



CHIME 2.0

QUICK GUIDE TO GETTING STARTED

A large, 3D geometric graphic at the bottom of the page, composed of several overlapping, translucent blue and grey rectangular blocks arranged in a complex, angular shape.

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CONTENTS

Introduction	3
Overview of What's Covered	3
Chime 2.0 Against Lync Online.....	3
Accessing the Application.....	3

INTRODUCTION

This guide is designed to show new users of Chime how to start using the application, including setting up the first queue, adding a dispatcher account, and adding agents into the queue.

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:

- Accessing the Chime application URL
- Adding a new dispatcher account
- Adding a new person
- Setting up a queue
- Adding people into the queue
- Starting a chat with the queue

CHIME 2.0 AGAINST LYNC ONLINE

If Chime has been installed and the web client was set up using a Lync Online account, then follow these instructions for getting started with Chime 2.0.

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. It will look something like this:

<http://192.168.1.82/chime>

ADDING A DISPATCHER

In order to route chats with Chime, we need a Lync-enabled account that will broker chats to agents.

1. Go to the Admin Page
2. On the left-hand side menu, navigate to the Dispatchers section
3. On the Dispatchers page, click on the New Dispatcher button.
4. This will open the New Dispatcher Modal.

New Dispatcher

ID

Dispatcher ID

Dir...

Description

Dispatcher Type

Testing

Platform Type

Lync

Domain

Domain

Server

Server

User

User

Password

Password

Connection Not Verified

Please test the connection.

Test Connection

Close

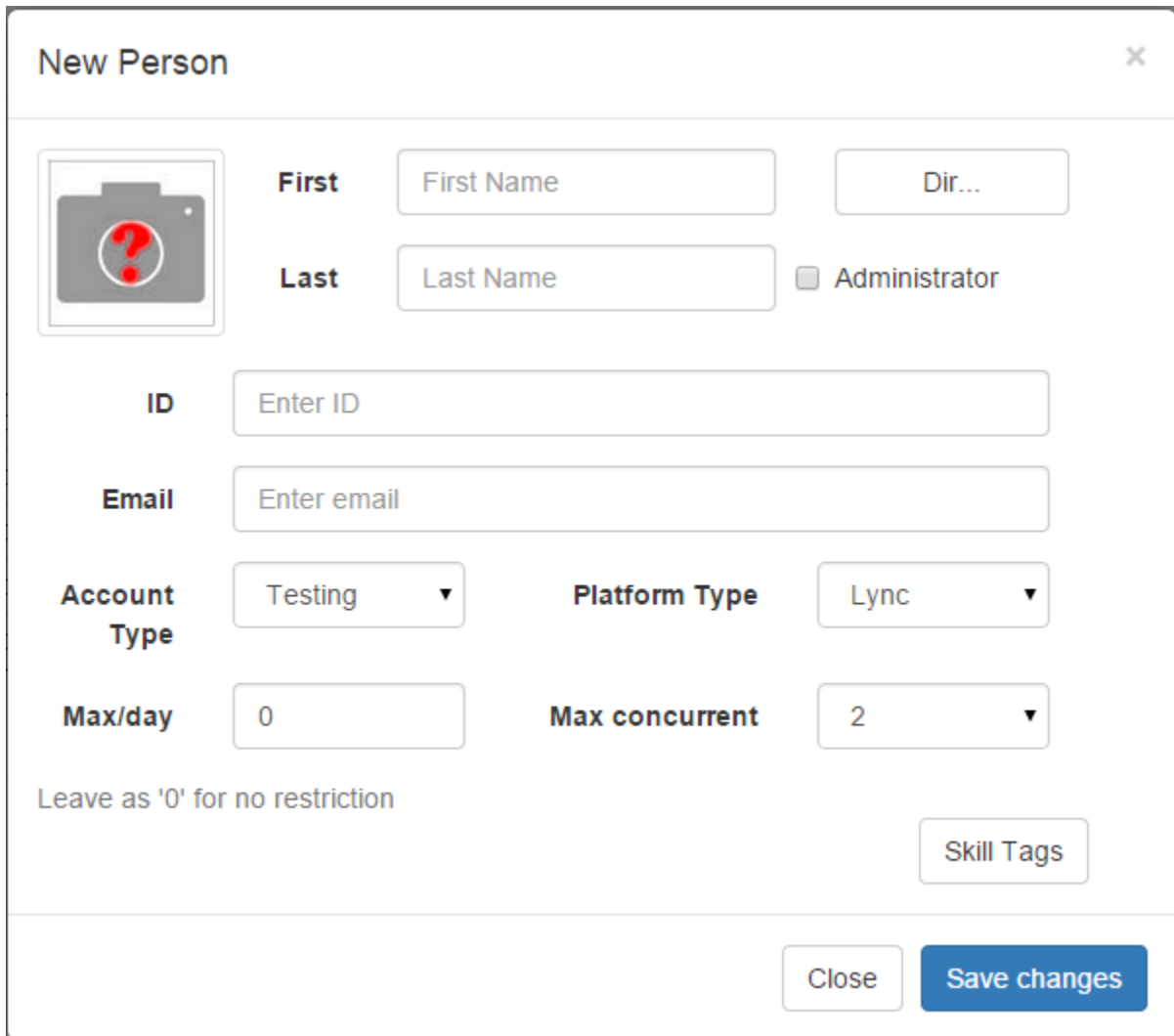
Save changes

5. Enter the SIP ID of the Lync-enabled account that will act as the dispatcher.
6. Enter a description for the new Dispatcher (optional).
7. Pick a Dispatcher Type (Development, Testing, or Production). Note: this is just for labeling purposes.
8. Pick the platform type for this Dispatcher account. If you've installed against Lync Online, choose 'Office 365 Lync'.
9. Enter the name of the domain that the dispatcher account belongs to.
10. If using Lync Online, the server field should already be filled out. If it's not already filled out, it should be: **sipdir.online.lync.com:443**
11. Enter the username and password of the dispatcher account.
12. Click on 'Test connection' to verify the settings.
13. Once the modal shows a notification that the connection was successful, click on Save changes and Close.

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 New Person button. This will bring up a modal.



The 'New Person' modal is a light gray box with a close button (X) in the top right corner. It contains the following fields and controls:

- Profile Picture:** A placeholder image of a camera with a red question mark.
- First Name:** A text input field labeled 'First'.
- Last Name:** A text input field labeled 'Last'.
- Directory:** A button labeled 'Dir...' next to the First Name field.
- Administrator:** A checkbox labeled 'Administrator' next to the Last Name field.
- ID:** A text input field labeled 'ID' with placeholder text 'Enter ID'.
- Email:** A text input field labeled 'Email' with placeholder text 'Enter email'.
- Account Type:** A dropdown menu currently showing 'Testing'.
- Platform Type:** A dropdown menu currently showing 'Lync'.
- Max/day:** A text input field showing '0'.
- Max concurrent:** A dropdown menu showing '2'.
- Instructions:** Text below the Max/day field: 'Leave as '0' for no restriction'.
- Skill Tags:** A button located at the bottom right of the form area.
- Buttons:** At the bottom right, there are two buttons: 'Close' and 'Save changes'.

3. To search for someone to add, click on the Dir button. This will bring up a directory search.
4. Type in the partial or full name of the person you want to add.
5. Click Search.
6. Once you've found the person you want to add, click on the blue plus button on the right side of the grid.
7. Click Close, and the New Person modal will be populated with the person's First and Last name, ID, and Email.
8. If this person will be an administrator, check off the Administrator box.
9. Choose the following options for this person: (optional)
 - a. Account Type

- b. Platform Type
- c. Max/Day
- d. Max concurrent

CREATE A NEW QUEUE

The queue that you will create here will be the central part of the helpdesk. You will connect the dispatcher you created in Admin, and add some people who will act as agents in the queue.