



iceChat
User Manual
Server Version 13.x

Copyright © 2024 Computer Talk Technology, Inc. All rights reserved.

No part of this publication may be reproduced, transmitted, or translated in any form or by any means, electronic, mechanical, manual, optical or otherwise, including photocopying, recording, or any information storage and retrieval system, without the prior permission in writing from Computer Talk Technology, Inc.

ComputerTalk Trademarks

ice, iceAdministrator, iceAlert, iceBar, iceBar for web, iceBar for Teams©, iceCampaign, iceChat, iceJournal, iceManager, iceMobile Connect, iceMonitor, icePay, icePhone, iceReporting, iceSurvey, iceWorkflow Designer are trademarks of ComputerTalk Technology, Inc.

Microsoft, Excel, and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Adobe, Acrobat, and Reader are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

All other company and product names used herein may be the trademarks or registered trademarks of their companies.

Microsoft product screen shot(s) reprinted with permission from Microsoft Corporation.

Part Number: UM_IIWC_12.x_E_20240611

iceChat for ice server 13.x

Table of Contents

| | |
|--|------------|
| TABLE OF CONTENTS | III |
| WELCOME TO ICECHAT | 4 |
| CHAPTER 1: VISITOR INTERFACE | 5 |
| INTEGRATION WITH CURRENT SITE..... | 5 |
| CHAPTER 2: THE CHAT WINDOW | 6 |
| UPLOAD CONTACT ATTACHMENT..... | 7 |
| PRINT | 9 |
| SOUND ON/OFF IN CHAT..... | 12 |
| END CHAT..... | 13 |
| CHAPTER 3: ICEPHONE CHAT CLIENT | 15 |
| UNDERSTANDING THE ICEPHONE CHAT CLIENT | 16 |
| <i>Contact Data</i> | 17 |
| <i>Release</i> | 18 |
| <i>Consult and End Consult</i> | 19 |
| <i>Transfer</i> | 19 |
| <i>Line of Business (LOB)</i> | 20 |
| <i>Canned Responses</i> | 21 |
| <i>Contact Attachments</i> | 22 |
| CHAPTER 4: HANDLING IMS AND WEBCHATS | 26 |
| RECEIVING AN IM FROM QUEUE..... | 27 |
| <i>To handle the IM using Microsoft Teams:</i> | 28 |
| <i>To handle the IM using the icePhone:</i> | 34 |
| <i>Chat Rehydration</i> | 40 |
| ACCESSING STATISTICS..... | 42 |
| INDEX | 43 |



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.

The screenshot shows a web browser window with a dark header containing the 'ice' logo. The main content area is white and features the 'ice' logo, the title 'ComputerTalk iceIM Web', and the subtitle 'iceIM Web de ComputerTalk'. Below this is a paragraph in English: 'Adding ComputerTalk's iceIM Chat to your Microsoft Lync Server empowers your business with new modes of real-time communication that benefit your customers and enterprise.' followed by a French translation: 'L'ajout d'iceIM Chat de ComputerTalk à votre serveur Microsoft Lync permet à votre entreprise d'utiliser de nouveaux modes de communication en temps réel qui bénéficient à vos clients de même qu'à votre entreprise.' Three red buttons with white text and external link icons are stacked vertically: 'Try Demo Now', 'Essayer la démo', and 'Probar demo ahora'. At the bottom, there are logos for 'talk', 'Lync ISV Qualified', and 'Microsoft Partner'. On the right side, a chat window titled 'ComputerTalk iceIM Web' is overlaid. It has a blue header with icons for Print, Email, Call Back, Sound On, and End Chat. The chat history shows: a 'Support Representative' message at 11:33 AM saying 'Welcome to ice!'; another 'Support Representative' message at 11:33 AM asking 'How may we assist you today?'; a 'Web User' message at 11:34 AM asking for help with a contact center solution; a 'Support Representative' message at 11:34 AM replying 'We would be pleased to assist you.'; and a final 'Support Representative' message at 11:35 AM providing information about the contact center. At the bottom of the chat window is a text input field with the placeholder 'Type what you want to say here' and a blue 'SEND' button.

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.

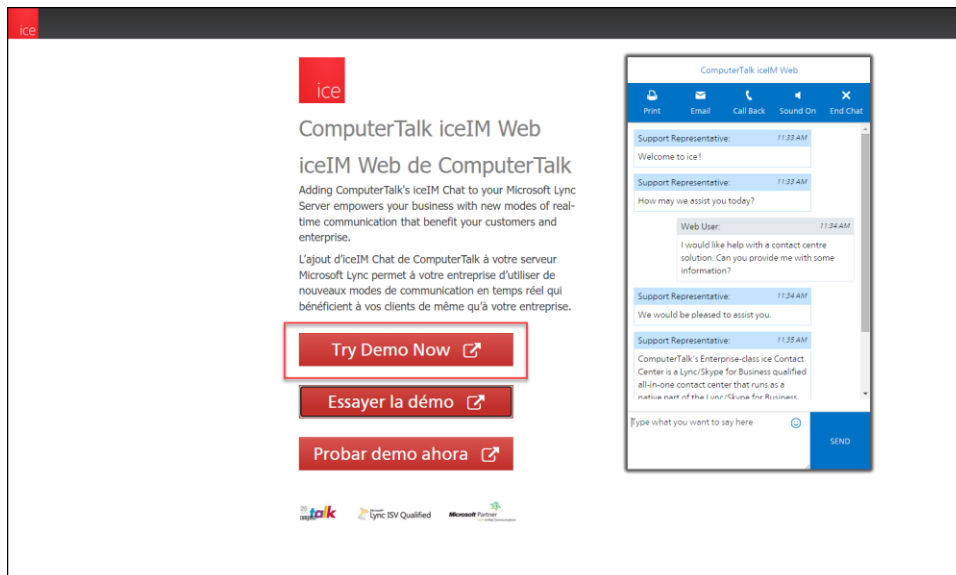


Chapter 1: Visitor Interface

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.



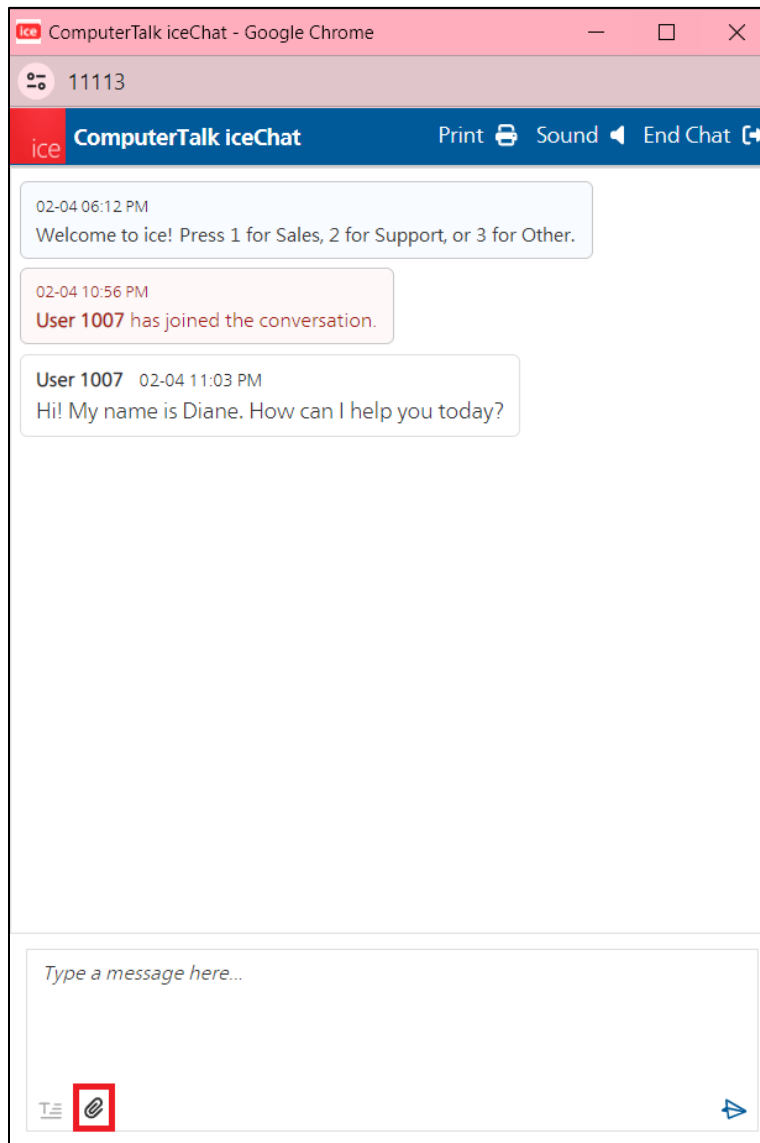


Chapter 2: The Chat Window

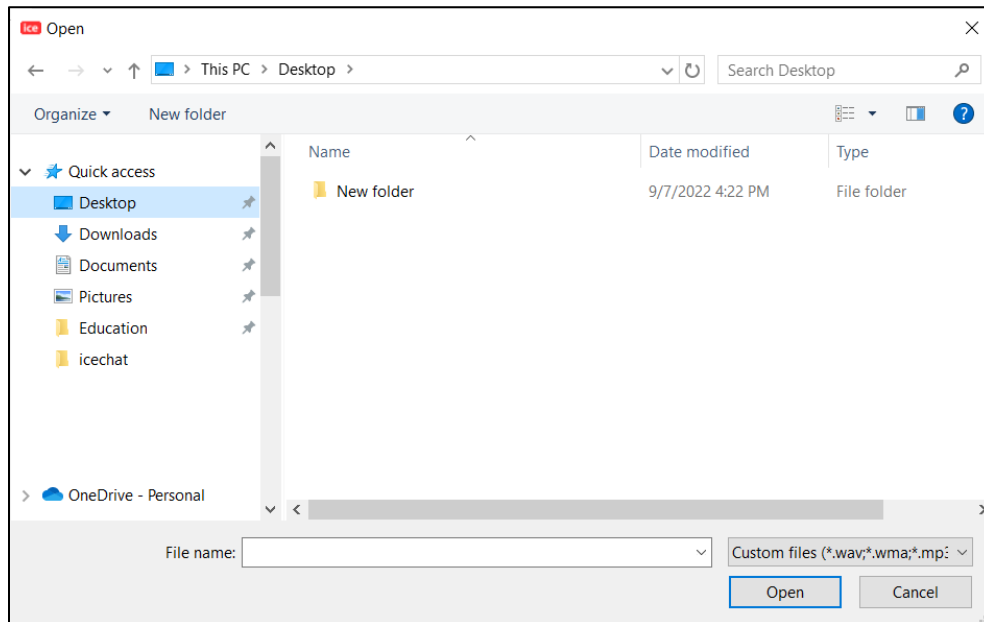
The chat conversation window has several features. Website visitors can upload attachments, print the chat transcript, and end the conversation.

Upload Contact Attachment

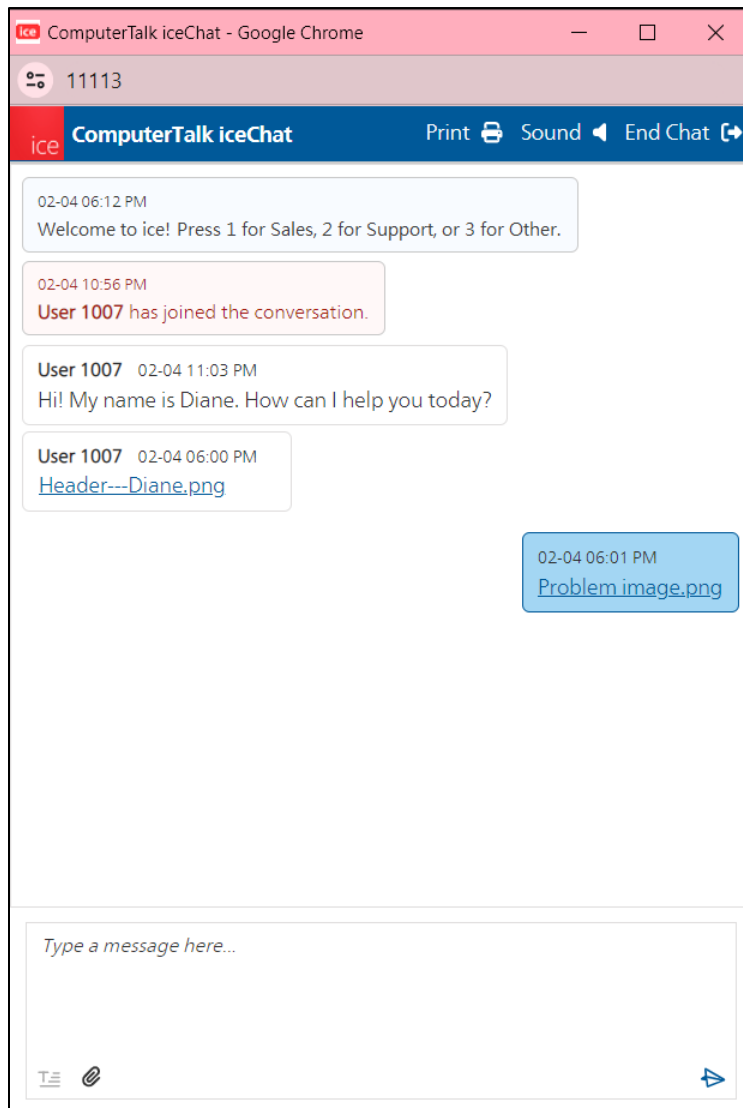
Website visitors can upload contact attachments in the chat by clicking the Contact Attachment button located on the bottom left of the chat window.



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

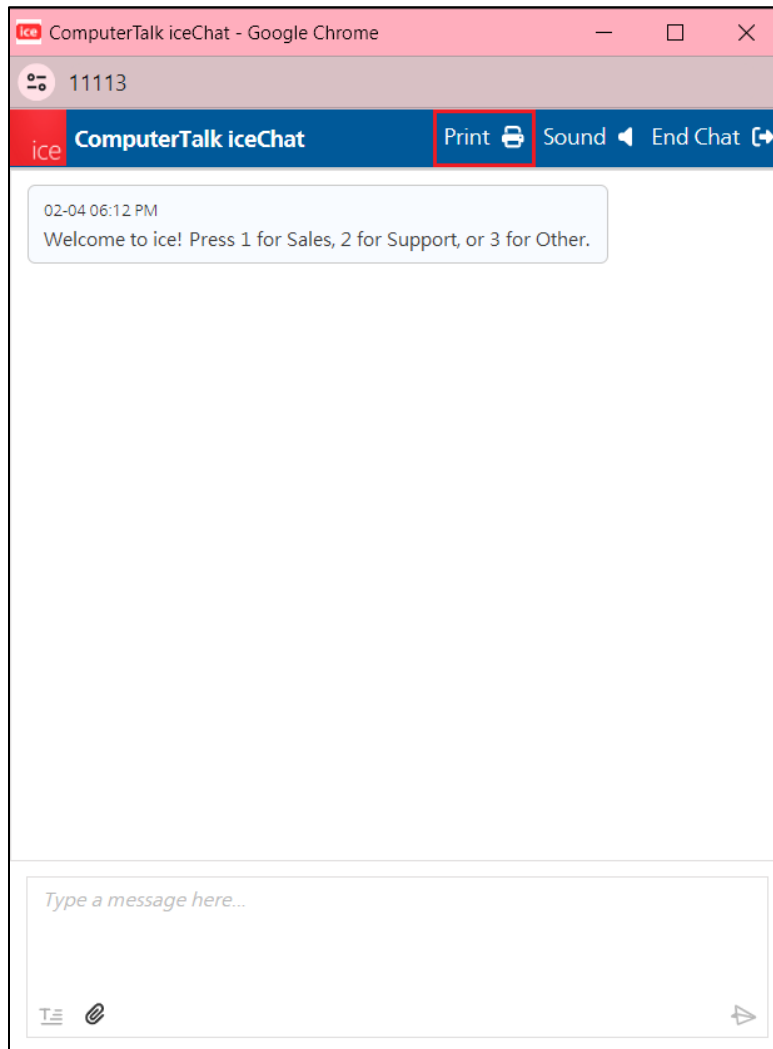


Once an attachment has been selected, it will be sent as a link in the chat for the agent to view.

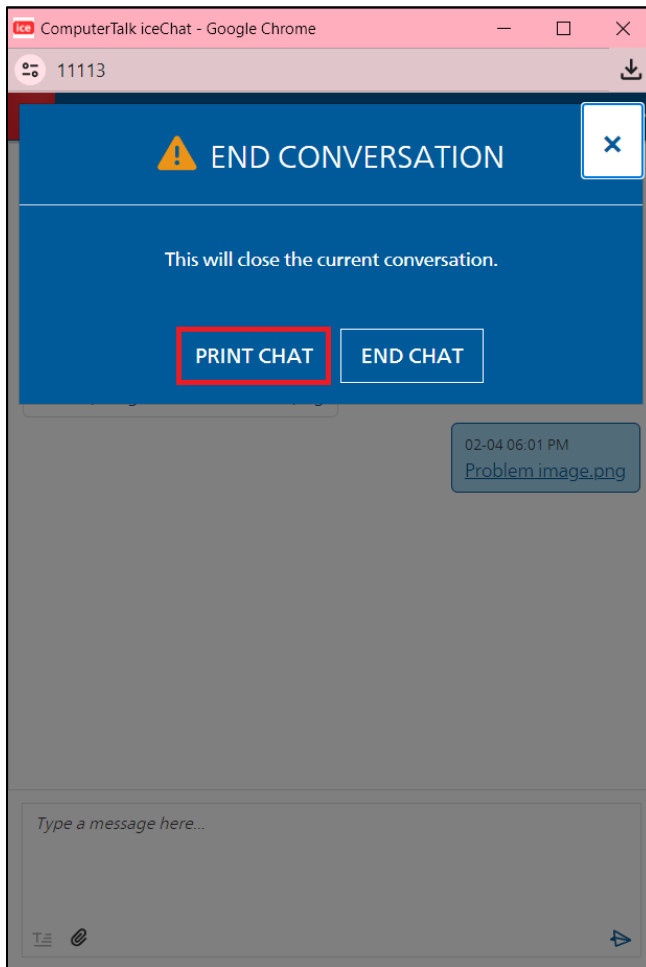


Print

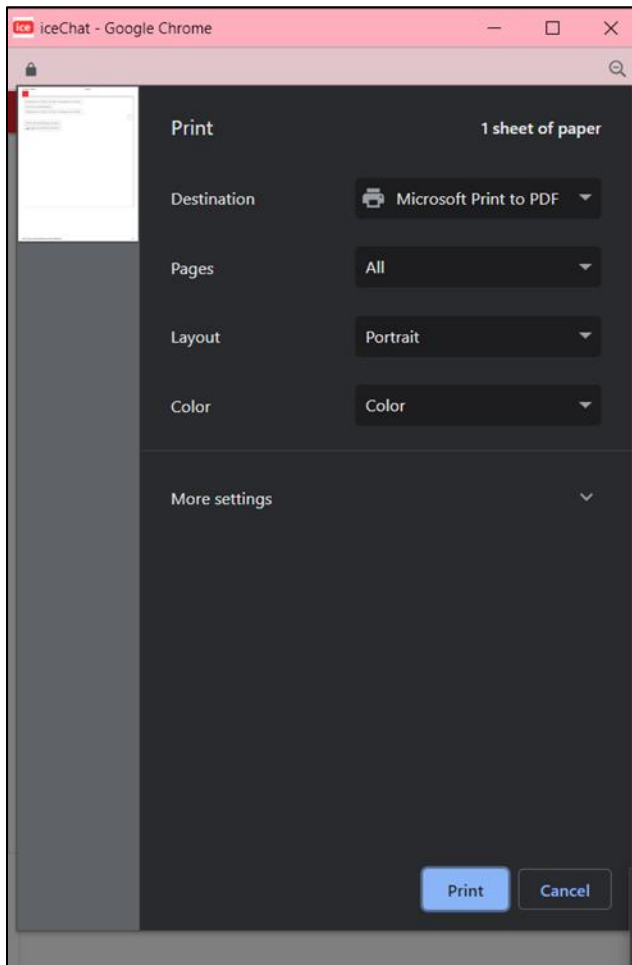
Website visitors can print the transcript of the conversation by clicking the Print button located on the top right of the chat window.



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.

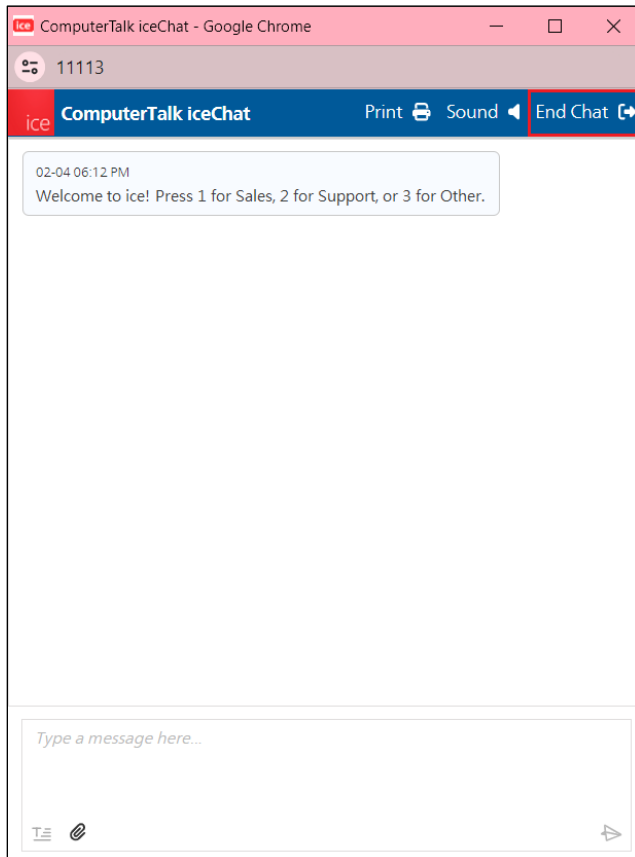


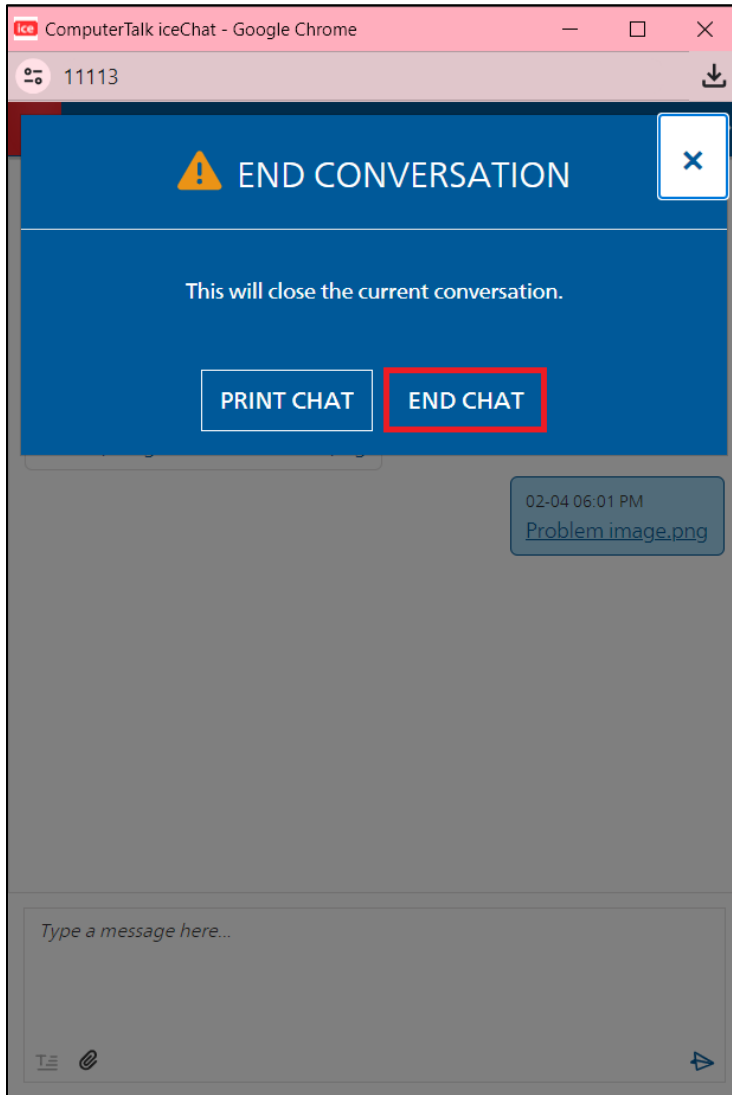
To disable the alerting sound, click the Sound button on the top right section of the chat window.



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.







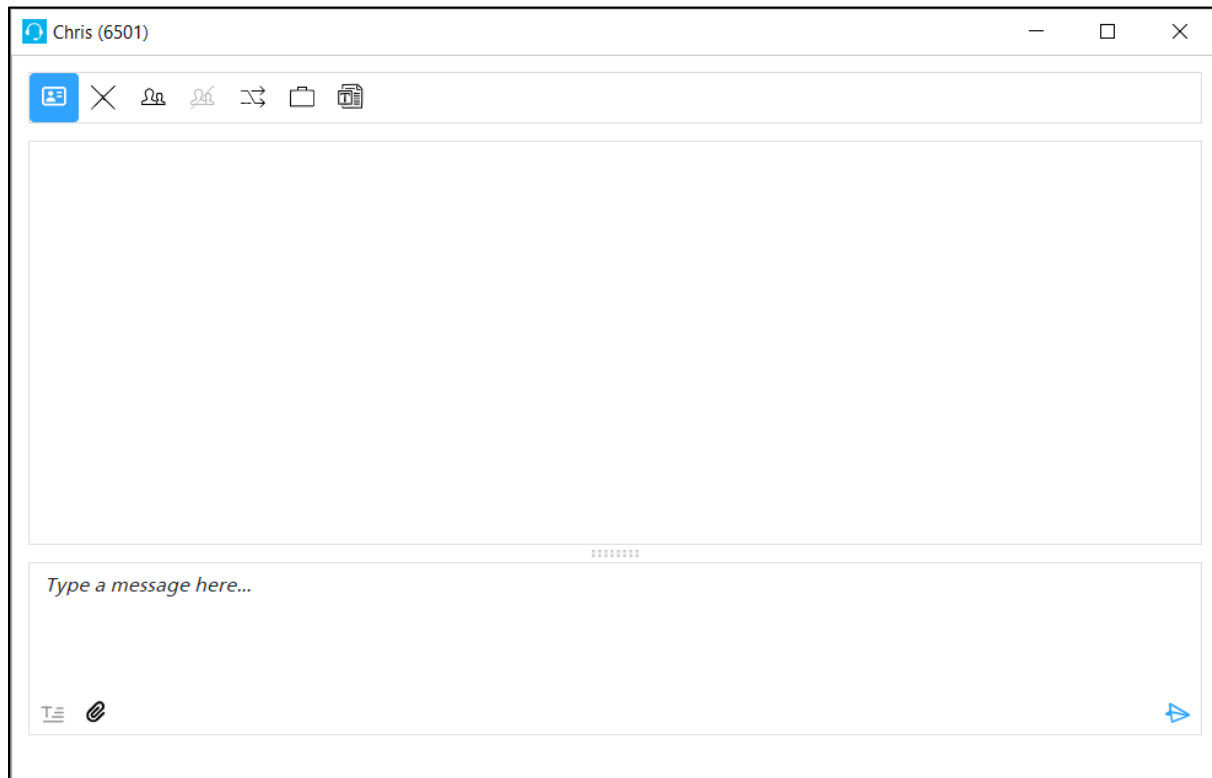
Chapter 3: icePhone Chat Client

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.



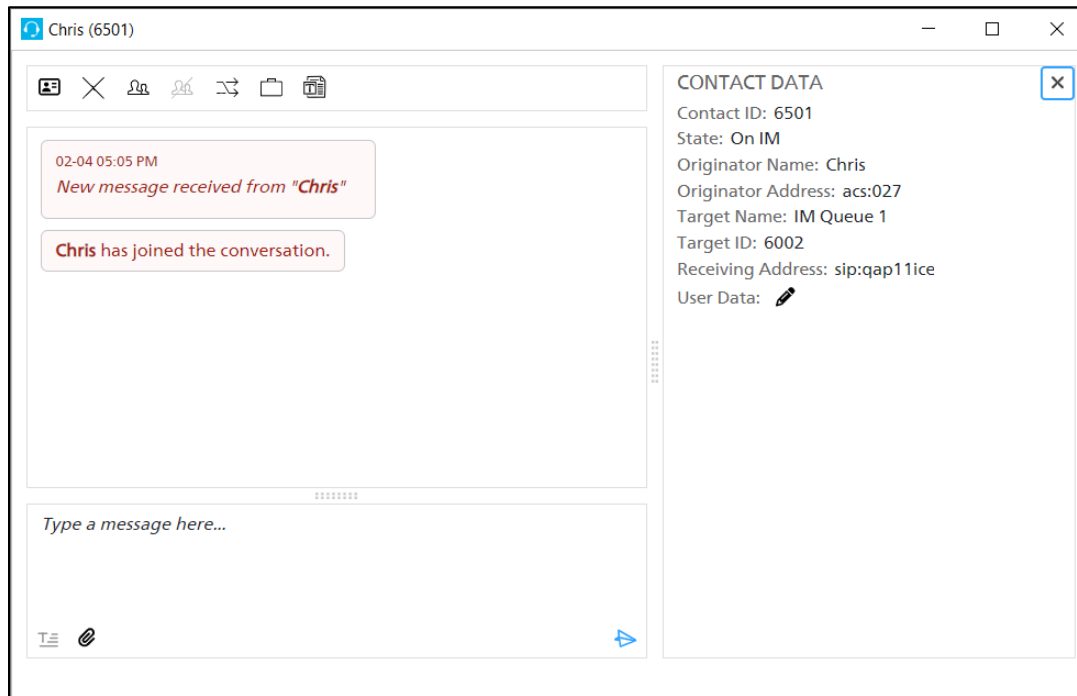
The bar of buttons across the top of the icePhone chat client window can be used to access additional contact handling functions.

| ICEPHONE CHAT CLIENT BUTTONS | |
|--|---|
| Button | Description |
|  Contact Data | Displays the contact data including: <ul style="list-style-type: none"> • Contact ID • State • Originator Name • Originator Address |

| | |
|---|--|
| | <ul style="list-style-type: none"> • 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. |

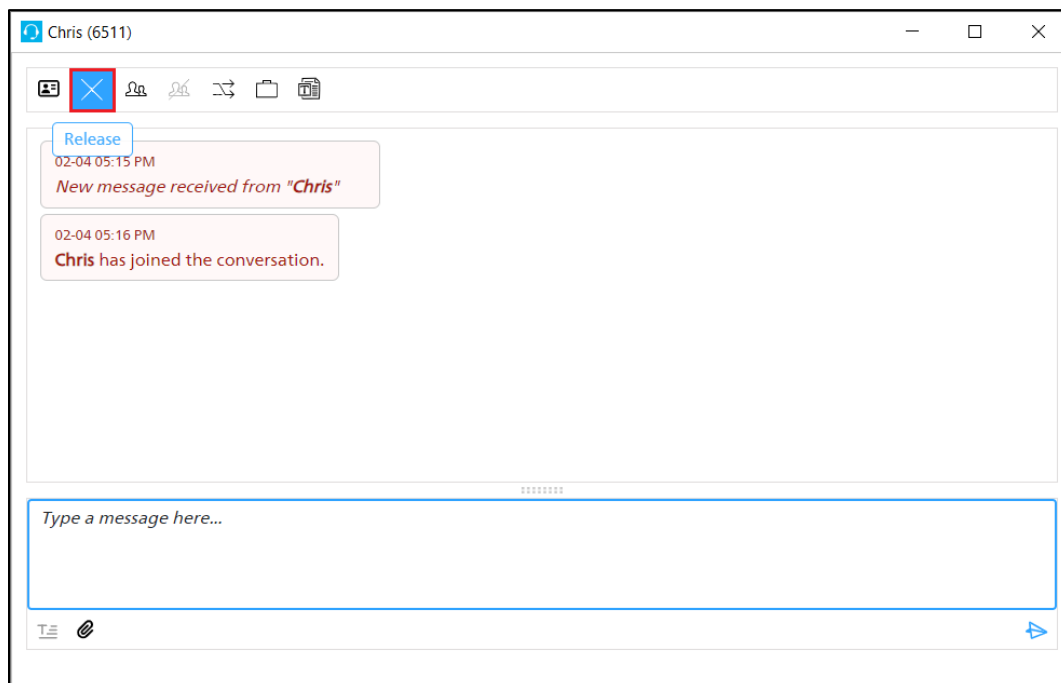
Contact Data

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.



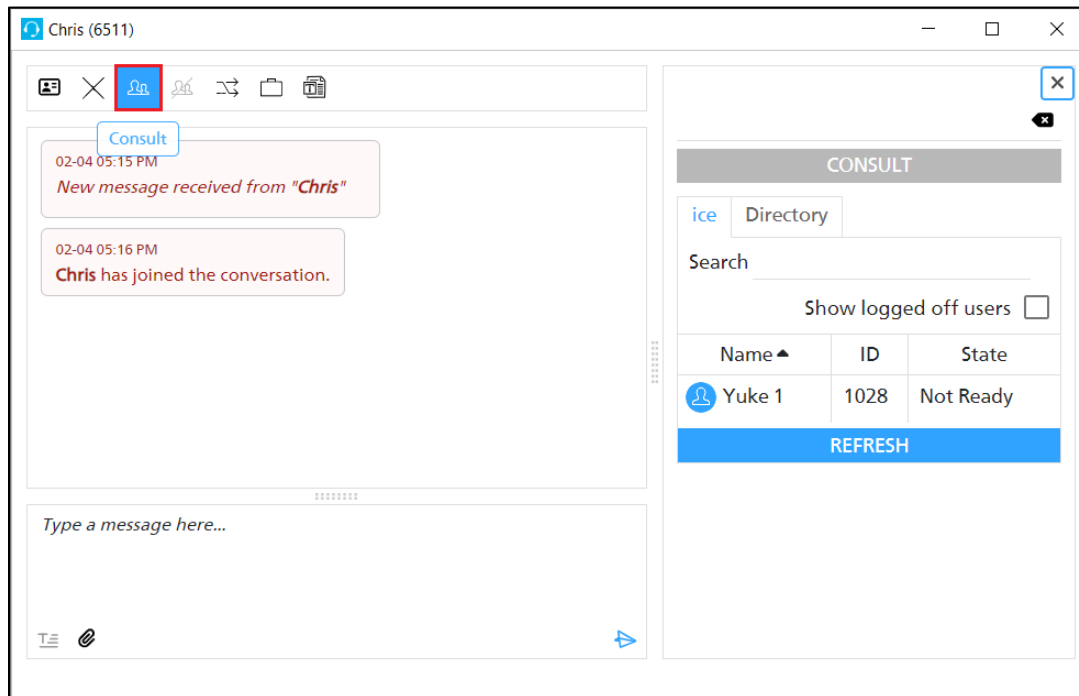
Release

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:

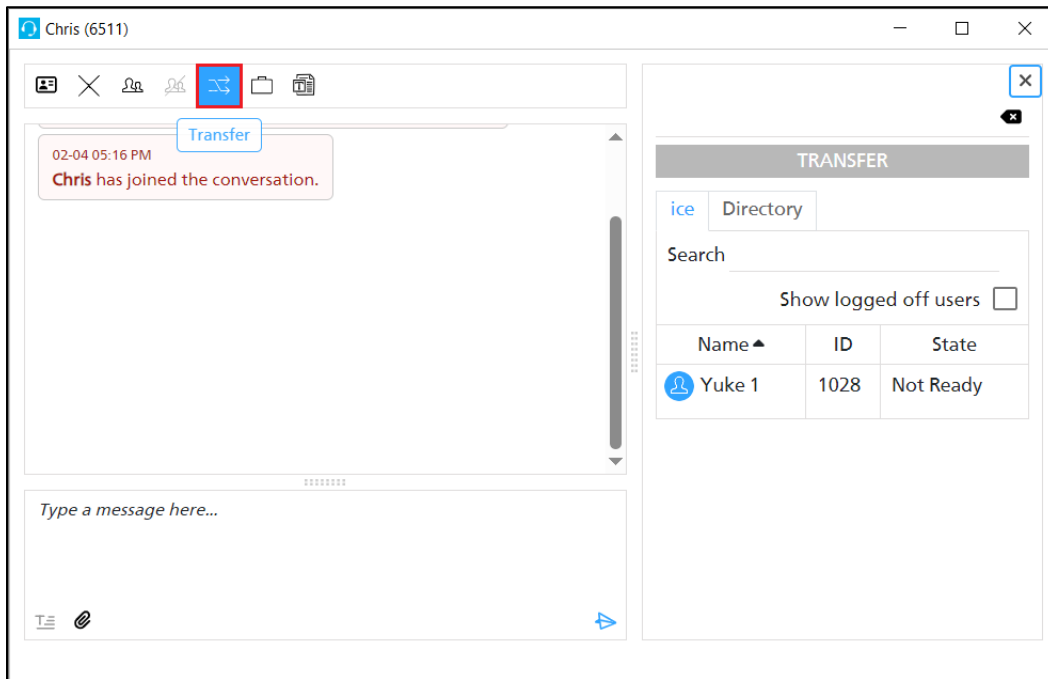
Step 1: Select the user or enter the sip address of the person you would like to consult.

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.



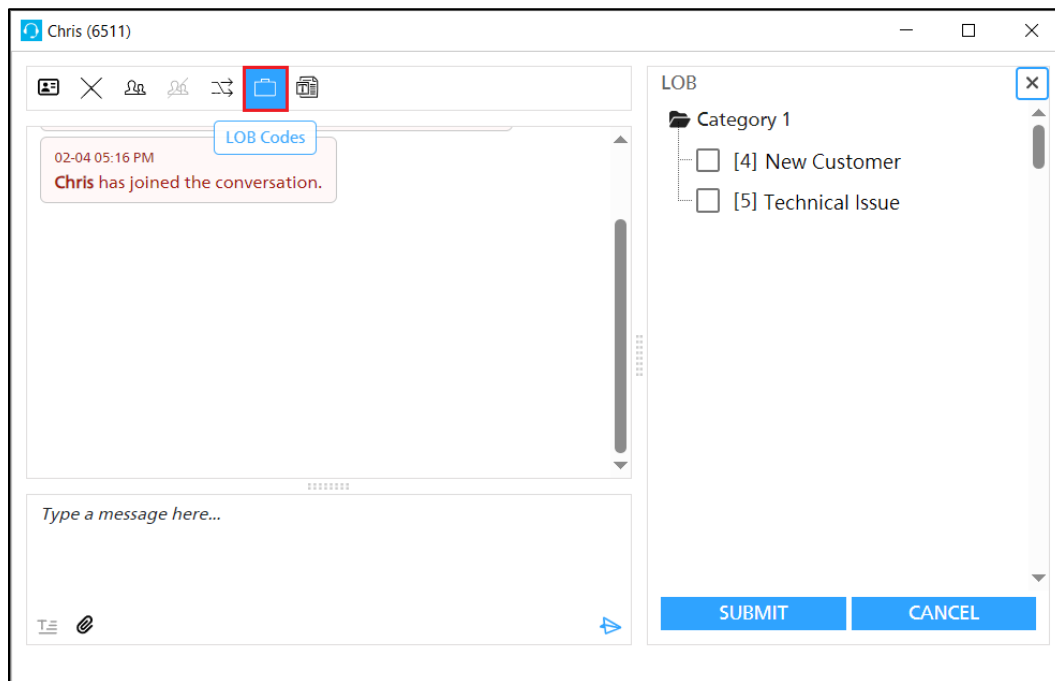
To transfer a call:

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.

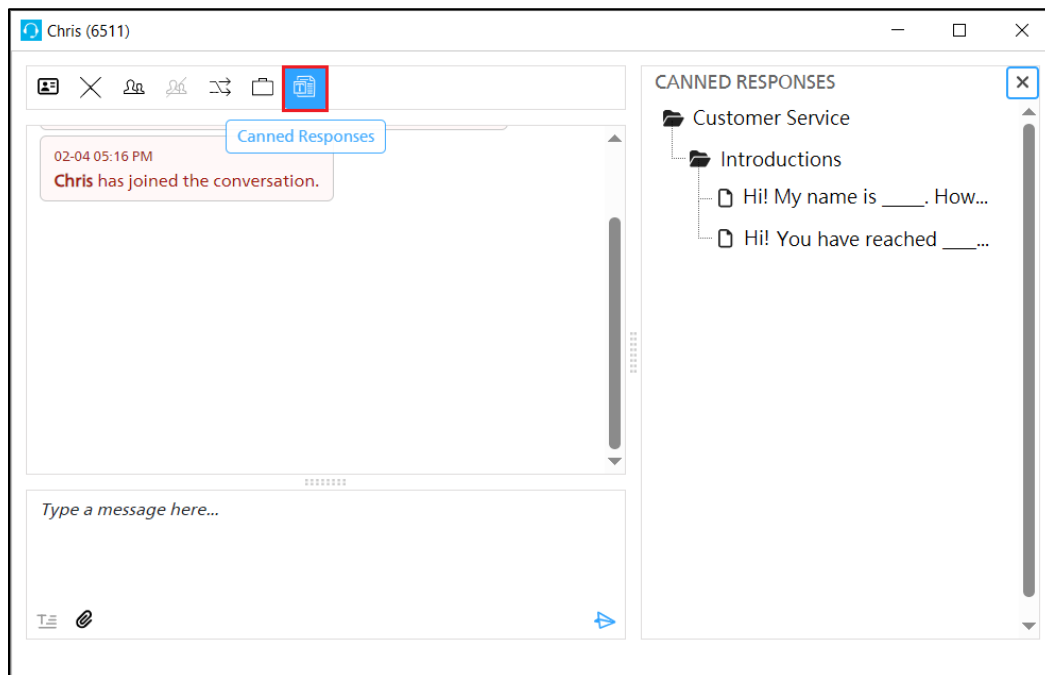
Line of Business (LOB)

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.



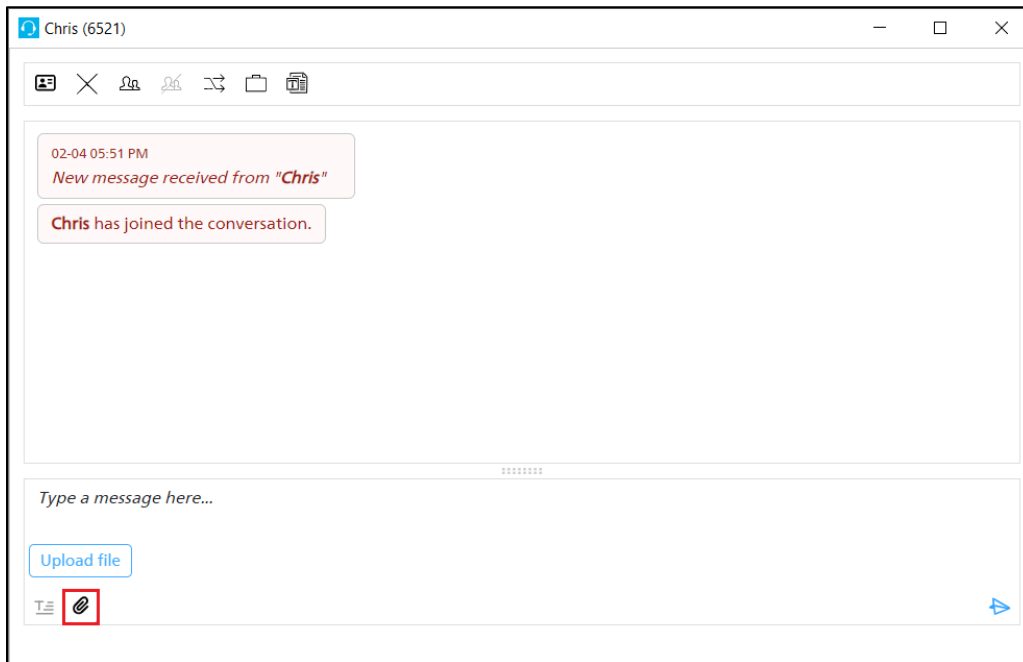
Canned Responses

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.



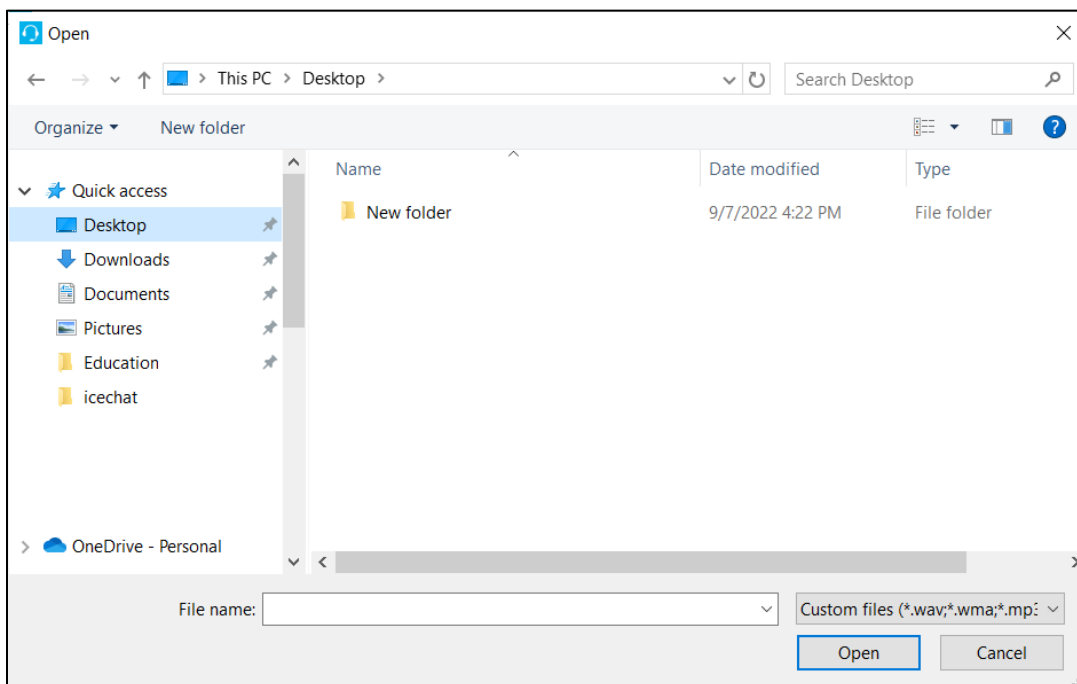
Contact Attachments

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.

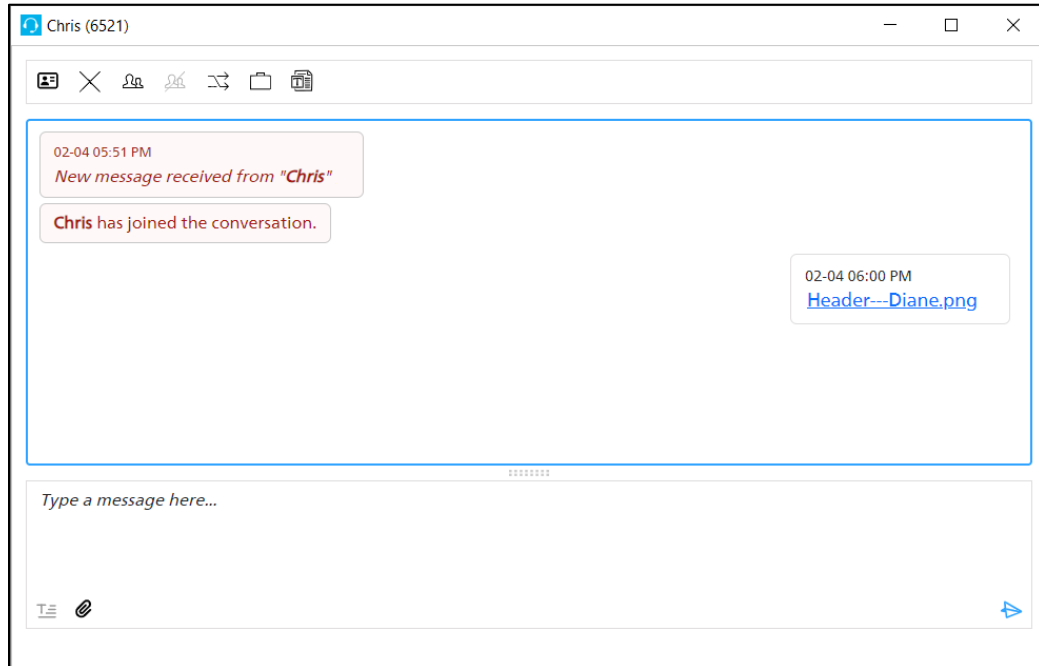


To upload a file in the chat:

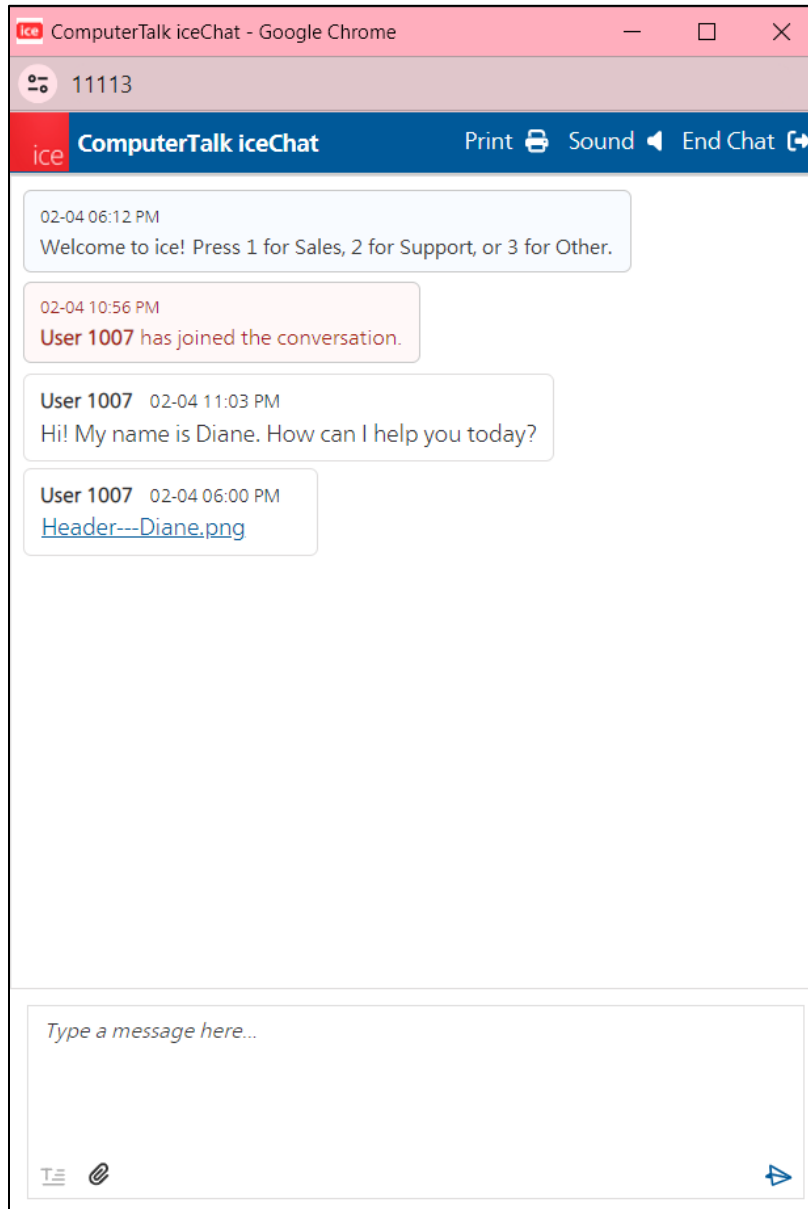
Step 1: Click the "Upload File" button. icebar will open the file explorer window on your local machine.



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

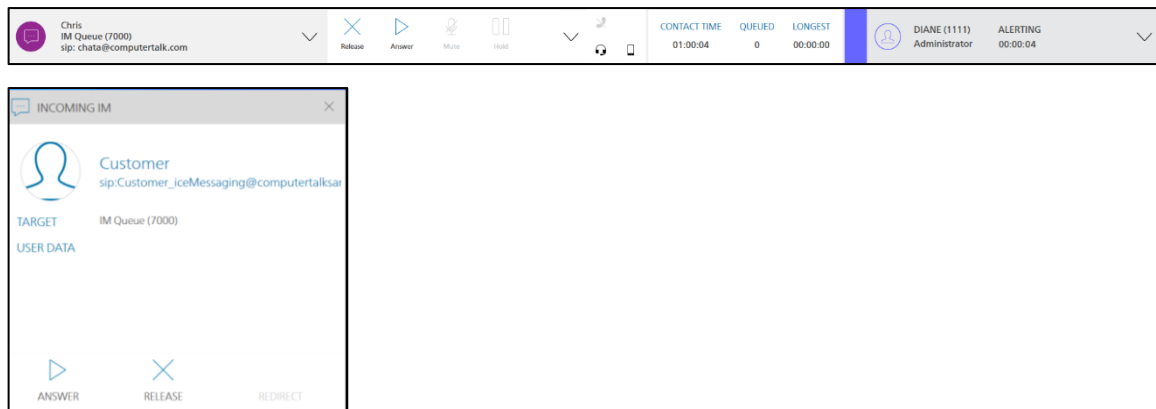
ice can be configured so that IM and Webchats are queued to a selected group of users. For example, your contact center may receive messages through a Live Chat button on your website. These are directed to the first available user in the IM queue.

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.

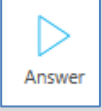

To receive an IM from the queue, users must be in a *Ready State*. When users receive a message, the 'iceBar: Incoming IM' dialog box appears.

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. |

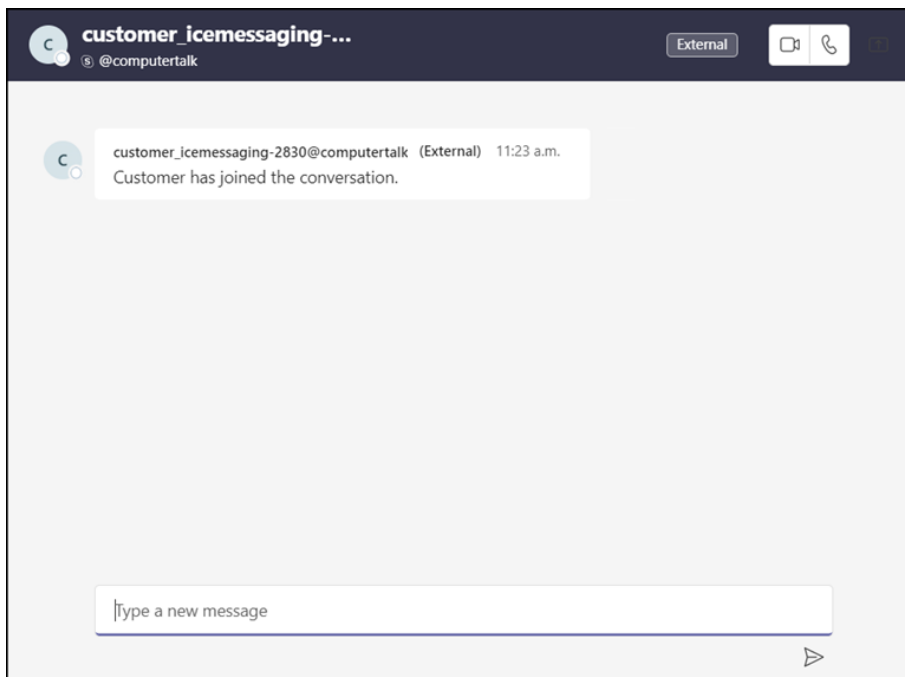
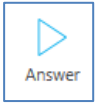
To handle the IM using Microsoft Teams:

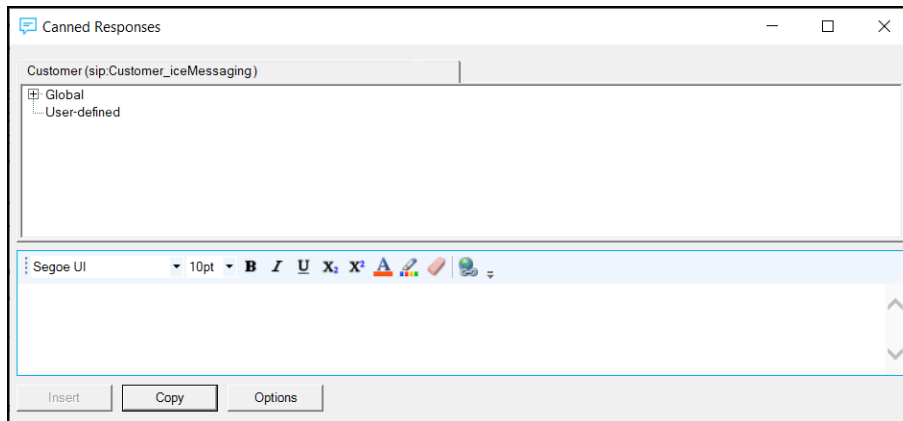
Note: Users who have Auto Answer Email/IM class of service should skip step 1 and proceed to step 2.

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.

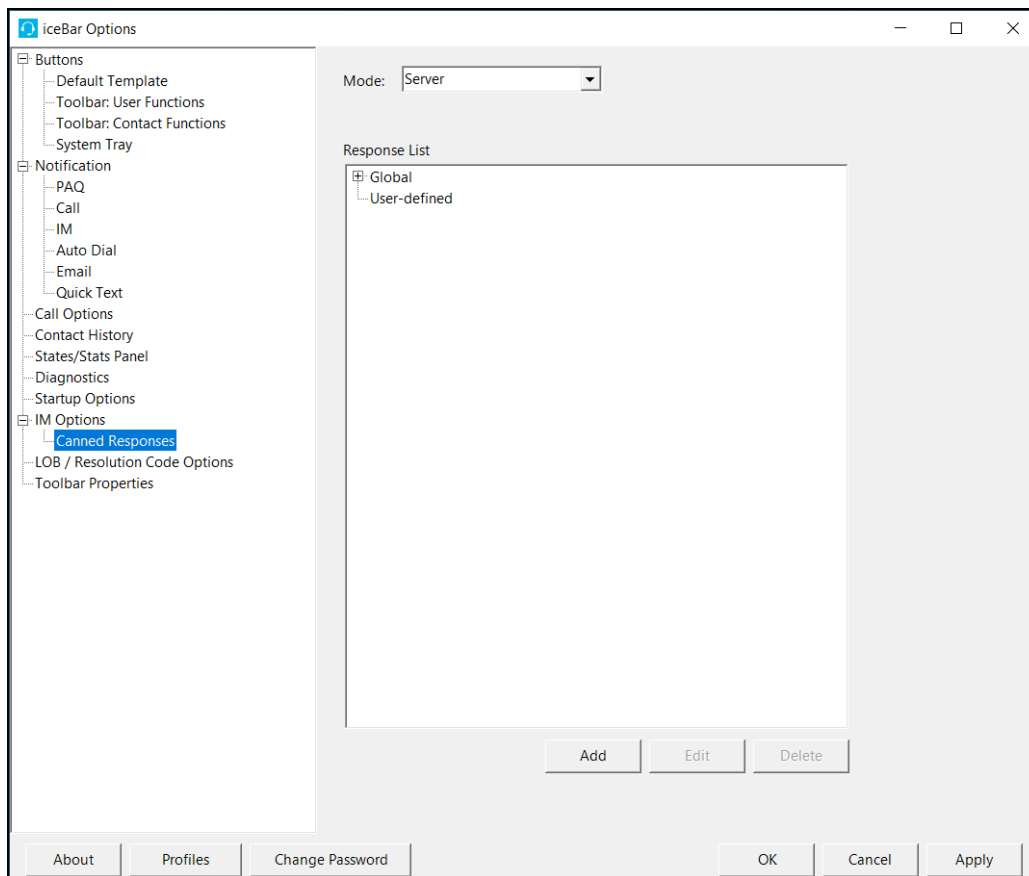




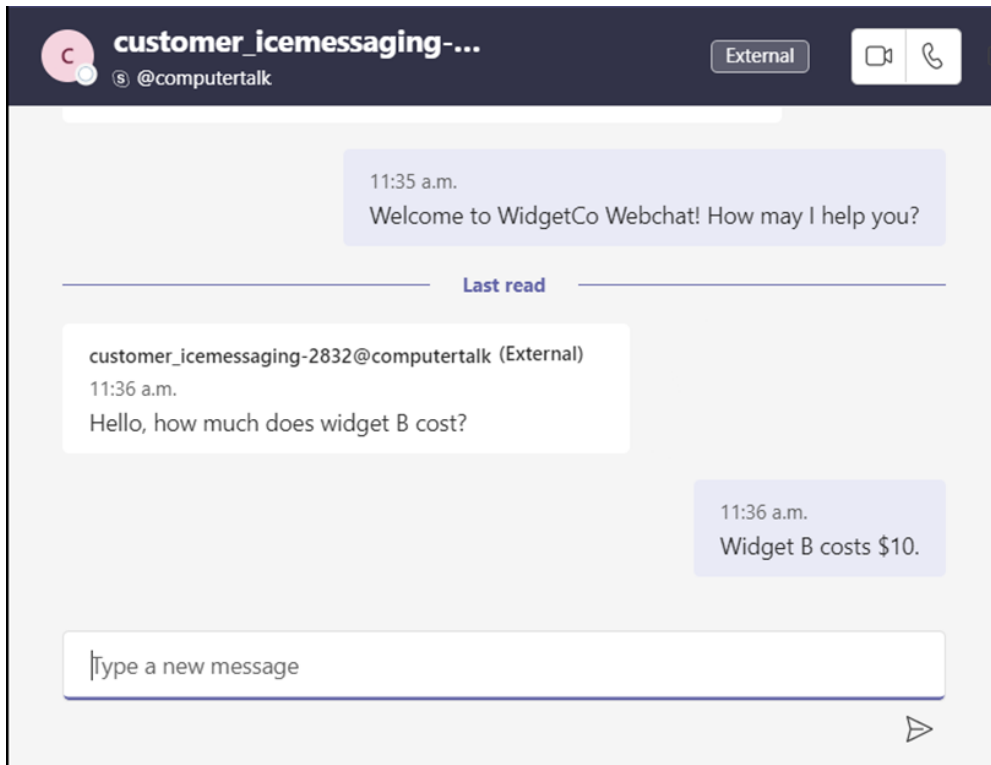
The IM content is located in the upper text box. To interact with the website visitor, users can type responses in the lower text box and hit the Enter key on their keyboard to send the message.

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.

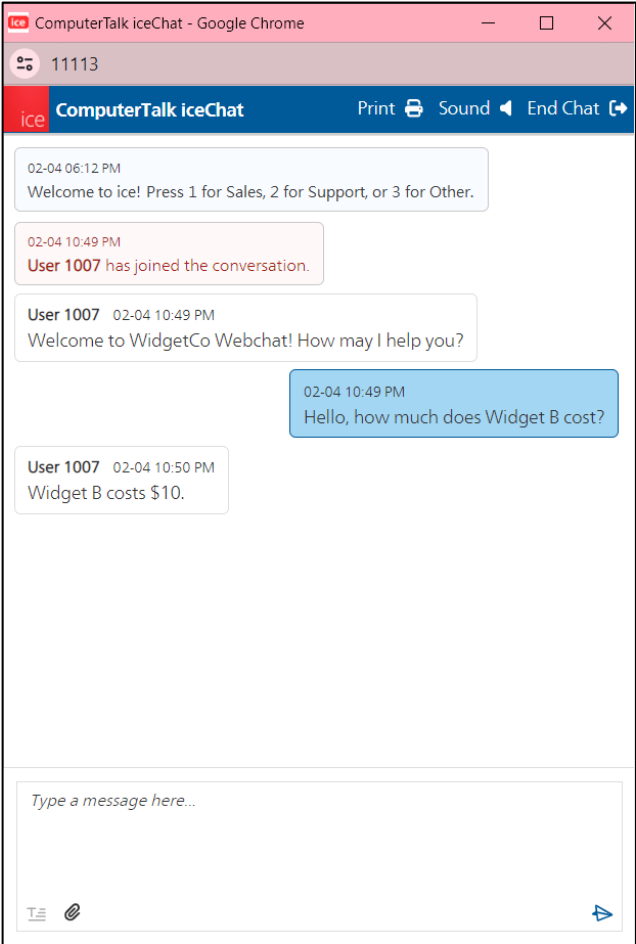
The list of canned responses can be configured for iceChat in the iceBar Options menu under IM Options - Canned Responses or within the iceManager settings page. For more information, refer to the *iceManager User Manual*.



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:



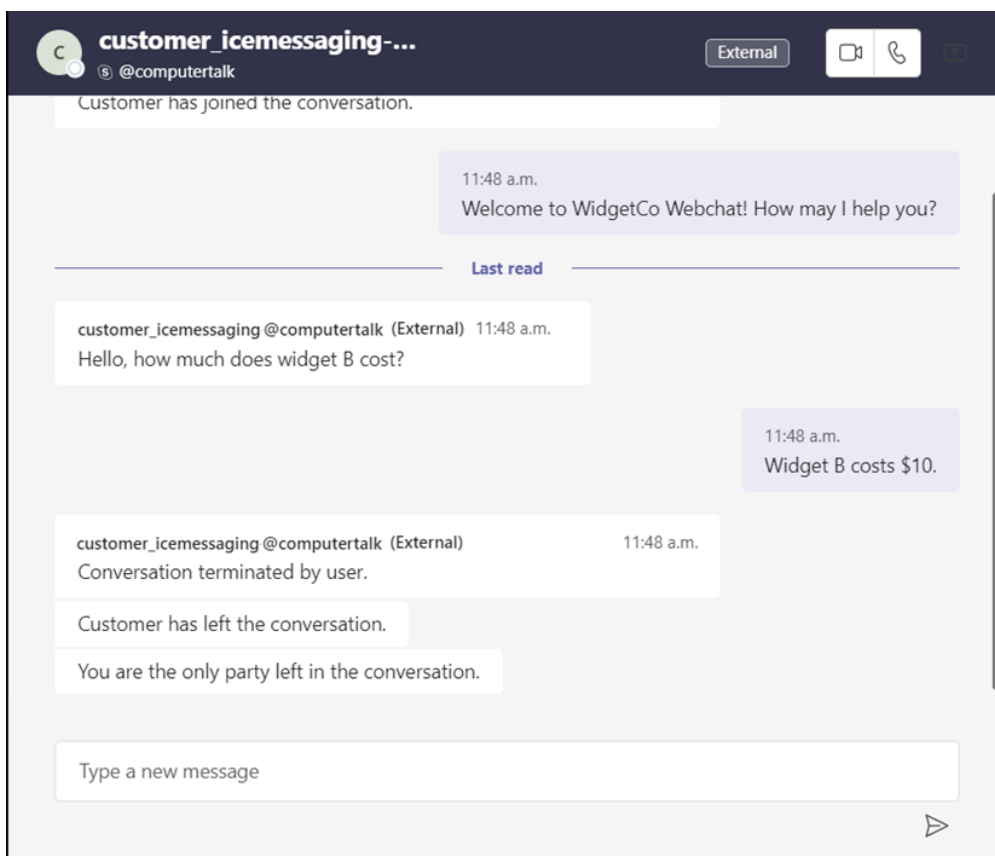
Note: Agent display names are configurable using the IM alias field in iceAdministrator. For more information, refer to the *iceAdministrator User Manual*.

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

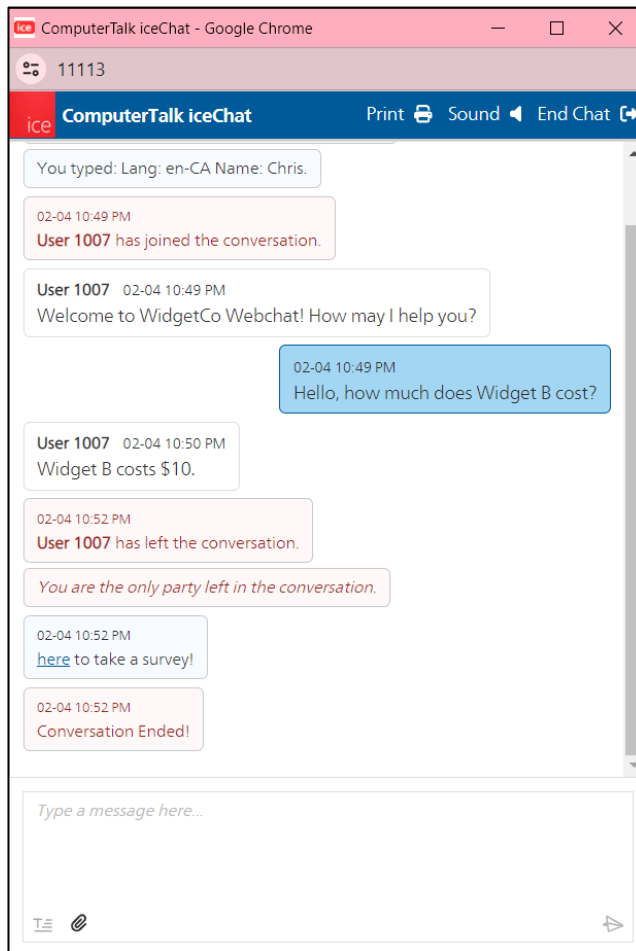
Users will automatically be put into the Ready state unless they have *Wrap Up* enabled.

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.

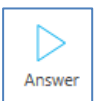
To handle the IM using the icePhone:

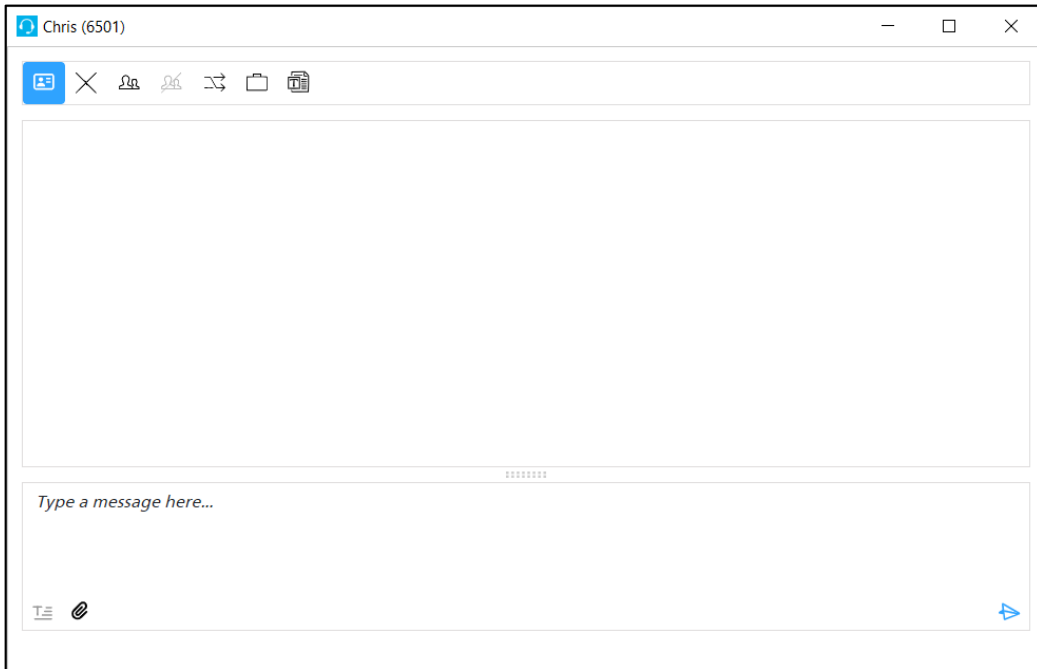
Note: Users who have Auto Answer Email/IM class of service should skip step 1 and proceed to step 2.

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

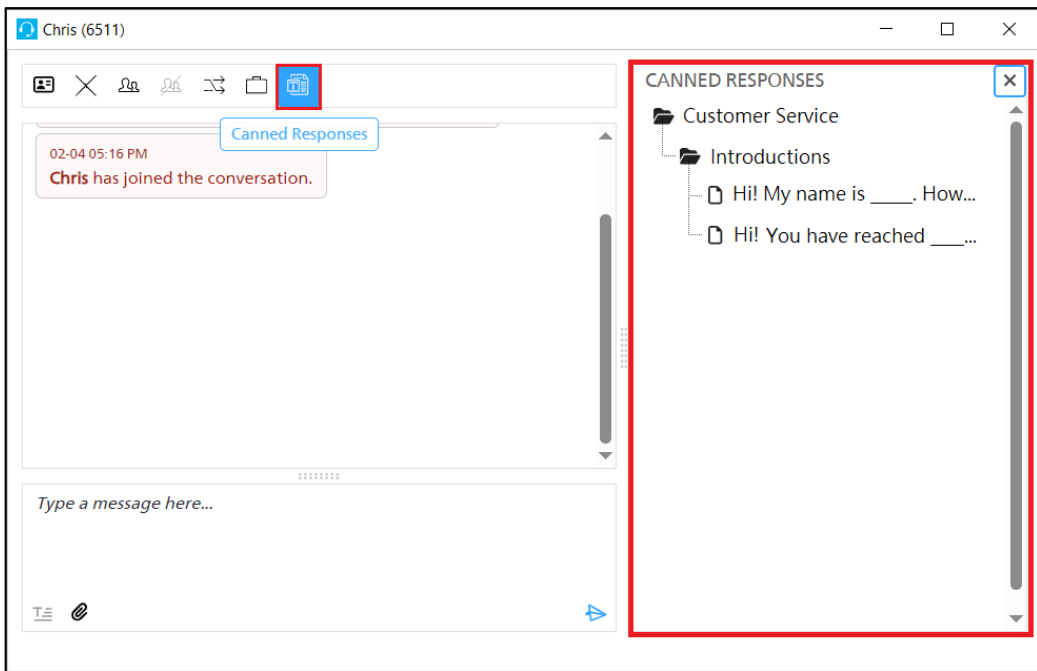
Notice the *Ready State* button changes to indicate you are in the *IM State*.

2. An icePhone Chat session opens.





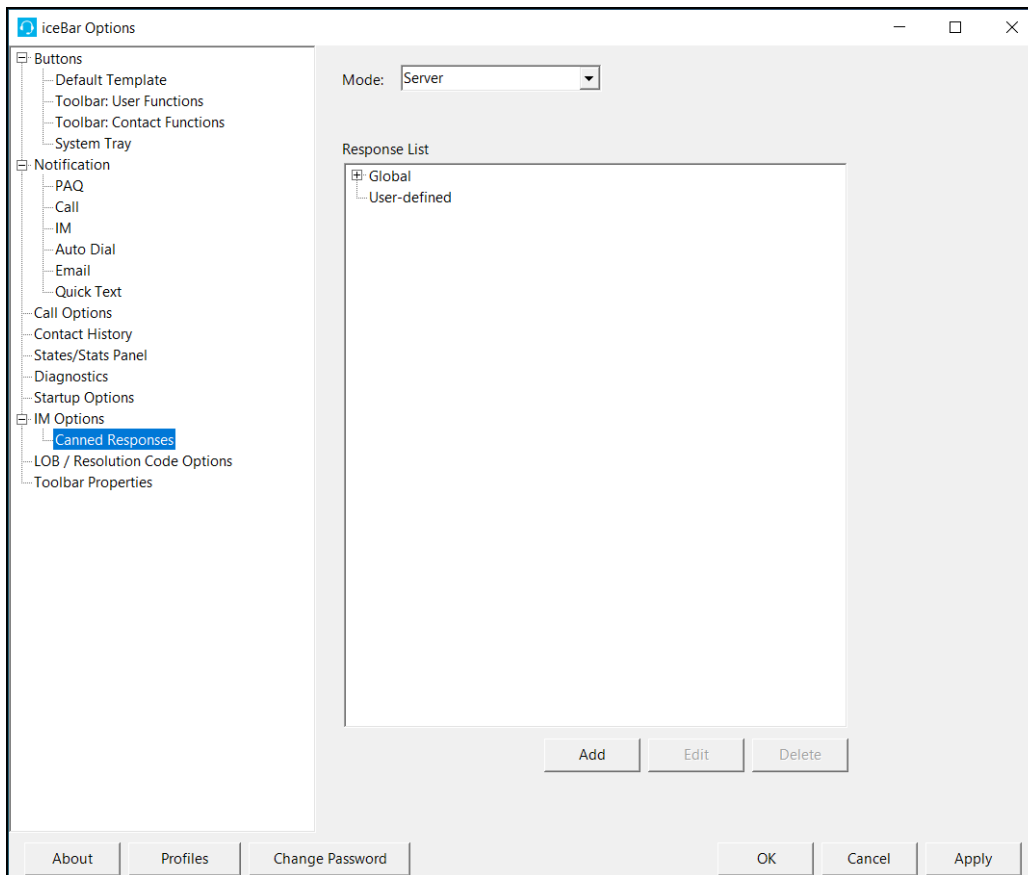
If canned responses are configured, they are accessible by clicking the canned responses button, highlighted in red below. The canned responses will open in a new tab within the chat window.



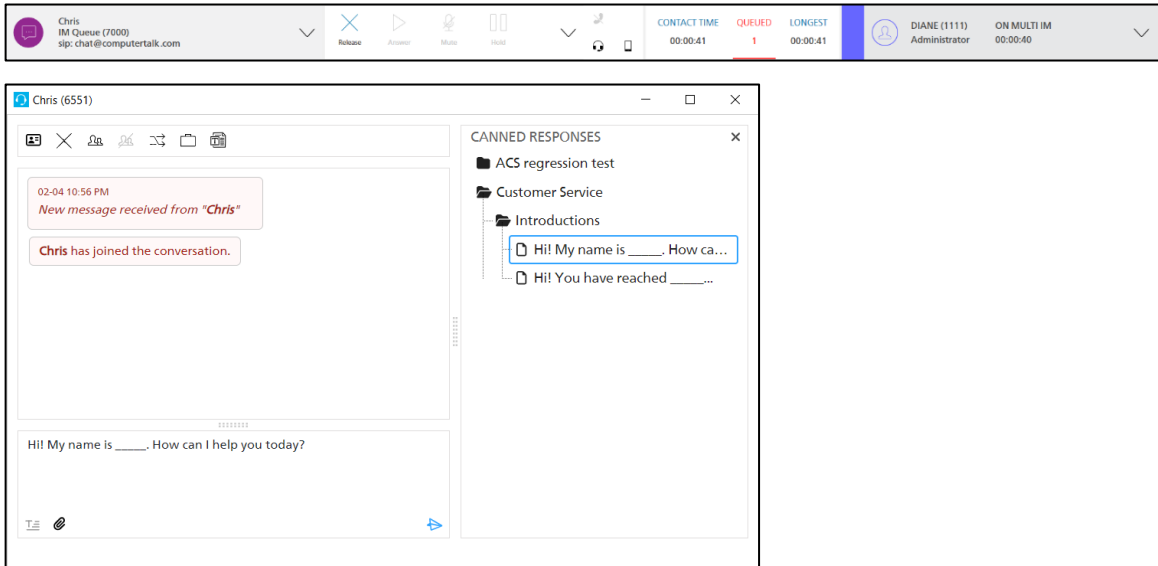
The IM content is located in the upper text box. To interact with the website visitor, users can type responses in the lower text box and hit the Enter key on their keyboard to send the message.

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.

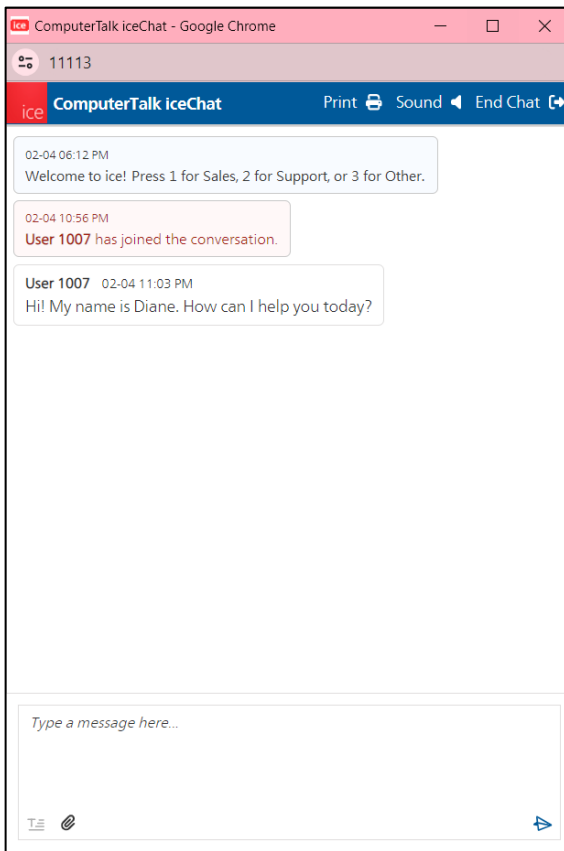
The list of canned responses can be configured for iceChat in the iceBar Options menu under IM Options - Canned Responses or within the iceManager settings page. For more information, refer to the *iceManager User Manual*.



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

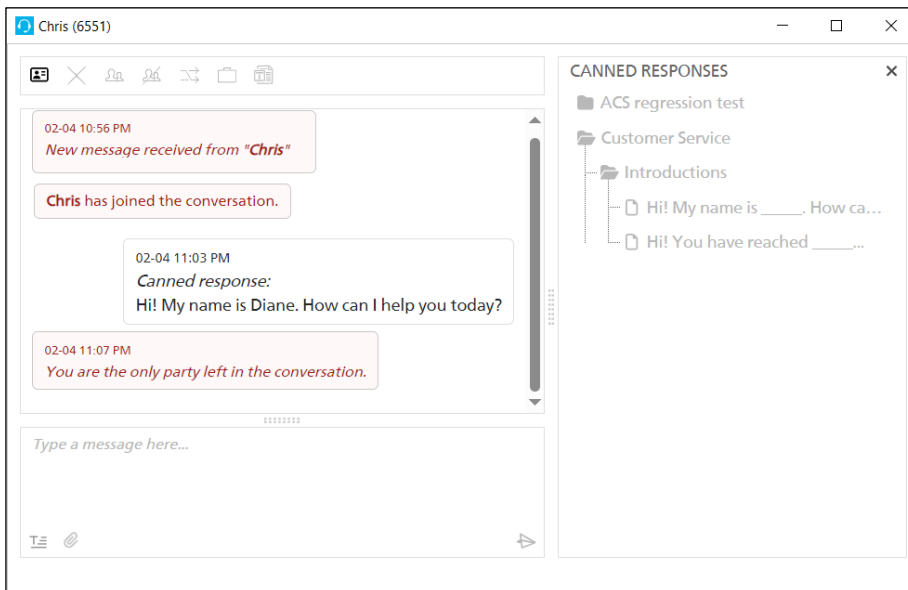
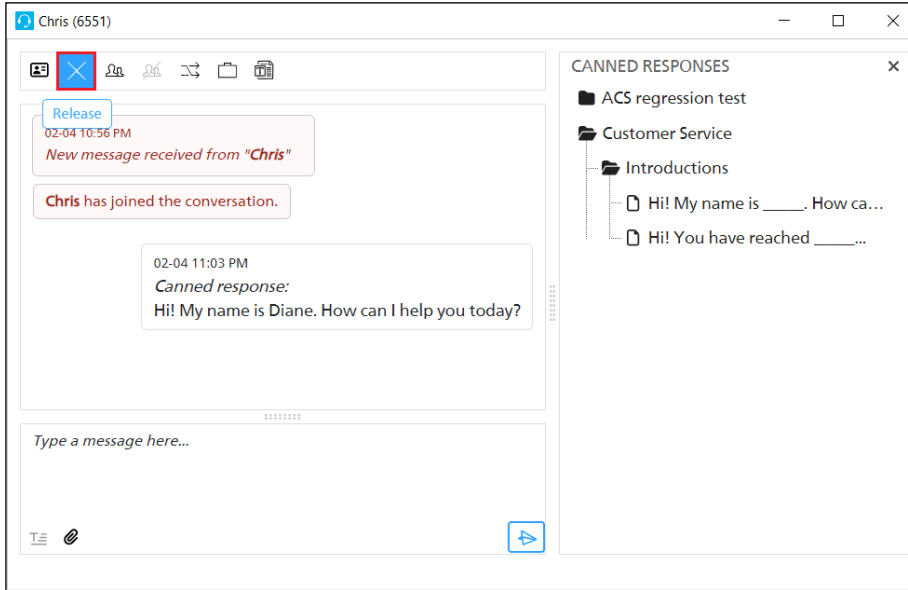


The screenshot below shows what the website visitor sees:



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

- 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.

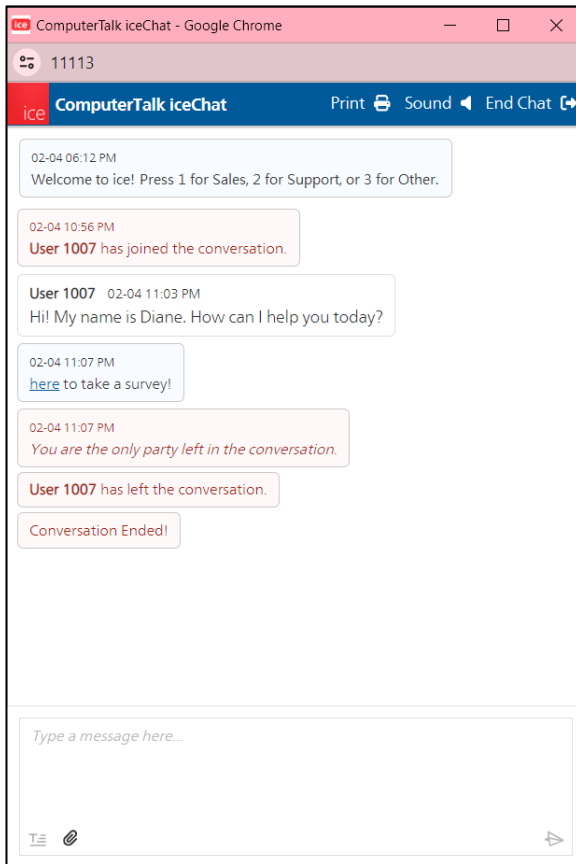


Users will automatically be put into the Ready state unless they have *Wrap Up* enabled.

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.

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*.



Index

H

handling
IM, 28, 34
handling contacts
receiving IM, 27
receiving IMI, 27

I

IM

handling, 28, 34
receiving, 27

R

receiving
IM, 27