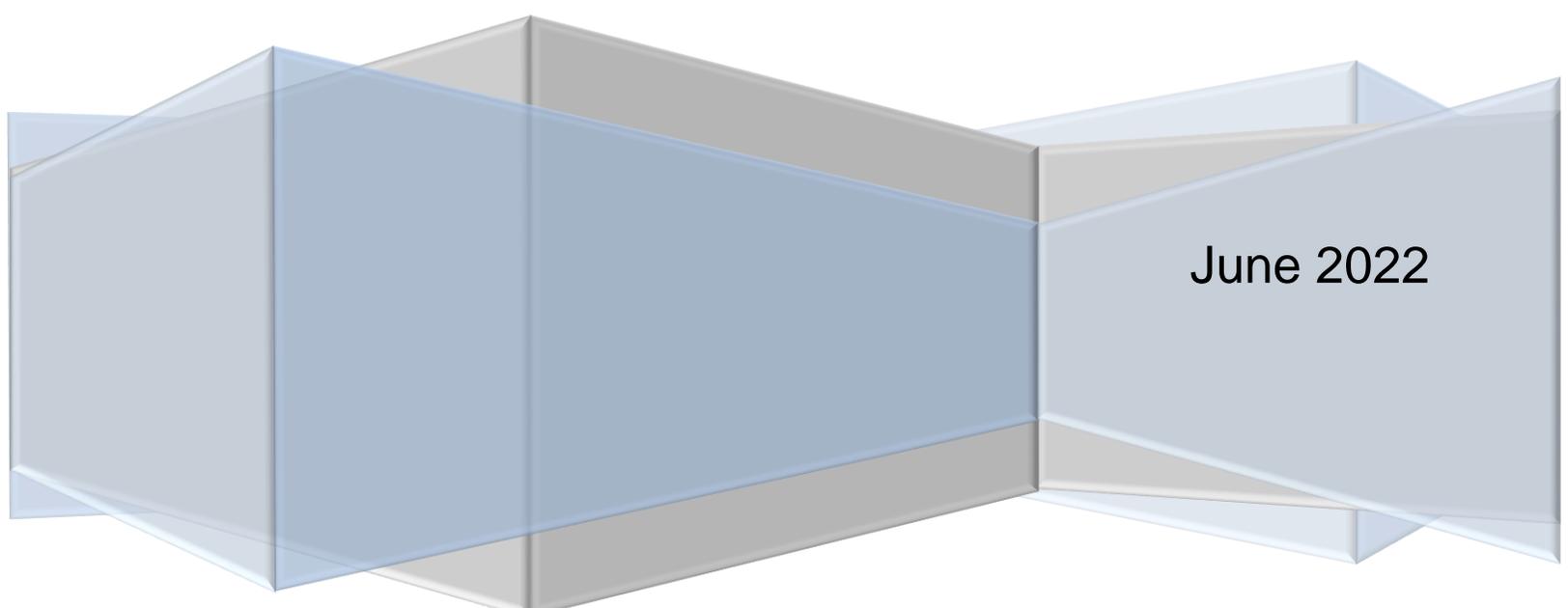




# CHIME FOR TEAMS

APPLICATION SETUP GUIDE

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

June 2022

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## 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](mailto: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
- Creating a Dispatcher
- 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

## CHIME FOR TEAMS

**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.

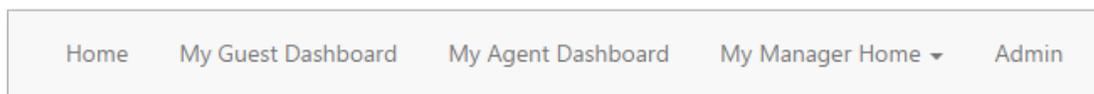
## ACCESSING THE APPLICATION

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

## LAYOUT OF CHIME FOR TEAMS

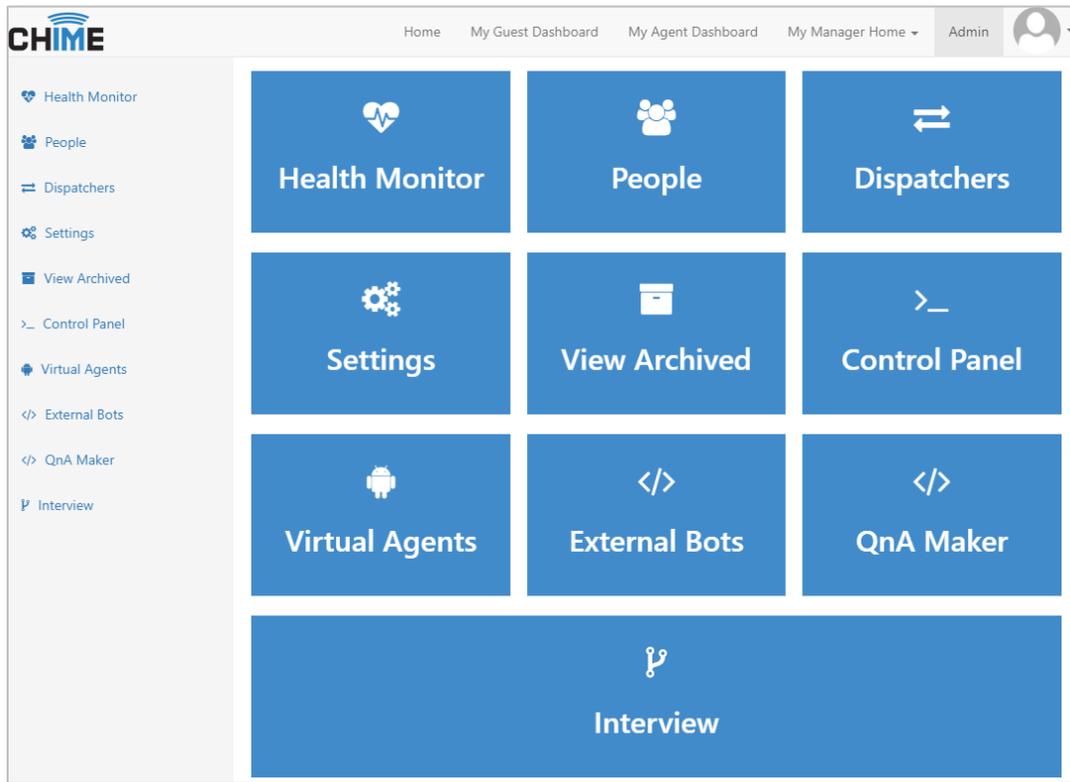
When you first log onto Chime, you will be brought to the Home page. For the purposes of this guide, you will not need to use this page. In the top-right of the page you will see that there is a navigation bar that allows you to navigate the Chime App. The options there are labeled: Home, My Guest Dashboard,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



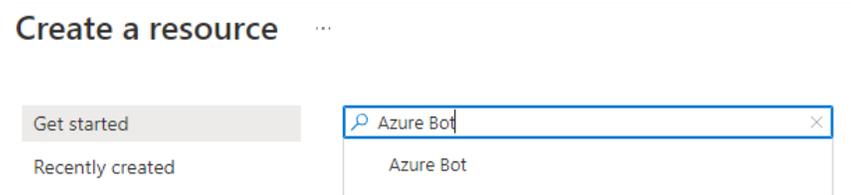
## ADDING A DISPATCHER

In order to create queues, route chats to agents, and send out alerts; Chime needs Azure Bot Resource created in Microsoft Azure that will be able to broker chats to agents and guests. Each queue you create needs a dispatcher and the Azure Bot will act as the dispatcher.

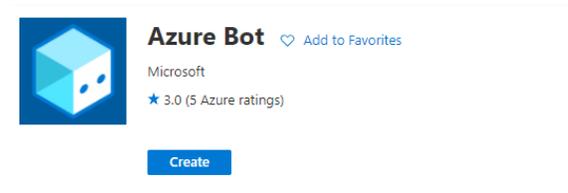
### CREATING A DISPATCHER RESOURCE

To create a Dispatcher for Chime you will need permissions to create resources in your organization's Microsoft Azure Subscription.

1. Navigate to the Azure Portal, at <https://portal.azure.com>



2. Click the "Create Resource" button in the side bar. Enter "Azure Bot" in the search bar and select the matching option from the list.
3. Click **Create** to start creating the resource.



4. You should see a configuration page to create the Bot Channel Registration. Fill out the following fields:

**Create an Azure Bot** ...

Basics Tags Review + create

**Project details**

Select the subscription to manage deployed resources and costs. Use resource groups like folders to organize and manage all your resources.

Bot handle \*  ✓

Subscription \*  ▼

Resource group \*  ▼  
[Create new](#)

New resource group location  ▼

**Pricing**

Select a pricing tier for your Azure Bot resource. You can change your selection later in the Azure portal's resource management. Learn more about available options, or request a pricing quote, by visiting the [Azure Bot Services pricing](#)

Pricing tier \* **Free**  
[Change plan](#)

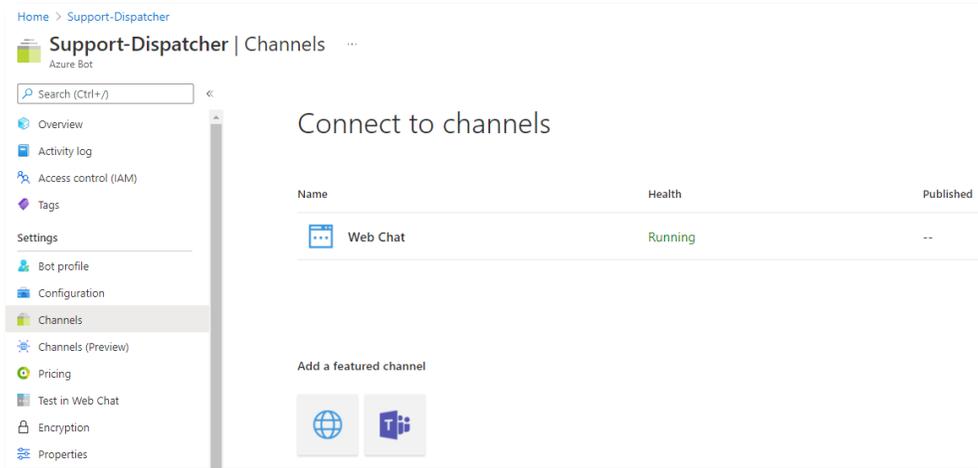
**Microsoft App ID**

A Microsoft AppID is required to create an Azure Bot resource. An App ID can be automatically created below, or you can manually create your own, then return here to input your new App ID and password.  
[Manually create App ID](#)

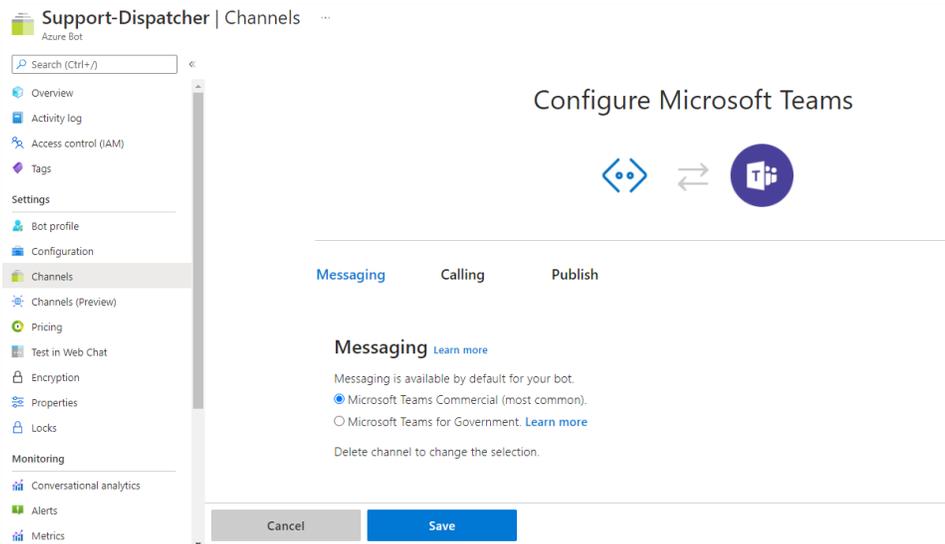
**i** The app secret will be stored in Azure Key Vault in the same resource group as your Azure bot. [Learn more](#)

Microsoft App ID  Create new Microsoft App ID  
 Use existing app registration

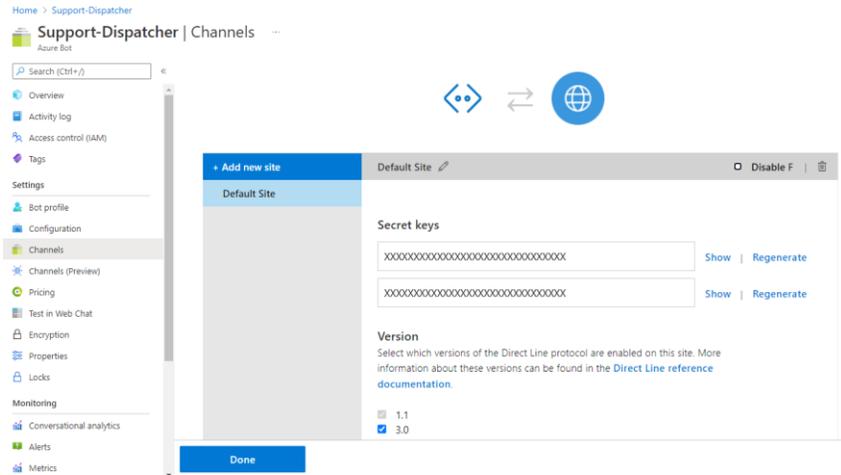
- a. **Bot handle:** Select an appropriate name for the bot – we would suggest matching the name of the queue in Chime that this bot will be used with.
- b. **Subscription:** Select an Azure subscription to tie this bot registration to.
- c. **Resource Group:** Select an existing Azure Resource Group to contain this registration, or create a new resource group. We would suggest creating a group and using it for all Chime bot registrations.
- d. **Location:** Select the most appropriate Azure datacenter location for your users.
- Pricing Tier:**
- If users will be primarily contacting Chime through the Teams client, then the F0 tier may be the most cost-effective and appropriate level
  - If users will be primarily using the web client to contact Chime, then select the S1 tier.
- e. **Microsoft App ID:** “Create new Microsoft App ID”
5. When this is completed, click “Review + create” then click “Create” and the bot registration will be created. After some time, this provisioning will complete, and you can navigate to the settings for the bot registration.
6. Next, navigate to the Channels tab for the bot registration. Click the Teams icon to enable the bot for Microsoft Teams



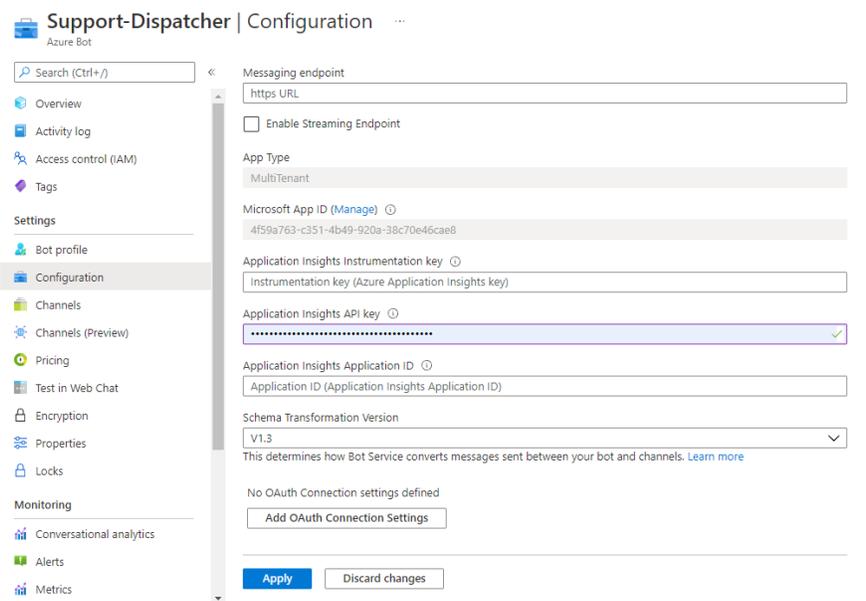
- No additional configuration is needed for Chime functionality, so just click “Save” to enable the Teams channel



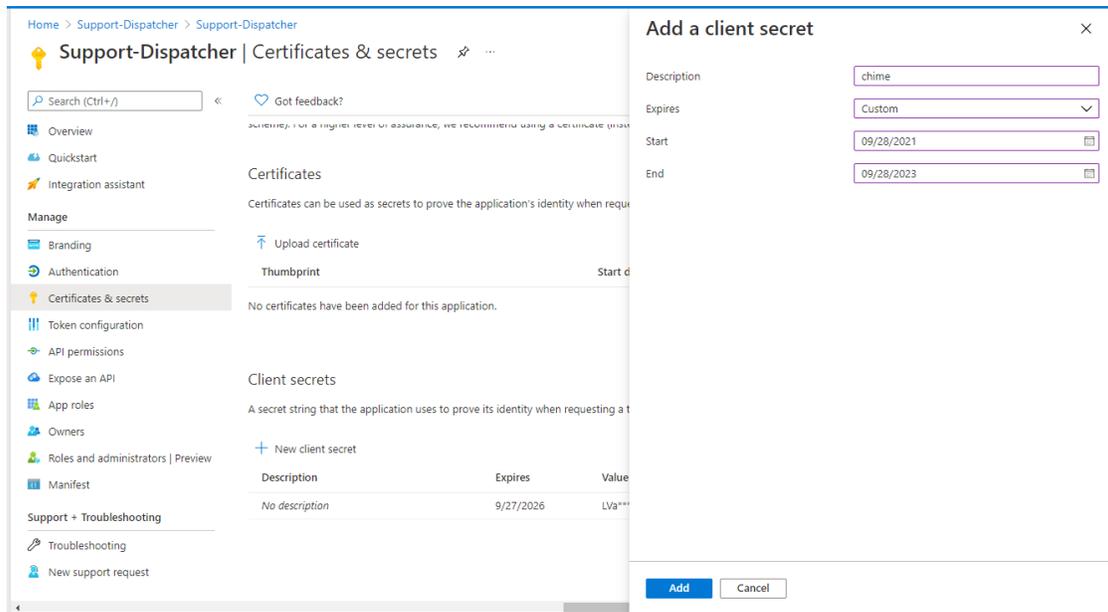
- If the Chime web client is going to be used to contact the queue, it is also necessary to configure the Direct Line channel



9. Click on the Show button to reveal the Direct Line secret key. Save this value, as it will be required later to configure the bot in Chime.
10. Next navigate to the Configuration tab on the bot registration. Record the **Microsoft App ID** fields here, as they will be needed to configure the bot in Chime.



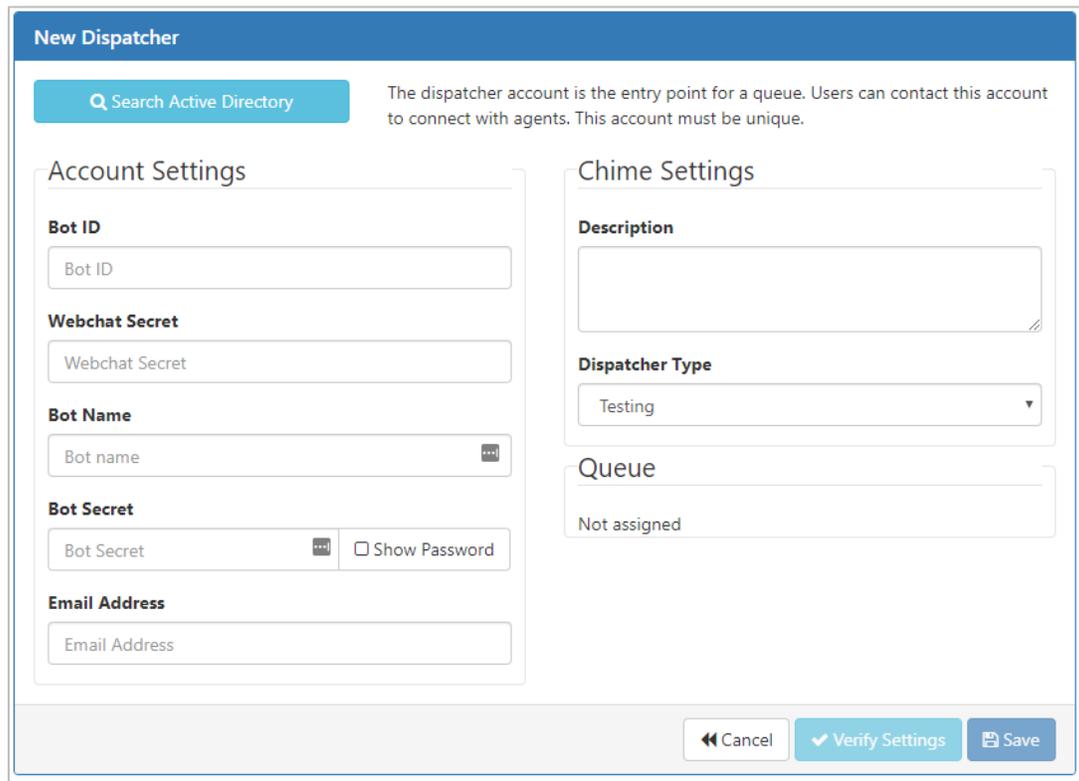
11. At the present time, there is no way to determine the password that is associated with the automatically created App ID for the bot registration, so it is necessary to create a new password.
12. Click the Manage link next to the Microsoft App ID field. This should bring you to a new page where it is possible to create a new password.



13. Click the “New client secret” button.
14. Add a description (*example*: “chime”) and set 2 years expiration date (max). **Note**: make sure this secret key is updated before it expires. If this expires, none of your users will be able to log into Chime. When updating this every 2 years you will need to also add the new value into the install wizard.
15. Record the Client Secret value that is generated – it will be necessary to configure the bot in Chime.
16. With the **Bot Handle**, **Microsoft App ID**, **Client Secret**, and **Direct Line secret**, it is possible to setup the bot as a dispatcher in Chime.

## ADDING A DISPATCHER IN CHIME

1. Click on the 'Dispatchers' panel. This will route you to the Dispatchers page where you will be able to add in new dispatchers.
2. On the Dispatchers page, click on the  button in the upper right corner.
3. This will open the New Dispatcher window.



**New Dispatcher**

Search Active Directory

The dispatcher account is the entry point for a queue. Users can contact this account to connect with agents. This account must be unique.

**Account Settings**

**Bot ID**

Bot ID

**Webchat Secret**

Webchat Secret

**Bot Name**

Bot name

**Bot Secret**

Bot Secret  Show Password

**Email Address**

Email Address

**Chime Settings**

**Description**

**Dispatcher Type**

Testing

**Queue**

Not assigned

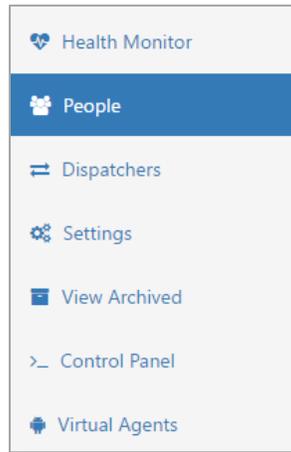
Cancel Verify Settings Save

4. At this point you can enter the information for the new dispatcher that you collected earlier.
5. Enter in the value you recorded from the Microsoft App ID into the Bot ID field of the form.
6. If you want to set up the web client, enter in the value from the Direct Line secret into the Webchat Secret field.
7. Enter the Bot Handle value into the field labeled Bot Name.
8. Next, enter in the Client Secret into the Bot Secret field.
9. Email Address is an optional setting that you can add to the dispatcher. This field is for adding a SMTP enabled email address that can be used to send out email alerts on behalf of the queue.
10. The Description field can be used to describe the purpose of the dispatcher and other information about it.
11. Dispatcher Type can be set to label what the dispatcher will be used for. This does not impact the use type of the dispatcher.
12. Click on 'Test connection' to verify the account settings.
13. Once a notification appears that shows the connection was successful, click on 'Save'

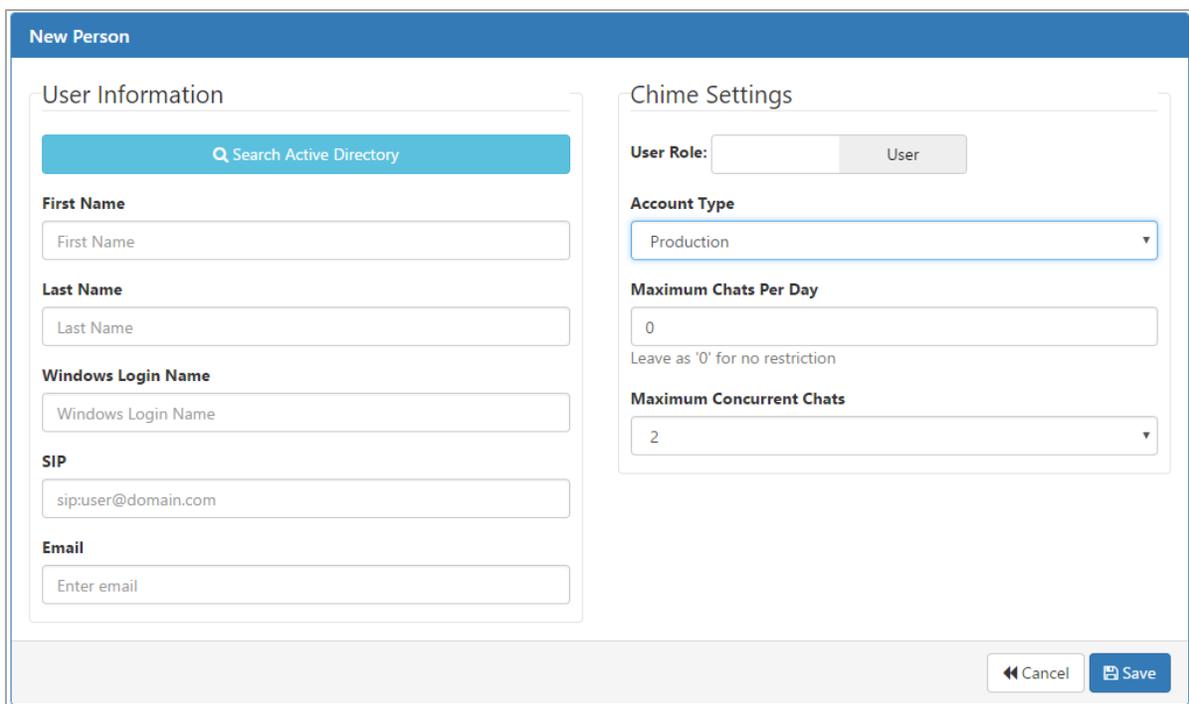
## ADDING PEOPLE

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.

The 'New Person' form is divided into two main sections: 'User Information' and 'Chime Settings'.  
**User Information:**

- A search bar with a magnifying glass icon and the text 'Search Active Directory'.
- First Name:** Text input field with placeholder 'First Name'.
- Last Name:** Text input field with placeholder 'Last Name'.
- Windows Login Name:** Text input field with placeholder 'Windows Login Name'.
- SIP:** Text input field with placeholder 'sip:user@domain.com'.
- Email:** Text input field with placeholder 'Enter email'.

**Chime Settings:**

- User Role:** A dropdown menu currently showing 'User'.
- Account Type:** A dropdown menu currently showing 'Production'.
- Maximum Chats Per Day:** A text input field with '0' and a note below it: 'Leave as '0' for no restriction'.
- Maximum Concurrent Chats:** A dropdown menu currently showing '2'.

At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

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.



Common Name	Display Name	SIPURI

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. Max/Day
  - b. Max concurrent

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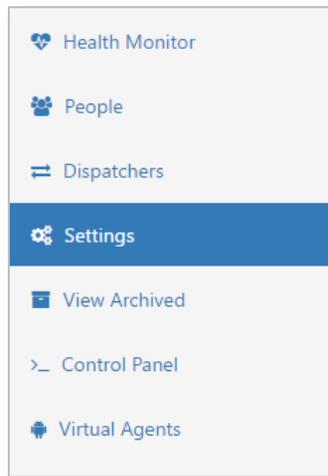
## ENTER PERSON MANUALLY

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. Maximum chats per day
  - b. Maximum concurrent chats

## 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:

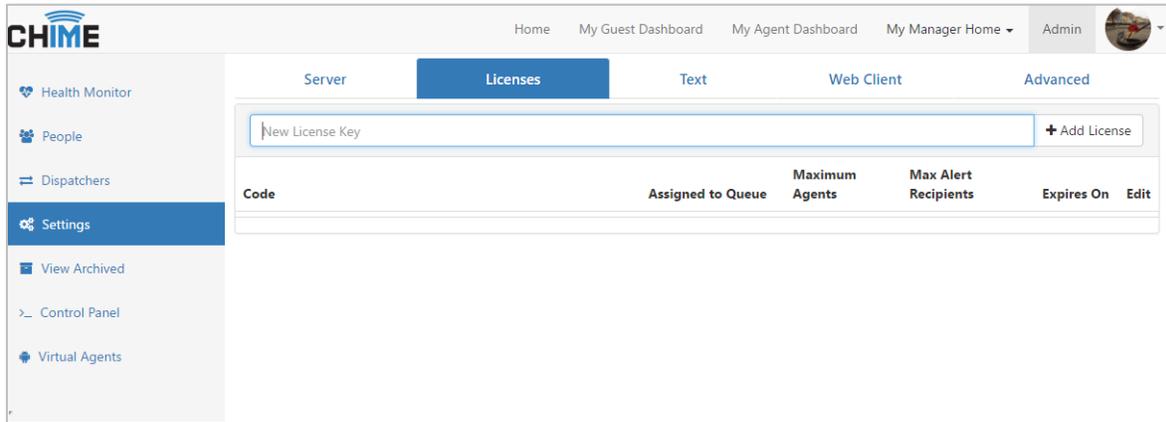
- e. Click the checkbox for 'Send Email Alerts On Critical Failures' to enable this setting
- f. Select the checkbox next to 'Include support@instant-tech.com' to enable this setting
- g. Click the checkbox next to the 'Use SSL' label to enable SSL on all emails sent

## 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 acquired a license key for Chime



3. Enter the license key into the field labeled 'New License Key'
4. Click the Add License 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.

The screenshot shows the CHIME Settings interface. The 'Text' tab is selected, displaying two sections: 'Agent Tags' and 'Text Resources'.

**Agent Tags (7)**

▲Name	Icon	Delete
Hardware		
Microsoft Office		
Mobility		
Operating System		
Outlook/Exchange		

**Text Resources (1)**

▲Name	Description	Language	Edit	Delete
DefResource	Default Text Resource	English		

**Create New Tag**

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.

The screenshot shows the CHIME administration interface. The top navigation bar includes 'Home', 'My Guest Dashboard', 'My Agent Dashboard', 'My Manager Home', and 'Admin'. The left sidebar contains 'Health Monitor', 'People', 'Dispatchers', 'Settings', 'View Archived', 'Control Panel', and 'Virtual Agents'. The 'Settings' section is expanded to show 'Web Client' settings. A table lists Web Clients with columns for ID, Name, Queues Using Client, Edit Client, Preview, and Delete. A 'Web Client Dispatcher' section shows the 'On Premise Web Client Dispatcher' account and a 'Restart Web Client' button. Below this is the 'Edit Web Client Settings' modal, which has three tabs: 'Details', 'Custom CSS', and 'Form Options'. The 'Details' tab is active, showing input fields for 'Web Client Name' and 'Webclient Window Page Title', and a list of 'Web Client Options' with checkboxes.

ID	Name	Queues Using Client	Edit Client	Preview	Delete
1	Default Web Client	Sales Queue Help Desk Queue	[Edit]	[Preview]	[Delete]

[Learn how to deploy a web client](#) [+ New Web Client](#)

**Edit Web Client Settings** [Cancel]

Details Custom CSS Form Options [Learn about Web Client customization](#)

**Web Client Name:** [Name] **Webclient Window Page Title:** [Window page title]

**Web Client Options**

- Authenticate Web Guest Using Integrated Windows Domain Authentication
- Enable Guest Rating
- Enable File Upload
- Enable Outage Support
- Show Queue Image
- Show Agent Image
- Enable Notification Sound By Default

Default image can be changed after new web client is saved

[Cancel] [Save]

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  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