



CHIME 2.6

QUICK GUIDE TO SETUP A HELPDESK QUEUE

A large, 3D geometric graphic composed of several overlapping, semi-transparent blue and grey rectangular blocks, creating a complex, layered structure.

May 2017

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INTRODUCTION

This guide is designed to show new users of Chime how to set up their first help desk queue. This guide covers how to set up the first queue, adding a dispatcher account to the queue, adding agents into the queue, and starting to take chat conversations.

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:

- Setting up a queue
- Adding people into the queue
- Installing the Context Window
- Starting a chat with the queue

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. Additionally, the Admin section has to be configured to have at least one dispatcher added, people added, at least one license key added, and SMTP settings set up. For more information on this see the “Chime Application Setup Guide”.

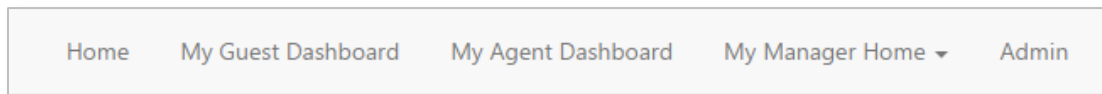
ACCESSING THE APPLICATION

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](http://[ServerName]/chime).

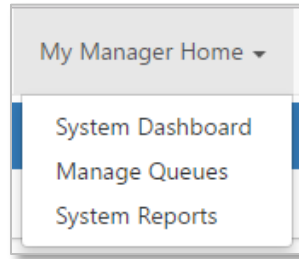
LAYOUT OF CHIME 2.6

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.



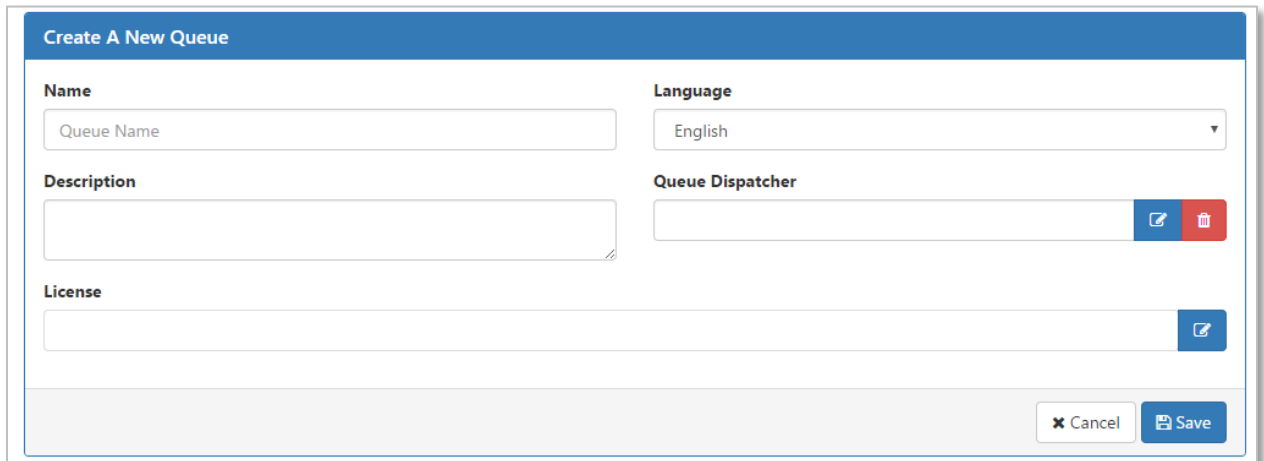
CREATE A NEW QUEUE

To set up a functioning help desk, the first step is to create a queue. To set up a queue, first click “My Manager Home” on the navbar. Then, on the dropdown, click the “Manage Queues” option.

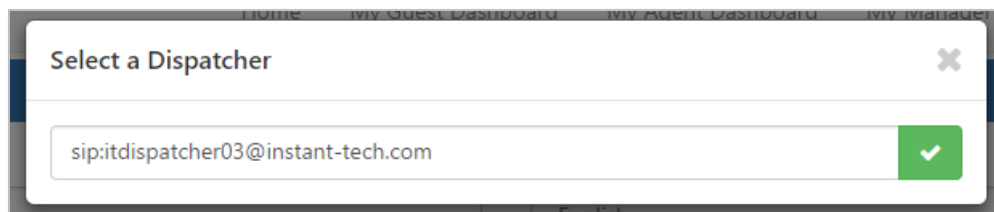


This will route you to the Manage Queues page which allows you to add new queues and manage queues that have already been created. The queue that you will create here will be the central part of the helpdesk. You will connect the queue with the dispatcher you created in Admin, and add some people who will act as agents in the queue.

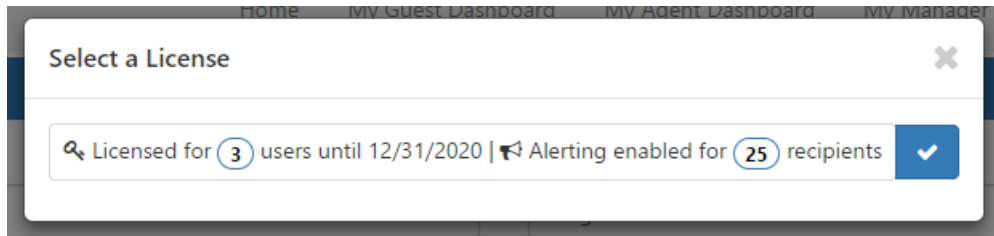
1. Click on the New Queue button. This will bring up the ‘New Queue’ window.

A screenshot of a web form titled "Create A New Queue". The form has a blue header bar with the title. Below the header are several input fields: "Name" with a text box containing "Queue Name"; "Description" with a larger text area; "License" with a text box; "Language" with a dropdown menu showing "English"; and "Queue Dispatcher" with a text box and a red trash icon. At the bottom right are "Cancel" and "Save" buttons.

2. Choose a name for the Queue: examples: IT Helpdesk, Sales, and Support.
3. Fill out a description for the queue (optional).
4. Select a Language for the Queue. Note: This is for labeling purposes, and does not change the language of the UI.
5. Select a Dispatcher. Click on the Select a Dispatcher button and a window will open with a list of the dispatchers that are available.



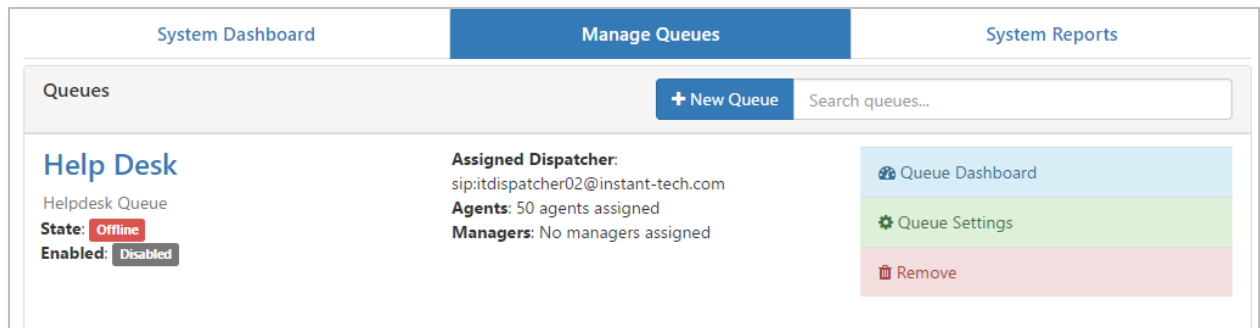
6. Click on the check mark button to associate this dispatcher with the new queue.
7. License: Click on the Assign a License button and a window will open with a list of the licenses that are available.



8. Select a license from the list that pops up on the screen. If you are using a trial version, you will have one license available to you.
9. Click Save, and the window will close.
10. You are finished creating a new queue. Now, the queue needs to be enabled so that people can be added into it.

ENABLING THE QUEUE

Once you've created a new queue, that queue should show up in the 'Queues' grid. By default, the queue will be listed as 'Disabled' and 'Offline'.



1. To enable the queue, click on the "Queue Settings" button on the far right side of the grid.
2. Toggle the 'Queue State' button until it switches from 'Stopped' to 'Running'.
3. Save changes.

ADDING PEOPLE TO THE QUEUE

To add people into a queue, they must first have been added into the Admin section. Once they have been added, they can be associated with one or more queues.

1. Navigate to Queue Settings for the queue you wish to add people to.
2. Navigate to the 'People' tab.
3. Click on the 'Add Users' button. This will bring up a window that allows you to search for people to add to the queue.

The screenshot shows the 'Queue Settings' interface with the 'People' tab selected. At the top, it says 'This queue is licensed for 3 agents.' Below this is a search bar containing 'Patrick' and a 'Search' button. A table below the search bar lists the search results:

First Name	Last Name	SIPURI	Tags	Add
Patrick	Madden	sip:pmadden@instant-tech.com		

Below the table is a section titled 'Agents To Add' with a sub-header '2 Remaining In License'. At the bottom right of the window are 'Cancel' and 'Add Users to Queue' buttons.

4. To add a person, search for their name in the search field. When you search, their name will display underneath the search bar.
5. Click the green '+' button to add the user to the list of Agents to add.
6. Click 'Add Users to Queue' when you have finished selecting the people who will be added.

The screenshot shows the 'Queue Settings' interface with the 'People' tab selected. At the top, it says 'This queue is licensed for 100000 agents.' and there is an 'Add Users' button. Below this is a search bar labeled 'Search people...'. A table below the search bar lists the agents:

▲First Name	Last Name	Tags	Priority	Role	No Chat	Remove
Justin	Moore		1	Manager	<input type="checkbox"/>	
Patrick	Madden		1	Agent	<input type="checkbox"/>	

At the bottom of the interface are buttons for 'Queue Dashboard', 'Manage Queues', 'Reset', and 'Save'.

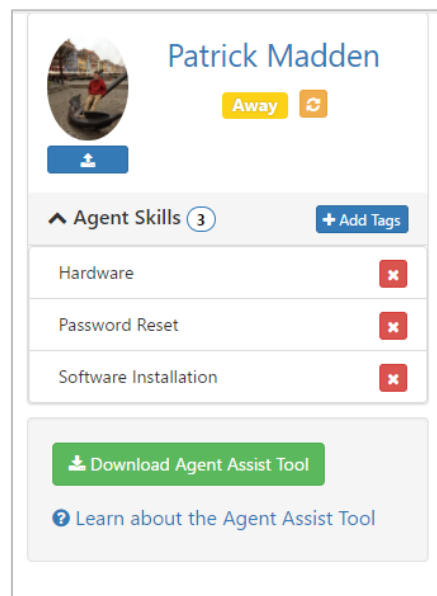
7. The people you added into the queue will be displayed in the 'People' Section.

INSTALL THE CONTEXT WINDOW

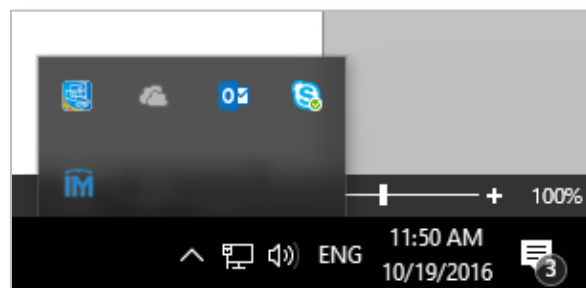
Once you have added people to the queue, you are almost ready to take chats. Before you take a chat, you will want the Agent Context Window (CWE) installed. The CWE is a very helpful tool for agents because it gives them information about the Guest that an assist them in solving the issues the Guest is facing.

To install the CWE:

1. Navigate to the Agent Dashboard by clicking “My Agent Dashboard” on the navbar.
2. Click on the green button labeled “Download Agent Assist Tool”.



3. Open the installer that just downloaded.
4. Proceed through the installer.
5. Once it installs there will be a new icon on the System Tray called “Chime Agent Assist”, right-click it and click the “Settings...”.



6. Enter in the Chime Server URL for your Chime instance and click the “Test” button.
7. Next, go to the “Active Chime Queues” tab and click the refresh button.
8. Go back to the Basic Settings tab and click “Save”.
9. Click close. The CWE is now fully set up.

STARTING A CHAT WITH THE QUEUE

There are a couple of things that need to take place in order to successfully route a chat using the web client:

1. At least one agent with a Lync-enabled account must be added to the queue.
2. The queue must be labeled on the dashboard as 'Enabled' and 'Online'.
3. At least one agent must be online in Lync.

ACCESS THE QUEUE DASHBOARD

1. To access the queue dashboard, navigate to the 'Manage Queues' Page.
2. On the right-hand side of the grid, click on the "Queue Dashboard" button.

The screenshot shows the 'Manage Queues' dashboard. At the top, there are three tabs: 'System Dashboard', 'Manage Queues' (which is active), and 'System Reports'. Below the tabs, there is a 'Queues' section with a '+ New Queue' button and a search bar labeled 'Search queues...'. The main content area displays the configuration for the 'Help Desk' queue. It shows the queue name 'Helpdesk Queue', its state as 'Online' (indicated by a green box), and its enabled status as 'Enabled' (indicated by a green box). To the right, there are details for the 'Assigned Dispatcher' (sip:itdispatcher02@instant-tech.com), 'Agents' (50 agents assigned), and 'Managers' (No managers assigned). On the far right, there is a vertical menu with three options: 'Queue Dashboard' (highlighted in blue), 'Queue Settings' (highlighted in green), and 'Remove' (highlighted in red).

START A WEB CHAT

1. To start a chat with the queue, navigate to the Queue Dashboard.
2. Click on the "Test Web Client" button.
3. Fill out the pre-chat form and enter a question. Click Start Chat.
4. You should receive a notification message that the queue will locate someone to help you.

The screenshot shows the CHIME web chat pre-chat form. At the top left is the CHIME logo, and at the top right is a speaker icon. Below the logo is a 'Form' tab. The main heading reads 'In order to better serve you, please provide the following information'. The form contains four input fields: 'First Name' (with the value 'Patrick'), 'Last Name' (with the value 'Madden'), 'Email' (with the value 'pmadden@email.com'), and 'What can we help you with?' (with the value 'I am having trouble with my computer'). At the bottom right of the form is a 'Start Chat' button.

5. As an agent, you should receive a notification from Skype for Business for a conversation with the dispatcher in the bottom right hand corner of your screen.
6. If you have the auto-accept feature turned on it will pop up on your screen, otherwise, you will have to click the notification to open the conversation.
7. Follow the dispatcher's prompt and type the "y" key (then press enter) to accept the chat
8. A new notification will appear that connects you to the Guest. Open the message and you will be able to see the guest's question as well as their information in the CWE.
9. To end the Chat session, either the Guest or the Agent can close the chat window.

