to mute the selected participant. Participants may unmute themselves.

Note: You will not be able to unmute other participants.

Remove Button

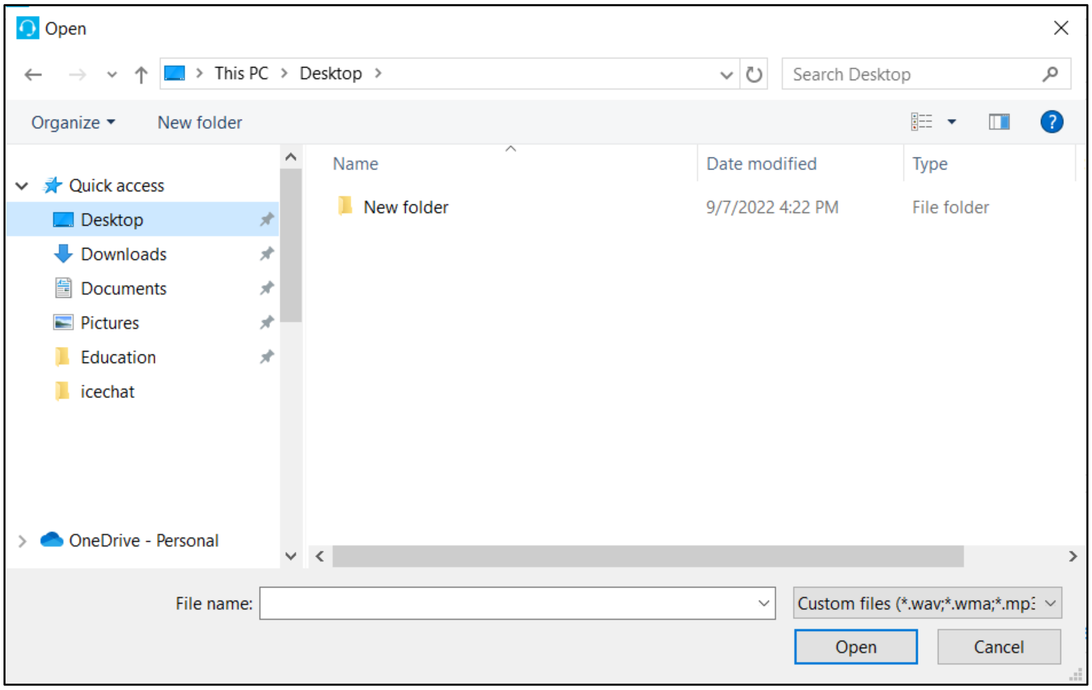
Click the Remove button to remove the selected participant from the meeting.

Note: The participant may rejoin the meeting from the same initial email invite while the meeting is in progress.

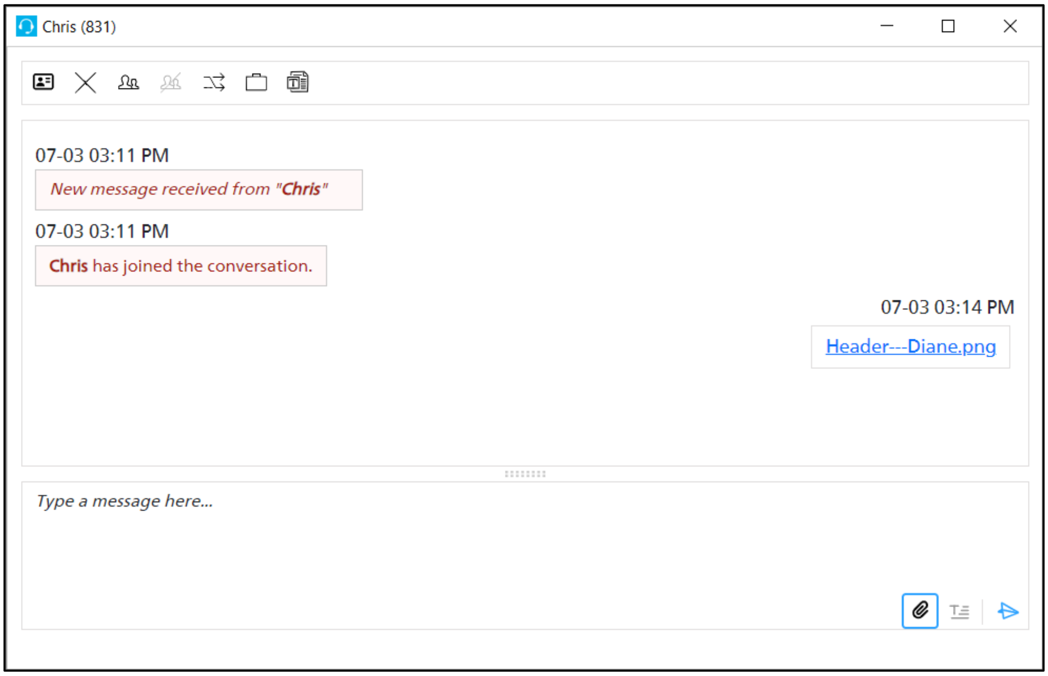


To upload a file in the chat:

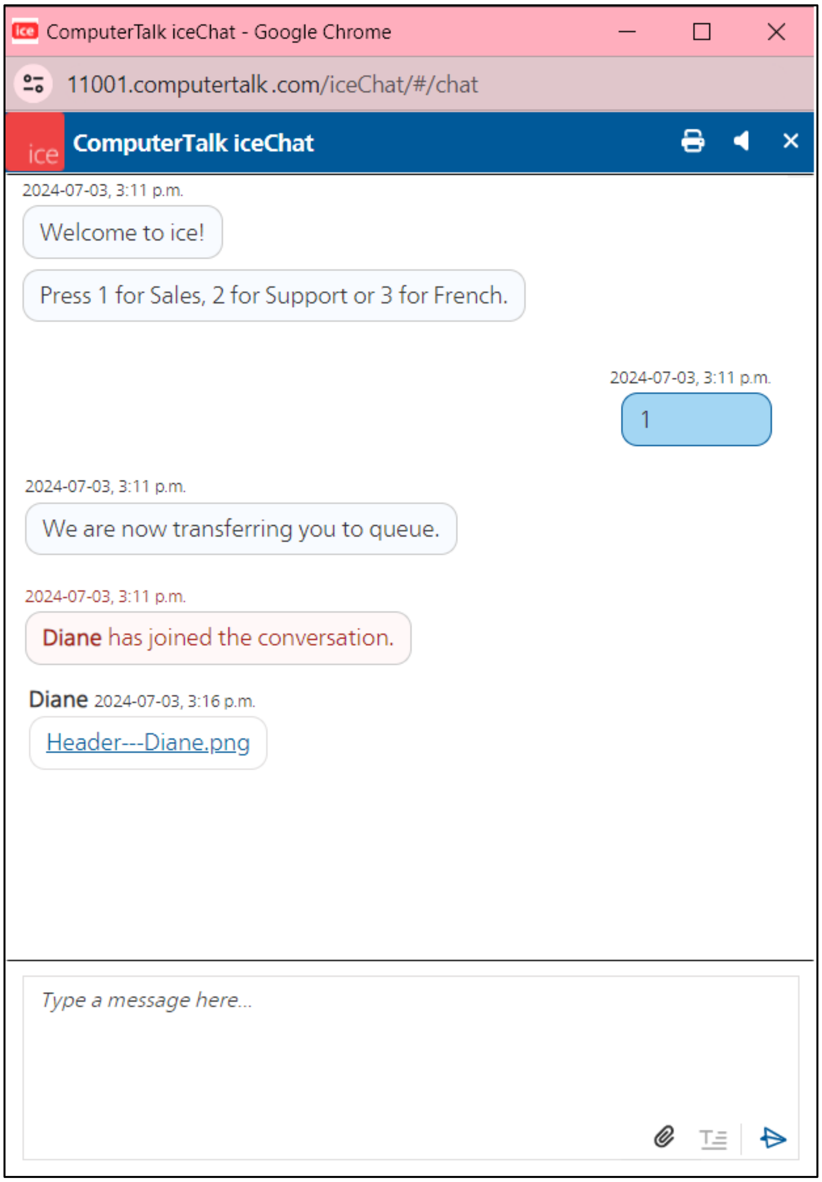
Step 1: Click the “Upload File” button. icebar will open the file explorer window on your local machine.



Step 2: Select a file to upload in the chat.



Once an attachment has been uploaded, the website visitor will be able to download this through the link provided.



Note: Once you have selected the file to upload in the chat, it cannot be recalled or cancelled. The attachment link will only be valid for the amount of time specified in the Contact attachment settings.

Please refer to the *iceManager User Manual* for information on the Contact attachment settings.

Chapter 4: Handling IMs and Webchats

To handle IMs and Webchats, users must have Microsoft Teams installed on their workstation or have the icePhone enabled. Users must also be configured to handle IMs and Webchats in iceAdministrator. For information on how to configure users to handle IMs and other modalities, refer to the *iceAdministrator User Manual*.

Once the client is installed and configured and users log on to ice, IMs and Webchats will alert on their computers. A new Teams session or icePhone chat session is created for every chat and users will respond to the chat in the chat client.

When users are in a *Ready State*, they can receive an instant message (IM) from ice. The user State will change to *On IM* and the State Time refreshes to show how long the User has been in the new state. The website visitor will see "connected to support representative message" in their chat session.

If the *Allow Multi-Contact Handling* Class of Service is enabled, users can accept additional contacts from ice. The existing conversation window will not close and the user is able to pick up the next chat in the queue.

Receiving an IM from Queue

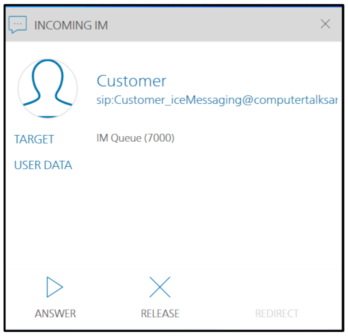
ice can be configured so that IM and Webchats are queued to a selected group of users. For example, your contact center may receive messages through a Live Chat button on your website. These are directed to the first available user in the IM queue.

Users in this IM queue can either be regular users set up to handle multiple modalities or they can be dedicated IM users set up to only handle IM contacts.

If users are logged on to a queue that receives IMs, they are notified of an incoming IM with the '*iceBar: Incoming IM'* dialog box. If you are off-hook when the IM arrives, you will be notified by a beep in your headset.

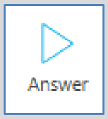
To receive an IM from the queue, users must be in a *Ready State*. When users receive a message, the '*iceBar: Incoming IM'* dialog box appears.

Note: When users with Auto Answer Email or IM class of service enabled receive a contact, they will be presented with the Microsoft Teams toast window. The '*iceBar: Incoming IM'* dialog box will not appear. Users will hear a beep in their headset before being presented with the chat session.



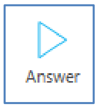
The table below describes the fields displayed on the 'iceBar: Incoming IM' window.

iceBar: Incoming IM	
Field	**Description**
Target	The IM queue to which the message has been sent.
User Data	Any data the IM sender may have entered.

iceBar: Incoming IM	
Field	**Description**
	‘Answer’ button. Once you click this button, ice routes the IM to Microsoft Teams. Clicking ‘Answer’ is only required if Auto Answer Email/IM class of service is disabled.
	‘Release Call’ button. ice sends the message back to queue.
Redirect To:	This option is greyed out. You cannot redirect incoming IMs.

<u>To handle the IM using Microsoft Teams:</u>

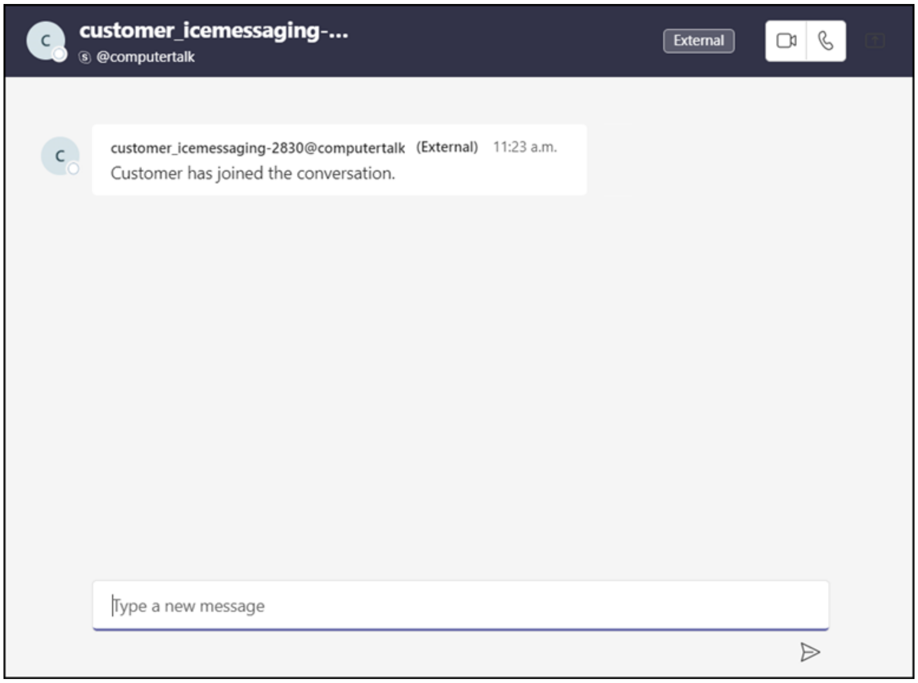
Note: Users who have Auto Answer Email/IM class of service should skip step 1 and proceed to step 2.

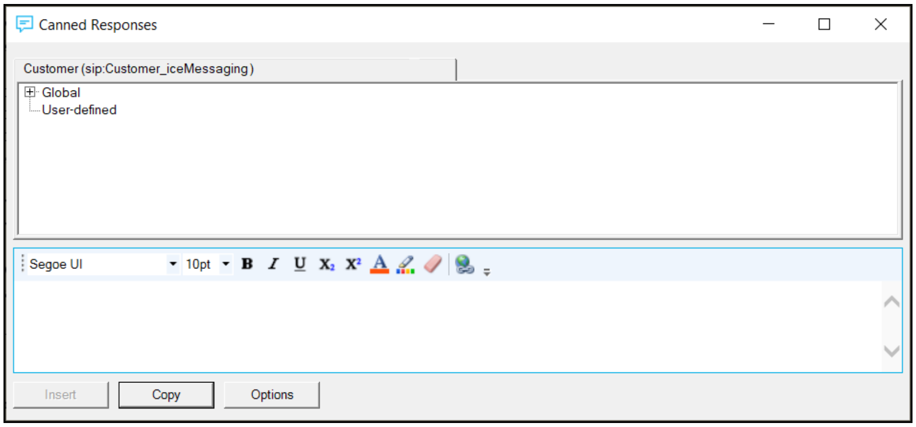


1. Click *Answer* on the ‘*iceBar: Incoming IM*’ dialog box.

   Notice the *Ready State* button changes to indicate you are in the *IM State*.

2. A Microsoft Teams session opens. If canned responses are configured, the canned responses list will open in a separate window.

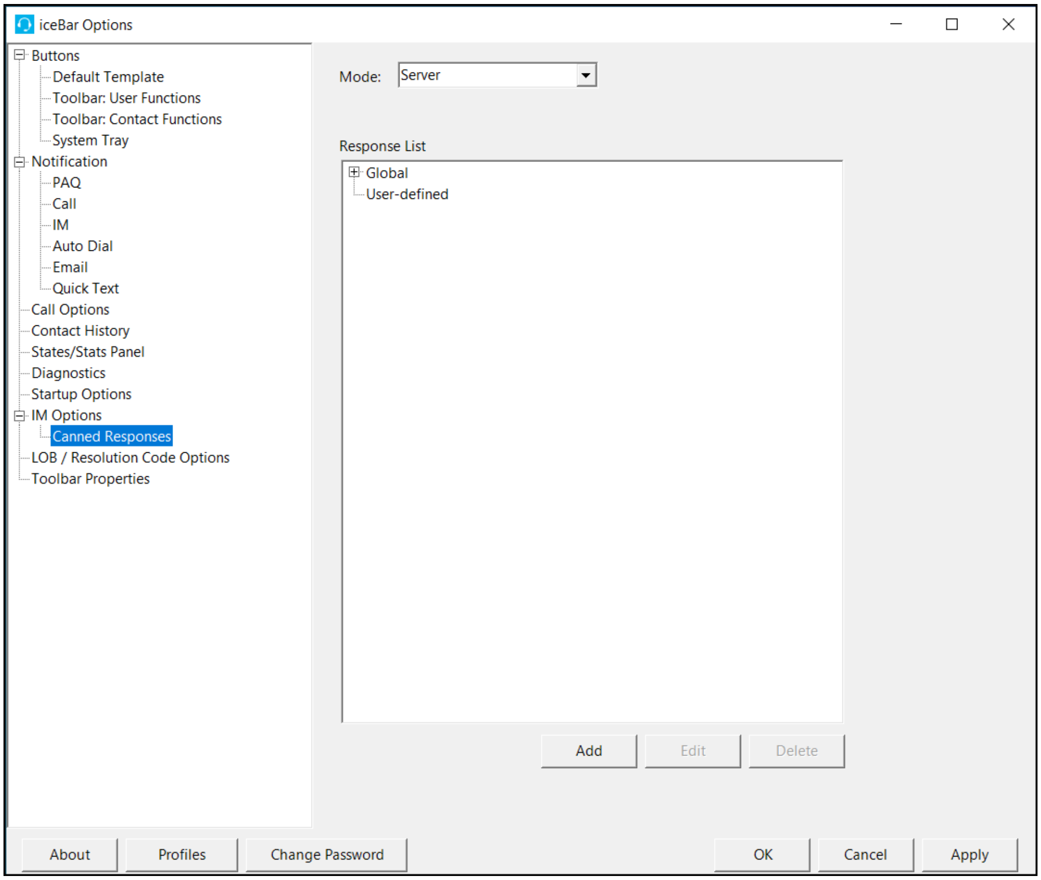




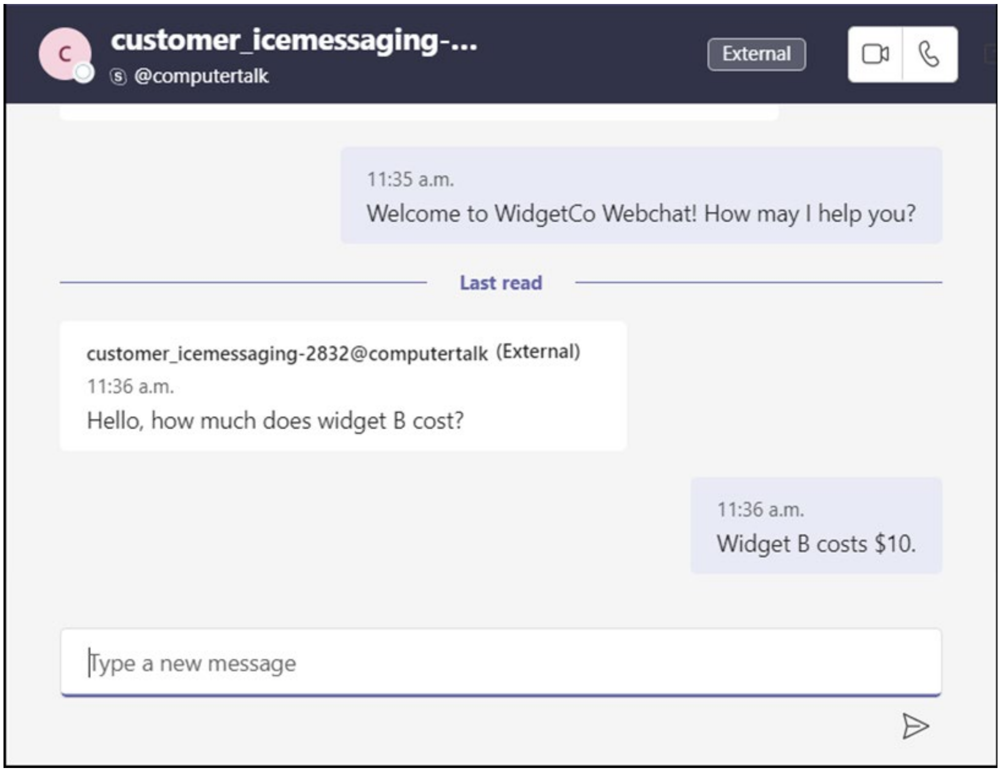
The IM content is located in the upper text box. To interact with the website visitor, users can type responses in the lower text box and hit the Enter key on their keyboard to send the message.

Alternatively, users can select a canned response to interact with the website visitor. To use canned responses, simply select it in the list and click Insert. Alternatively, you may double-click the entry and it will automatically appear in the conversation box.

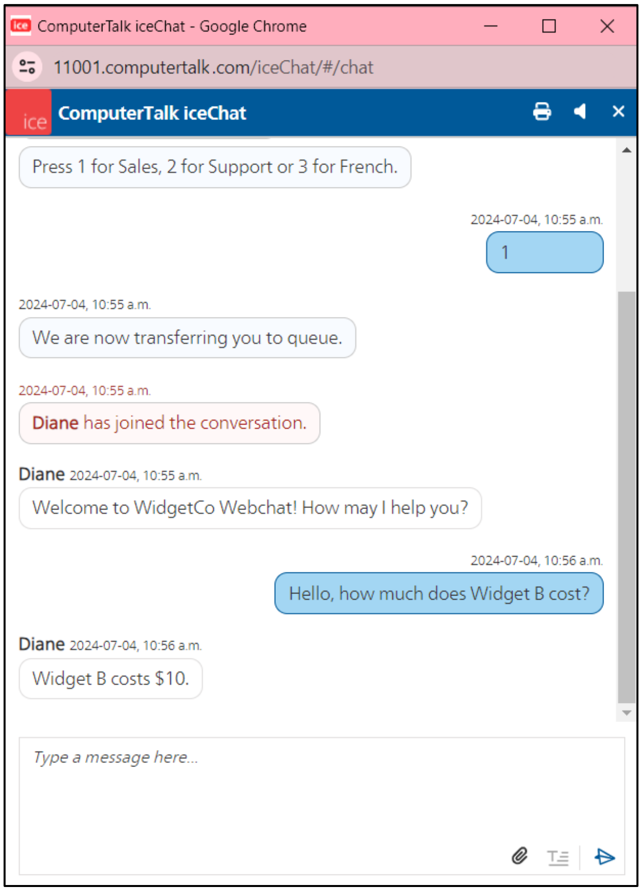
The list of canned responses can be configured for iceChat in the iceBar Options menu under IM Options - Canned Responses or within the iceManager settings page. For more information, refer to the *iceManager User Manual*.



The screenshot below shows what users see. On their desktop, users see iceBar, the conversation window, and a canned response list.



The screenshot below shows what the website visitor sees:



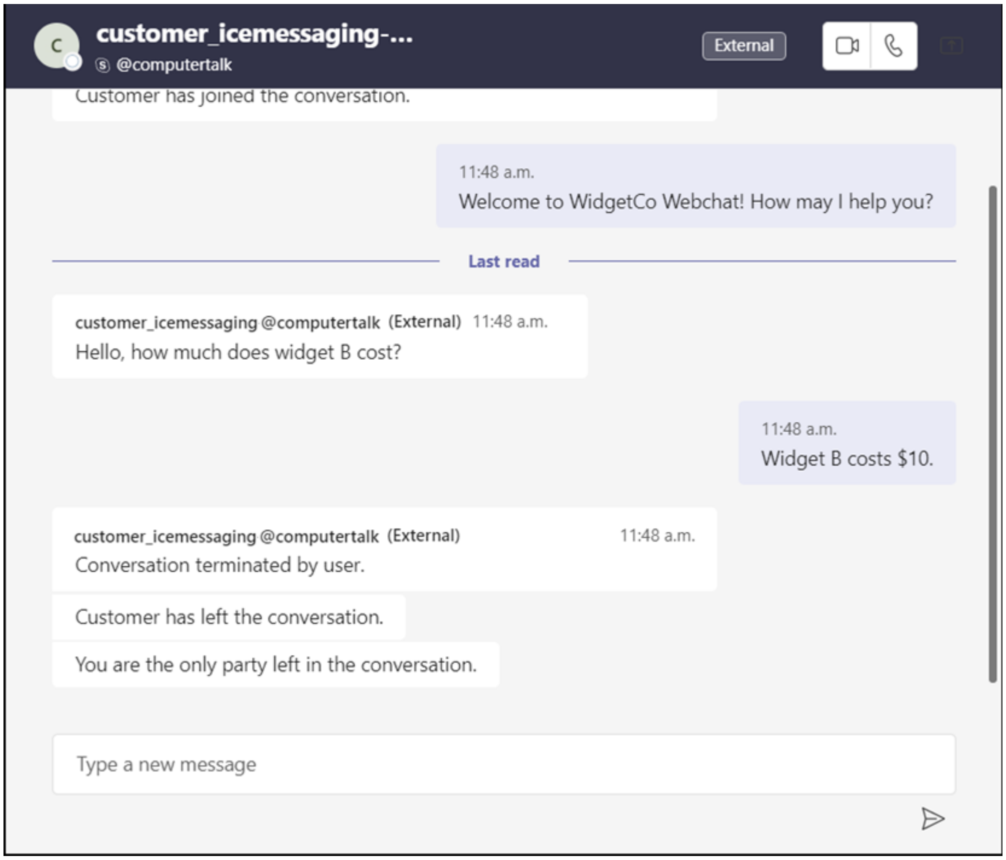
Note: Agent display names are configurable using the IM alias field in iceAdministrator. For more information, refer to the *iceAdministrator User Manual*.

3. Once users are finished with the conversation, they can end the contact by clicking on the release button on their iceBar.

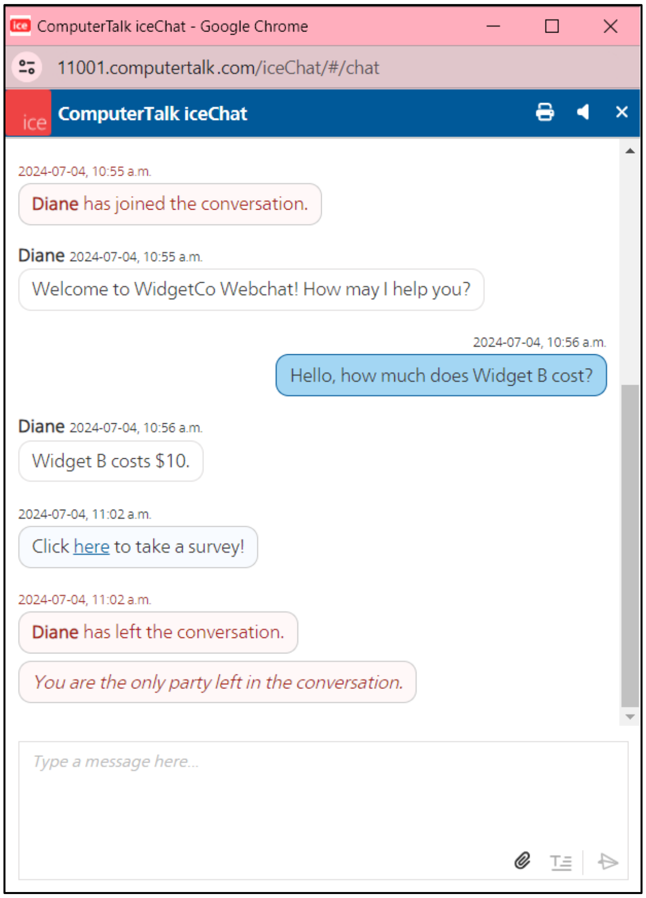
   Users will automatically be put into the Ready state unless they have *Wrap Up* enabled.

   Note: Users with the *Request to Select Next Contact* class of service feature will need to click *Request New Contact* to receive the next chat or pick the next contact in the queue.

   If the website visitor ends the conversation, the user will receive a "The other party has left the conversation" message. This message can be modified to fit the needs of your contact center.



If the user ends the conversation first, the website visitor will receive a "The other party has left the conversation" message. This message can be modified to fit the needs of your contact center.



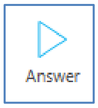
4. Users should click the *Ready* button to remove themselves from the IM state.

   They may also right-click the *Ready* button to move to the *Not Ready* state.

   Note: This step is only necessary if *Wrap Up* is enabled or when Multiple IM Handling is enabled.

<u>To handle the IM using the icePhone:</u>

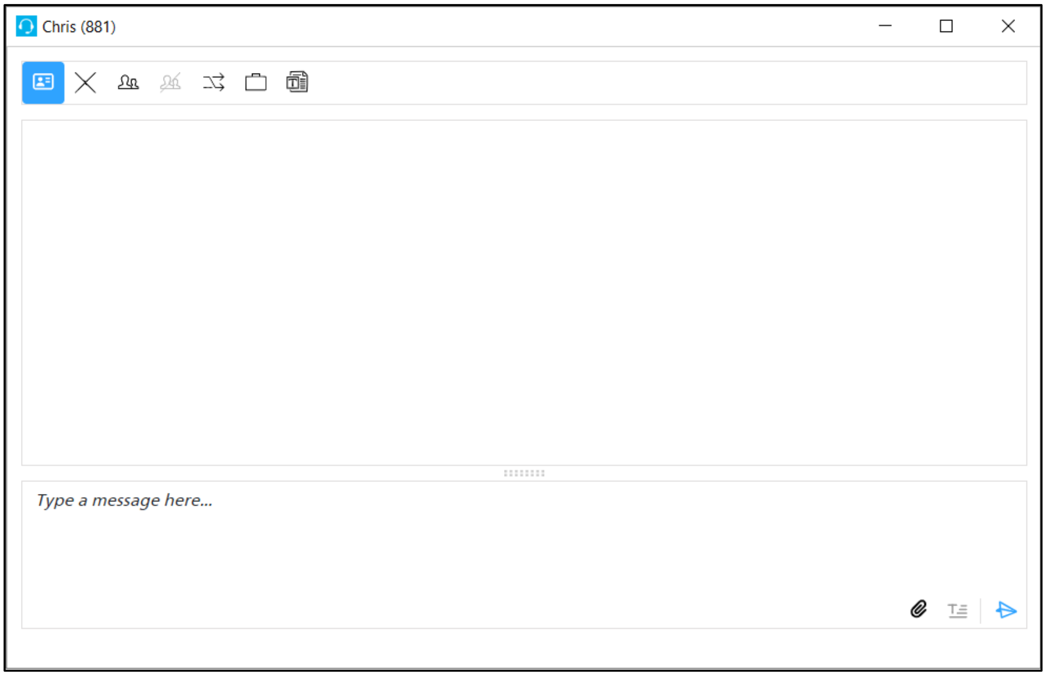
Note: Users who have Auto Answer Email/IM class of service should skip step 1 and proceed to step 2.



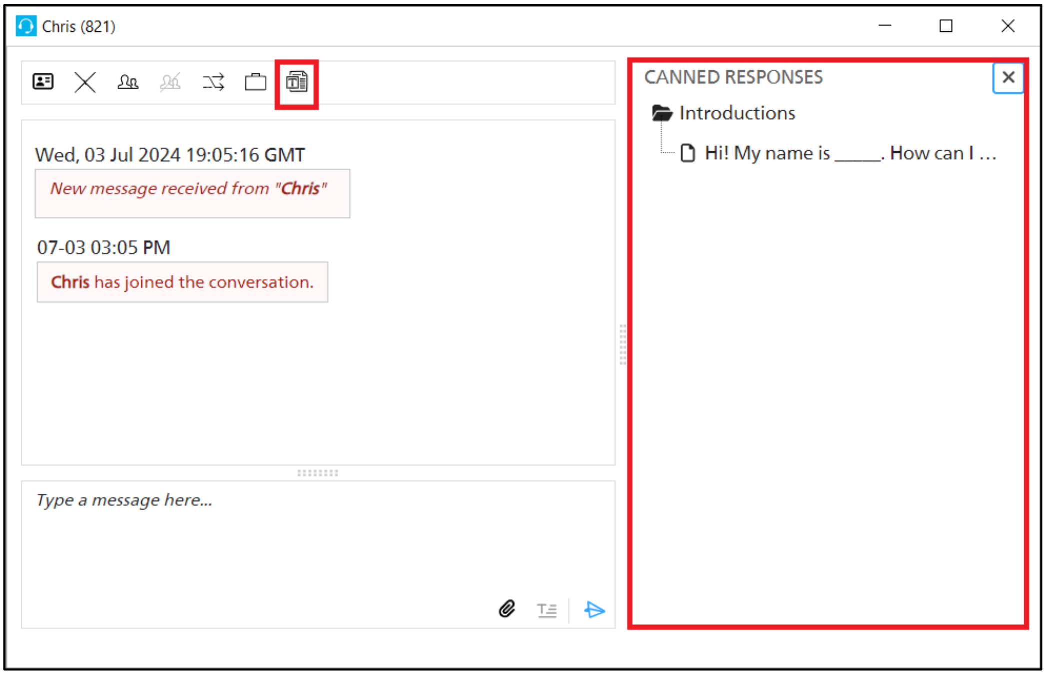
1. Click *Answer* on the '*iceBar: Incoming IM'* dialog box.

   Notice the *Ready State* button changes to indicate you are in the *IM State*.

2. An icePhone Chat session opens.



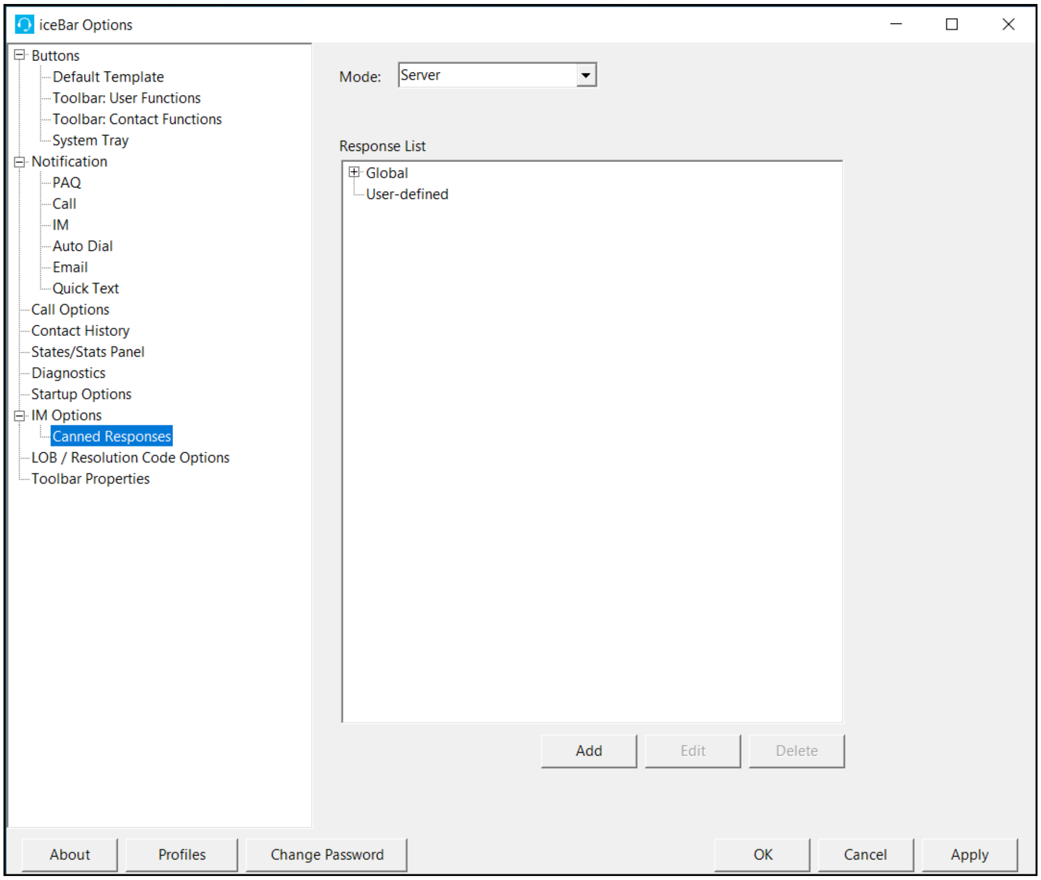
If canned responses are configured, they are accessible by clicking the canned responses button, highlighted in red below. The canned responses will open in a new tab within the chat window.



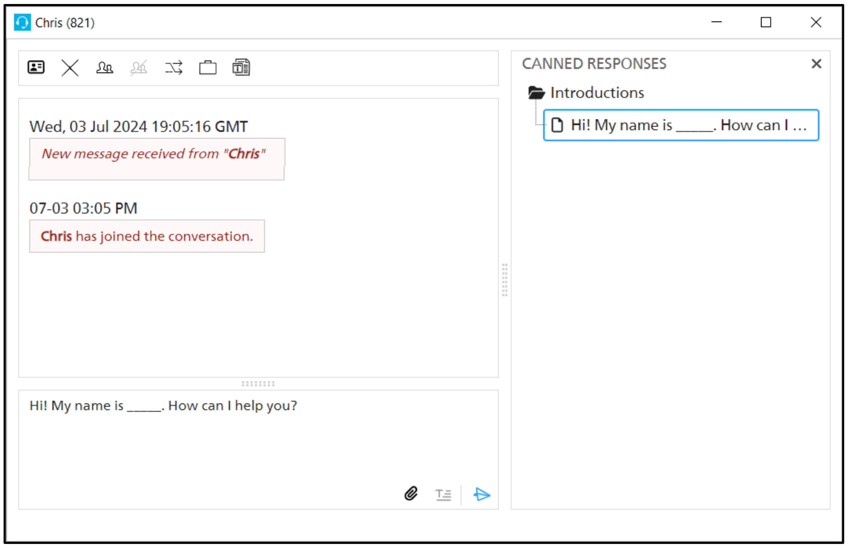
The IM content is located in the upper text box. To interact with the website visitor, users can type responses in the lower text box and hit the Enter key on their keyboard to send the message.

Alternatively, users can select a canned response to interact with the website visitor. To use canned responses, simply select it in the list and click send. Alternatively, you may double-click the entry and it will automatically appear in the conversation box.

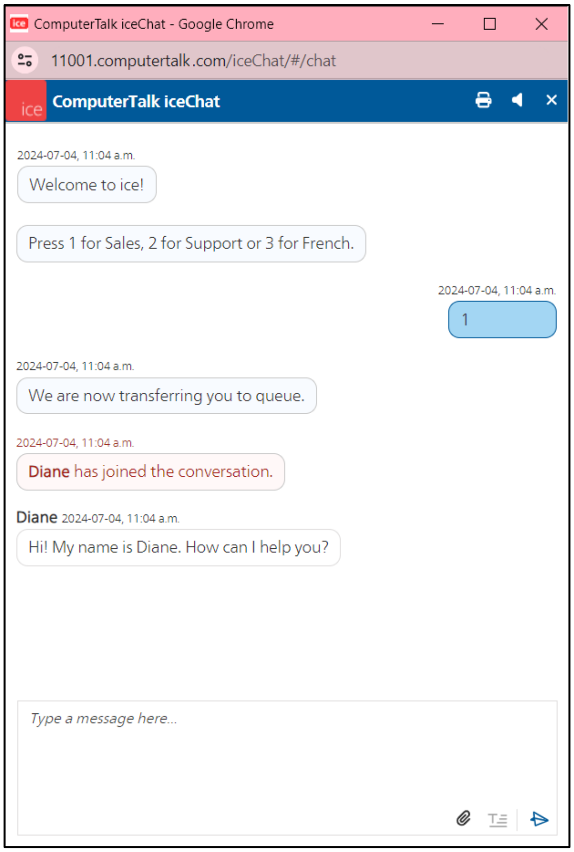
The list of canned responses can be configured for iceChat in the iceBar Options menu under IM Options - Canned Responses or within the iceManager settings page. For more information, refer to the *iceManager User Manual*.



The screenshot below shows what users see. On their desktop, users see iceBar and the conversation window.

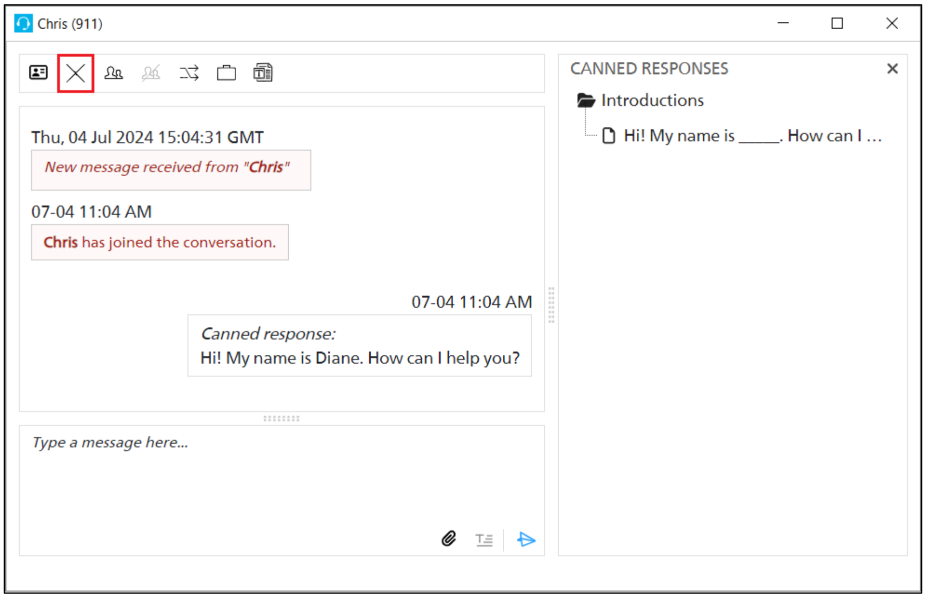


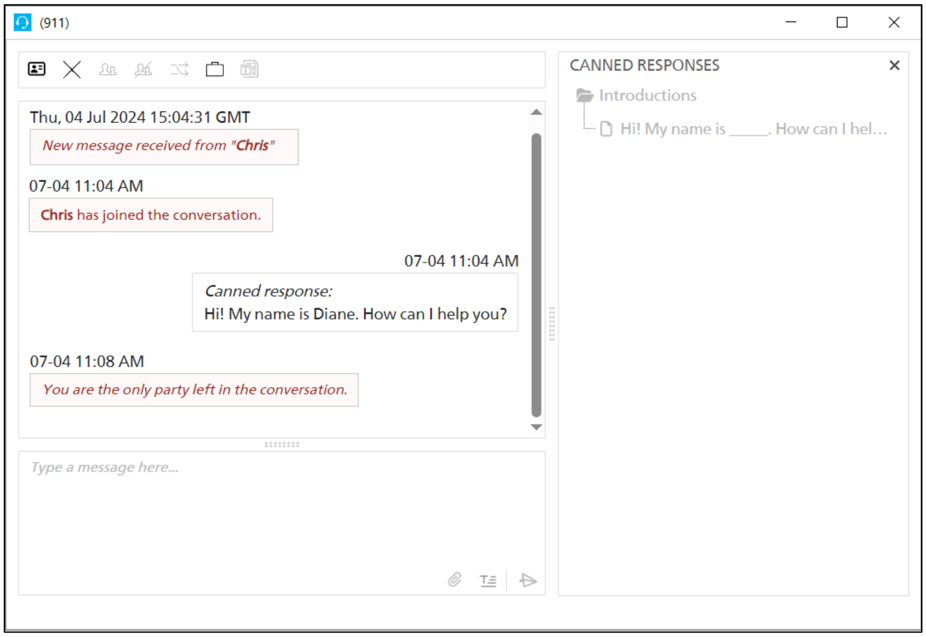
The screenshot below shows what the website visitor sees:



Note: Agent display names are configurable using the IM alias field in iceAdministrator. For more information, refer to the *iceAdministrator User Manual*.

3. Once users are finished with the conversation, they can end the contact by clicking on the release button on their iceBar or in the chat window.



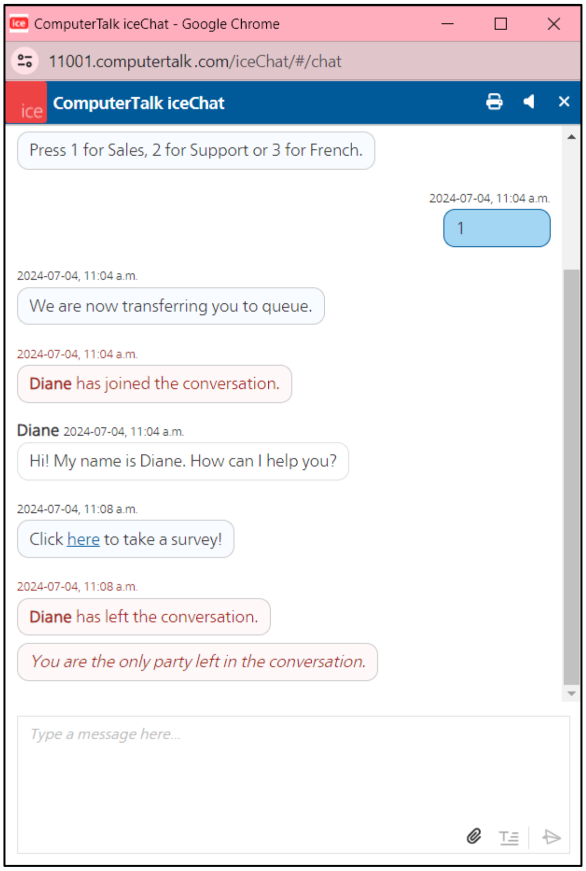


Users will automatically be put into the Ready state unless they have *Wrap Up* enabled.

Note: Users with the Request to Select Next Contact class of service feature will need to click *Request New Contact* to receive the next chat or pick the next contact in the queue.

If the website visitor ends the conversation, the user will receive a "The other party has left the conversation" message. This message can be modified to fit the needs of your contact center.

If the user ends the conversation first, the website visitor will receive a "The other party has left the conversation" message. This message can be modified to fit the needs of your contact center.



4. Users should click the *Ready* button to remove themselves from the IM state.

   They may also right-click the *Ready* button to move to the *Not Ready* state.

   Note: This step is only necessary if *Wrap Up* is enabled or when Multi-Contact Handling is enabled.

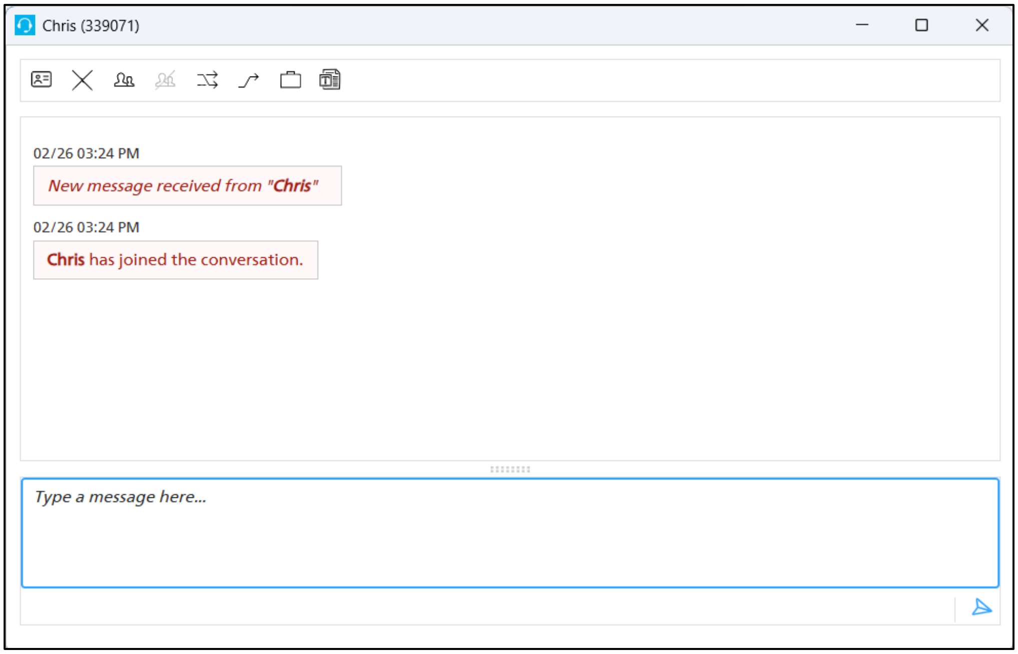
<u>Elevate a chat to a meeting</u>

Elevation to a meeting with screen share and video share is supported if you are using icePhone for chat and speaking with customers using ice web chat.

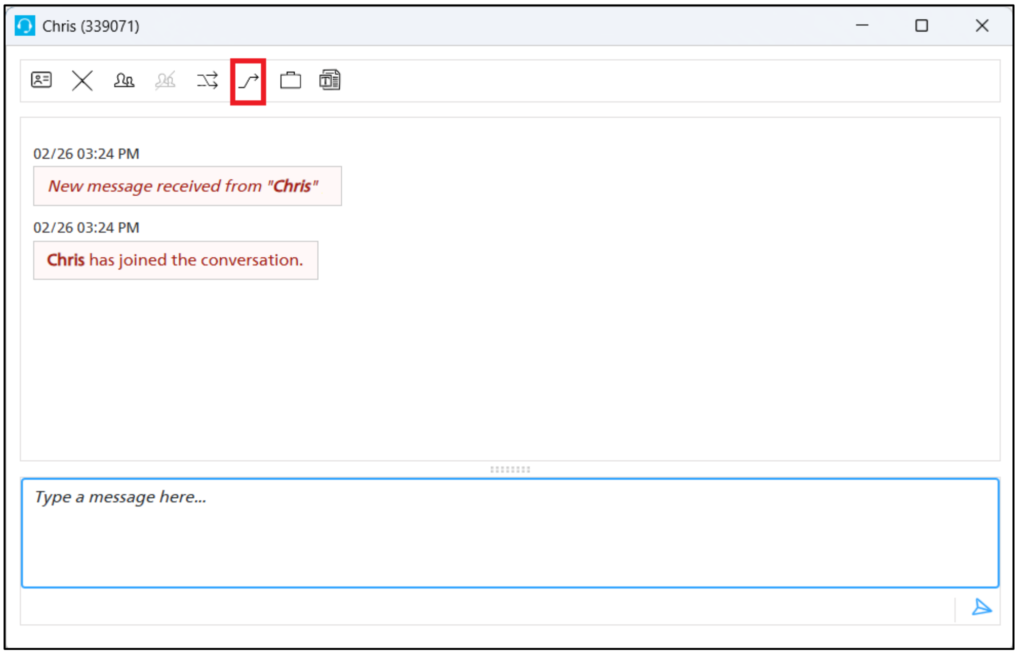
The elevate button will be available in both the icePhone window, and on your toolbar and allows you to elevate a chat to an ACS meeting. In this meeting, agents and participants can share their screen, enable and disable video, and send chat messages.

To elevate a chat to a meeting, follow the steps below:

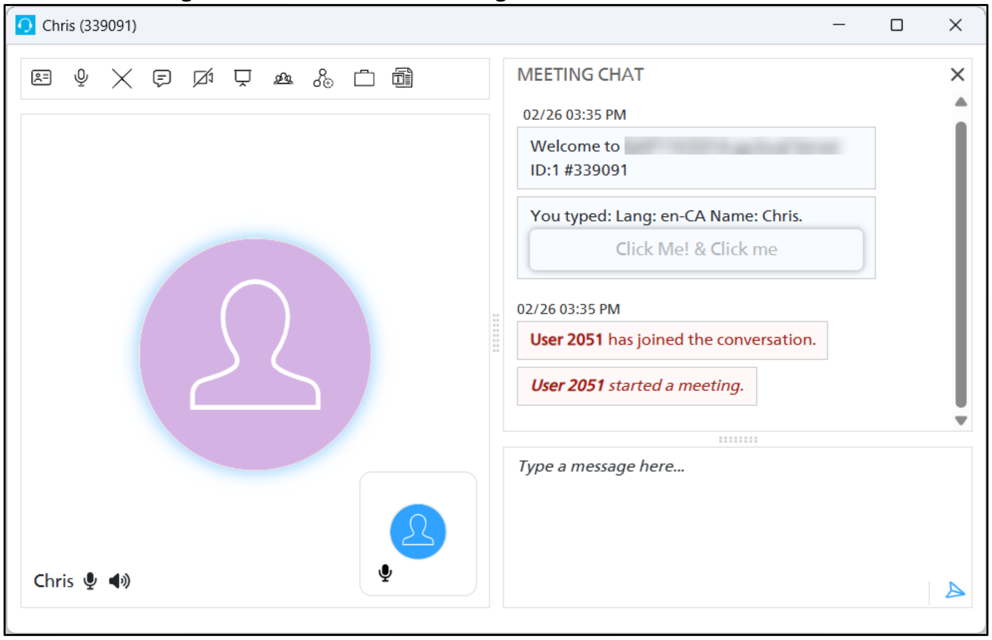
1. Ensure you are actively handling a chat contact.



2. When you are ready to elevate your chat to a meeting, click the Elevate button.



3. A new meeting window will open. The participants are visible in the panel on the left and the meeting chat is available on the right.



4. The regular icePhone buttons: *Contact Data*, *Mute*, *LOB*, *Chat*, and *Canned Reponses*, are all available while you are in a meeting. Additionally, the *Start Video*, *Start Screenshare*, *Conference Roster*, and *Add Participants* buttons are available in an ACS meeting.

   For more information on these buttons, refer to *Understanding the icePhone* and *icePhone Meeting Buttons*.

Note: The meeting will not end until all ice agents have left.

Chat Rehydration

Beginning in ice 13.1.0, users can restore active chat sessions in the following scenarios.

Note: Chat rehydration settings can be configured by Administrators in iceManager. For more information, please refer to the *iceManager User Manual*.

1. Customer ends the chat in the UI: This correctly ends the contact in ice and there is no option to re-hydrate the chat. Clicking on a **start chat** button to populate the chat data will create a new contact.

2. Agent ends the chat: This correctly ends the contact in ice and there is no option to re-hydrate the chat. Clicking on a **start chat** button to populate the chat data will create a new contact.

3. Closing the browser: The contact is still alive in ice and the contact can be re-hydrated (restored).
   If the rehydration mode is set to **Rehydrate** and the active chat is still in progress, clicking on a **start chat** button will rehydrate the previous chat.
   If the rehydration mode is set to **Prompt** and new parameters are passed to iceChat, the customer will be asked if they want to start a new chat or continue with the previous one.
   If the rehydration mode is set to **Prompt** and the parameters have not changed, the previous chat will be rehydrated.
   Note: The agent keep alive message will end the chat eventually if the customer does not rehydrate the chat and the agent does not end it. Both rehydration modes **Prompt** and **Start New** will end the existing chat prior to creating a new one.

4. Refreshing the browser on an active chat: Refreshing the chat browser page without changing any of the chat parameters (for example, destination ID, language, etc) will always rehydrate the active chat.

5. Opening a new tab and clicking on the **start chat** button:
   If the rehydration mode is set to **Rehydrate** and there is an existing chat from that browser, the previous chat will be rehydrated.
   If the rehydration mode is set to **Prompt** and new parameters are passed to iceChat, the customer will receive a prompt asking if they would like to start a new chat. If the parameters are the same, it will restore the active chat session.
   If there is no existing chat, a new chat is created.

6. Opening a new browser and clicking on the start chat button:
   If it is a different browser, a new chat is created.
   If it is the same browser, for example two Edge windows open, and there is an existing chat session:
   If the rehydration mode is set to **Rehydrate** and the active chat is still in progress, the previous chat will be rehydrated.
   If the rehydration mode is set to **Prompt** and new parameters are passed to iceChat, the customer will be asked if they want to start a new chat or continue with the previous one.
   If the rehydration mode is set to **Prompt** and the same parameters are passed to iceChat, the previous chat will be rehydrated.

Accessing Statistics

IM statistics are tracked the same way voice calls and emails are tracked. IM statistics appear in all contact-related reports. For more information, refer to the *iceReporting User Manual*.

iceJournal can be used to review IM transcripts and high-level information about a specific IM interaction, including contact attachments. For more information, refer to the *iceManager User Manual*.

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