instant

CHIME

CHIME FOR TEAMS

QUICK GUIDE TO SETUP A HELPDESK QUEUE

July 2023

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INTRODUCTION

This guide is designed to show new users of Chime for Teams how to set up their first help desk Queue. This guide covers how to set up the first Queue, adding a dispatcher 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
- Setting up a Teams Channel
- Starting a chat with the Queue

CHIME FOR TEAMS ON OFFICE 365

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

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.
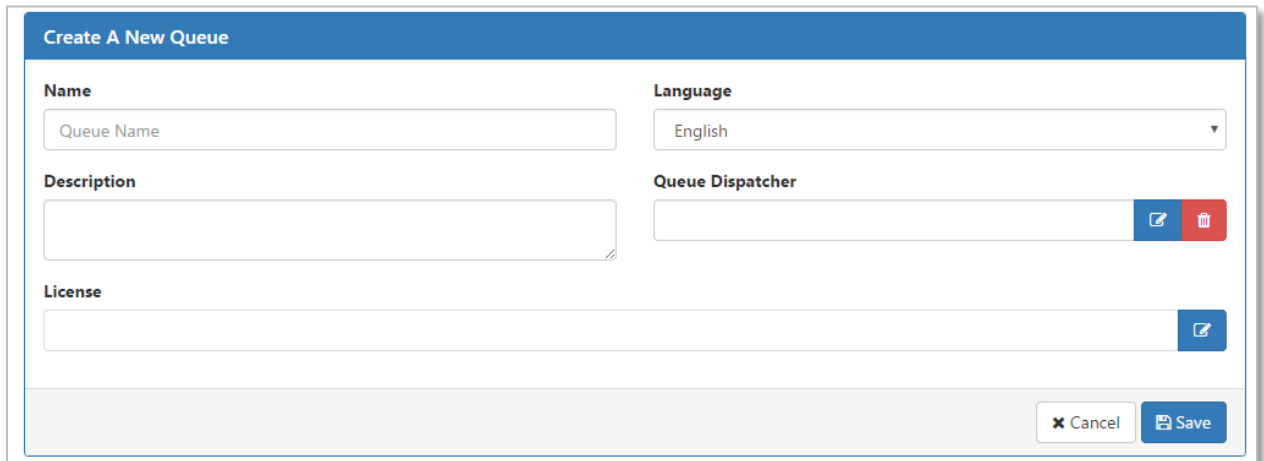
| Home | My Guest Dashboard | My Agent Dashboard | My Manager Home ▾ | Admin |
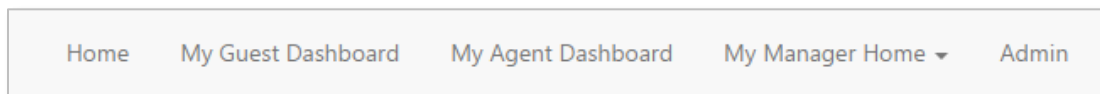
CREATE A NEW QUEUE

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.
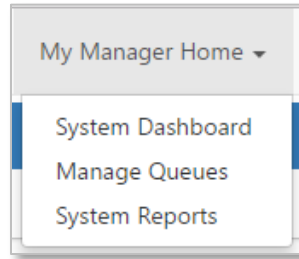

This will route you to the Manage Queues page which allows you to add new Queues and manage Queues that have already been created. The Queue that you will create here will be the central part of the helpdesk. You will connect the Queue with the dispatcher you created in Admin and add some people who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

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

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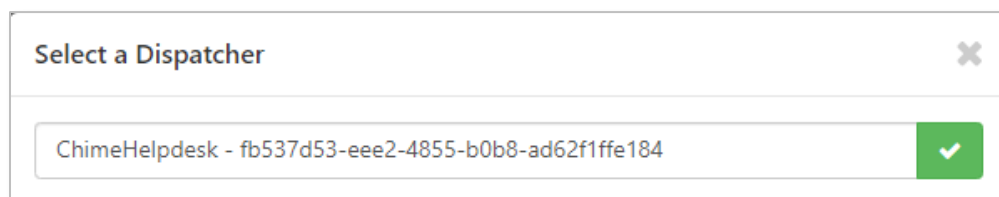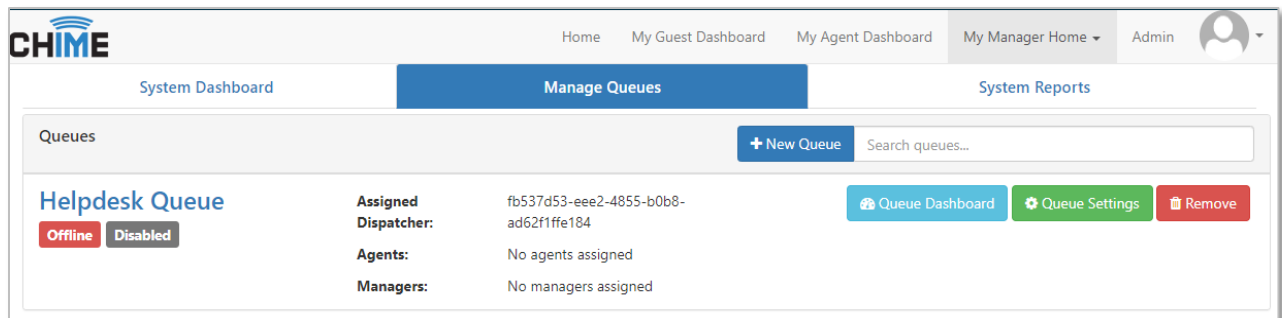
6. Click on the check mark button to associate this dispatcher with the new Queue.
7. License: Click on the Assign a License button and a window will open with a list of the licenses that are available.

Select a License   ✕

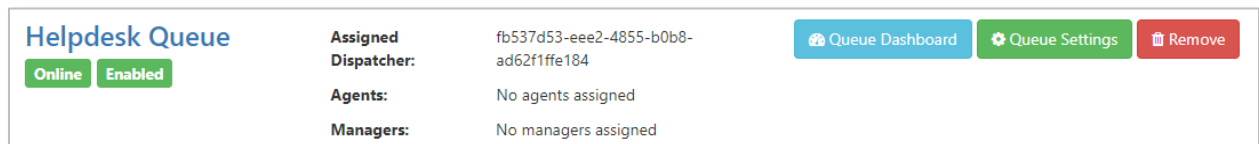🔍 Licensed for ③ users until 12/31/2020 | 📢 Alerting enabled for ㉕ recipients   ✔
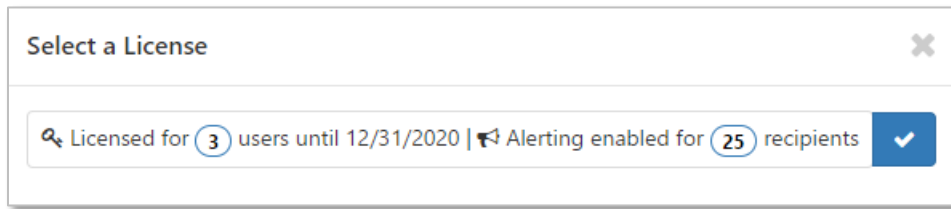
8. Select a license from the list that pops up on the screen. If you are using a trial version, you will have one license available to you.
9. Click Save, and the window will close.
10. You are finished creating a new Queue. Now, the Queue needs to be enabled so that people can be added into it.

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'.

| CHIME | Home | My Guest Dashboard | My Agent Dashboard | My Manager Home ▾ | Admin |

| System Dashboard | Manage Queues | System Reports |

Queues   **+ New Queue**   Search queues...

Helpdesk Queue
Offline Disabled
Assigned Dispatcher:	fb537d53-eee2-4855-b0b8-ad62f1ffe184	🖥 Queue Dashboard ⚙ Queue Settings 🗑 Remove
Agents:	No agents assigned
Managers:	No managers assigned

1. To enable the Queue, click the 'Queue Settings' button on the right side of the grid.
2. Click the green Start button in the lower right side of the page. Select OK when the page prompts you to start the Queue.
3. The Queue will start up and notify you when the Queue has started.
4. To check the Queue is started, you can navigate back to Manage Queues, and see that the Queue is Online and Enabled.

Helpdesk Queue
Online Enabled
Assigned Dispatcher:	fb537d53-eee2-4855-b0b8-ad62f1ffe184	🖥 Queue Dashboard ⚙ Queue Settings 🗑 Remove
Agents:	No agents assigned
Managers:	No managers assigned

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.

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.

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

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After creating the Queue in Chime, you will need to create a corresponding channel in Microsoft Teams where chats will route to and agents will be able to accept new chat sessions from.

1. The first thing you will need to do is download the Teams App Package. This can be found in Queue Settings → Publish in the left side of the page.
2. Please click the Increment Version button and then save the settings.
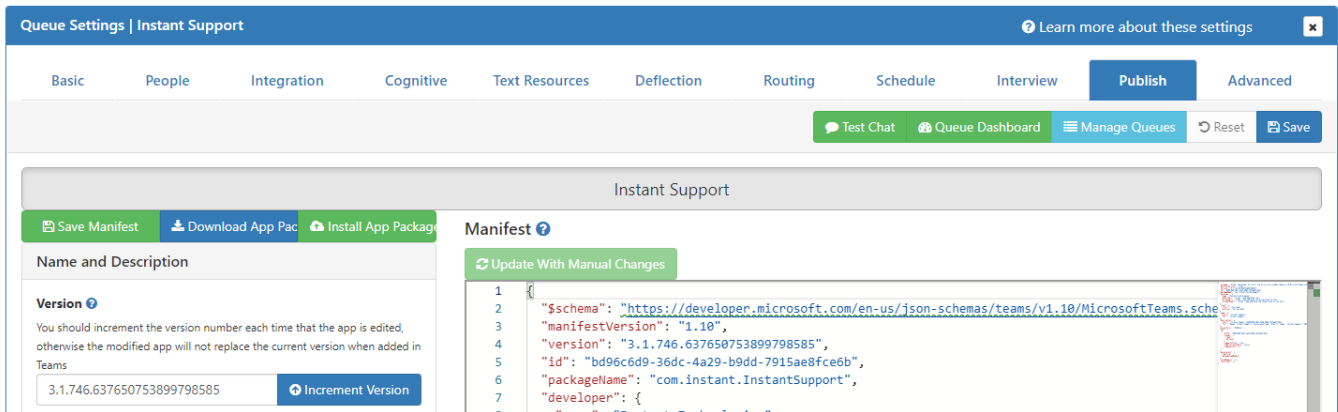
3. Click the "Download App Package" button. This will download a zipped/compressed folder that is named after the Queue you are in.
   Example: HelpdeskQueue-bots.zip
4. Navigate to where the Teams App Package zip file has been downloaded. Right-click on the file and then click the Extract All… option.
5. Click the Browse button and choose where you want the folder extracted to. This should be a place you can remember and come back to easily because you will need this later.

CREATE A TEAM AND ROUTING CHANNEL

1. Next, navigate into your Microsoft Teams application. On the leftmost sidebar, click the icon for 'Teams'. This will bring up all teams that you are part of.
2. Click the 'Join or create a team' button in the bottom left of the application. This will open a page allowing you to create a team.
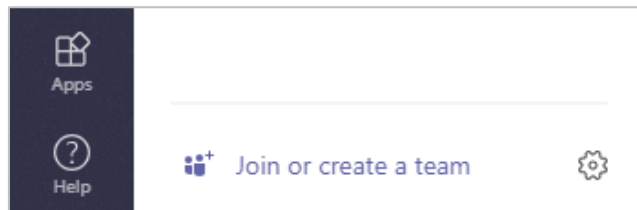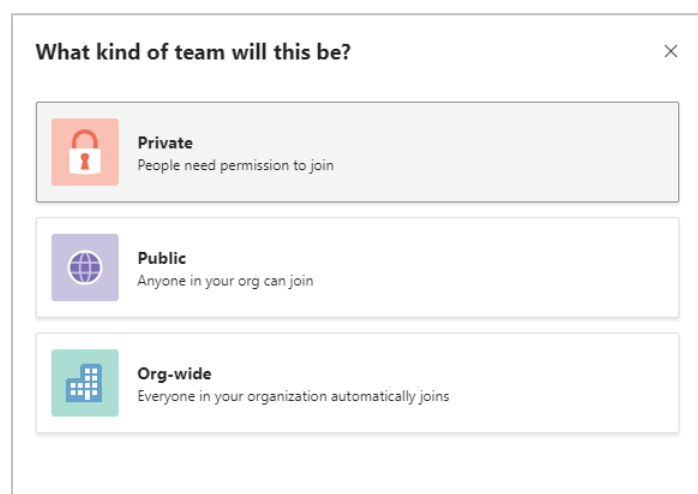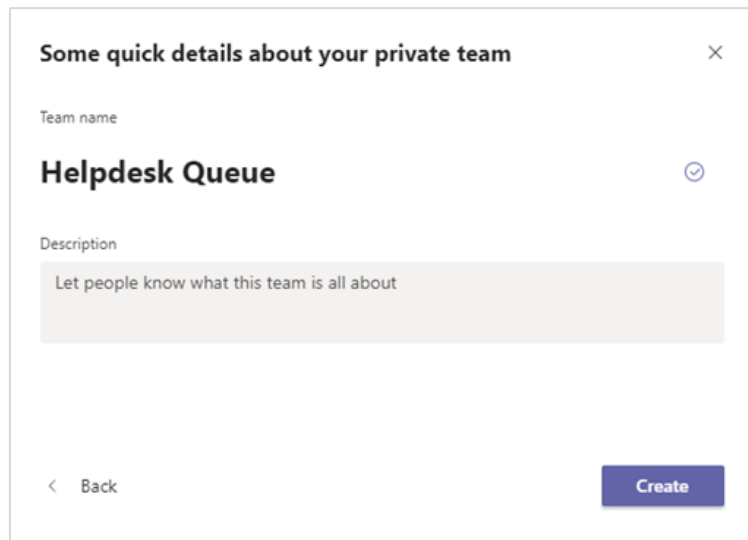
3. Next, Click the 'Create team' button.
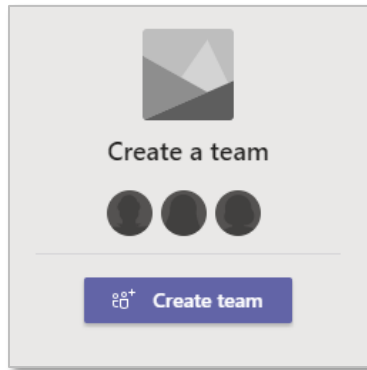
4. Select the 'Build a team from scratch' option.
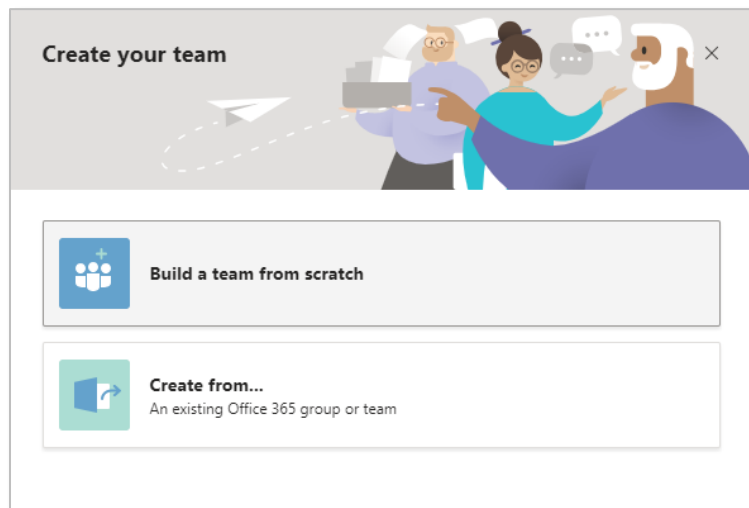
5. Select Private when asked what type of Team this will be.

6. Name the team and add a description. It is recommended to name the Team after the Queue that you are connecting it to.
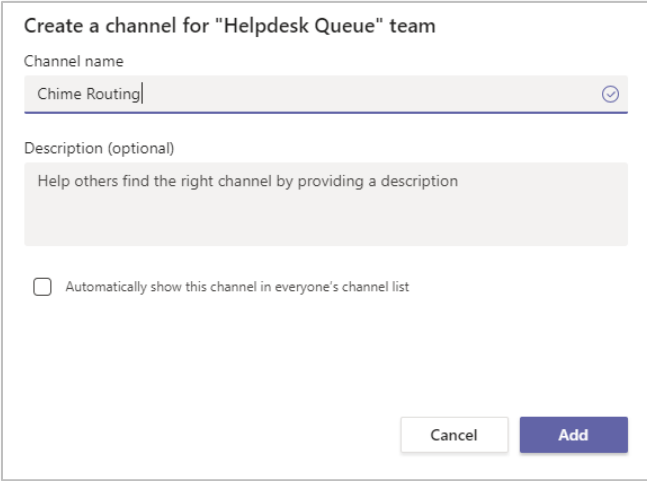
7. Click the Create button.
8. Next, once the Team has been created, it will show up in the list of available teams on the left. Right-click on the team and select the 'Add channel' option.
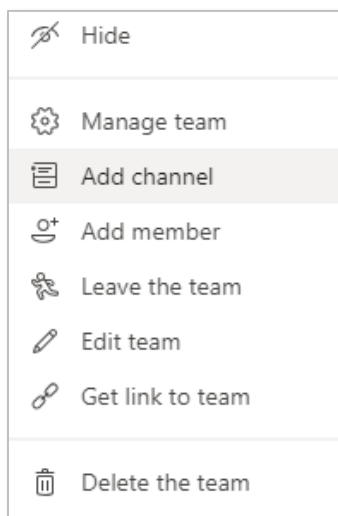
9. Give the Channel a name, for example "Chime Routing" or "Chime Notifications".


10. Click the Add button to create the Channel in the Team.

ADDING THE TEAMS APP PACKAGE

11. Next, you will need to add the Teams App Package to the Team and Channel.
12. Click the Apps button on the bottom left side of the application. This will bring up a page letting you add apps to your Teams.
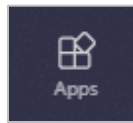

13. Click the 'Upload a custom app' link at the bottom of the list.
14. Select the 'Upload for me or my teams' option. This will open up a file explorer that will let you select the app you want to add.
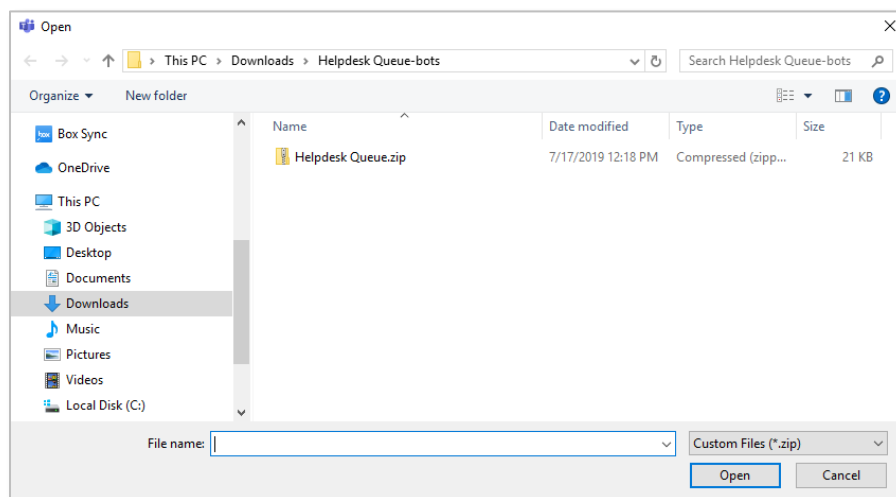
15. Navigate to the Teams App Package folder that you extracted earlier. Inside this folder is another zip file.
16. Select this file. It contains the code and assets to create the custom app to enable the connection between Chime and Teams.
17. Click Open.
18. When the modal opens make sure:
    a. Add for you is set to Yes
    b. Add to a team is set to Yes
    c. Search for the Team you created and set that as the team the app will be installed to.
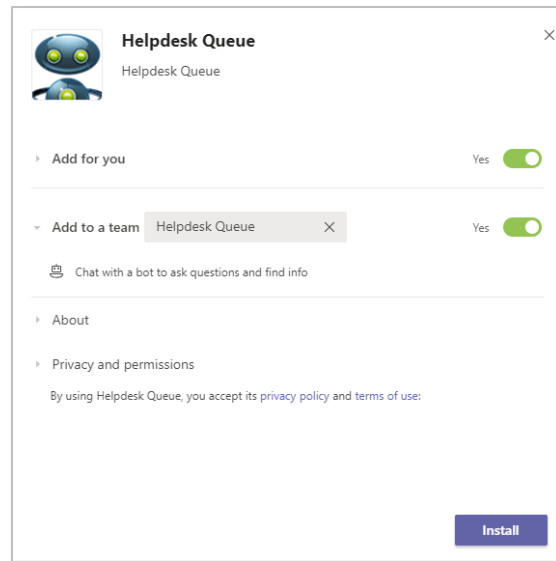
19. Click the Install button.
20. On the next page that opens, click the dropdown and select the routing/notifications channel that you created in the previous section.
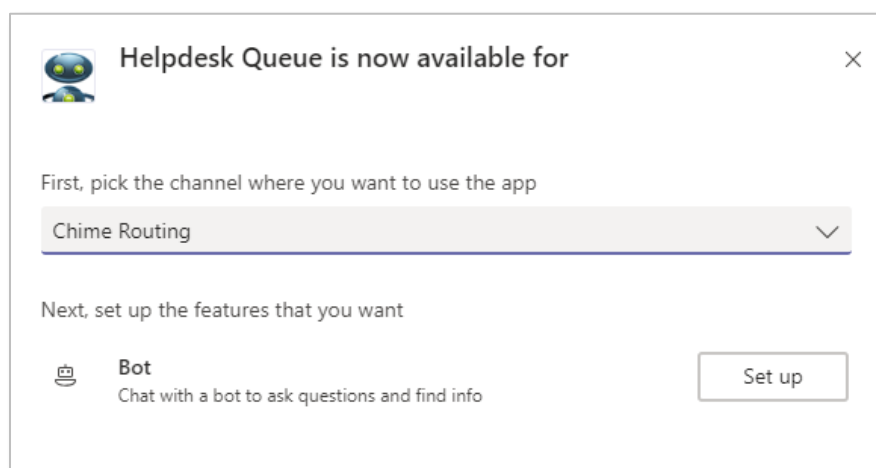

21. Next, click the 'Set up' button. This will add the app to that Channel and designate it as the channel where chat notifications will be surfaced.

ADDING PEOPLE TO THE TEAM

Once the notification Channel has been created and set up you are able to add people to the Team who are assigned to the Queue in Chime. **Note**: In Microsoft Teams you are able to add as many users as you want to the Team, but only users that are added in Chime will be allowed to accept chat conversations.
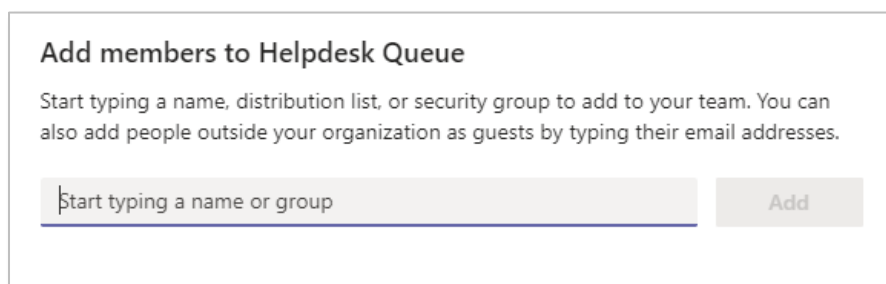
1. Right click the HelpDesk Team and then select 'Manage team'.
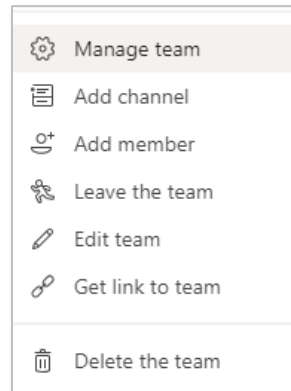
2. Select the 'Add member' button on the right side of the page.
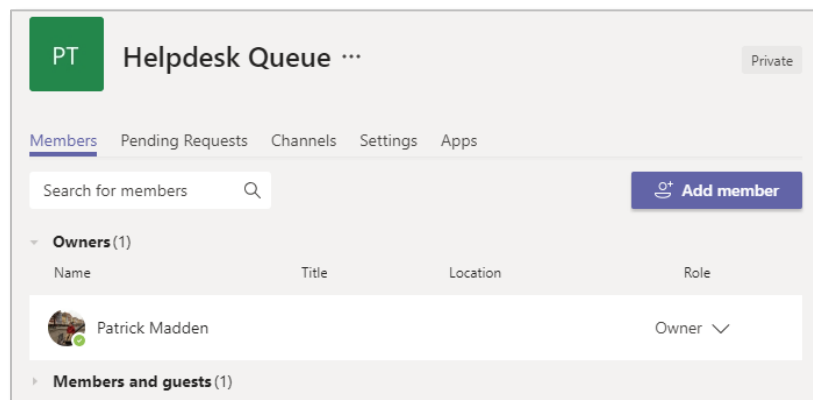
3. Enter the name(s) of the user(s) that you wish to add to the team.

4. Once all of the members have been selected, click the 'Add' button.

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 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 available to accept the chat in Teams.

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.

Helpdesk Queue
Online Enabled

Assigned Dispatcher:	fb537d53-eee2-4855-b0b8-ad62f1ffe184
Agents:	No agents assigned
Managers:	No managers assigned

[Queue Dashboard] [Queue Settings] [Remove]

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. If there is a prechat form, fill it out and submit.

CHIME   [💬] [★] [🔔] [End Chat] [P.]

Chime Support Desk

Hello Patrick, welcome to the Chime helpdesk!

Please choose one of the below options based on the enquiry you are coming in with:

| General | Chat With Agent | Self Service |

A minute ago

📎 Type your message   ➢

4. You should receive a notification message that the Queue will locate someone to help you.

5. As an agent, you should receive a notification from Teams in the Channel that was set up earlier.
6. To accept the chat session, click the card displaying the chat session.
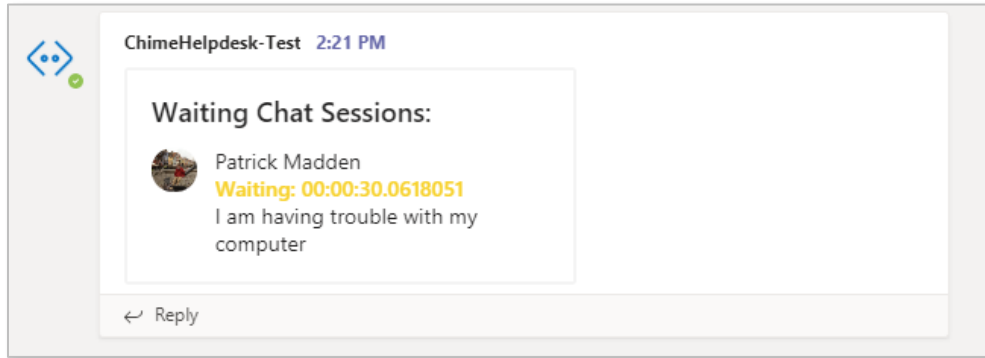
7. This will connect you and the guest in a chat conversation and should notify you that a chat session has started in your Microsoft Teams client.
8. Navigate to the Chat session.
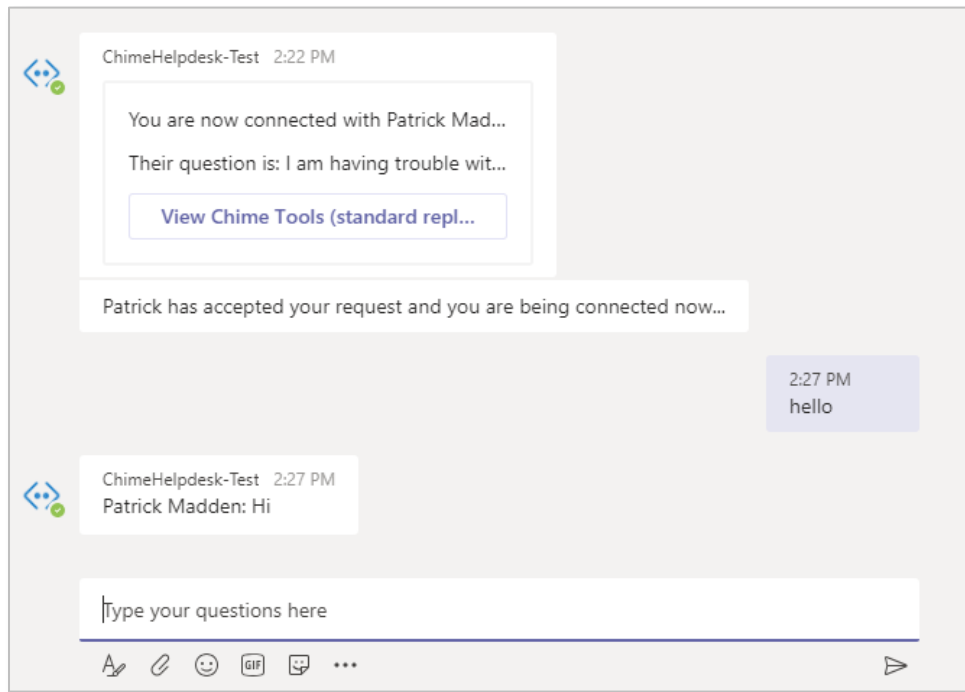
9. When the chat session is started, you will be able to talk back and forth with the Guest.
10. When you want to end the chat session, either the Guest can close their web client, or the Agent can type in the command "/end".