



# **Enterprise Chat and Email Administrator's Guide to Chat and Collaboration Resources, Release 12.5(1) ES1**

**For Unified Contact Center Enterprise**

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# Preface

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Welcome to the Enterprise Chat and Email (ECE) feature, which provides multichannel interaction software used by businesses all over the world as a core component to the Unified Contact Center Enterprise product line. ECE offers a unified suite of the industry’s best applications for chat and email interaction management to enable a blended agent for handling of web chat, email and voice interactions.

## About This Guide

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*Enterprise Chat and Email Administrator’s Guide to Chat and Collaboration Resources* introduces you to chat and collaboration infrastructure within the application. It includes instructions on how to set up template sets, and entry points.

## Change History

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This table lists changes made to this guide. Most recent changes appear at the top.

| Change  | See  | Date          |
|---|--|---------------|
| <b>Update of Document</b>   |  | November 2024 |
| Added details for setting primary keys for login parameters                           | <a href="#">“Configuring Login Page Parameters” on page 29</a>                     |               |
| <b>Update of Document</b>   |  | August 2021   |
| Updated details about adding Post Chat Attributes for Docked and Undocked Chat        | <a href="#">“Adding Chat and Collaboration Help Links to Websites” on page 112</a> |               |
| <b>Update of Document</b>   |  | February 2021 |
| Updated DRASR details   | <a href="#">“Configuring Dynamic Messages for Chats and Callback” on page 119</a>  |               |
| <b>Update of Document</b>   |  | December 2020 |
| Added note about WXM surveys not being supported in Kiwi templates.                   | <a href="#">“About Kiwi Template Sets” on page 52</a>                              |               |
| <b>Update of Document for Release of 12.5(1) ES1</b>                                  |  | June 2020     |
| Notes in reference to WXM integrated installations and how chat surveys are affected. | <a href="#">“Aqua Chat Template Sets” on page 18</a>                               |               |

## Related Documents

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The latest versions of all Cisco documentation can be found online at <https://www.cisco.com>

| Subject   | Link  |
|---|---|
| Complete documentation for Enterprise Chat and Email, for both Cisco Unified Contact Center Enterprise (UCCE) and Cisco Packaged Contact Center Enterprise (PCCE) | <a href="https://www.cisco.com/c/en/us/support/customer-collaboration/cisco-enterprise-chat-email/tsd-products-support-series-home.html">https://www.cisco.com/c/en/us/support/customer-collaboration/cisco-enterprise-chat-email/tsd-products-support-series-home.html</a> |

## Communications, Services, and Additional Information

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- ▶ To receive timely, relevant information from Cisco, sign up at [Cisco Profile Manager](#).
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### Cisco Bug Search Tool

[Cisco Bug Search Tool](#) (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

## Field Alerts and Field Notices

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Cisco products may be modified or key processes may be determined to be important. These are announced through use of the Cisco Field Alerts and Cisco Field Notices. You can register to receive Field Alerts and Field Notices through the Product Alert Tool on Cisco.com. This tool enables you to create a profile to receive announcements by selecting all products of interest.

Log into [www.cisco.com](http://www.cisco.com) and then access the tool at <https://www.cisco.com/cisco/support/notifications.html>

# Documentation Feedback

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To provide comments about this document, send an email message to the following address:  
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We appreciate your comments.

# Document Conventions

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This guide uses the following typographical conventions.

| Convention      | Indicates  |
|-----------------|--|
| <i>Italic</i>   | Emphasis.<br>Or the title of a published document.   |
| <b>Bold</b>     | Labels of items on the user interface, such as buttons, boxes, and lists.<br>Or text that must be typed by the user. |
| Monospace       | The name of a file or folder, a database table column or value, or a command.  |
| <i>Variable</i> | User-specific text; varies from one user or installation to another.   |

*Document conventions*

# 1

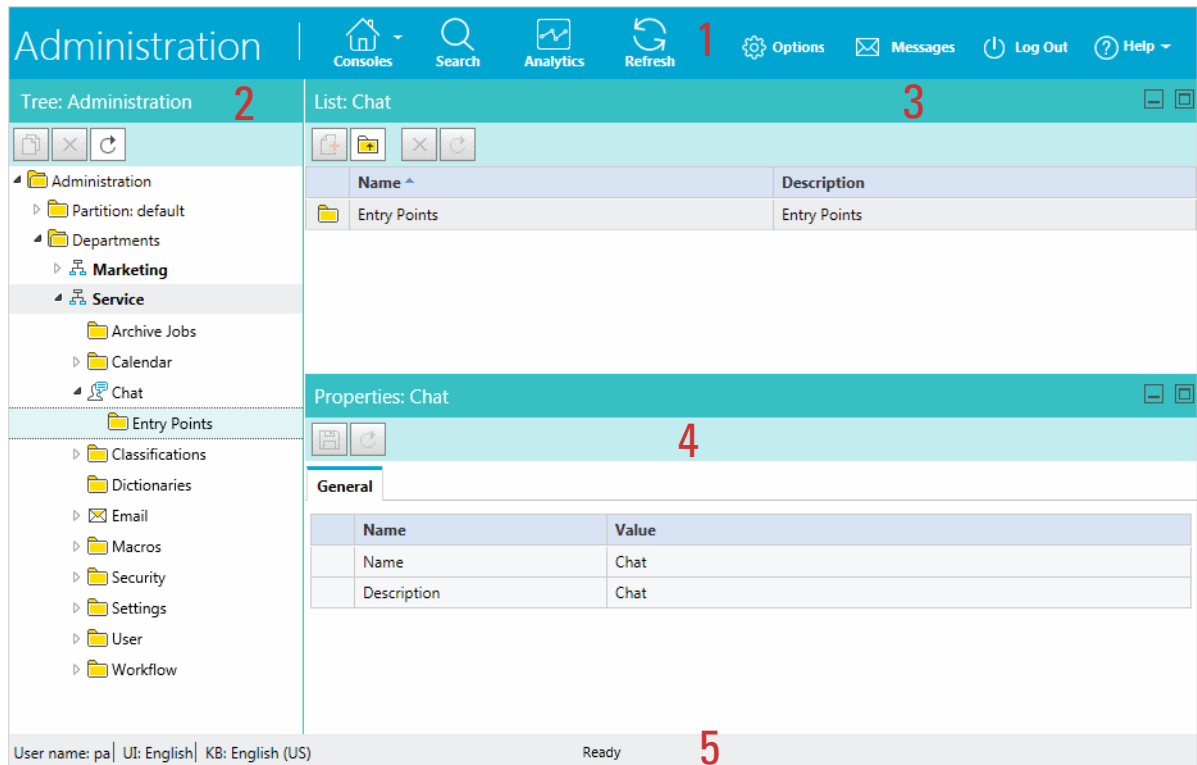
# Chat and Collaboration Basics

- ▶ [Elements of the Consoles](#)
- ▶ [Key Terms and Concepts](#)
- ▶ [Configuring the System for Chat, Callback, and Delayed Callback](#)

This chapter deals with the basics of using the Administration Console to set up the chat and collaboration infrastructure.

## Elements of the Consoles

The components of chat and collaboration are available in the Administration Console. To get to know the console user interface better, let us begin by dividing it into five functional areas.



*Elements of the Administration Console user interface*

- 1. Console toolbar:** The main toolbar of the console appears at the top of the screen. Each button on this toolbar allows you to perform a specific function. Some of these are: navigate to other consoles, send and receive internal messages, log out of the system, and access the online help for the Administration Console.
- 2. Tree pane:** The Tree pane lists all the business objects in the application, allowing you to select the node (folder) that you wish to work in. When you select a folder, its first-level contents are displayed in the List pane.  
  
To expand all first and second level nodes with a single click, press SHIFT and click the plus [+] button next to the topmost node. The contents of all first and second level nodes are displayed in the Tree pane.
- 3. List pane:** The List pane displays first-level contents of the folder selected in the Tree pane. You can view the name, description, date of creation, and so on, of the displayed items. In this pane, you can create items or select existing ones to modify or delete them.
- 4. Properties pane:** The Properties pane displays the contents of the business object selected in the List pane. In this pane, you can edit the properties of the selected item.

5. **Status bar:** The status bar is present at the bottom of every screen. It displays the following information:
- The user name with which the user has logged in the system.
  - The language currently in use.
  - The status of the system (**Loading, Ready**, and so on).

## Key Terms and Concepts

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- ▶ **Chat activity:** An activity created for a chat session between a customer and an agent. A chat is a real time interaction between an agent and a customer where they exchange text messages. As part of a chat, agents can also push web pages to customers. The chat is routed to a queue, and a message is sent to Unified CCE. Unified CCE processes the activity and assigns the chat to an available agent.
- ▶ **Callback activities:** An activity created for a web callback session between an agent and a customer. In callback activities, the customer provides personal details (including the phone number) in a customized web form, and the system automatically generates a call activity and assigns the activity to an agent.
- ▶ **Delayed callback activities:** An activity created for a delayed web callback session between an agent and a customer. In delayed callback activities, customer provides the personal details (including the phone number and a delay time, after which he wants to receive the call) in a customized web form, and the system automatically creates a call activity after the specified delayed time and assigns the activity to an agent.
- ▶ **Template sets:** Template sets consist of HTML, CSS (cascading style sheets) and JS (JavaScript) files. The CSS files control the look and feel of the customer's chat and Callback area. The JS files contain the logic used to render data in the chat and Callback area. Templates are also used to determine the type of information collected on the web form and used to identify the customer (for example, name, email address, phone number). You can also compose messages that the customer will see under certain circumstances (for example, if they request a chat session out of hours). The system comes with multiple template sets, Aqua and Kiwi for chats, and Rainbow for callback and delayed callback activities. For more details, see [“Aqua Chat Template Sets” on page 18](#), [“Kiwi Chat Template Sets” on page 50](#) and [“Callback Template Sets” on page 85](#).
- ▶ **Entry points:** An entry point defines the starting point from which customers initiate chat and web callback interactions. Every help link on a website is mapped to an entry point and each entry point has a queue associated with it. Different template sets can be used with the same entry point. The queue is used to route activities to agents while the template set determines the look and feel of the different pages displayed to chat customers. For more details, see [“Entry Points” on page 102](#).

# Configuring the System for Chat, Callback, and Delayed Callback

This section describes the objects you need to create to set up your system for chat, callback, and delayed callback activities.



**Important:** If your system has been integrated with Cisco Unified CCE, the configuration options for chat and callback may vary. For more details, see the *eGain for Cisco Unified CCE Companion Guide*.

## For Chat Activities

- ▶ An email address (a valid email address on your mail server): Contact your system administrator to get this configured.
- ▶ Articles (from the Knowledge Base Console, Content node): For details, see the *Enterprise Chat and Email Administrator's Guide to Routing and Workflows*.
- ▶ Users (from the Administration Console, User node): For details, see the *Enterprise Chat and Email Administrator's Guide to Administration Console*.
- ▶ Queues (from the Administration Console, Workflow node): For details, see the *Enterprise Chat and Email Administrator's Guide to Routing and Workflows*.
- ▶ Templates (from the web server): For details, see [Chapter 2, "Aqua Chat Template Sets"](#) or [Chapter 3, "Kiwi Chat Template Sets"](#).
- ▶ Entry points (from the Administration Console, Chat node): For details, see [Chapter 5, "Entry Points"](#).
- ▶ Transfer codes (from the Administration Console, Workflow node): For details, see the *Enterprise Chat and Email Administrator's Guide to Routing and Workflows*.
- ▶ Share chat transcripts with other departments (from the Administration Console, Departments node): For details, see the *Enterprise Chat and Email Administrator's Guide to Administration Console*.
- ▶ Configuring the dynamic messages to be displayed for chats activities. For details, see ["Configuring Dynamic Messages for Chats and Callback" on page 119](#).
- ▶ Enable the website for chat by inserting a code snippet. The "Begin Chat" or "Chat with an agent" link is here.

## For Callback and Delayed Callback Activities

To be able to set up your system for these activities, you need to create the following objects:

- ▶ Users (From the Administration Console, User node): For details, see the *Enterprise Chat and Email Administrator's Guide to Administration Console*. Queues (From the Administration Console, Workflow node): For details, see the Templates (From the web server): For details, see [Chapter 4, "Callback Template Sets"](#).
- ▶ Queues (from the Administration Console, Workflow node): For details, see the *Enterprise Chat and Email Administrator's Guide to Routing and Workflows*.

- ▶ Entry points (From the Administration Console, Chat node): For details, see [Chapter 5, “Entry Points”](#).
- ▶ Enable the website for callback by inserting a code snippet. For details, see [“Adding Callback Links to a Website” on page 118](#).

## Data Masking for Chat

Data masking allows businesses to ensure that sensitive information, like credit card numbers, Social Security Numbers, bank account numbers, and so on, is not transmitted from the system to the customers and vice versa. If the customer and agent do add any sensitive data in the email content and chat messages, all such data is masked before it is displayed to customers and agents and before it is stored in the system.

For chat, you have the option to allow customers to disable data masking for selective messages. The Off-the-record feature allows agents and customers to exchange sensitive information as data masking rules do not apply to these messages. Any information exchanged while off-record is not stored in the system. Off-the-record conversations can be started and stopped only by customers.

For details about setting up data masking, see the *Enterprise Chat and E-Mail Administrator’s Guide to Administration Console*.

## Secure Chat

Secure Chat allows chat entry points to transfer customer context information from the company website to the application through SAML. This allows website visitors who are already recognized on the company website to use a single sign-on enabled entry point to chat with an agent without having to provide redundant information. Entry points can be configured to allow website visitors to log in to secure chat upon initially accessing the chat entry point, or to allow agents to initiate the authentication process mid-chat.

To enable secure chat, the chat templates must be configured, an entry point must be configured to allow secure chat, and customer single sign-on must be configured.

- ▶ To learn how to enable secure chat for aqua chat templates, see [“Enabling Auto-Login” on page 34](#) and [“Configuring Aqua Templates for Customer SSO” on page 35](#).
- ▶ To learn how to enable secure chat for kiwi chat templates, see [“Enabling Auto-Login” on page 65](#) and [“Configuring Kiwi Templates for Customer SSO” on page 65](#).
- ▶ For details about configuring entry points to use secure chat and mid-chat authentication, see [“Creating Entry Points” on page 103](#) and [“Adding Chat and Collaboration Help Links to Websites” on page 112](#).
- ▶ For more details about configuring Chat Customer Single Sign-On, see *Enterprise Chat and Email Administrator’s Guide to Administration Console*.

## Chat Attachments

Customers and agents can send files to each other during a chat. Once configured by an administrator, customers and agents can browse to a file and attach it to their chat messages. Customers can also drag and drop files into the chat text editor. For more details about the types of files that can be allowed or blocked, or how to set up chat attachments, see the *Enterprise Chat and E-Mail Administrator’s Guide to Administration Console*.

## Services for Chat and Collaboration

Make sure that the following service in the System Console are configured properly and are in running state. For details about configuring the services, see the *Enterprise Chat and Email Administrator's Guide to System Console*.

- ▶ **External Agent Assignment Service (EAAS)** (For emails, chats, callback, and delayed callback activities.)
- ▶ **External Agent Messaging Service (EAMS) Service** (For emails, chats, callback, and delayed callback activities.)

## IIS Configuration

If your configuration is using Secure Chat, Docked Chat, or Cobrowse, the X-Frame-Options of the response headers may need to be reconfigured.

## Settings for Chat and Collaboration

Make sure that the following partition and department level settings are configured properly. For details about these settings, see the *Enterprise Chat and E-Mail Administrator's Guide to Administration Console*.

### Settings at the Partition Level

- ▶ Chat Watchdog Settings
- ▶ Enable Chat Queueing
- ▶ Starvation Time for Activities
- ▶ Chat Auto-Pushback Settings
  - Enable auto-pushback of chats
  - Expiry time for auto-pushback for chats (minutes)
  - Make agent unavailable on auto-pushback of chats

### Settings at the Department Level

- ▶ Chat - Agent availability choice enabled
- ▶ Chat - Agent chat message maximum length
- ▶ Chat - Auto block check
- ▶ Chat - Auto spellcheck
- ▶ Chat - Customer offline interval
- ▶ Chat - Daily service level sample set definition
- ▶ Chat - Disable typing area and page push area on customer exit
- ▶ Chat - Display timestamp in agent chat console
- ▶ Chat - Display timestamp in completed chat transcript

- ▶ Chat - Display timestamp in customer chat console
- ▶ Chat - Disable typing area and page push area on customer exit
- ▶ Chat - Enable Sound Alert
- ▶ Chat - Force activity categorization
- ▶ Chat - Force resolution code
- ▶ Chat - Inbox sort column
- ▶ Chat - Inbox sort order
- ▶ Chat - My Monitor - Activity refresh interval (seconds)
- ▶ Chat - SLA threshold interval (seconds)
- ▶ Reason for chat transfer



# Aqua Chat Template Sets

- ▶ [About Aqua Template Sets](#)
- ▶ [Creating an Aqua Template Set](#)
- ▶ [Changing General Settings](#)
- ▶ [Changing Header and Footer Colors](#)
- ▶ [Changing Color of Buttons](#)
- ▶ [Changing the Size and Placement of the Chat Frame](#)
- ▶ [Configuring Login Page Parameters](#)
- ▶ [Adding New Fields](#)
- ▶ [Configuring Sub-Domain Navigation Options](#)
- ▶ [Enabling Anonymous Chats](#)
- ▶ [Enabling Auto-Login](#)
- ▶ [Configuring Aqua Templates for Customer SSO](#)
- ▶ [Configuring Off-the-Record Options](#)
- ▶ [Setting Maximum Length for Chat Messages](#)

- ▶ [Changing Sound Alert](#)
- ▶ [Changing Chat Bubble Colors](#)
- ▶ [Configuring Survey Questions](#)
- ▶ [Turning Off Surveys](#)
- ▶ [Changing the Off Hours Message](#)
- ▶ [Changing Chat Transcript Options](#)
- ▶ [Deleting Template Sets](#)

This chapter will assist you in understanding how to set up docked chat template sets. For template sets for callback activities, see [“Callback Template Sets” on page 85](#). For information about editing standard template sets, see [“Kiwi Chat Template Sets” on page 50](#).

## About Aqua Template Sets

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Template sets consist of CSS (cascading style sheets) and JS (JavaScript) files. The CSS files control the look and feel of the Customer Chat Console. The JS files contain the business logic used to render data in the Customer Chat Console. Templates are also used to determine what information is requested to identify the customer (for example, name, email address, phone number). You can also compose messages that the customer will see under certain circumstances (for example, if they request a chat session out of hours).

An entry point can be mapped to multiple template sets and multiple entry points can use the same template set. The template sets for, Aqua and Aqua (docked), are shipped with the application and can readily be mapped to any number of entry points.



**Important:** The system supplied templates should not be deleted.

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The template sets are managed from the web server and not from the Administration Console.

## What Makes up an Aqua Template?

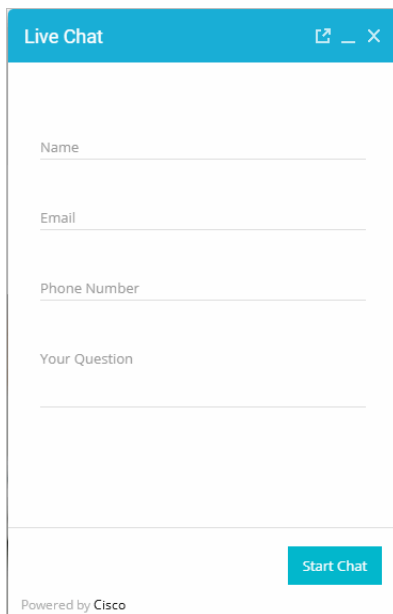
A template consists of a set of pages that are designed to work together. Typically, a chat template has the following pages:

- ▶ A pre chat form
- ▶ The chat area
- ▶ Post chat survey form
- ▶ The off-hours page
- ▶ The alternative help options page

All these pages can be customized to meet your business needs.

## Pre chat form

Customers fill up this form to start a chat.

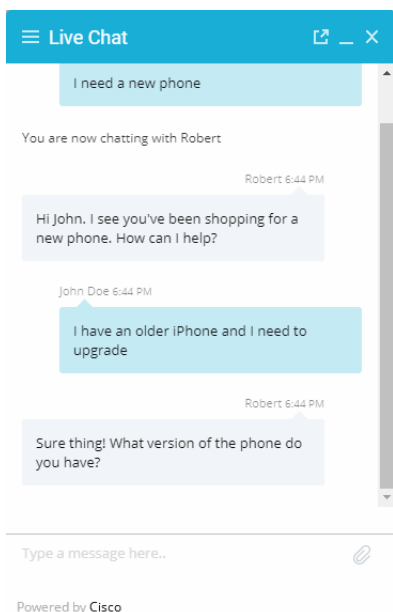


The screenshot shows a pre-chat form titled "Live Chat" with a blue header bar containing a maximize icon, a minus sign, and a close icon. The form contains four input fields: "Name", "Email", "Phone Number", and "Your Question". A blue "Start Chat" button is located at the bottom right. At the bottom left, it says "Powered by Cisco".

*Pre chat form*

## Chat Area

Agent and customer exchange chat messages in the chat area.



The screenshot shows a chat area titled "Live Chat" with a blue header bar containing a hamburger menu icon, a maximize icon, a minus sign, and a close icon. The chat history shows a customer message: "I need a new phone". Below this, it says "You are now chatting with Robert". An agent message follows: "Hi John, I see you've been shopping for a new phone. How can I help?". Then a customer message: "I have an older iPhone and I need to upgrade". Finally, an agent message: "Sure thing! What version of the phone do you have?". At the bottom, there is a text input field with the placeholder "Type a message here.." and a paperclip icon. At the bottom left, it says "Powered by Cisco".

*The chat area*

## Post Chat Survey



**Important:** If the installation is integrated with Cisco WXM, this post chat survey is not displayed when the chat ends and is instead replaced with the WXM survey form.

Customer is presented a survey form at the end of the chat.

The screenshot shows a 'Live Chat' window with a survey form. The form contains three questions, each with a five-star rating scale:

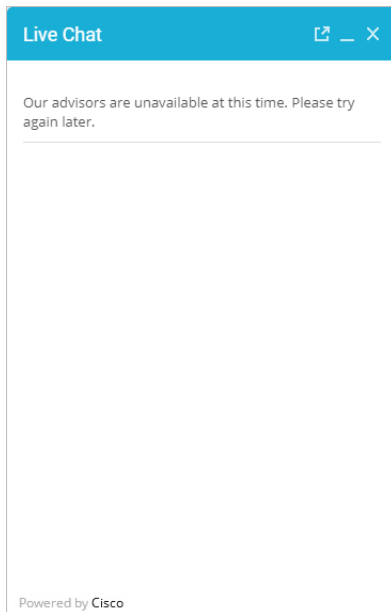
- Question 1: "How would you rate the quality of the answers you received?" (Rating: 4 stars)
- Question 2: "What about the speed with which we answered your questions?" (Rating: 5 stars)
- Question 3: "How would you rate your overall chat experience?" (Rating: 4 stars)

At the bottom of the form is a blue "Send" button and the text "Powered by Cisco".

*Post chat survey form*

## Off Hours Page

An off-hours page is displayed to customers, typically when the customer tries to chat during business off hours.



*The off hours page*

## Do I need to create new templates or just use the default ones?

The docked chat template set, Aqua, is shipped with the application. You *must* always create a copy of the default template set and customize it to look like your website.

You can choose to use one template set for all your chat entry points for a consistent look and feel. Alternatively, you can use different templates, so that the look and feel of each one is targeted towards a specific audience.

## How easy are the templates to modify?

The templates are easy to modify. All the properties of the templates sets are modified using the files available on the web server. It is possible to make a number of layout and wording changes as well as branding changes to match them with the look and feel of your website.

Some important things to note:

- ▶ You must have a good knowledge of the HTML and CSS languages to make changes in the HTML and CSS files.
- ▶ Always create a backup copy of the files before making any changes.

The following table describes the files that can be changed for the **Aqua** template. All the files are available on the web server at *Cisco\_Home\eservice\templates\chat\Aqua*.

| Use  | To  |
|--|---|
| \l10n\Language-Locale.json   | <ul style="list-style-type: none"> <li>▶ Update the text displayed on the chat pages.</li> </ul>  |
| application\application-chat-defaults.js   | <ul style="list-style-type: none"> <li>▶ Enable anonymous chat.</li> <li>▶ Enable auto login</li> <li>▶ Enable surveys</li> <li>▶ Configure the maximum length allowed for customer messages</li> <li>▶ Configure sound alert for chat messages</li> <li>▶</li> </ul>   |
| \css\cssbundle.css, iframe-style.css   | <ul style="list-style-type: none"> <li>▶ Configure the look and feel of the chat pop-up and the chat typing area.</li> </ul>  |
| <ul style="list-style-type: none"> <li>▶ aqua\components\alternate-contact-options</li> <li>▶ aqua\components\alternate-engagement-options</li> <li>▶ aqua\components\article-content</li> <li>▶ aqua\components\article-toolbar</li> <li>▶ aqua\components\attachment</li> <li>▶ aqua\components\attachment-review</li> <li>▶ aqua\components\chat-unavailable-message</li> <li>▶ aqua\components\cobrowse</li> <li>▶ aqua\components\error-message</li> <li>▶ aqua\components\escalation-search-results-list</li> <li>▶ aqua\components\footer-small</li> <li>▶ aqua\components\header-small</li> <li>▶ aqua\components\launch-button</li> <li>▶ aqua\components\message-input-horizontal</li> <li>▶ aqua\components\post-chat-survey</li> <li>▶ aqua\components\pre-chat-params-list</li> <li>▶ aqua\components\status-bar</li> <li>▶ aqua\components\thanks-message</li> <li>▶ aqua\components\transcript</li> <li>▶ aqua\components\video</li> <li>▶ aqua\components\wait-screen</li> </ul> | <ul style="list-style-type: none"> <li>▶ Configure the look and feel of the chat pages, the chat typing area, and the text editor toolbar.</li> <li>▶ Change the images used.</li> <li>▶ <b>Note:</b> The size of the custom images should match the size of the default images. However, if you are changing the size of the chat windows, you can adjust the images size to match the new windows.</li> </ul> |

# Creating an Aqua Template Set

You need access to the web server to perform this task.



---

**Important:** Anytime you update or create new templates, you must copy the templates files on all web servers in your installation.

---

## To create a new template set:

1. On the web server, browse to `Cisco_Home\eService\templates\chat`.
2. Create a copy of the **Aqua** folder and rename the folder.
3. The new template set is created. You can now edit the files in the template folder to configure your template settings and to customize the look of your templates. After creating the template set, some of the things that you can do are:
  - ▶ Configure the login page parameters ([page 29](#))
  - ▶ Enable anonymous chats ([page 34](#))
  - ▶ Set the maximum length of chat messages ([page 41](#))
  - ▶ Configure the survey questions ([page 43](#))
  - ▶ Change the off hours message ([page 46](#))

# Changing General Settings

## To change the general properties for templates:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor.
2. Edit the values for the various properties, such as:
  - **TITLE:** Change the title of the chat window. The default value is Live Collaboration by Cisco.
  - **EG\_CONFIRM\_CLOSE\_CHAT:** Change the message displayed to the agent when the customer closes the chat session.
  - **EG\_START\_CHAT:** Change the text of the button for starting chat. The default value is **Start Chat**.
  - **EG\_SEND:** Change the text of the button for sending the first chat message. The default value is **Send**.
  - **EG\_SUBMIT:** Change the text of the button for sending chat messages. The default value is **Submit**.
3. Save the changes.
4. Clear the browser cache and access the chat link to test the changes.

# Changing Header and Footer Colors

---

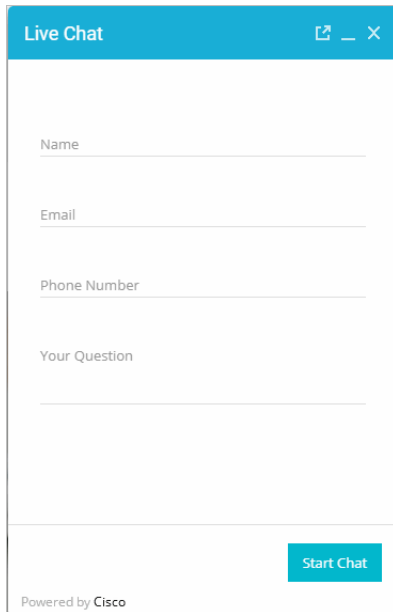
This section talks about changing the header and footer of all pages in the Chat Customer Console, that is, the Login page, the Chat page, and the Survey page.

## To change the header and footer colors:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\css\cssbundle.css` file in a text editor.
2. To change the header colors, locate the following classes and change the value of the background properties:  
`#egain-chat-header-small nav.egain-navbar-fixed-top .colored`
3. To change the footer colors, locate the following classes and change the value of the background properties:  
`#egain-chat-footer-small`  
`#egain-chat-footer-small > span > span`  
`#egain-chat-pre-chat-page .action-footer`  
`#egain-chat-post-chat-page .action-footer`  
`#egain-chat-overlay .egain-navbar-fixed-bottom`
4. Save the changes.
5. Clear the browser cache and access the chat link to test the changes.

# Changing Color of Buttons

This section talks about changing the colors for **Start Chat**, **Send**, and **Close** buttons.

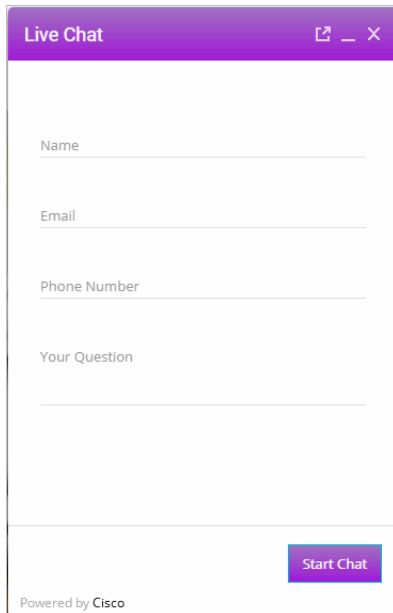
A screenshot of a web-based live chat interface. At the top, there is a blue header bar with the text "Live Chat" on the left and three small icons (a square with an arrow, a minus sign, and an X) on the right. Below the header, there are four input fields: "Name", "Email", "Phone Number", and "Your Question". Each field has a horizontal line below it. At the bottom right of the form, there is a blue button with the text "Start Chat". In the bottom left corner, there is a small text label that says "Powered by Cisco".

*Out-of-the-box color of buttons*

## To change button colors:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\css\cssbundle.css` file in a text editor.
2. Locate the `.action-footer .btn` class and change the value of the `Background` property.
3. Save the changes.

4. Clear the browser cache and access the chat link to test the changes.

A screenshot of a 'Live Chat' form. The form has a purple header with the text 'Live Chat' and window control icons (maximize, minimize, close). Below the header are four input fields: 'Name', 'Email', 'Phone Number', and 'Your Question'. At the bottom right of the form is a purple button labeled 'Start Chat'. At the bottom left, it says 'Powered by Cisco'.

*Custom color of buttons*

## Changing the Size and Placement of the Chat Frame

This section talks about defining the size of the chat frame.

### To change the size of the chat frame:

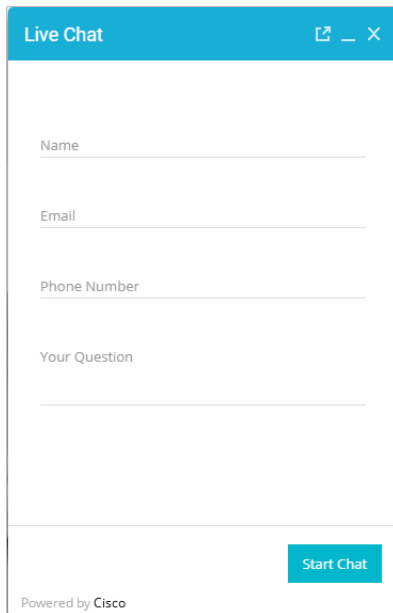
1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\css\iframe-style.css` file in a text editor.
2. Edit the values for the following properties:
  - `#egain-chat-wrapper`: Set the size and position of the chat section in a standard frame.
  - `#egain-chat-iframe`: Set the height, width, position, and placement of the frame.
  - `#egain-chat-wrapper.egain-minimized #egain-chat-iframe`: Set the size and position of the chat sections in a minimized frame. By default, this area is left blank so the content follows the frame.
  - `#egain-chat-iframe`: Set the size and position of the chat frame.
3. Save the changes.
4. Clear the browser cache and access the chat link to test the changes.

# Configuring Login Page Parameters

Build the web form which customers must fill in to initiate a chat. The system uses the customer's contact details (for example, email address, phone number, and so on) to identify existing customers and add the chat session to their customer records automatically. It also creates customer record for new customers.

You can:

- ▶ Change the text of the options
- ▶ Remove fields
- ▶ Change the order of fields
- ▶ Change error messages
- ▶ Change the format of the field



*Out-of-the-box login page*

## To configure the login page:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. Locate the `loginParameters` property, and do the following.
  - a. To remove an existing field, select the code for the field and delete it from the file. For example, to remove the phone number from the login page, delete the following lines:

```
{  
  "eGainAttributeName": "phone_number",  
  "eGainParentObject": "casemgmt",  
  "eGainChildObject": "phone_number_data",
```

```

    "primaryKey": false,
    "controlType": "text",
    "label": "APP.EG_PHONE_NUMBER",
    "required": false,
    "minLength": "0",
    "maxLength": "18",
    "validationPattern": "([0-9 \\-\\(\\)]*)$"
  },

```



**Important:** Do not remove a field that is set as the primary key.

- b. To change the required fields, locate the attribute which you want to change and do the following:
    - i. For the attribute, locate the property required and change the value to true to make it a required field, or change the value to **false** to make it an optional field.
    - ii. If you are setting a field as required, you must set the minimum length allowed for the field.
    - iii. In the attribute section, locate the property `minLength` and set a minimum length for the field. You can also set the maximum length by configuring the `maxLength` setting.
  - c. By default, the email address is set as the primary key for the login page. You can choose to change the primary key to phone number. Also, note that only one field can be set as the primary key. The attribute set as the primary key must be marked as a required field.
  - d. To enable the use of selections in dropdowns for autologin, the values of the `egainChat.SetCustomerParameters(fieldName,value)` parameter need to be passed as such:
    - **Single-select:** `fieldName` is the string “`fieldName_index of login parameter`” and `value` is the internal value of selected option. For example, `egainChat.SetCustomerParameters('fieldName_1','savings')`
    - **Multi-select:** `value` is an array of selected values. For example, `egainChat.SetCustomerParameters('fieldName_1',['abc','xyz'])`
3. Open the `Cisco_Home\eservice\templates\Template_Folder\l10n\Language-Locale.json` file in a text editor.

You can change the text of the fields displayed on the login page. Locate the following properties and provide new labels for the fields.

- `EG_FULLNAME`: Change the label of the name field.
- `EG_EMAIL_ADDRESS`: Change the label of the email field.
- `EG_PHONE_NUMBER`: Change the label of the phone number field.
- `EG_QUESTION`: Change the label of the text field.
- `EG_CHARACTERS_REMAINING`: Change the text of the message displayed to indicate the character count for the text box on the chat interaction page. Make sure you do not delete `{{characterCountRemaining}}` from the message.
- `EG_MESSAGE_LENGTH_ERROR`: Change the text of the warning message to be displayed when the message of the customer exceeds the allowed length. As part of the message, if you want to display the allowed length and the number of characters the user has typed, make sure you retain `(MESSAGE_LENGTH)` and `(MAX_LENGTH)` in the new message.

4. Save the changes.
5. Clear the browser cache and access the chat link to test the changes.

## Adding New Fields

Along with full name, email address, and phone number, you can use custom attributes on the login page.

Before editing the template, the custom attributes for the following objects must be created in the Tools Console via **Tools > Partition\_Name > Business Objects > Attribute settings > System** and mapped to the necessary values in the Tools Console via **Tools > Departments > Attribute Settings > Screen**.

- Customer Data
- Contact Point Data
- Activity Data

When the attributes have been created mapped to the appropriate values, the values then appear as options in the new fields for single and multiselect fields at the login screen. For details about creating these attributes, see the *Enterprise Chat and Email Administrator's Guide to Tools Console*.

The following table lists the fields that can be added to the login page. It also lists the attribute names and object names for each field. You will need this information to add new fields to the login screen.



**Important:** The “Internal Name” of the custom attribute should be used as the Attribute Name when configuring custom attributes in the chat template.

| For   | Parent Object | Child Object                     | Attribute Name   |
|---|---------------|----------------------------------|--|
| Full Name   | casemgmt      | individual_customer_data         | full_name  |
| Email Address                                     | casemgmt      | email_address_contact_point_data | email_address  |
| Phone Number                                      | casemgmt      | phone_number_data                | phone_number   |
| Subject, Custom attributes added to activity data | casemgmt      | activity_data                    | subject<br>If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is <code>More details</code> , the attribute name will be <code>more_details</code> . |
| Custom attributes added to customer data          | casemgmt      | customer_data                    | If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is <code>Family name</code> , the attribute name will be <code>family_name</code> .              |
| Custom attributes added to contact point data     | casemgmt      | contact_point_data               | If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is <code>Mobile number</code> , the attribute name will be <code>mobile_number</code> .          |

## To add new fields:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor and do the following:
  - a. Locate the `loginParameters` property, and copy a section for one of the existing parameters and paste it where you want to add the custom field. Edit the following properties.
    - `eGainAttributeName`: Provide the attribute name. See the table for details about the attribute name you need to provide.
    - `eGainParentObject`: Provide the parent object name. See the table for details about the object name you need to provide.
    - `eGainChildObject`: Provide the child object name. See the table for details about the object name you need to provide.
    - `primaryKey`: Set the value as **false**.
    - `controlType`: Set the format for the field. For a single line text field, set the value to **text**. For a multi-line text field, set the value to **textarea**. For a single-select dropdown, set the value to **singleselect**. For a multi-select option, set the value to **multiselect**.
    - `label`: Provide the label from the I10n language file for the field. For example, for the phone number field, use `APP.EG_PHONE_NUMBER`.
    - `required`: If you want to set the field, as optional set the value as **false**. To make the field mandatory, set the value as **true**.
    - `minLength`: Set the minimum required characters for the field.
    - `maxLength`: Set the maximum allowed characters for the field. The value should not be set more than the value set in the Tools Console while creating the custom attribute.
    - `validationPattern`: If necessary, provide the expression against which the information provided by the customer is to be checked. For example, for phone number you can give an expression like, `^\s*(?!\s*\d{3}\s*)?\s*[-.]?\s*\d{3}\s*[-.]?\s*\d{4}\s*$`. And, for email you can use the expression like, `^[0-9a-zA-Z\.\-\_] +\@[0-9a-zA-Z\.\-\_]+` - this expression refers to the format X@Y.Z (john@mycompany.com). For fields that require an integer value, you need to at least set the validation string as `\d+$`.

For example, a new single-select dropdown field for a custom attribute added to activity data might appear as follows:

```
{
  "eGainAttributeName": "ServiceName",
  "eGainParentObject": "casemgmt",
  "eGainChildObject": "activity_data",
  "controlType": "singleselect",
  "label": "APP.EG_SINGLESELECT",
  "required": true,
  "primaryKey": false,
  "minLength": "0",
  "maxLength": "800",
  "validationPattern": ""
}
```

- b. When finished, save the changes.
2. Open the `Cisco_Home\eservice\templates\Template_Folder\l10n\Language-Locale.json` file in a text editor and do the following:
  - a. Add the following line in the property file: `APP: { }` list in the file: `"EG_Name" : "Display name for the attribute",`  
 Where: `EG_Name` should match the value set in **label** in step 1 on [page 32](#).
  - b. Save the changes.
3. Clear the browser cache and access the chat link to test the changes. The login page should show the new fields.

The screenshot shows a 'Live Chat' window with a purple header. Inside, there are three input fields with labels: 'Full Name' (John Doe), 'Preferred Contact (Email or Phone)' (John@d.com), and 'How Can We Help?' (I need a new phone). A 'Start Chat' button is located at the bottom right, and 'Powered by Cisco' is at the bottom left.

*Custom login form*

## Configuring Sub-Domain Navigation Options

The Aqua template, by default, allows for website visitors to chat with agents while browsing pages hosted on a single domain. To allow for visitors to chat with agents while navigating to other web pages hosted on other sub-domains, further configuration is required. The template must be configured to store chat session data in cookies, thus allowing visitors to freely navigate so other sub-domains without ending the chat session.



**Important:** Do not use multiple chat templates on a domain if only one template has been configured for sub-domain navigation.

### To configure templates for sub-domain navigation:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.

2. Locate the `MultiSubDomainSupport` object and adjust the following properties:
  - `IsRequired`: By default, the value is set to **false**. Set the value to **true** to enable storage of chat session data in cookies.
  - `CookieParentDomain`: Provide the parent domain in which the cookies are stored. For example, `help.com`. This is required if `IsRequired` is set to **true**.
  - `CookiePath`: Provide the common URL path of all the sub-domains that should be supported for continuing the chat, for example: `/chat`. This prevents the cookie data from being sent over to the server with every request. This is required if `IsRequired` is set to **true**.
  - `IsCookieSecured`: Determine whether the cookies should only be used for HTTPS domains. Set to **true** to allow cookies only to be used in HTTPS connections, or set to **false** to allow cookies to be used in HTTP and HTTPS connections.
3. Save the changes.
4. Clear the cookies and browser cache before accessing the chat link to test the changes.

## Enabling Anonymous Chats

---

Anonymous chats allow customers to chat with agents without providing any personal details, like name, email address, phone number, and so on.

### To enable anonymous chats:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. Locate the `loginParameters` property and delete all the parameters between the square brackets. The property will look like: `loginParameters : []`
3. Save the changes.
4. Clear the browser cache and access the chat link to test the changes. The chat should start without showing the login page.

## Enabling Auto-Login

---

When the chat link is provided in an authenticated section of the website, the auto-login feature can be used to automatically login the customer for chat. When the customer clicks the chat link or button, he is not displayed the login page.



**Important:** A template where auto-login is enabled should not be used for regular chats.

---

### To enable auto-login for chats:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.

2. Locate the `EnableAutoLogin` property and set the value to `true` to enable auto-login.
3. Save the changes.

## Configuring Aqua Templates for Customer SSO

Chat entry points can be configured to transfer customer context information from the company website to the application through SAML.

- ▶ For more information about configuring entry points and adding them to websites, see [“Creating Entry Points” on page 103](#) and [“Adding Chat and Collaboration Help Links to Websites” on page 112](#).
- ▶ For more information about Secure Chat for customers, see *Enterprise Chat and Email Administrator’s Guide to Administration Console*.

### To configure chat templates for customer single sign-on:

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. Enable auto-login by setting the value of the `EnableAutoLogin` parameter to **true**.
3. Configure the attributes that will be transferred to the application along with the chat creation request. You can do this by configuring the `loginParameters` property for each of the attributes as described in [“Configuring Login Page Parameters” on page 29](#).
4. If any of the attributes will be transferred to the application in the SAML assertion, specify the following additional properties for the attribute in `loginParameters`:
  - `providerAttributeName`: Name of the attribute in the SAML assertion.
  - `secureAttribute`: You have multiple options of what to set here:
    - Set the value to **1** or **SECURE** to indicate that this attribute will be transferred in the SAML assertion. For example, if the below configuration is done for `full_name`, then this field is not shown on login page and application searches for and extracts information for this attribute from SAML assertion:

```
{
  "providerAttributeName": "my_name",
  "secureAttribute": "1",
  "eGainAttributeName": "full_name",
  "eGainParentObject": "casemgmt",
  "eGainChildObject": "individual_customer_data",
  "primaryKey": false,
  "controlType": "text",
  "label": "APP.EG_FULLNAME",
  "required": true,
  "minLength": "1",
  "maxLength": "120",
```

```
"validationPattern": ""
}
```

- Set the value to **2** or **UNAUTH\_AND\_SECURE** to indicate that this attribute will be transferred in the SAML assertion and it will also be displayed on login page for authentication at start. For example, If the below configuration is done for `full_name`, then this field is shown on login page and application also searches for and extracts information for this attribute from SAML assertion.

```
{
  "providerAttributeName": "my_name",
  "secureAttribute": "2",
  "eGainAttributeName": "full_name",
  "eGainParentObject": "casemgmt",
  "eGainChildObject": "individual_customer_data",
  "primaryKey": false,
  "controlType": "text",
  "label": "APP.EG_FULLNAME",
  "required": true,
  "minLength": "1",
  "maxLength": "120",
  "validationPattern": ""
}
```

- If `secureAttribute` is missing or is set to **0** or **UNAUTHENTICATED**, the application does not search for and extract information for that attribute from SAML assertion, and the `full_name` field appears on the login screen. For this configuration, you must specify the login parameters the application searches for and extracts from SAML assertion in a similar way as that of a **1** or **SECURE** attribute.
- If the `EnableAutologin` property value is **false** and all the login parameters are configured with the `secureAttribute` value as **1** or **SECURE**, then the chat is treated as an Anonymous chat. If `EnableAutologin` property value is **true** and all the login parameters are configured with the `secureAttribute` value as **1** or **SECURE** along with the `SAMLToken`, then the chat is treated as a secure chat.

## Configuring Alternative Engagement Options

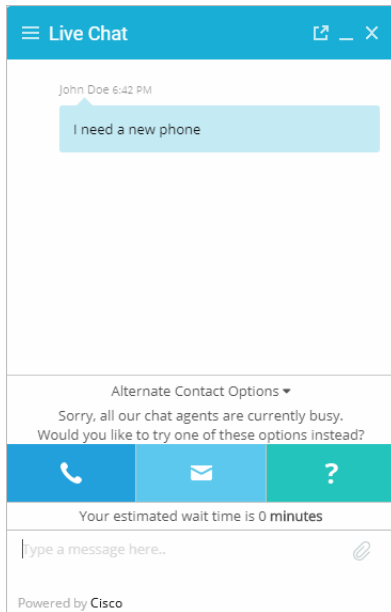
Out-of-the-box templates come with three alternative engagement options for the chat window. These options are displayed to customers while they are waiting in queue (new chats or transferred chats) to be serviced by an agent. Once an agent joins the chat, the options are removed from the chat window. You can display these options as soon as the customer starts the chat, or after a delay. To enable these options for a queue, see *Enterprise Chat and Email Administrator's Guide to Routing and Workflows*.

- ▶ Give us a call
- ▶ Send us an email

- ▶ Visit our FAQ page

These options have placeholder links. You must update these links before using this feature. You can also:

- ▶ Update the text.
- ▶ Remove options.
- ▶ Add new options.



*Out-of-the-box options*

### To update links on the page:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. In the file, search for `AlternateEngmtParams` and in this section set the following properties:
  - Search for text : `'APP.EG_ALT_ENGMT_PHONE'` and for the URL parameter provide the link for the callback page.
  - Search for text : `'APP.EG_ALT_ENGMT_EMAIL'` and for the URL parameter provide the email address which customers can use to send emails. Make sure you do not delete the `mailto:` text.
  - Search for text : `'APP.EG_ALT_ENGMT_FAQ'` and for the URL parameter provide the link to the FAQ page on your website.
3. Clear the browser cache and access the chat link to test the changes.

### To update the text on the page:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor and do the following:
  - Locate the `EG_ALT_ENGMT` properties and change the value of this property to the new message you want to display for the alternative engagement options.

- Similarly, locate the EG\_ALT\_ENGMT\_PHONE, EG\_ALT\_ENGMT\_EMAIL, and EG\_ALT\_ENGMT\_FAQ properties and update the text for each of the options, that is, **Give us a call**, **Send us an email**, and **Visit our FAQ page**.
2. Save the changes.
  3. Clear the browser cache and access the chat link to test the changes.

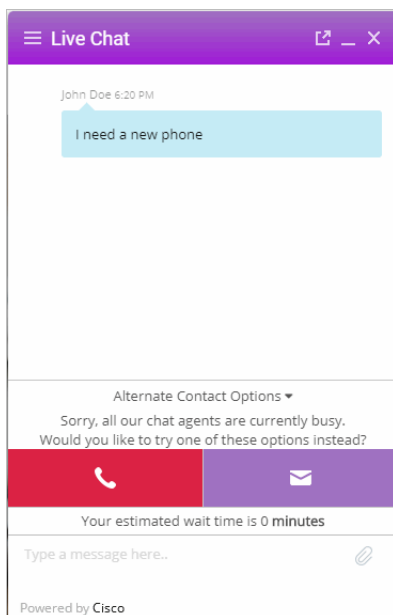
### To remove an option:

1. Open the `Cisco_Home\Service\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. In the file search for `AlternateEngmtParams` and from this section delete the code lines for the help option you do not want to display. For example, to remove the **Send us an Email** option, delete the following lines of code:

```

{
  label : 'APP.EG_ALT_ENGMT_EMAIL',
  image : 'components/alternate-engagement-options/icon_email.png',
  hoverImage : 'components/alternate-engagement-options/mail_hover.png',
  url : 'mailto:support@company.com'
},

```



*Customized remove an option*

3. Clear the browser cache and access the chat link to test the changes.

### To add new options:

1. Open the `Cisco_Home\Service\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.

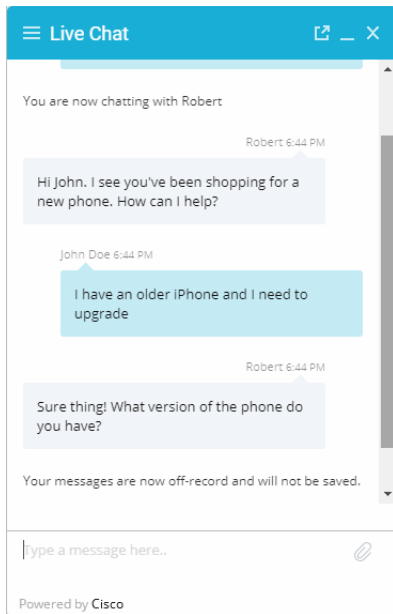
2. In the file locate the `AlternateEngmtParams` property, and copy a section for one of the existing help options and paste it where you want the new section. Edit the following properties.
  - **label:** Create a new parameter using the name as `EG_ALT_ENGMT_Name` from `l10n\Language-Locale.json`.
  - **image:** Set the value as `'components/alternate-engagement-options/icon_email.png'`
  - **hoverImage:** Set the value as `'components/alternate-engagement-options/mail_hover.png'`
  - **url:** Provide the URL for the option.
3. Save the changes.
4. Place the images to be used for the new section at the following location:  
`Cisco_Home\eservice\templates\chat\Template_Folder\components\alternate-engagement-options`
5. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor and do the following:
  - a. Add the following line in the property file: `EG_ALT_ENGMT_Name="Text for the section"` Where `EG_ALT_ENGMT_Name` should match the value set in text in step 2.
  - b. Save the changes.
6. Clear the browser cache and access the chat link to test the changes.

## Configuring Off-the-Record Options

---

When data masking is enabled, masking rules prevent agents and customers from sending sensitive information like credit card numbers, social security numbers, and so on, during the chat session. The Off-the-record feature allows agents and customers to exchange sensitive information as data masking rules do not apply to these messages. Any information exchanged while off-record is not stored in the system. Off-the-record conversation

can be started and stopped only by customers. This feature is enabled while configuring data masking for the chat channel. For details, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.

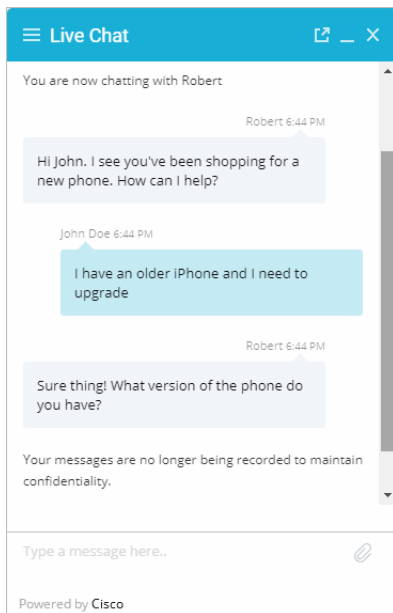


*Off the record messages*

### To change the text of off-the-record messages:

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor.
2. To change the text that appears when a customer goes on-record and off-record, locate the following properties and change the values:
  - `EG_OFF_RECORD`: The default value is `Your messages are now off-record and will not be saved in the system.`
  - `EG_ON_RECORD`: The default value is `Your messages are now on record.`
3. To change the text that appears when data is masked, change the value of the following property:
  - `EG_SENSITIVE_DATA_NOTIFICATION`: The default value is `Don't worry. Your sensitive data has been masked.`
4. To change the text that appears in the chat transcript when messages have been removed due to masking, change the value of the following property:
  - `EG_OFF_RECORD_MESSAGE_REMOVED`: The default value is `Message has been removed.`
5. Save the changes.

6. Clear the browser cache and access the chat link to test the changes.



*Customized messages*

## Setting Maximum Length for Chat Messages

### To set the maximum length for chat messages:

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. Locate the `MaxMessageSize` property and change the value of the property to the number of characters you want to allow for each chat message. By default the value is set to 800. This setting is also used to control the message length in the **Additional Comments** field in the survey form. The maximum value can be set to 2000.



**Important:** This setting does not apply to WXM survey forms if the installation is integrated with Cisco WXM

3. Save the changes.
4. Clear the browser cache and access the chat link to test the changes.

## Changing Sound Alert

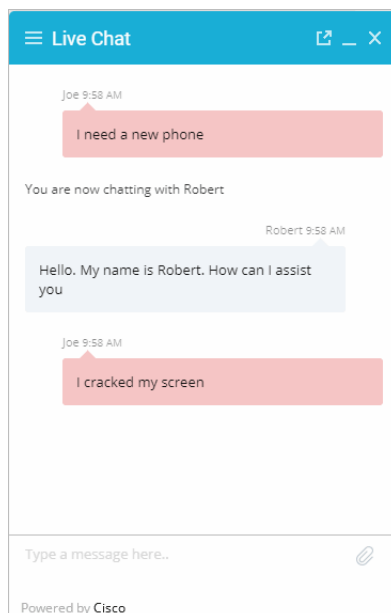
A sound alert is played on the customer side when a new chat message comes. You can change this sound alert.

### To change the sound alert:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. Locate the `CustomerAudioAlert` property and change the value of the property to the path of the new chat sound file. Only `.wav` files are supported.
3. Save the changes.
4. Clear the browser cache and access the chat link to test the changes.

## Changing Chat Bubble Colors

Different bubble colors are used to identify messages sent by the agent and the customer during chat interactions. You can change these colors of these bubbles.



*Custom colors for chat bubbles*

### To change the chat message bubble colors:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\css\cssbundle.css` file in a text editor.
2. To change the chat message bubble color for customers: Locate the `again-chat-transcript.customer.bubble` class and in the `.bubble` class change the value of the background property. You can use the `.customer.bubble` classes to adjust the borders, spacing, and margin as well.

3. To change the chat message bubble color for the first agent: Locate the `egain-chat-transcript.agent.bubble` class and in the `.bubble` class change the value of the `background` property. You can use the `.agent.bubble` classes to adjust the borders, spacing, and margin as well.
4. To change the chat message bubble color for all other agents who can join the chat as supervisors: Locate the `&.agent1`, `&.agent2`, and `&.agent3` classes and in the `.bubble` class change the value of the `background` property. In the `.arrow` class change the value of the `border-right` property.
5. Save the changes.

## Configuring Survey Questions



**Important:** This does not apply to WXM survey forms. If the installation is integrated with Cisco WXM, this survey is replaced by the WXM survey.

At the end of the chat session a survey form is presented to customers to measure the usefulness of the chat. The survey form has three questions and a text box for providing additional comments. You can change the text of these questions, however, you cannot add or remove questions from the survey form.

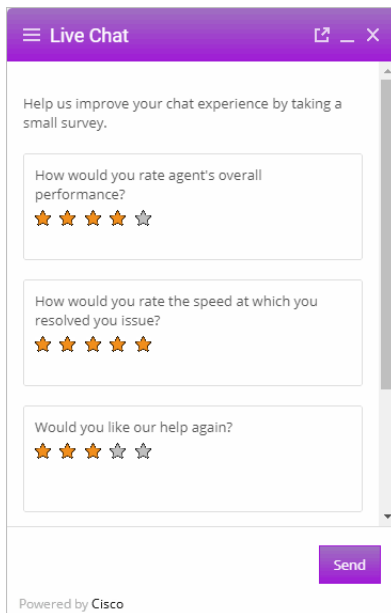
You can turn off the survey, if you do not wish to use it. For details, see [“Turning Off Surveys” on page 45](#).

*Out-of-the-box chat survey form*

### To change the text of survey questions:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor.
2. Locate the section for survey questions by searching for `EG_SURVEY`. In this section change the following properties:

- **EG\_SURVEY\_HEADING:** Change the text for presenting the survey form.
  - **EG\_SURVEY\_QUESTION\_1, EG\_SURVEY\_QUESTION\_2, and EG\_SURVEY\_QUESTION\_3:** Change the text of the survey questions.
  - **EG\_SURVEY\_QUESTION\_4:** Change the title of the textbox.
  - **EG\_MESSAGE\_LENGTH\_ERROR:** Provide the message to be displayed when the text in the comments box exceeds the allowed size. Keep in mind this is a general message that is used in the chat session and on the survey page when a user exceeds the character limit for the message.
  - **EG\_THANKS\_SURVEY\_MESSAGE:** Change the message displayed to users after they have completed the survey.
  - **EG\_SEND:** Change the text of the button used for submitting the survey. Keep in mind this is a general button which may be used in chat pages other than just the survey section.
3. Save the changes.
  4. Clear the browser cache and access the chat link to test the survey form changes.



*Customized chat survey form*

### **To change the maximum allowed characters of the survey text box:**

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. Locate and set the `MaxSurveyTextSize` property to a new value. By default, this value is set to 2000. The maximum value for this property cannot exceed 4000.
3. Save the changes.

# Turning Off Surveys

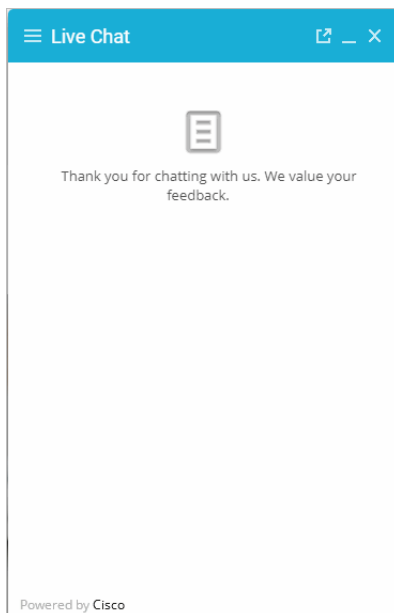


**Important:** This does not apply to WXM survey forms. If the installation is integrated with Cisco WXM, this survey is replaced by the WXM survey.

You can turn off the survey if you do not wish to display a survey form at the end of chat sessions.

## To turn off surveys:

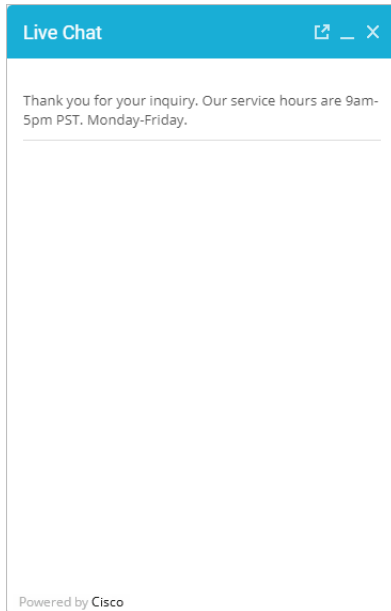
1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\application\application-chat-defaults.js` file in a text editor.
2. In the file locate the `SurveyPageOn` property and change its value to `false`. Save the changes.
3. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor.
4. In the file locate the `EG_THANKS_CHAT_MESSAGE` property and change the text to be displayed to customers when they end the chat session. The default value is `Thank you for chatting with us.`
5. Save the changes.
6. Clear the browser cache and access the chat link to test the changes.



*The message shown if surveys are removed*

# Changing the Off Hours Message

An off hours message can be displayed to customers when agents are not available for handling chats. Note that this message differs from the message that appears when all available agents have reached their concurrent task limit.

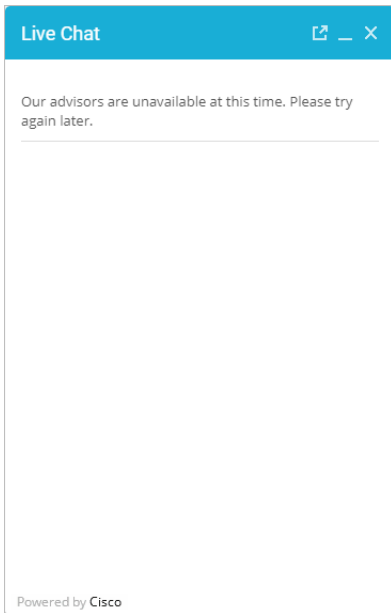


*Off hours message*

## To change the off hours message:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor.
2. Locate the property `EG_CHAT_UNAVAILABLE` and change the message to be displayed during off hours.
3. Save the changes.

4. Clear the browser cache and access the chat link to test the changes.

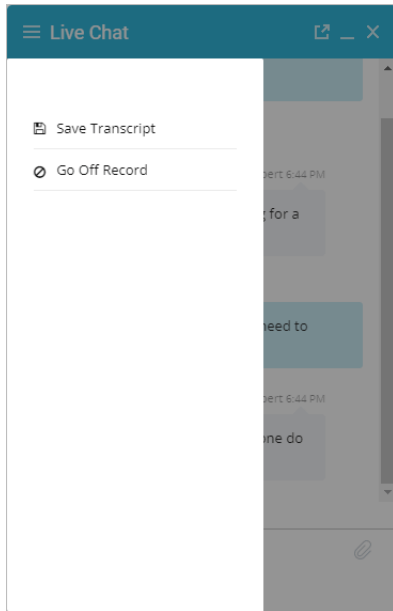


*Custom message*

# Changing Chat Transcript Options

During a chat session and at the end of a chat session, customers have access to the Save Transcript button. Customers can use this to save the chat transcript for future reference.

You can change the tool tips and you can add a header, footer, and title for the transcript window. You cannot remove buttons from the chat window.



*Default Save and Print Transcript buttons*

## To change the chat transcript options:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\l10n\Language-Locale.json` file in a text editor.
2. Edit the values for the following properties:
  - **EG\_TOOLBAR\_SAVE\_TRANSCRIPT:** Change the tool tip of the **Save Transcript** button.
  - **EG\_TRANSCRIPT\_HEADER:** Provide the header for the transcript page.
  - **EG\_TRANSCRIPT\_START\_TIME:** Change how you want the start time of the transcript to be displayed. Do not change the value of the `chatStartTime` property.
  - **EG\_CHAT\_TRANSCRIPT\_HEADER:** Change how you want the customers to see which agent they're talking to. Do not change the value of the `AgentName` property.
3. Save the changes.
4. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\l10n\messaging_Language_Locale.properties` file in a text editor.
5. Edit the value for the following property:
  - **MAIL\_HEADER\_LIVE\_CHAT:** Change the header of the transcript emailed by the system.
6. Save the changes.

7. Clear the browser cache and access the chat link to test the changes.

## Deleting Template Sets

---



**Important:** You must delete the templates files from all web servers in your installation.

---

### To delete a template set:

1. On the web server, browse to `Cisco_Home\eService\templates\chat`.
2. Delete the template folder that you do not want to use. If you are using these templates for any entry point, make sure to update the HTML code on web pages with the new template sets you want to use.



# Kiwi Chat Template Sets

- ▶ [About Kiwi Template Sets](#)
- ▶ [Creating Template Set Folders](#)
- ▶ [Changing General Settings](#)
- ▶ [Changing Header and Footer Colors](#)
- ▶ [Changing Color of Buttons](#)
- ▶ [Changing the Size of Chat Window](#)
- ▶ [Configuring Login Page Parameters](#)
- ▶ [Adding New Fields](#)
- ▶ [Enabling Anonymous Chats](#)
- ▶ [Enabling Auto-Login](#)
- ▶ [Configuring Kiwi Templates for Customer SSO](#)
- ▶ [Configuring Alternative Engagement Options](#)
- ▶ [Configuring Off-the-Record Options](#)
- ▶ [Setting Maximum Length for Chat Messages](#)

- ▶ [Disabling Rich Text Editor](#)
- ▶ [Hiding Emoticons](#)
- ▶ [Changing Agent and Customer Images](#)
- ▶ [Changing Chat Bubble Colors](#)
- ▶ [Changing Sound Alert](#)
- ▶ [Configuring Widgets](#)
- ▶ [Configuring Survey Questions](#)
- ▶ [Turning Off Surveys](#)
- ▶ [Changing the Off Hours Message](#)
- ▶ [Changing Chat Transcript Options](#)
- ▶ [Deleting Template Sets](#)

This chapter will assist you in understanding how to update and edit Kiwi template sets. Kiwi template sets from prior versions of the application are supported and can be edited. Kiwi template sets are not included in new installs of ECE 12.0

For template sets for callback activities, see [“Callback Template Sets” on page 85](#). For information about editing Aqua chat template sets, see [“Aqua Chat Template Sets” on page 18](#).

## About Kiwi Template Sets

---

An entry point can be mapped to multiple template sets and multiple entry points can use the same template set. The template set, Kiwi is supported from previous versions of the application, but is not included in new installations, is shipped with the application and can readily be mapped to any number of entry points.

The Aqua template set should be used for new chat configurations. For more information, see [“Aqua Chat Template Sets” on page 18](#).



**Important:** The system supplied templates should not be deleted.

---

The template sets are managed from the web server and not from the Administration Console.



**Important:** Kiwi template sets do not support WXM surveys for installations that are integrated with Cisco WXM. For more information about surveys that are compatible with Kiwi template sets, see [“Configuring Survey Questions” on page 80](#).

---

## What Makes up a Kiwi Template?

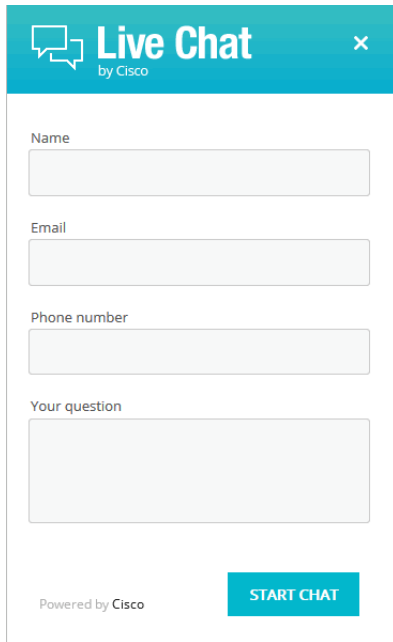
A template consists of a set of pages that are designed to work together. Typically, a chat template has the following pages:

- ▶ A pre chat form
- ▶ The chat area
- ▶ Post chat survey form
- ▶ The off-hours page
- ▶ The alternative help options page.

All these pages can be customized to meet your business needs.

## Pre chat form

Customers fill up this form to start a chat.

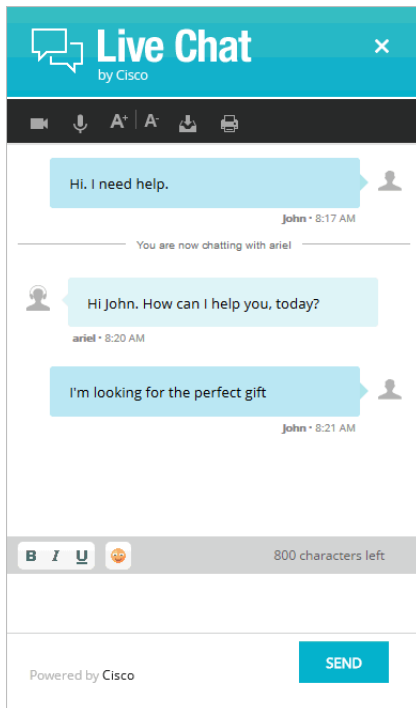


The pre chat form is a vertical rectangular window with a teal header. The header contains a speech bubble icon, the text "Live Chat" in white, and "by Cisco" in smaller white text. A close button (X) is in the top right corner. Below the header are four input fields: "Name", "Email", "Phone number", and "Your question". Each field is a light gray rectangle with rounded corners. At the bottom left, it says "Powered by Cisco". At the bottom right, there is a teal button with the text "START CHAT" in white.

*Pre chat form*

## Chat Area

Agent and customer exchange chat messages in the chat area.

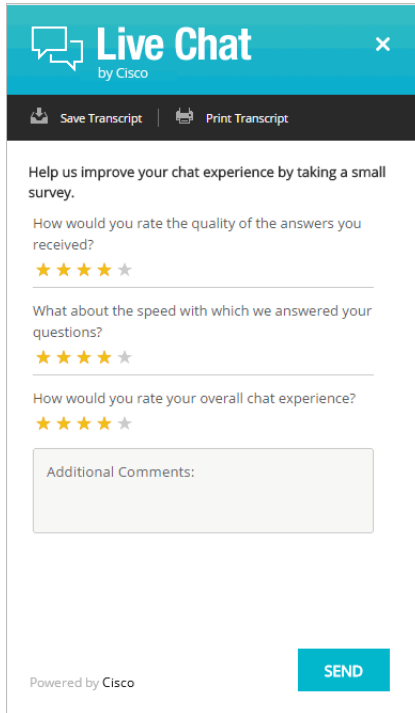


The chat area is a vertical rectangular window with a teal header. The header contains a speech bubble icon, the text "Live Chat" in white, and "by Cisco" in smaller white text. A close button (X) is in the top right corner. Below the header is a black toolbar with icons for video, microphone, text size, text color, and print. The chat messages are displayed in a list: a customer message "Hi. I need help." in a light blue bubble with a right-pointing arrow, timestamped "John • 8:17 AM"; a separator line with the text "You are now chatting with ariel"; an agent message "Hi John. How can I help you, today?" in a light teal bubble with a left-pointing arrow, timestamped "ariel • 8:20 AM"; and another customer message "I'm looking for the perfect gift" in a light blue bubble with a right-pointing arrow, timestamped "John • 8:21 AM". Below the messages is a text input field with a gray background, containing icons for bold (B), italic (I), underline (U), and emoji, and the text "800 characters left". At the bottom left, it says "Powered by Cisco". At the bottom right, there is a teal button with the text "SEND" in white.

*The chat area*

## Post Chat Survey

Customer is presented a survey form at the end of the chat.

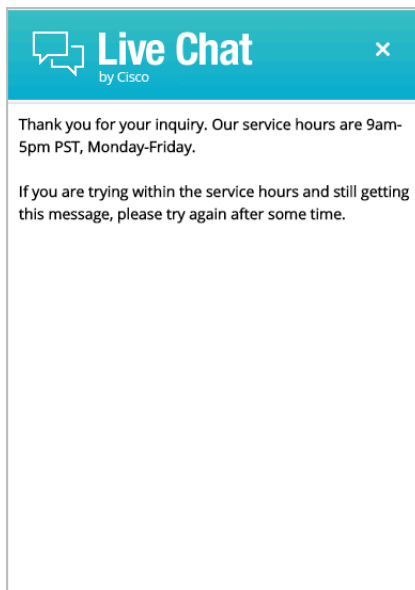


The screenshot shows a 'Live Chat by Cisco' window. At the top, there are icons for 'Save Transcript' and 'Print Transcript'. The main content area contains a survey with three questions, each followed by a five-star rating scale. The first question is 'How would you rate the quality of the answers you received?' with 4 stars selected. The second question is 'What about the speed with which we answered your questions?' with 4 stars selected. The third question is 'How would you rate your overall chat experience?' with 4 stars selected. Below the questions is a text input field labeled 'Additional Comments:'. At the bottom left, it says 'Powered by Cisco', and at the bottom right, there is a blue 'SEND' button.

*Post chat survey form*

## Off Hours Page

An off-hours page is displayed to customers, typically when the customer tries to chat during business off hours.



The screenshot shows a 'Live Chat by Cisco' window. The main content area contains a message: 'Thank you for your inquiry. Our service hours are 9am-5pm PST, Monday-Friday.' Below this is another message: 'If you are trying within the service hours and still getting this message, please try again after some time.'

*The off hours page*

## Do I need to create new templates or just use the default ones?

The template set, Cisco Kiwi, is shipped with the application. You *must* always create a copy of the default template set and customize it to look like your website.

You can choose to use one template set for all your chat entry points for a consistent look and feel. Alternatively, you can use different templates, so that the look and feel of each one is targeted towards a specific audience.

## How easy are the templates to modify?

The templates are easy to modify. All the properties of the templates sets are modified using the files available on the web server. It is possible to make a number of layout and wording changes as well as branding changes to match them with the look and feel of your website.

Some important things to note:

- ▶ You must have a good knowledge of the HTML and CSS languages to make changes in the HTML and CSS files.
- ▶ Always create a backup copy of the files before making any changes.

The following table describes the files that can be changed. All the files are available on the web server at *Cisco\_Home\eService\templates\chat\Template\_Name*.

| Use   | To  |
|---|---|
| <code>\Properties\chat_Locale.properties</code>   | <ul style="list-style-type: none"> <li>▶ Update the text displayed on the chat pages.</li> </ul>  |
| <code>\eGainLiveConfig.js</code>  | <ul style="list-style-type: none"> <li>▶ Change the fields displayed on the login page.</li> <li>▶ Enable anonymous chats.</li> <li>▶ Enable auto login.</li> <li>▶ Show emoticons.</li> <li>▶ Configure the height of the chat window.</li> <li>▶ Configure the maximum length allowed for customer messages.</li> <li>▶ Configure sound alert for chat messages.</li> <li>▶ Hide rich text editor.</li> </ul> |
| <code>css\transcript.css,</code><br><code>mailtranscript.css</code><br><code>\chat\less\chat-main.less</code>   | <ul style="list-style-type: none"> <li>▶ Configure the look and feel of the chat pages, the chat typing area, and the text editor toolbar.</li> </ul>   |
| <code>\chat.html</code>   | <ul style="list-style-type: none"> <li>▶ Change the layout of the chat page.</li> </ul>   |
| Images folders:<br><ul style="list-style-type: none"> <li>▶ <i>Template_Name</i>\images</li> <li>▶ <i>Template_Name</i>\templates\chat\img</li> </ul> | <ul style="list-style-type: none"> <li>▶ Change the images used.</li> </ul> <p><b>Note:</b> The size of the custom images should match the size of the default images. However, if you are changing the size of the chat windows, you can adjust the images size to match the new windows.</p>  |

# Creating Template Set Folders

---

You need access to the web server to perform this task.



**Important:** Anytime you update or create new templates, you must copy the templates files on all web servers in your installation.

---

## To create a new template set:

1. On the web server, browse to `Cisco_Home\eService\templates\chat`.
2. Create a copy of the **Kiwi** folder and rename the folder.
3. The new template set is created. You can now edit the files in the template folder to configure your template settings and to customize the look of your templates. Except for the following files, all the files can be changed.
  - `connection.js`
  - `session.js`
  - `messenger.js`
  - `audio.js`
  - `transcript.js`
  - `blank.html`
  - `v11.version`
  - All file in the `libs` folder

After creating the template set, some of the things that you can do are:

- ▶ Configure the login page parameters ([page 60](#))
- ▶ Enable anonymous chats ([page 64](#))
- ▶ Hide the emoticons option ([page 83](#))
- ▶ Set the maximum length of chat messages ([page 71](#))
- ▶ Configure widgets ([page 79](#))
- ▶ Configure the survey questions ([page 80](#))
- ▶ Change the off hours message ([page 82](#))

# Changing General Settings

---

## To change the general properties for templates:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor.
2. Edit the values for the following properties:

- **L10N\_DOCUMENT\_TITLE:** Change the title of the chat window. The default value is Live Collaboration by Cisco.
  - **L10N\_BROWSER\_CLOSE\_MESSAGE:** Change the message displayed to the customer when he closes the chat window during a chat session.
  - **L10N\_CLOSE\_MESSAGE:** Change the message displayed to the agent when the customer closes the chat session.
  - **L10N\_NEW\_MESSAGE:** Change the text that is displayed in the task bar and the title window of chat when the agent sends a new message to the customer.
  - **L10N\_START\_CHAT\_BUTTON:** Change the text of the button for starting chat. The default value is Start Chat.
  - **L10N\_SUBMIT:** Change the text of the button for sending chat messages. The default value is **Send**.
  - **L10N\_WINDOW\_CLOSE\_BUTTON:** Change the text of the button for closing the chat window. The default value is **Close window**.
3. Save the changes.
  4. Clear the browser cache and access the chat link to test the changes.

## Changing Header and Footer Colors

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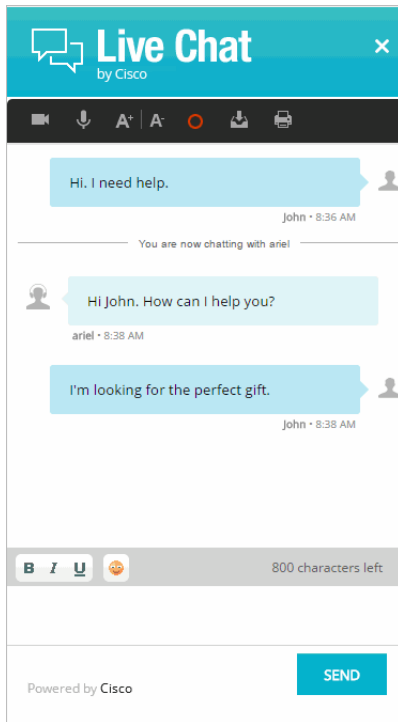
This section talks about changing the header and footer of all pages in the Chat Customer Console, that is, the Login page, the Chat page, and the Survey page.

### To change the header and footer colors:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\chat\less\chat-main.less` file in a text editor.
2. To change the header color, locate the `#eg-chat-header` class and in the `.wrap` class change the value of the `background` property.
3. To change the footer color, locate the `.submit-section` class and change the value of the `background` property.
4. Save the changes.
5. Clear the browser cache and access the chat link to test the changes.

# Changing Color of Buttons

This section talks about changing the colors for **Start Chat**, **Send**, and **Close** buttons.

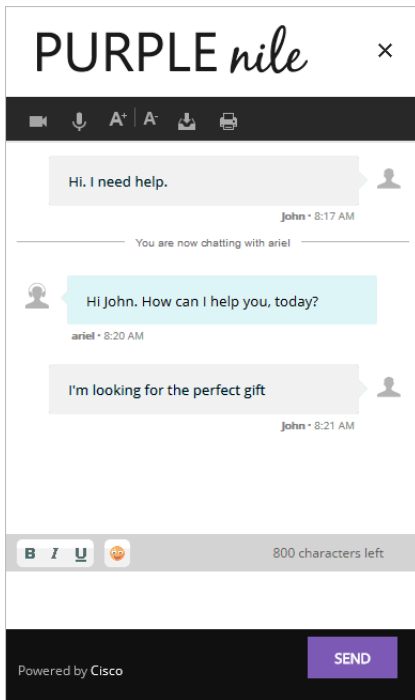


*Out-of-the-box color of buttons*

## To change button colors:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\chat\less\chat-main.less` file in a text editor.
2. Locate the `.kiwiSubmit` class and change the value of the `.gradientBackground` property.
3. Save the changes.

4. Clear the browser cache and access the chat link to test the changes.



*Custom color of buttons*

## Changing the Size of Chat Window

This section talks about defining the size of the chat window.

### To change the size of the chat window:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\GainLiveConfig.js` file in a text editor.
2. Edit the values for the following properties:
  - `chatWindowWidth`: Set the width of the chat window. The width for the login, chat, survey, and thank you pages are the same. The default value is 419 pixels.
  - `chatWindowHeight`: Set the height of the chat window. The default value is 678 pixels.
  - `chatLoginWindowHeight`: Set the height of the login page. The default value is 623 pixels.
  - `chatSurveyWindowHeight`: Set the height of the survey page. The default value is 615 pixels.
  - `chatThanksWindowHeight`: Set the height of the thank you page. The default value is 450 pixels.
  - `chatWindowWidthWithWidget`: Set the width of the chat window when widgets are displayed on the login page and during the chat session. The default value is 830 pixels.
  - `minWidthForShowingSidebar`: Set the minimum width for showing the widget. The default value is 796 pixels.
3. Save the changes.

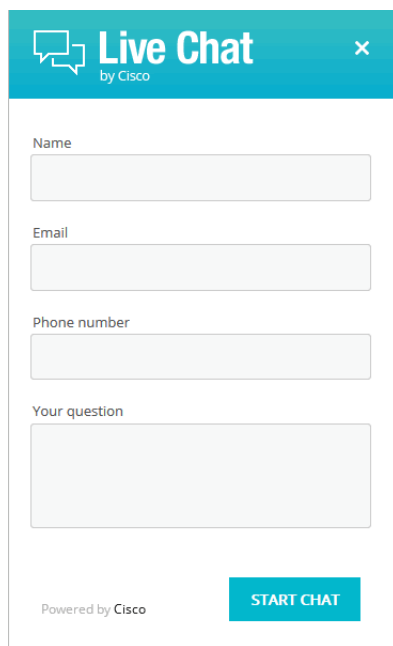
4. Clear the browser cache and access the chat link to test the changes.

## Configuring Login Page Parameters

Build the web form which customers must fill in to initiate a chat. The system uses the customer's contact details (for example, email address, phone number, and so on) to identify existing customers and add the chat session to their customer records automatically. It also creates customer record for new customers.

You can:

- ▶ Change the text of the options
- ▶ Remove fields
- ▶ Change the order of fields
- ▶ Change the primary key



*Out-of-the-box login page*

### To configure the login page:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\egainLiveConfig.js` file in a text editor.
2. Locate the `loginParameters` property, and do the following.
  - a. To remove an existing field, select the code for the field and delete it from the file. For example, to remove the phone number from the login page, delete the following lines:

```
{  
  paramName : 'L10N_PHONE_NUMBER_PROMPT',
```

```

objectName : 'casemgmt::phone_number_data',
attributeName : 'phone_number',
primaryKey : '0',
required : '0',
minLength : '0',
maxLength : '13',
fieldType : '1',
validationString : ''
},

```



**Important:** Do not remove a field that is set as the primary key.

- b. To change the order of the fields, remove the code for the field you want to move and paste it at the new location. Make sure to copy the complete set of lines for a field and move them to the new location.
- c. To change the required fields, locate the attribute which you want to change and do the following:
  - i. For the attribute, locate the property `required` and change the value to 1 to make it a required field, or change the value to 0 to make it an optional field.  
  
If you are setting a field as required, you must set the minimum length allowed for the field.
  - ii. In the attribute section, locate the property `minLength` and set a minimum length for the field. You can also set the maximum length by configuring the `maxLength` setting.
- d. By default, the email address is set as the primary key for the login page. You can choose to change the primary key to phone number. No other field can be set as the primary key. Also, note that only one field can be set as the primary key. To change the primary key, do the following:



**Important:** Only the customer phone number or email address can be set as the primary key.

- i. Locate the section for email address by searching for `attributeName : 'email_address'`. In this section, locate the `primaryKey` property and set the value to 0.
  - ii. Next, locate the section for phone number by searching for `attributeName : 'phone_number'`. In this section, locate the `primaryKey` property and set the value to 1.  
  
Also, the attribute that is set as the primary key needs to be marked as a required field.
  - iii. In the phone number section, locate the property `required` and change the value to 1.
3. Open the `Cisco_Home\eservice\templates\Template_Folder\properties\chat_Locale.properties` file in a text editor.
  - a. You can change the error message for the fields displayed on the login page. Locate the following properties and provide new labels for the fields:
    - `ERROR_NAME`: Change the error message of the name field.
    - `ERROR_EMAIL`: Change the error message of the email field.
    - `ERROR_PHONE`: Change the error message of the phone field.

- **ERROR\_SUBJECT:** Change the error message of the question field.
- b. You can also change the text of the fields displayed on the login page. Locate the following properties and provide new labels for the fields.
- **L10N\_NAME\_PROMPT:** Change the label of the name field.
  - **L10N\_EMAIL\_PROMPT:** Change the label of the email field.
  - **L10N\_PHONE\_NUMBER\_PROMPT:** Change the label of the phone number field.
  - **L10N\_YOUR\_QUESTION\_PROMPT:** Change the label of the text field.
  - **L10N\_CHARACTER\_COUNT:** Change the text of the message displayed to indicate the character count for the text box. Make sure you do not delete {0} from the message.
  - **L10N\_MESSAGE\_LENGTH\_ERROR:** Change the message displayed when the message of the customer exceeds the allowed message length. As part of the message, if you want to display the allowed length and the number of characters the user has typed, make sure you retain (MESSAGE\_LENGTH) and (MAX\_LENGTH) in the new message.
4. Save the changes.
  5. Clear the browser cache and access the chat link to test the changes.

## Adding New Fields

Along with full name, email address, and phone number, you can use custom attributes on the login page.

Custom attributes created for the following objects can be added to the login screen. For details about creating these attributes, see the *Enterprise Chat and E-Mail Administrator's Guide to Tools Console*.

- Customer Data
- Contact Point Data
- Activity Data

The following table lists the fields that can be added to the login page. It also lists the attribute names and object names for each field. You will need this information to add new fields to the login screen.



**Important:** The “Internal Name” of the custom attribute should be used as the Attribute Name when configuring custom attributes in the chat template.

| For           | Object Name                               | Attribute Name |
|---------------|---|----------------|
| Full Name     | casemgmt:individual_customer_data         | full_name      |
| Email Address | casemgmt:email_address_contact_point_data | email_address  |
| Phone Number  | casemgmt:phone_number_data                | phone_number   |

| For   | Object Name                  | Attribute Name   |
|---|------------------------------|--|
| Subject, Custom attributes added to activity data | casemgmt::activity_data      | subject<br>If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is More details, the attribute name will be more_details. |
| Custom attributes added to customer data          | casemgmt::customer_data      | If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is Family name, the attribute name will be family_name.              |
| Custom attributes added to contact point data     | casemgmt::contact_point_data | If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is Mobile number, the attribute name will be mobile_number.          |

### To add new fields:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\GainLiveConfig.js` file in a text editor and do the following:
  - a. Locate the `loginParameters` property, and copy a section for one of the existing parameters and paste it where you want to add the custom field. Edit the following properties.
    - **paramName:** Create a parameter name using the format `L10N_Name_PROMPT`.
    - **objectName:** Provide the object name. See the table on [page 62](#) for details about the object name you need to provide.
    - **attributeName:** Provide the attribute name. See the table on [page 62](#) for details about the attribute name you need to provide.
    - **primaryKey:** Set the value as 0.
    - **required:** If you want to set the field as required set the value as 0. To make the field mandatory, set the value 1.
    - **minLength:** Set the minimum required characters for the field. If a field is not required, set the minimum length as 0.
    - **maxLength:** Set the maximum allowed characters for the field. The value should not be set more than the value set in the Tools Console while creating the custom attribute.
    - **fieldType:** Set the field type.
      - For single line text fields, set the value as **1**.
      - For multi-line text fields, set the value as **2**.
      - For dropdown fields, set the value as **3**.
      - For multi-select dropdown list, set the value as **4**.
    - **validationString:** Provide the expression against which the information provided by the customer is to be checked. For example, for phone number you can give an expression like, `^\s*(?!\s*\d{3}\s*)?\s*[-.]?\s*\d{3}\s*[-.]?\s*\d{4}\s*$`. And, for email you can use the expression like, `^[0-9a-zA-Z\.\-\_]+\@[0-9a-zA-Z\.\-\_]+\.` - this expression refers to the format `X@Y.Z` (john@mycompany.com). For fields that require an integer value, you need to atleast set the validation string as `^\d+$`.
  - b. Save the changes.

2. Open the `Cisco_Home\eService\templates\Template_Folder\properties\chat_Locale.properties` file in a text editor and do the following:
  - a. Add the following line in the property file: `L10N_Name_PROMPT = "Display name for the attribute"`  
Where: `L10N_Name_PROMPT` should match the value set in **paramName** in step 1 on [page 63](#).
  - b. Save the changes.
3. Clear the browser cache and access the chat link to test the changes. The login page should show the new fields.

The screenshot shows a chat window titled 'PURPLE Nile'. Inside the window, there is a login form with the following elements:

- Name:** A text input field.
- Email:** A text input field.
- Account Type:** A dropdown menu currently showing 'Platinum'.
- Your Question:** A large text area for entering a question.
- Footer:** A black bar at the bottom containing 'Powered by Cisco' on the left and a purple 'START CHAT' button on the right.

*Custom login form*

## Enabling Anonymous Chats

Anonymous chats allow customers to chat with agents without providing any personal details, like name, email address, phone number, and so on. When the customer clicks the chat link or button, he is not displayed the login page.

### To enable anonymous chats:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `loginParameters` property and delete all the parameters between the square brackets. The property will look like: `loginParameters : []`
3. Save the changes.

4. Clear the browser cache and access the chat link to test the changes. The chat should start without showing the login page.

## Enabling Auto-Login

When the chat link is provided in an authenticated section of the website, the auto-login feature can be used to automatically login the customer for chat. When the customer clicks the chat link or button, he is not displayed the login page.



---

**Important:** A template where auto-login is enabled should not be used for regular chats.

---

### To enable auto-login for chats:

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `autoLogin` property and set the value to `1` to enable auto-login.
3. Save the changes.
4. Change the entry point code so that the customer information collected at the time of login on the website is passed on to the ECE application when the customer initiates a chat session. For details, see [Step 14](#) on [page 117](#).

## Configuring Kiwi Templates for Customer SSO

Chat entry points can be configured to transfer customer context information from the company website to the application through SAML. To learn more about Secure Chat for customers, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.

### To configure chat templates for customer single sign-on:

1. On the web server, navigate to `Cisco_Home\web\templates\chat\Template_Name\` and open `eGainLiveConfig.js`.
2. Enable `autoLogin` by setting the value of the `autoLogin` parameter to `1`.
3. Configure the attributes that will be transferred to the application along with the chat creation request. You can do this by configuring the `loginParameters` property for each of the attribute as described in [“Configuring Login Page Parameters”](#) on [page 60](#).
4. If any of the attributes will be transferred to the application in the SAML assertion, specify the following additional properties for the attribute in `loginParameters`:
  - `AttributeName`: Name of the attribute in the SAML assertion.
  - `secureAttribute`: Set the value to `1` to indicate that this attribute will be transferred in the SAML assertion. For example:

```
{
  AttributeName : 'account_number',
  secureAttribute : '1',
  paramName : 'L10N_NAME_PROMPT',
  objectName : 'casemgmt::individual_customer_data',
  attributeName : 'full_name',
  primaryKey : '0',
  required : '1',
  minLength : '1',
  maxLength : '120',
  fieldType : '1',
  validationString : ''
}
```

If `secureAttribute` is missing or is set to **0**, the application does not look for and extract information for that attribute from SAML assertion. Similarly, if `secureAttribute` is set to **1** for an attribute, but either `AttributeName` is not provided, or an attribute with the given name is missing from SAML assertion, chat creation request will be denied.

## Configuring Alternative Engagement Options

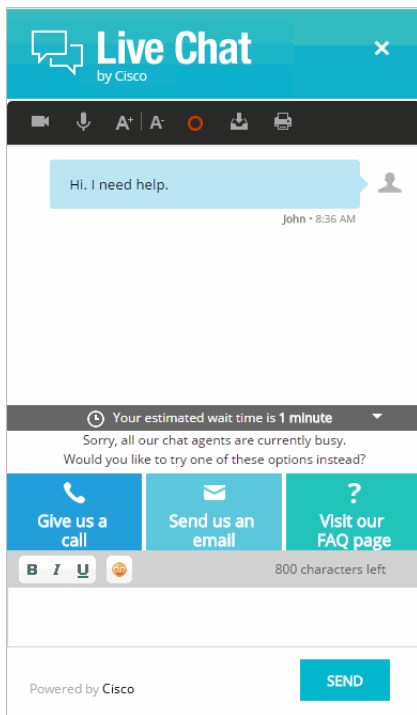
Out-of-the-box templates come with three alternative engagement options for the chat window. These options are displayed to customers while they are waiting in queue (new chats or transferred chats) to be serviced by an agent. Once an agent joins the chat, the options are removed from the chat window. You can display these options as soon as the customer starts the chat, or after a delay. To enable these options for a queue, see *Enterprise Chat and Email Administrator's Guide to Routing and Workflows*.

- ▶ Give us a call
- ▶ Send us an email
- ▶ Visit our FAQ page

These options have placeholder links. You must update these links before using this feature. You can also:

- ▶ Update the text.
- ▶ Remove options.

- ▶ Add new options.



*Out-of-the-box options*

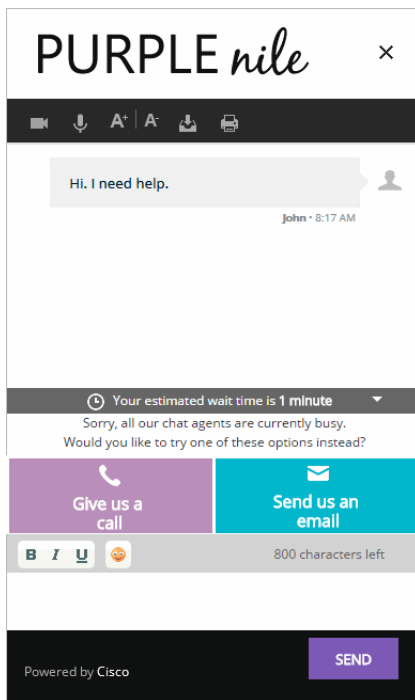
### To update links on the page:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. In the file, search for **altEngagementOptions** and in this section set the following properties:
  - Search for text: 'L10N\_ALT\_ENGMT\_TEXT1' and for the URL parameter provide the link for the callback page.
  - Search for text: 'L10N\_ALT\_ENGMT\_TEXT2' and for the URL parameter provide the email address which customers can use to send emails. Make sure you do not delete the `mailto:` text.
  - Search for text: 'L10N\_ALT\_ENGMT\_TEXT3' and for the URL parameter provide the link to the FAQ page on your website.
3. Clear the browser cache and access the chat link to test the changes.

### To update the text on the page:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor and do the following:
  - Locate the `L10N_ALT_ENGMT_MESSAGE` property and change the value of this property to the new message you want to display for the alternative engagement options.
  - Similarly, locate the `L10N_ALT_ENGMT_TEXT1`, `L10N_ALT_ENGMT_TEXT2`, and `L10N_ALT_ENGMT_TEXT3` properties and update the text for each of the options, that is, **Give us a call**, **Send us an email**, and **Visit our FAQ page**.

2. Save the changes.
3. Clear the browser cache and access the chat link to test the changes.



*Customized text and options*

### To update the background colors and buttons for the options:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. In the file search for `altEngagementOptions` and in this section locate the option for which you want to change the background color and images. Change the following properties:
  - Search for `bgColor` and set the new background color for the section.
  - Search for `image` and provide the name of the new image.
  - Search for `hoverImage` and provide the name of the new hover image for the button.
3. Place the new images at the following location:  
`Cisco_Home\eService\templates\chat\Template_Folder\chat\img`
4. Clear the browser cache and access the chat link to test the changes.

### To remove an option:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. In the file search for `altEngagementOptions` and from this section delete the code lines for the help option you do not want to display. For example, to remove the **Send us an Email** option, delete the following lines of code:

```
{
```

```
text: 'L10N_ALT_ENGMT_TEXT2',
image: 'chat/img/icon_email.png',
hoverImage: 'chat/img/mail_hover.png',
bgcolor: '#f27935',
url: 'mailto:support@company.com'
},
```

3. Clear the browser cache and access the chat link to test the changes.

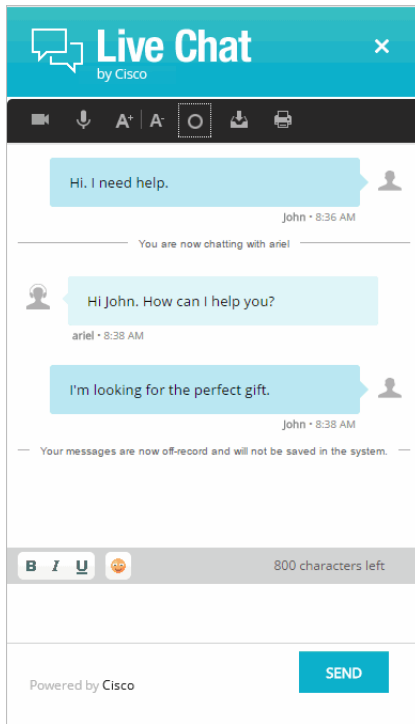
### To add new options:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. In the file locate the `altEngagementOptions` property, and copy a section for one of the existing help options and paste it where you want the new section. Edit the following properties.
  - `text`: Create a new parameter using the name as `L10N_ALT_ENGMT_Name`
  - `image`: Set the value as `'chat/img/icon_email.png'`,
  - `hoverImage`: Set the value as `'chat/img/mail_hover.png'`,
  - `bgcolor`: Set the value as `'#f27935'`,
  - `url`: Provide the URL for the option.
3. Place the images to be used for the new section at the following location:  
`Cisco_Home\eService\templates\chat\Template_Folder\chat\img`
4. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor and do the following:
  - a. Add the following line in the property file: `L10N_ALT_ENGMT_Name="Text for the section"` Where `L10N_ALT_ENGMT_Name` should match the value set in text in step 2.
  - b. Save the changes.
5. Clear the browser cache and access the chat link to test the changes.

## Configuring Off-the-Record Options

When data masking is enabled, masking rules prevent agents and customers from sending sensitive information like credit card numbers, social security numbers, and so on, during the chat session. The Off-the-record feature allows agents and customers to exchange sensitive information as data masking rules do not apply to these messages. Any information exchanged while off-record is not stored in the ECE system. Off-the-record conversation can be started and stopped only by customers. This feature is enabled while configuring data

masking for the chat channel. For details, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.

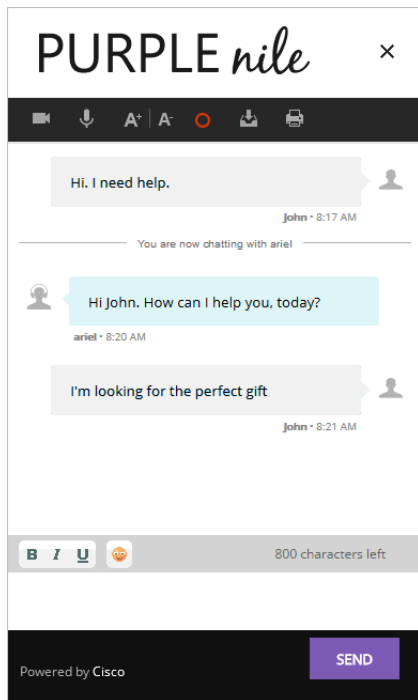


*Off the record messages*

### To change the text for various options:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor.
2. To change the text that appears when a customer goes on-record and off-record, locate the following properties and change the values:
  - `L10N_OFF_RECORD_MESSAGE`: The default value is `Your messages are now off-record and will not be saved in the system.`
  - `L10N_ON_RECORD_MESSAGE`: The default value is `Your messages are now on record.`
3. To change the text that appears when data is masked, change the value of the following property:
  - `L10N_SENSITIVE_DATA_MASKED`: The default value is `Don't worry. Your sensitive data has been masked.`
4. To change the text that appears in the chat transcript when messages have been removed due to masking, change the value of the following property:
  - `L10N_OFF_RECORD_MESSAGE_REMOVED`: The default value is `Message has been removed.`
5. Save the changes.

6. Clear the browser cache and access the chat link to test the changes.



*Customized messages*

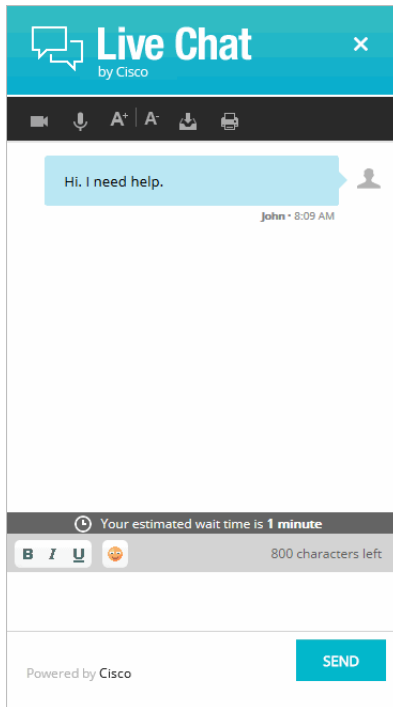
## Setting Maximum Length for Chat Messages

### To set the maximum length for chat messages:

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\egainLiveConfig.js` file in a text editor.
2. Locate the `maxMessageSize` property and change the value of the property to the number of characters you want to allow for each chat message. By default the value is set to 800. This setting is also used to control the message length in the **Additional Comments** field in the survey form. The maximum value can be set to 2000.
3. Save the changes.
4. Clear the browser cache and access the chat link to test the changes.

# Disabling Rich Text Editor

By default the chat typing area of the Chat Customer Console has a rich text editor. You can enable the plain text editor, if you do not want customers to use the rich text editor.

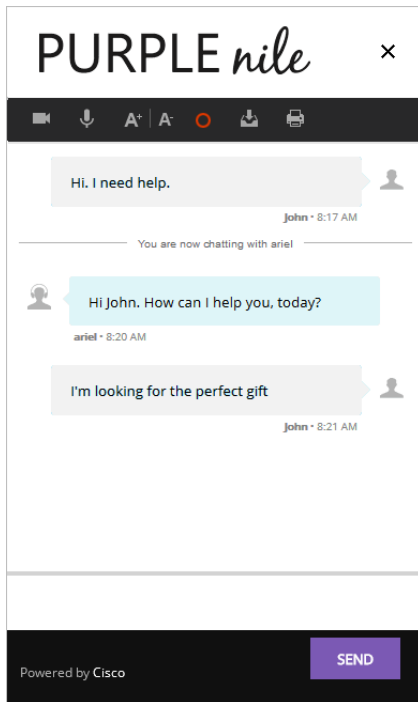


*Out-of-the-box rich text editor toolbar*

## To disable the rich text editor:

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `useTextEditor` property and set the value to 1 to enable the plain text editor. The default value is 0, which means that the rich text editor is enabled.
3. Save the changes.

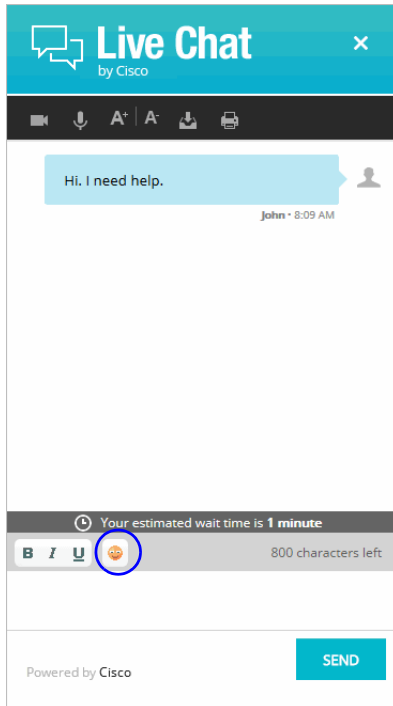
4. Clear the browser cache and access the chat link to test the changes.



*Disable the rich text editor*

# Hiding Emoticons

The chat typing area toolbar of the customer console has a **Smiley** button that can be used to add emoticons in the chat messages. You can hide the button if you do not want customers to use it.

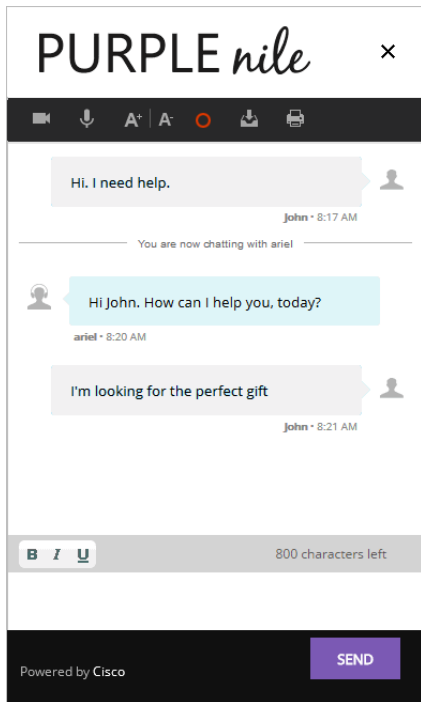


*The Emoticons button*

## To hide emoticons:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\EGainLiveConfig.js` file in a text editor.
2. Locate the `showSmileyTool` property and change the value of the property to `false` to hide the emoticons.
3. Save the changes.

4. Clear the browser cache and access the chat link to test the changes.

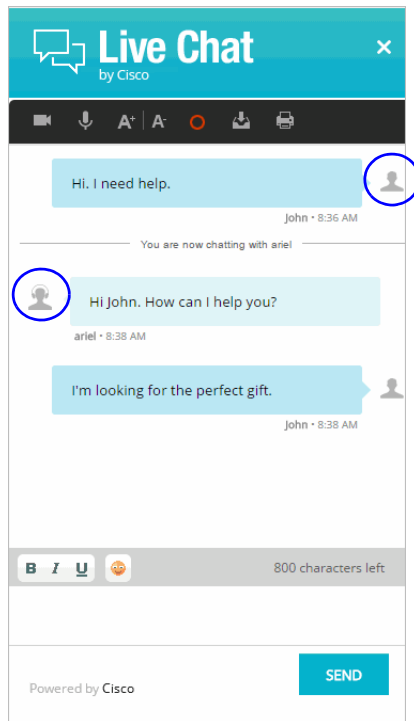


*Hide the Emoticons button*

## Changing Agent and Customer Images

The Chat Customer Console contains a static agent and customer image, which is displayed next to each chat message in the chat area. You can replace the out-of-the-box images with custom images.

Before you begin, get the new images that you want to use. The height of the new images should be 28 pixels and the width should be 26 pixels.



*Out-of-the-box customer and agent images*

### **To change the customer image:**

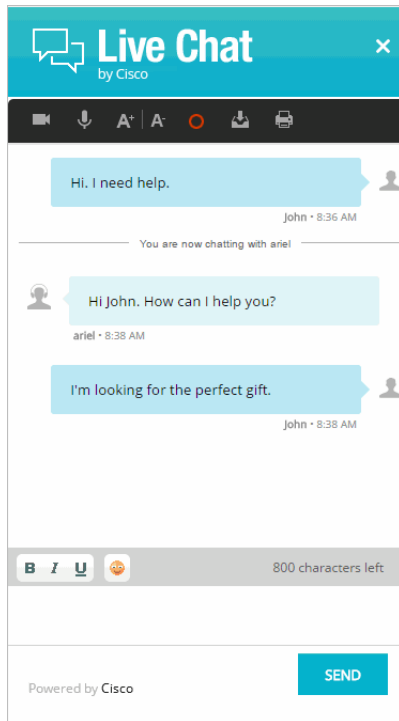
1. Place the new image in the `Cisco_Home\eService\templates\Template_Folder\chat\img` folder.
2. Open the `Cisco_Home\eService\templates\Template_Folder\chat\less\chat-main.less` file in a text editor.
3. Locate the `&.customer` class and in it locate the `.author > &.typing` class.
4. Change the value of the `background-image` property.
5. Save the changes.
6. Clear the browser cache and access the chat link to test the changes.

### **To change the agent image:**

1. Place the new image in the `Cisco_Home\eService\templates\chat\Template_Folder\chat\img` folder.
2. Open the `Cisco_Home\eService\templates\Template_Folder\chat\less\chat-main.less` file in a text editor.
3. Locate the `.eg-chat-message`, `.eg-chat-temporary-message` class and in the `.author` and `&.typing` classes change the value of the `background-image` property.
4. Save the changes.
5. Clear the browser cache and access the chat link to test the changes.

# Changing Chat Bubble Colors

Five different bubble colors are used to identify the messages sent by the customer and all agents in the chat session. You can change the color of all these bubbles.

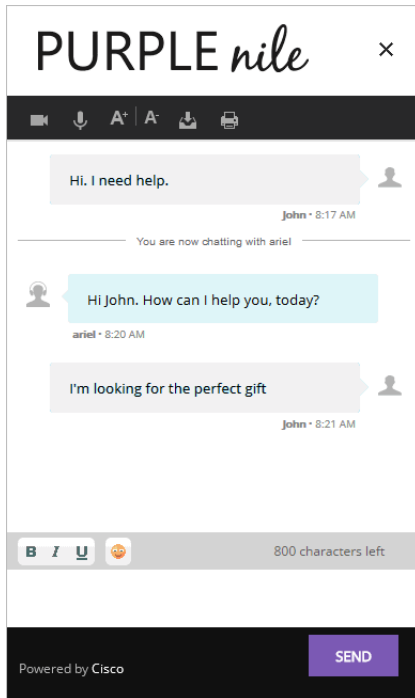


*Out-of-the-box bubble colors*

## To change the chat message bubble colors:

1. Open the `Cisco_Home\service\templates\chat\Template_Folder\chat\less\chat-main.less` file in a text editor.
2. To change the chat message bubble color for customers: Locate the `&.customer` class and in the `.bubble` class change the value of the `background` property. Also, in the `.arrow-wrap` class change the value of the `border-left` property.
3. To change the chat message bubble color for the first agent: Locate the `.eg-chat-message` class and in the `.bubble` class change the value of the `background` property. Next, locate the `.eg-chat-message`, `.eg-chat-temporary-message` class and in the `.arrow` class change the value of the `border-right` property.
4. To change the chat message bubble color for all other agents who can join the chat as supervisors: Locate the `&.agent1`, `&.agent2`, and `&.agent3` classes and in the `.bubble` class change the value of the `background` property. In the `.arrow` class change the value of the `border-right` property.
5. Save the changes.

6. Clear the browser cache and access the chat link to test the changes.



*Customized bubble colors*

## Changing Sound Alert

---

A sound alert is played on the customer side when a new chat message comes. You can change this sound alert.

### To change the sound alert:

1. Open the `Cisco_Home\eservice\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `chatSoundURL` property and change the value of the property to the path of the new chat sound file. Only `.wav` files are supported.
3. Save the changes.
4. Clear the browser cache and access the chat link to test the changes.

# Configuring Widgets

---

Widgets with useful information such as, frequently asked questions, can be added to the login page and to the chat page.

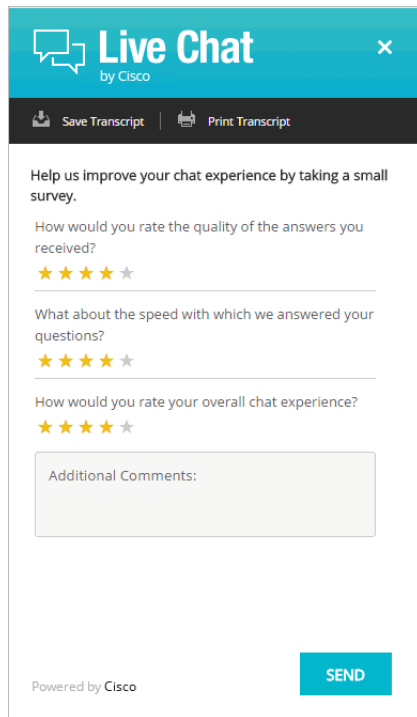
## To configure widgets:

1. Open the  
`Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties`  
file in a text editor.
2. Configure the following settings:
  - `CONFIG_LOGIN_FORM_WIDGET_URL`: Provide the URL of the widget you want to display on the login page for chat.
  - `CONFIG_DIALOGUE_WIDGET_URL`: Provide the URL of the widget you want to display during the chat session.
3. Save the file.
4. Clear the browser cache and access the chat link to test the changes.

# Configuring Survey Questions

At the end of the chat session a survey form is presented to customers to measure the usefulness of the chat. The survey form has three questions and a text box for providing additional comments. You can change the text of these questions, however, you cannot add or remove questions from the survey form.

You can turn off the survey, if you do not wish to use it. For details, see “Turning Off Surveys” on page 81.



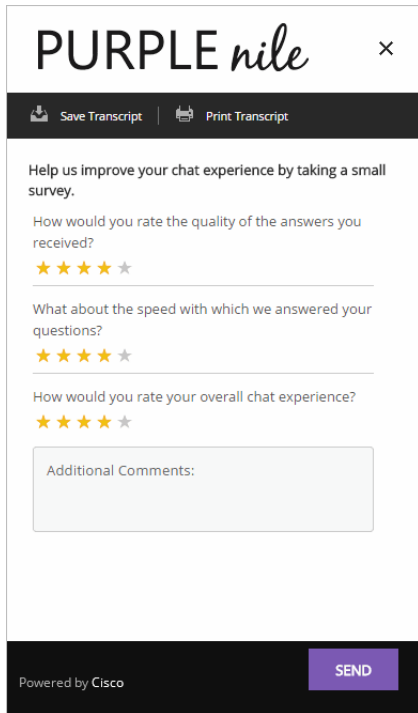
*Out-of-the-box chat survey form*

## To change the text of survey questions:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor.
2. Locate the section for survey questions by searching for `L10N_SURVEY_INTR0`. In this section change the following properties:
  - `L10N_SURVEY_INTR0`: Change the text for presenting the survey form.
  - `L10N_SURVEY_Q1`, `L10N_SURVEY_Q2`, and `L10N_SURVEY_Q3`: Change the text of the survey questions.
  - `L10N_POOR`, `L10N_FAIR`, `L10N_GOOD`, `L10N_VERY_GOOD`, `L10N_EXCELLENT`: Change the text of the tool tip for the stars shown on the survey form.
  - `L10N_SURVEY_ADDITIONAL`: Change the title of the text box.
  - `L10N_SURVEY_VALIDATION_ERROR`: Provide the message to be displayed when the text in the comments box exceeds the allowed size.
  - `L10N_THANKS`: Change the message displayed to users after they have completed the survey.
  - `L10N_SUBMIT`: Change the text of the button used for submitting the survey.

Save the changes.

3. Clear the browser cache and access the chat link to test the survey form changes.



PURPLE Nile

Save Transcript | Print Transcript

Help us improve your chat experience by taking a small survey.

How would you rate the quality of the answers you received?

★★★★☆

What about the speed with which we answered your questions?

★★★★☆

How would you rate your overall chat experience?

★★★★☆

Additional Comments:

Powered by Cisco

SEND

*Customized chat survey form*

## Turning Off Surveys

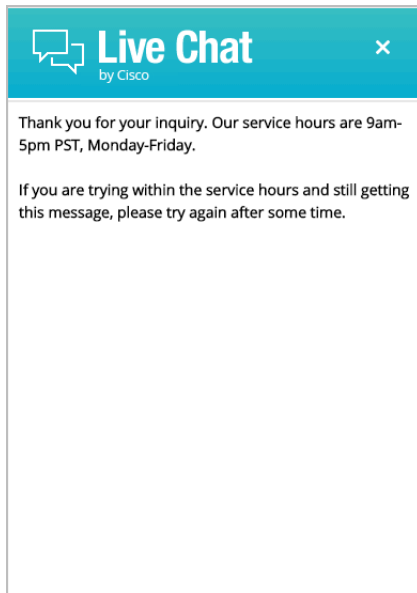
You can turn off the survey if you do not wish to display a survey form at the end of chat sessions.

### To turn off surveys:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. In the file locate the `turnOffChatSurveyPage` property and change its value to `true`. Save the changes.
3. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor.
4. In the file locate the `L10N_THANKS_WITHOUT_SURVEY` property and change the text to be displayed to customers when they end the chat session. The default value is `Thank you for chatting with us.`  
Save the changes.
5. Clear the browser cache and access the chat link to test the changes.

# Changing the Off Hours Message

An off hours message can be displayed to customers when agents are not available for handling chats.

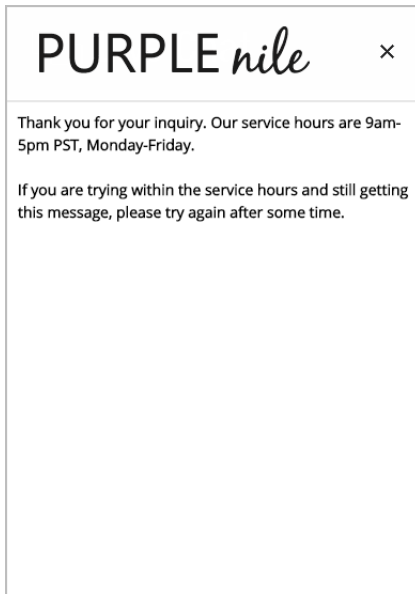


*Off hours message*

## To change the off hours message:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor.
2. Locate the property `L10N_OFF_HOURS` and change the message to be displayed during off hours.
3. Save the changes.

4. Clear the browser cache and access the chat link to test the changes.



*Custom message*

## Changing Chat Transcript Options

During a chat session and at the end of a chat session, customers have access to the Print Transcript and Save Transcript buttons. Customers can use these buttons to print or save the chat transcript for future reference.

You can change the tool tips for these buttons and you can add a header, footer, and title for the transcript window. You cannot remove these buttons from the chat window.

### To change the chat transcript options:

1. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\chat_Locale.properties` file in a text editor.
2. Edit the values for the following properties:
  - `L10N_SAVE_TRANSCRIPT_BUTTON`: Change the tool tip of the **Save Transcript** button.
  - `L10N_PRINT_TRANSCRIPT_BUTTON`: Change the tool tip of the **Print Transcript** button.
  - `L10N_TRANSCRIPT_TITLE`: Provide a title for the transcript page.
  - `TRANSCRIPT_HEADER_LIVE_CHAT`: Provide the header for the transcript page.
  - `L10N_CUSTOMER`: Do not change the value of this property.
  - `L10N_AGENT`: Do not change the value of this property.
3. Open the `Cisco_Home\eService\templates\chat\Template_Folder\properties\messaging_Locale.properties` file in a text editor.
4. Edit the value for the following property:

- MAIL\_HEADER\_LIVE\_CHAT: Change the header of the transcript emailed by the system.
5. Save the changes.
  6. Clear the browser cache and access the chat link to test the changes.

## Deleting Template Sets

---



**Important:** You must delete the templates files from all web servers in your installation.

---

### To delete a template set:

1. On the web server, browse to `Cisco_Home\eService\templates\chat`.
2. Delete the template folder that you do not want to use. If you are using these templates for any entry point, make sure to update the HTML code on web pages with the new template sets you want to use.



# Callback Template Sets

- ▶ [About Template Sets](#)
- ▶ [Creating Template Set Folders](#)
- ▶ [Changing General Settings](#)
- ▶ [Changing Header Image](#)
- ▶ [Changing Color of Buttons](#)
- ▶ [Changing the Size of Callback Windows](#)
- ▶ [Configuring Call Request Page Parameters](#)
- ▶ [Adding New Fields](#)
- ▶ [Adding New Countries](#)
- ▶ [Enabling Auto-Login](#)
- ▶ [Adding Country Codes](#)
- ▶ [Changing the Off Hours Message](#)
- ▶ [Deleting Template Sets](#)

This chapter will assist you in understanding how to set up callback template sets. For template sets for chat activities, see [“Kiwi Chat Template Sets” on page 50](#).

## About Template Sets

---

Template sets consist of CSS (cascading style sheets) and JS (JavaScript) files. The CSS files control the look and feel of the Callback Console. The JS files contain the business logic used to render data in the Callback Console. Templates are also used to determine what information is requested to identify the customer (such as name, email address, phone number). You can also compose messages that the customer will see under certain circumstances (for example: if they request a callback session out of hours).

An entry point can be mapped to multiple template sets and multiple entry points can use the same template set. One template set, Cisco Rainbow, is shipped with the application and can readily be mapped to any number of entry points.



**Important:** The system supplied templates should not be deleted.

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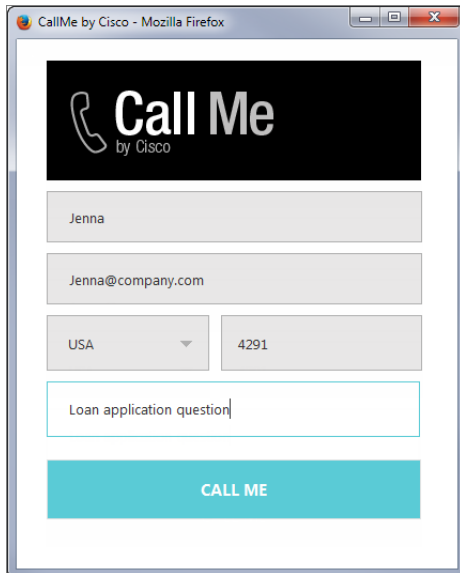
The template sets are managed from the web server and not from the Administration Console.

### What Makes up a Template?

A template consists of a set of pages that are designed to work together. Typically, a callback template has three pages - a callback or delayed callback request form, the call status page, and the off-hours page. All these pages can be customized to meet your business needs.

## Callback request form

Customers fill up this form to start a callback session.



CallMe by Cisco - Mozilla Firefox

**Call Me**  
by Cisco

Jenna

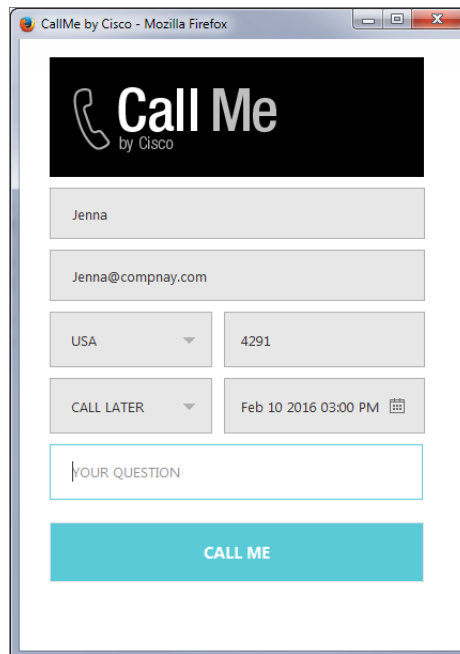
Jenna@company.com

USA    4291

Loan application question

CALL ME

*Callback request form*



CallMe by Cisco - Mozilla Firefox

**Call Me**  
by Cisco

Jenna

Jenna@compnay.com

USA    4291

CALL LATER    Feb 10 2016 03:00 PM

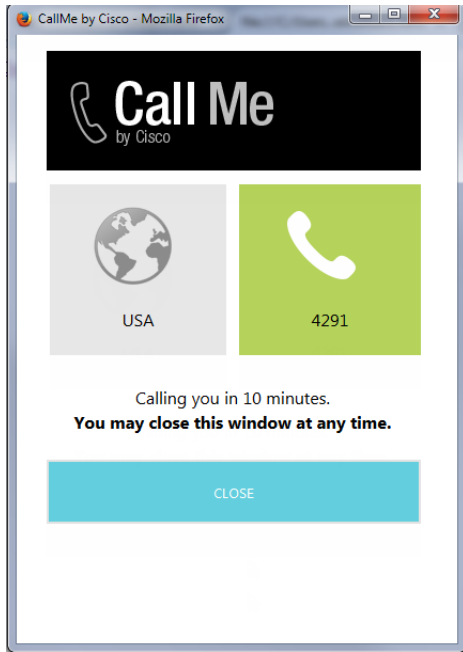
YOUR QUESTION

CALL ME

*Delayed callback request form*

## Callback Status Area

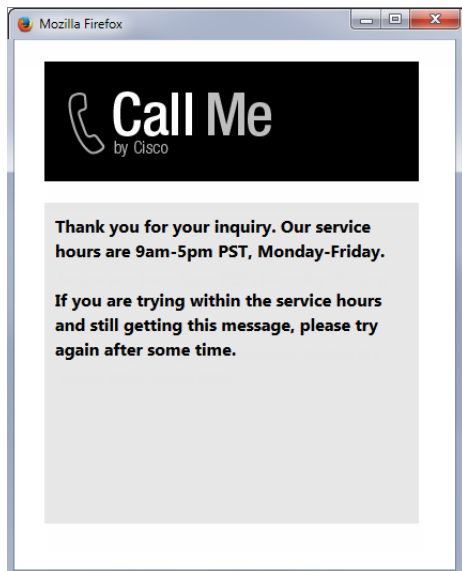
Status of call session is displayed here.



*The callback status area*

## Off Hours Page

An off-hours message is displayed to customers when the application is not able to connect to Unified CCE to place a call.



*The off hours page*

## Do I need to create new templates or just use the default ones?

The template set, Cisco Rainbow, is shipped with the application. You *must* always create a copy of the default template set and customize it to look like your website.

You can choose to use one template set for all your callback entry points for a consistent look and feel. Alternatively, you can use different templates, so that the look and feel of each one is targeted towards a specific audience.

## How easy are the templates to modify?

The templates are easy to modify. All the properties of the templates sets are modified using the files available on the web server. It is possible to make a number of layout and wording changes as well as branding changes to match them with the look and feel of your website.

Some important things to note:

- ▶ You must have a good knowledge of the HTML and CSS languages to make changes in the HTML and CSS files.
- ▶ Always create a backup copy of the files before making any changes.

The following table describes the files that can be changed. All the files are available on the web server at *Cisco\_Home\eService\templates\callback\Template\_Name*.

| Use   | To   |
|---|--|
| <code>\\110n\custom_callback_Locale.properties</code> | <ul style="list-style-type: none"><li>▶ Update the text displayed on the callback pages.</li></ul> <p><b>Note:</b> All custom messages should be added in the <code>custom_callback_Locale.properties</code> file. Do not make any changes to the <code>callback_Locale.properties</code></p>    |
| <code>\eGainLiveConfig.js</code>                      | <ul style="list-style-type: none"><li>▶ Change the fields displayed on the login page.</li><li>▶ Enable auto login.</li><li>▶ Configure the height of the callback window.</li><li>▶ Configure the maximum length allowed for the customer message.</li></ul>                                    |
| <code>css\callback.css</code>                         | <ul style="list-style-type: none"><li>▶ Configure the look and feel of the callback pages.</li></ul>   |
| <code>\call.html</code>                               | <ul style="list-style-type: none"><li>▶ Change the layout of the callback page.</li></ul>  |
| Images folders:<br>▶ <code>Template_Name\image</code> | <ul style="list-style-type: none"><li>▶ Change the images used.</li></ul> <p><b>Note:</b> The size of the custom images should match the size of the default images. However, if you are changing the size of the callback windows, you can adjust the images size to match the new windows.</p> |

# Creating Template Set Folders

You need access to the web server to perform this task.



**Important:** Anytime you update or create new templates, you must copy the templates files on all web servers in your installation.

Create a separate template set for each of the following types of activities:

- ▶ Callback activities
- ▶ Delayed callback activities

## To create a new template set:

1. On the web server, browse to `Cisco_Home\eService\templates\callback`.
2. Create a copy of the **Rainbow** folder and rename the folder.
3. The new template set is created. You can now edit the files in the template folder to configure your template settings and to customize the look of your templates. You can change any files *except* for files in the following folders:
  - `script`
  - `libs`

After creating the template set, some of the things that you can do are:

- ▶ Configure the login page parameters ([page 93](#))
- ▶ Change the off hours message ([page 100](#))

# Changing General Settings

## To change the general properties for templates:

1. Open the `Cisco_Home\eService\templates\callback\Template_Folder\l10n\custom_callback_locale.properties` file in a text editor.
2. Add the following properties and set the values as required.
  - **L10N\_DOCUMENT\_TITLE:** Change the title of the callback window. The default value is **CallMe** by Cisco.
  - **L10N\_BROWSER\_CLOSE\_MESSAGE:** Change the message displayed to the customer when he closes the callback window.
  - **L10N\_CLICK\_TO\_CALL:** Change the text of the button for initiating callback session. The default value is **Call Me**.
  - **L10N\_CLOSE:** Change the text of the button for closing the callback window. The default value is **Close**.
3. Save the changes.

4. Clear the browser cache and access the callback link to test the changes.

## Changing Header Image

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This section talks about changing the header image for the callback templates.

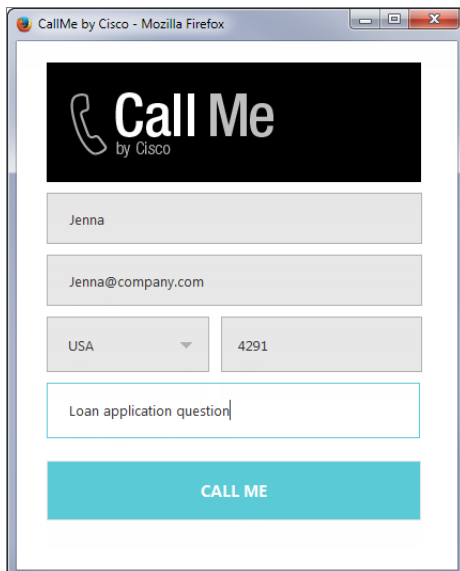
### To change the header image:

1. Change the `logo_click_to_call.png` image file in the `Cisco_Home\eservice\templates\callback\Template_Folder\image` folder with your custom image.
2. Clear the browser cache and access the callback link to test the changes.

## Changing Color of Buttons

---

This section talks about changing the colors for **Call Me** and **Close** buttons.

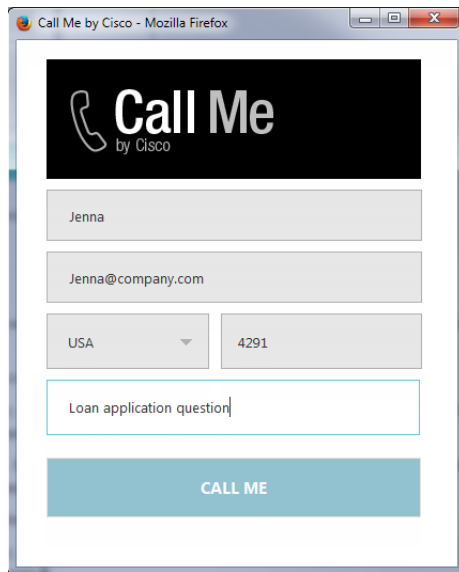


*Out-of-the-box color of buttons*

### To change button colors:

1. Open the `Cisco_Home\eservice\templates\callback\Template_Folder\css\callback.css` file in a text editor.
2. To change the **Call Me** button colors, do the following:
  - a. To change the button color, locate the `call_button_class` class and change the value of the `background-color` property.
  - b. To change the hover color, locate the `call_button_class:hover` class and change the value of the `background-color` property.

3. To change the **Close** button colors, do the following:
  - a. To change the button color, locate the `close-button-class` and change the value of the `background-color` property.
  - b. To change the hover color, locate the `close_button_class:hover` class and change the value of the `background-color` property.
4. Save the changes.
5. Clear the browser cache and access the callback link to test the changes.



*Custom color of buttons*

## Changing the Size of Callback Windows

This section talks about defining the size of the windows.

### To change the size of the callback windows:

1. Open the `Cisco_Home\eservice\templates\callback\Template_Folder\egainLiveConfig.js` file in a text editor.
2. Edit the values for the following properties:
  - **windowWidth:** Set the width of the callback and delayed callback windows. The default value is 425 pixels.
  - **windowHeightCallback:** Set the height of the callback page. The default value is 600 pixels.
  - **windowHeightDelayedCallback:** Set the height of the delayed callback page. The default value is 680 pixels.
3. Save the changes.
4. Clear the browser cache and access the callback link to test the changes.

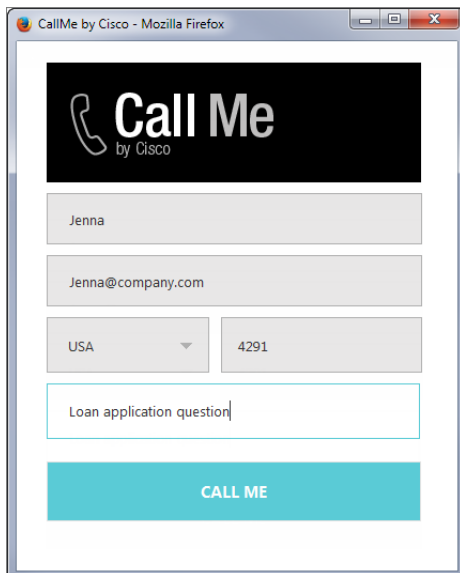
# Configuring Call Request Page Parameters

Build the web form which customers must fill in to initiate a web callback interaction. The system uses the customer's contact details (for example, email address, phone number, and so on) to identify existing customers and add the session to their customer records automatically. It also creates customer records for new customers.

Phone number is a required attribute for callback and delayed callback activities. Schedule call is a required attribute for delayed callback activities and should not be removed from templates configured for delayed callback activities.

You can:

- ▶ Change the text of the options
- ▶ Remove fields
- ▶ Change the order of fields
- ▶ Change the primary key



*Out-of-the-box login page*

## To configure the call request page:

1. Open the `Cisco_Home\eservice\templates\callback\Template_Folder\EGainLiveConfig.js` file in a text editor.
2. Locate the `loginParameters` property, and do the following.
  - a. To remove an existing field, select the code for the field and delete it from the file. For example, to remove the question field from the page, delete the following lines:

```
{
  paramName : 'L10N_YOUR_QUESTION_PROMPT',
  objectName : 'casemgmt::activity_data',
  attributeName : 'subject',
  primaryKey : '0',
```

```
required : '0',
minLength : '1',
maxLength : '800',
fieldType : '2',
validationString : '',
errorMessage : '',
className : 'textarea_field'
}
```



**Important:** Do not remove a field that is set as the primary key.

- b. To change the order of the fields, remove the code for the field you want to move and paste it at the new location. Make sure to copy the complete set of lines for a field and move them to the new location.
- c. To change the required fields, locate the attribute which you want to change and do the following:
  - i. For the attribute, locate the property `required` and change the value to 1 to make it a required field, or change the value to 0 to make it an optional field.

If you are setting a field as required, you must set the minimum length allowed for the field.
  - ii. In the attribute section, locate the property `minLength` and set a minimum length for the field. You can also set the maximum length by configuring the `maxLength` setting.
- d. By default, the email address is set as the primary key for the login page. You can choose to change the primary key to phone number. No other field can be set as the primary key. Also, note that only one field can be set as the primary key. To change the primary key, do the following:



**Important:** Only the customer phone number or email address can be set as the primary key.

- i. Locate the section for email address by searching for `attributeName : 'email_address'`. In this section, locate the `primaryKey` property and set the value to 0.
  - ii. Next, locate the section for phone number by searching for `attributeName : 'phone_number'`. In this section, locate the `primaryKey` property and set the value to 1.

Also, the attribute that is set as the primary key needs to be marked as a required field.
  - iii. In the phone number section, locate the property `required` and change the value to 1.
3. Open the `Cisco_Home\eservice\templates\Template_Folder\l10n\custom_callback_Locale.properties` file in a text editor.
  - a. You can change the error message for the fields displayed on the call request page. Add the following properties and provide new error messages:
    - **L10N\_ERROR\_NAME:** Change the error message of the name field.
    - **L10N\_ERROR\_EMAIL:** Change the error message of the email field.
    - **L10N\_ERROR\_PHONE:** Change the error message of the phone field.
    - **L10N\_ERROR\_DELAYED\_TIME:** Change the error message in case delay time is not valid.

- **L10N\_ERROR\_SUBJECT:** Change the error message of the question field.
- b. You can also change the text of the fields displayed on the call request page. Add the following properties and provide new labels for the fields.
- **L10N\_NAME\_PROMPT:** Change the label of the name field.
  - **L10N\_EMAIL\_PROMPT:** Change the label of the email field.
  - **L10N\_PHONE\_NUMBER\_PROMPT:** Change the label of the phone number field.
  - **L10N\_YOUR\_QUESTION\_PROMPT:** Change the label of the text field.
  - **L10N\_CALL\_NOW:** Change the label of **Call Now** in the dropdown. This applies to delayed callback only.
  - **L10N\_CALL\_LATER:** Change the label of **Call Later** in the dropdown. This applies to delayed callback only.
  - **L10N\_CALL\_IN\_MINS:** Change the label of the options **Call in *Specified Time* minutes** dropdown. While setting the value, do not remove the variable {0} as that defines the time after which the call will be placed.
  - **L10N\_SCHEDULE:** Change the label of **Schedule Call** field. This applies to delayed callback only.
4. Save the changes.
  5. Clear the browser cache and access the callback link to test the changes.

## Adding New Fields

Along with full name, email address, and phone number, you can use custom attributes on the login page.

Custom attributes created for the following objects can be added to the login screen. For details about creating these attributes, see the *Enterprise Chat and Email Administrator's Guide to Tools Console*.

- Customer Data
- Contact Point Data
- Activity Data

The following table lists the fields that can be added to the login page. It also lists the attribute names and object names for each field. You will need this information to add new fields to the login screen.

| For   | Object Name                               | Attribute Name   |
|---|---|--|
| Full Name   | casemgmt:individual_customer_data         | full_name  |
| Email Address                                     | casemgmt:email_address_contact_point_data | email_address  |
| Phone Number                                      | casemgmt:phone_number_data                | phone_number   |
| Subject, Custom attributes added to activity data | casemgmt:activity_data                    | subject<br>If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is <code>More details</code> , the attribute name will be <code>more_details</code> . |

| For   | Object Name                 | Attribute Name  |
|---|-----------------------------|---|
| Custom attributes added to customer data      | casemgmt:customer_data      | If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is Family name, the attribute name will be family_name.     |
| Custom attributes added to contact point data | casemgmt:contact_point_data | If the custom attributes added to the object has two words, replace the space with underscore (_). For example, if the attribute created in Tools Console is Mobile number, the attribute name will be mobile_number. |

## To add new fields:

- Open the `Cisco_Home\eservice\templates\callback\Template_Folder\GainLiveConfig.js` file in a text editor and do the following:
  - Locate the `loginParameters` property, and copy a section for one of the existing parameters and paste it where you want to add the custom field. Edit the following properties.
    - paramName:** Create a parameter name using the format `L10N_Name_PROMPT`.
    - objectName:** Provide the object name. See the table on [page 95](#) for details about the object name you need to provide.
    - attributeName:** Provide the attribute name. See the table on [page 95](#) for details about the attribute name you need to provide.
    - primaryKey:** Set the value as `0`.
    - required:** If you want to set the field as required set the value as `0`. To make the field mandatory, set the value `1`.
    - minLength:** Set the minimum required characters for the field. If a field is not required, set the minimum length as `0`.
    - maxLength:** Set the maximum allowed characters for the field. The value should not be set more than the value set in the Tools Console while creating the custom attribute.
    - fieldType:** Set the field type.
      - For single line text fields, set the value as `1`.
      - For multi-line text fields, set the value as `2`.
      - For dropdown fields, set the value as `3`.
      - For multi-select dropdown list, set the value as `4`.
    - validationString:** Provide the expression against which the information provided by the customer is to be checked. For example, for phone number you can give an expression like, `^\s*(?!\s*\d{3}\s*)?\s*[-.]?\s*\d{3}\s*[-.]?\s*\d{4}\s*$`. And, for email you can use the expression like, `^[0-9a-zA-Z\.\-\_]+\@[0-9a-zA-Z\.\-\_]+\.` - this expression refers to the format `X@Y.Z` (john@mycompany.com). For fields that require an integer value, you need to atleast set the validation string as `^\d+$`.
    - className:** Provide the `css` class you want to use for the field. These are defined in the `callback.css` file available in the `css` folder. You can use an existing class or create a new one.
  - Save the changes.
- Open the `Cisco_Home\eservice\templates\callback\Template_Folder\L10N\custom_callback_locale.properties` file in a text editor and do the following:

- a. Add the following line in the property file: `L10N_Name_PROMPT = "Display name for the attribute"`  
Where: `L10N_Name_PROMPT` should match the value set in **paramName** in step 1 on [page 96](#).
  - b. Save the changes.
3. Clear the browser cache and access the callback link to test the changes. The login page should show the new fields.

*Custom login form*

## Adding New Countries

By default United States and United Kingdom are the two countries available on the callback form. You can add or remove countries from this list.

### To add a new county:

1. Open the `Cisco_Home\eservice\templates\callback\Template_Folder\egainLiveConfig.js` file in a text editor.
2. Locate the `countryCodes` property, and copy a section for one of the existing country and paste it where you want to add the new country. Edit the following properties:
  - **name:** Create a name like `l10n_Name`
  - **value:** Provide the country code.
3. Open the `Cisco_Home\eservice\templates\Template_Folder\l10n\custom_callback_Locale.properties` file in a text editor and do the following:
  - a. Add the following line in the property file: `L10N_Name= "Country_Name"` Where: `L10N_Name` should match the value set in [Step 2](#).
  - b. Save the changes.

4. Clear the browser cache and access the call link to test the changes. The call request page should show the new country.

### To remove a country:

1. Open the `Cisco_Home\eService\templates\callback\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `countryCodes` property, and select the code for a country and delete it from the file. For example, to remove United States, and delete the following lines:

```
{
  name: 'L10n_US',
  value: '1'
}
```

3. Clear the browser cache and access the call link to test the changes. The call request page should not show the country removed from the file.

### To change the order of countries:

The order of the country codes in the call request form is determined by the order in which the fields are configured in the `eGainLiveConfig.js`. To change the order, just move the section for a country in the file to the new location.

1. Open the `Cisco_Home\eService\templates\callback\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `countryCodes` property, and rearrange the country codes. For example, to move United Kingdom before United States change the order as:

```
countryCodes : [
  {
    name: "L10N_UK",
    value: "44"
  },
  {
    name: "L10N_US",
    value: "1"
  }
]
```

3. Clear the browser cache and access the call link to test the changes. The call request page should show the new order of country codes.

# Enabling Auto-Login

---

When the callback link is provided in an authenticated section of the website, the auto-login feature can be used to automatically login the customer for call. When the customer clicks the callback link or button, he is not displayed the login page.



**Important:** A template where auto-login is enabled should not be used for regular callback.

---

## To enable auto-login:

1. Open the `Cisco_Home\eService\templates\callback\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `autoLogin` property and set the value to 1 to enable auto-login.
3. Save the changes.
4. Change the entry point code so that the customer information collected at the time of login on the website is passed on to the application when the customer initiates a callback session. For details, see [“Adding Chat and Collaboration Help Links to Websites”](#) on page 112.

# Adding Country Codes

---

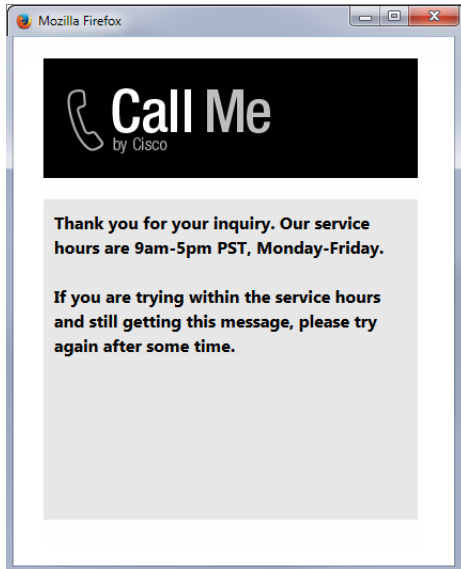
Callback templates can be set to automatically enter the country code for the phone number entered by the customer using an entry point. Be aware, if a customer includes their country code in their phone number while the parameter is enabled, the country code is still automatically added to the number, causing a misdial. Disable the country code parameter to allow customers to enter their own country codes.

## To change the country code parameter:

1. Open the `Cisco_Home\eService\templates\callback\Template_Folder\eGainLiveConfig.js` file in a text editor.
2. Locate the `useCountryCode` parameter and change it to one of the following:
  - **0:** The phone number used to place the call does NOT use the country code.
  - **1:** The phone number used to place the call uses the country code.
3. Save the changes.
4. Reload the Callback / Delayed Callback URL entry point web site from the browser.

# Changing the Off Hours Message

An off hours message is displayed to customers when the application is not able to connect to Unified CCE to place a call.

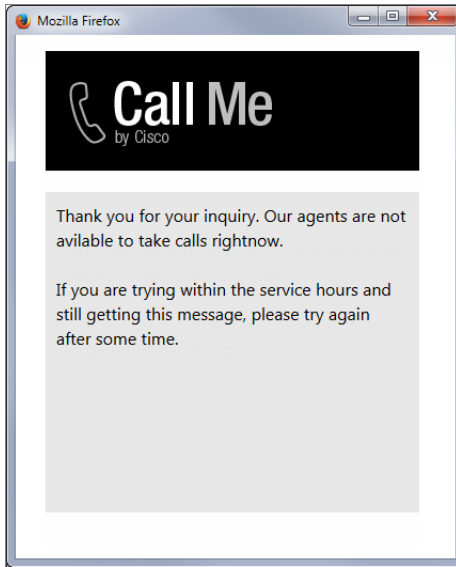


*Off hours message*

## To change the off hours message:

1. Open the `Cisco_Home\eservice\templates\callback\Template_Folder\l10n\custom_callback_Locale.properties` file in a text editor.
2. Add the property `L10N_OFF_HOURS` and change the message to be displayed to customers.
3. Save the changes.

4. Clear the browser cache and access the callback link to test the changes.



*Custom message*

## Deleting Template Sets

---



**Important:** You must delete the templates files from all web servers in your installation.

---

### To delete a template set:

1. On the web server, browse to `Cisco_Home\eService\templates\callback`.
2. Delete the template folder that you do not want to use. If you are using these templates for any entry point, make sure to update the HTML code on web pages with the new template sets you want to use.



# Entry Points

- ▶ [About Entry Points](#)
- ▶ [Creating Entry Points](#)
- ▶ [Deleting Entry Points](#)
- ▶ [Testing Entry Points](#)
- ▶ [Setting Up Transcripts and Notifications](#)
- ▶ [Turning Off Active Entry Points](#)
- ▶ [Adding Chat and Collaboration Help Links to Websites](#)
- ▶ [Configuring Auto-Pushback Settings for Chats](#)
- ▶ [Configuring Dynamic Messages for Chats and Callback](#)

This chapter will assist you in understanding how to set up chat and collaboration entry points.

## About Entry Points

---

An entry point defines the starting point from which customers initiate chat, and web callback interactions. Every help link on a website is mapped to an entry point. Each entry point has a queue associated with it and the queue is used to route activities to agents. A default entry point is provided in each department.



**Important:** Multiple help links on a website can point to the same entry point.

---


## Creating Entry Points

---

Before creating an entry point, create the queues and template sets to be used for the entry points. For details on creating queues, see *Enterprise Chat and Email Administrator's Guide to Routing and Workflows*.

Chat Activities and Callback Activities use different starting template sets: Aqua, Kiwi, and Callback Rainbow. For details on creating templates for chat, see [“Aqua Chat Template Sets” on page 18](#) and [“Kiwi Chat Template Sets” on page 50](#). For details on creating templates for callback activities, see [“Callback Template Sets” on page 85](#).

### To create an entry point:

1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Entry Points**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, on the General tab, provide the following details.
  - **Name:** Type the name of the entry point. This is required information.
  - **Description:** Type a brief description.
  - **Active:** Select **Yes** to make the entry point active.



**Important:** For a customer to be able to chat, the entry point mapped to the chat help link should be made active, else the customer would be displayed a no service page.


---

- **Apply customer chat single sign-on:** Select one of the following options
  - **No:** Disable the entry point for Secure Chat.
  - **At the start of chat:** Enable Secure Chat for the entry point and allow customers to authenticate their accounts using Chat Customer Single Sign-On before the chat activity is first created.
  - **During chat:** Enable Secure Chat for the entry point and allow customers to authenticate their accounts using Chat Customer Single Sign-On after the chat activity has begun and while interacting with an agent.

Secure Chat, utilizing customer single sign-on functionality, allows chat entry points to transfer customer context information from the company website to the application through SAML. This allows

customers who are already recognized on the company website to use a SSO-enabled entry point to chat with a customer without having to provide redundant information.

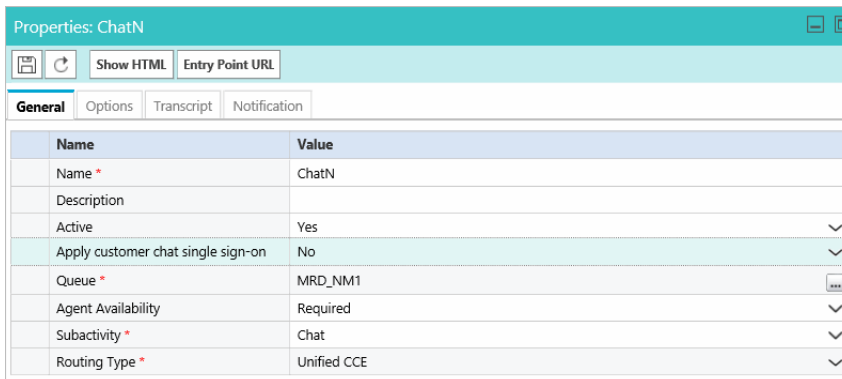
The chat creation request must contain a SAML assertion. If the SAML assertion is missing, or is not valid for the entry point, chat requests are denied for that entry point. For details about secure chat configuration, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.

- **Queue:** Select a queue. This is required information. To select a queue, click the **Assistance**  button. From the Select Queue window, select a queue. The queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.



**Important:** An active entry point cannot be mapped to an inactive queue.

- **Agent Availability:** With this option you can decide if the agent availability is to be checked when a customer initiates a chat session. The following options are available:
  - **Required:** Customers will be able to initiate a chat session only if an agent is available (Availability setting from the Agent Console is selected) for handling chats. If no agent is available, the off hours message is shown to customers.
  - **Not required:** Customers will be able to initiate chat sessions even when no agent (Availability setting from the Agent Console is not selected) is available for handling chats. Customers are not shown the off hours message and the login page is displayed.
- **Subactivity:** From the dropdown list, select **Chat**.
- **Routing type:** This is automatically set to Unified CCE.



| Name                               | Value       |
|------------------------------------|-------------|
| Name *                             | ChatN       |
| Description                        |             |
| Active                             | Yes         |
| Apply customer chat single sign-on | No          |
| Queue *                            | MRD_NM1     |
| Agent Availability                 | Required    |
| Subactivity *                      | Chat        |
| Routing Type *                     | Unified CCE |

*Set general properties*

4. In the Properties pane, on the Options tab, go to the Page push section to enable page pushing. It allows agents to send web pages to customers.
  - **Enable page pushing from agent to customer:** Enable this option to allow agents to send web pages to customers. By default **Yes** is selected. Select **No** to disable it. When page pushing is not allowed, the **Page Push** button of the Agent Console is disabled.

Properties: Customer Support Entry Point

Show HTML Entry Point URL

General Options Transcript Notification

Page push


| Name                                       | Value |
|--|-------|
| Enable page pushing from agent to custo... | Yes   |

Do not allow page push of the URLs listed below.

| URL                       |
|---------------------------|
| www://www.blockedpage.com |

Configure page pushing settings


You can also control the URLs allowed for page pushing.

- a. Select the **page push of the URLs listed below** option.
  - b. From the dropdown list, select one of the following options.
    - **Do not allow:** The listed URLs will not be allowed for page pushing.
    - **Allow:** Only the listed URLs will be allowed for page pushing.
  - c. In the field, type the URL. Press Enter and type the next URL.
5. Click the **Save**  button.

After creating the entry point, set the notifications and transcript emails ([page 109](#)), test the entry point ([page 107](#)), and add the help link to your website ([page 112](#)).


## Creating Entry Points for Callback

### To create an entry point for callback:

1. In the Tree pane, browse to **Administration > Departments > *Department Name* > Chat > Entry Points**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, on the General tab, provide the following details.
  - **Name:** Type the name of the entry point. This is required information.
  - **Description:** Type a brief description.
  - **Active:** Select **Yes** to make the entry point active.



**Important:** For a customer to be able to chat, the entry point mapped to the help link should be made active, else the customer would be displayed a no service page.

- **Apply customer chat single sign-on:** This field is not used for callback activities.
- **Queue:** Select a queue mapped to a Unified CCE Media Routing Domain that belongs to the Cisco\_Voice Media Class. This is required information. To select a queue, click the **Assistance**  button. From the Select Queue window, select a queue. The queues available in this window are decided based on the subactivity and routing type configured for the queue. When the subactivity selected is callback and the routing type selected is Unified CCE, only the queues mapped to a Unified CCE Media

Routing Domain that belong to the Cisco\_Voice Media Class are displayed. The queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.



**Important:** An active entry point cannot be mapped to an inactive queue.

- **Agent Availability:** This field is not used for callback activities as availability is determined in realtime by Unified CCE and not ECE. Activity assignment is also handled by Unified CCE.
- **Subactivity:** From the dropdown list, select **Callback**.
- **Routing type:** From the dropdown list, select **Unified CCE**.

| Name                               | Value                              |
|------------------------------------|------------------------------------|
| Name *                             | CallN                              |
| Description                        |                                    |
| Active                             | Yes                                |
| Apply customer chat single sign-on | No                                 |
| Queue *                            | Cisco_Voice_Callback_1565076363855 |
| Agent Availability                 | Required                           |
| Subactivity *                      | Callback                           |
| Routing Type *                     | Unified CCE                        |


*Set the general properties*

4. Click the **Save**  button.

After creating the entry point, test it ([page 107](#)) and add the help link to your website ([page 112](#)).

## Creating Entry Points for Delayed Callback

### To create an entry point for delayed callback:

- ▶ Follow all the steps in the “[Creating Entry Points for Callback](#)” on [page 105](#). In Step 3, for the Subactivity and Queue fields, make sure you set the following values:
  - **Subactivity:** From the dropdown list, select **Delayed Callback**.
  - **Queue:** Select a queue mapped to Unified CCE Media Routing Domain that belongs to the Cisco\_Voice Media Class. This is required information. To select a queue, click the **Assistance**  button. From the Select Queue window, select a queue. The queues available in this window are decided based on the subactivity and routing type configured for the queue. When the subactivity selected is delayed callback and the routing type selected is Unified CCE, only the queues mapped to a Unified CCE Media Routing Domain that belong to the Cisco\_Voice Media Class are displayed. The queues available can be active

or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.



**Important:** An active entry point cannot be mapped to an inactive queue.

| Name                               | Value            |
|------------------------------------|------------------|
| Name *                             | CallN            |
| Description                        |                  |
| Active                             | Yes              |
| Apply customer chat single sign-on | No               |
| Queue *                            |                  |
| Agent Availability                 | Required         |
| Subactivity *                      | Delayed Callback |
| Routing Type *                     | Unified CCE      |

*Set the general properties*


## Deleting Entry Points

Before you delete the entry point make sure you remove all the chat links related to the entry point from your website.



**Important:** The default entry point and active entry points cannot be deleted.

### To delete an entry point:

1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Entry Points**.
2. In the List pane, select the entry point you want to delete.
3. In the List pane toolbar, click the **Delete**  button.

If you attempt to delete inactive and active entry points together, the inactive entry points get deleted, and a message appears telling that the active entry points cannot be deleted.

## Testing Entry Points

After configuring an entry point, you can test it immediately to see how the entry point looks like.

The UI does not display the custom chat or callback templates or languages added for chat. Before you begin this task, get the list of template names and language files names that you have created on the web server:

*Cisco\_Home*\eService\templates\chat and *Cisco\_Home*\eService\templates\callback.

## To test an entry point:

1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Entry Points**.
2. In the List pane, select an entry point.
3. In the Properties pane toolbar, click the **Entry Point URL** button.



**Important:** If you are creating a new entry point and want to test it, you have to save the entry point to be able to test it.

4. The Select Template Folder window opens. From the window, select the templates and language you want to use for the entry point. This window only displays out-of-the-box templates and languages. If you have created custom templates or languages, you will need to edit the entry point URL before you can test it (page 108).
5. When you have made your selections, click **OK**.
6. From the Entry Point URL window that opens, copy the entry point URL by using the **Copy** button.



*Sample URL window*

7. If you are using custom templates or languages, change the following parameters in the URL:

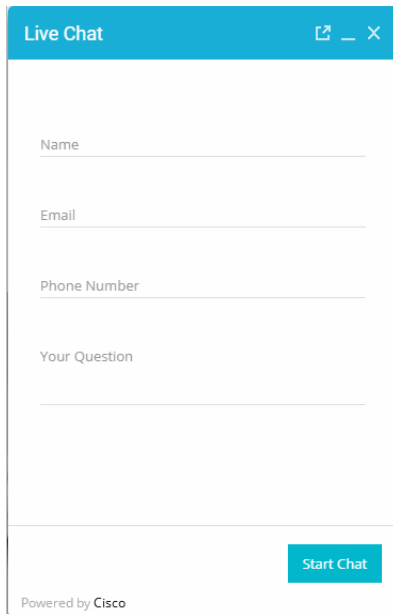
Replace both occurrences of `kiwi` or `rainbow` with the name of your custom template. For example, `PurpleNile`.

Change the language code and country code in `languageCode=en&countryCode=US`. For example, `languageCode=it&countryCode=IT`.

The sample chat URL will look like:

```
https://demo1/pm/templates/chat/PurpleNile/chat.html?subActivity=Chat&entryPointId=1000&templateName=PurpleNile&languageCode=it&countryCode=IT&ver=v11
```

8. Open a new browser window and access the entry point URL and test it. To test the entry point with other templates available in the system, repeat [Step 7](#) and select a different template folder.



*A sample chat entry point*

## Setting Up Transcripts and Notifications

### Sending Transcripts for Serviced and Abandoned Chats

You can email chat transcripts to customers. Transcripts can be sent for both serviced and abandoned chats. Serviced chats are those chat sessions where the agent joins the chat session at least once (activity substatus changes to “In Progress”) before the customer exits the session. Serviced chats also include chats that were not completed successfully because of some error. Abandoned chats are those chat sessions where the customer exits the chat before the activity substatus changes to “In Progress” at least once. This means the customer leaves the chat before an agent could attend to him.

In the transcript email that is sent, the chat transcript is placed between the greeting article and the signature article.







---

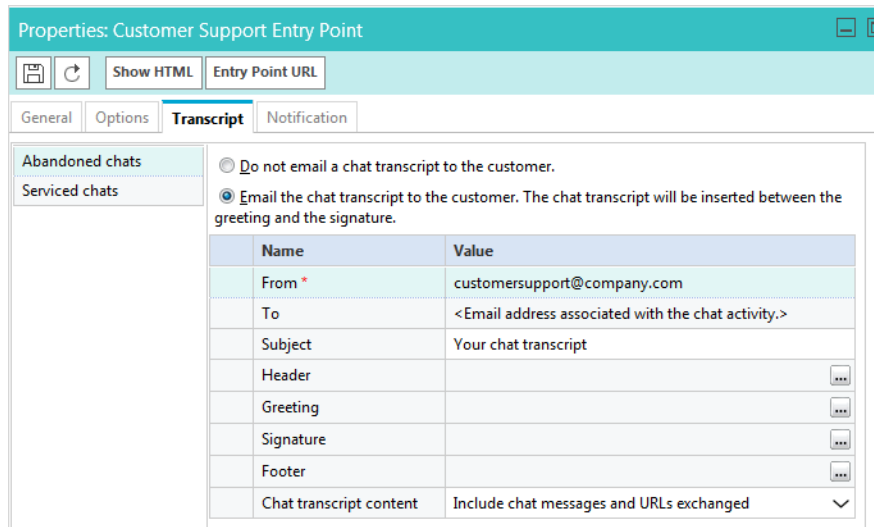
**Important:** Before you start, make sure you create the header, footer, signature, and greeting KB articles to be used in the chat transcript email. The articles need to be created from the Knowledge Base Console.

---

#### To email transcripts of serviced and abandoned chats:

1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Entry Points**.
2. In the List pane, select an entry point.

3. In the Properties pane, on the Transcript tab, go the Abandoned chats or Serviced chats section and provide the following details.
  - If you want to send the chat transcript select the **Email the chat transcript to the customer** option. If you select the **Do not email a chat transcript to the customer** option, all other options will be disabled.
  - **From:** Type the email address to be displayed in the **From** field of the transcript emails sent to customers. This is required information. Any replies sent by customers, in response to the chat transcript emails, go to this address.
  - **To:** The transcript emails are sent to the email address provided by customers while initiating chats. This field cannot be edited.
  - **Subject:** Type the subject of the email.
  - **Header:** To select a header, click the **Assistance**  button. From the Select Article window that appears, select the header article you want to use.
  - **Greeting:** To select a greeting, click the **Assistance**  button. From the Select Article window that appears, select the greeting article you want to use.
  - **Signature:** To select a signature, click the **Assistance**  button. From the Select Article window that appears, select the signature article you want to use.
  - **Footer:** To select a footer, click the **Assistance**  button. From the Select Article window that appears, select the footer article you want to use.
  - **Chat transcript content:** Specify what you want to include in the transcript. The following options are available.
    - **Include chat messages and URLs exchanged** (default value)
    - **Include only chat messages**
    - **Include only URLs exchanged**



*Configure the transcript options for chats*

4. Click the **Save**  button.

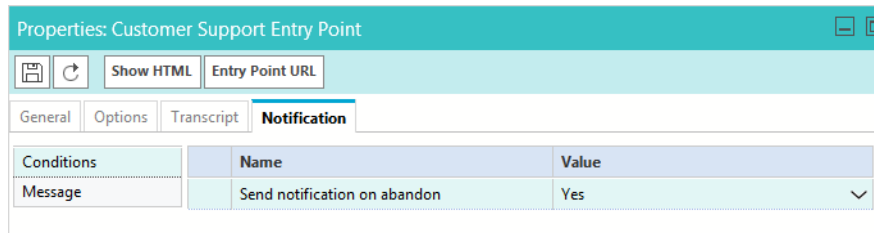
# Setting Up Notifications

Notifications are messages sent to administrators using the messaging infrastructure. You can send a notification when a chat gets abandoned. Along with notifications, the transcript of a chat can also be sent. Notifications can be sent to internal users as well as to external email addresses.

The difference between a transcript and a notification is that a transcript is sent to the customer with whom the chat session is held and a notification is sent to administrators when a chat is abandoned. You can create an entry point without selecting the option of sending transcript or notification.

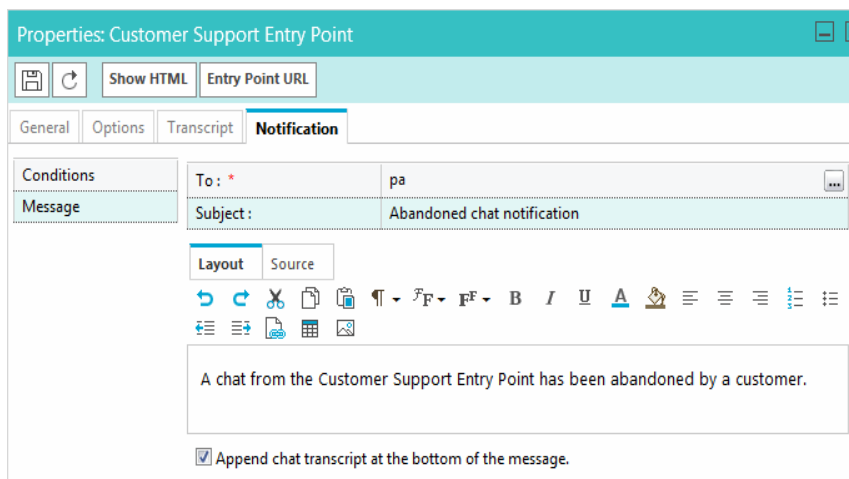
## To send a notification:

1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Entry Points**.
2. In the List pane, select an entry point.
3. In the Properties pane, on the Notification tab, go the Conditions section and specify if you want to send notifications for abandoned chats.



*Set the conditions for sending notifications*

4. Next, on the Notification tab, go to the Message section, and provide the following details.
  - **To:** Select to whom you want to send the notifications. You can send notifications to internal users and to external email addresses. This is required information.
  - **Subject:** Type a subject for the notification to be sent.
  - **Text box:** Type a message in the text box. Use the text box toolbar to format the text.
  - **Append chat transcript at the bottom of the message:** Select this option if you want to send the chat transcript with the notification.



*Set the message for sending notifications*

5. Click the **Save**  button.

## Turning Off Active Entry Points

---

Use this option to temporarily turn off all entry points for your department.

### To turn off active entry points:

1. In the Tree pane browse to **Department** > *Department\_Name* > **Chat** > **Entry Points**.  
The List pane shows the list of entry points.
2. In the List pane toolbar, click the **Entry Points Off** button.  
All the active entry points are turned off.
3. Click the **Entry Points On** button, to turn on the entry points. When you click the button, it turns on the active entry points.

## Adding Chat and Collaboration Help Links to Websites

---

You can view the HTML code, and use it for pointing the chat help hyperlinks and buttons on your website to open chat sessions. In a web page, chat help can be invoked from either a hyperlink or from a form button, the HTML window displays code to be used for both these cases.

### Adding Docked Text Chat to a Website

Docked chat allows website visitors to interact with customer service without creating additional browser windows. The docked chat frame always floats on top of the browser window, which lets the visitor continue to communicate with the agent without having to move between windows.

Docked chat utilizes a different set of templates than typical text chat, audio chat or video chat. For more information about the docked chat templates, see [“Aqua Chat Template Sets” on page 18](#).

The UI does not display the custom chat templates or languages added for chat or video chat. Before you begin this task, get the list of template names and language files names that you have created on the web server:

*Cisco\_Home\eservice\templates\chat*.

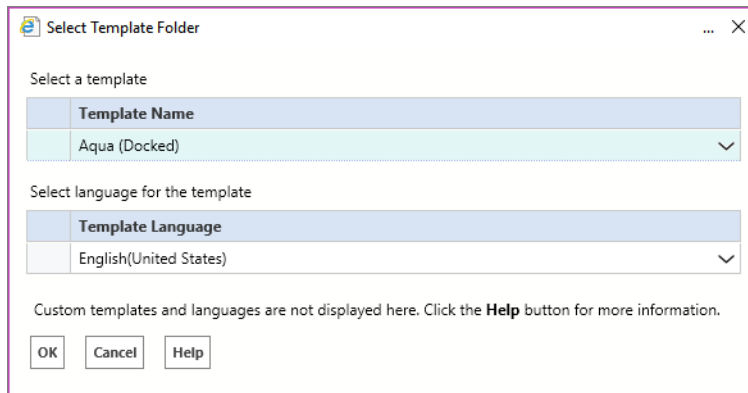
The following line must be added to the HTML of all pages on which you want docked chat to function:

```
<script type="text/javascript"  
src="https://WebServerName/system/templates/chat/egain-chat.js"></script>
```

### To add docked chat to a website:

1. In the Tree pane, browse to **Administration** > **Departments** > *Department\_Name* > **Chat** > **Entry Points**.
2. In the List pane, select an entry point.

3. In the Properties pane toolbar, click the **Show HTML** button.



*Select the Aqua template*

4. The Select Template Folder window opens. From the window, select the templates you want to use for the entry point and select the Template Language from the dropdown list. Custom chat templates and languages are not displayed here.
5. When you have made your selection, click **OK**. The Show HTML window appears. Here you can view the HTML code of the entry point. If you plan to edit it at all, copy it into a text editor before adding it to the host webpage.

You can only view or copy the HTML in the application. It cannot be edited or deleted in the application. If you are creating a new entry point and want to view its HTML, you have to first save it to enable the Show HTML button.

6. Before adding the code to your website, ensure that you replace the server name in the value of the `egainDockChat.serverURL` property with the fully qualified domain name of the web server. If you are using custom templates and custom languages, change those values as well.
7. Locate the `egainDockChat.VChatParams` property in the endpoint HTML and make the following changes:
  - If the domain of the website in which the endpoint HTML is embedded is the top level domain in the browser tab, add following to the next line:

```
egainDockChat.VChatParams = egainDockChat.VChatParams + '&wsname='+  
window.top.location.origin;
```
  - If the domain of the website in which the endpoint HTML is embedded NOT the top level domain in the browser tab, add the following to the next line:

```
egainDockChat.VChatParams = egainDockChat.VChatParams + '&wsname=<website  
domain name>'; where <website domain name> has the format http(s)://<host name>.  
For example, https://www.google.com.
```
8. Locate `egainDockChat.EntryPointId` and check the value of the property to see if you need to replace the entry point ID.
9. Locate `egainDockChat.Locale` and check the value of the property to see if you need to replace the language-country codes with custom languages.
10. Locate `egainDockChat.Template` and check the value of the property to see if you need to replace the template name with custom templates.

11. Locate `egainDockChat.UseCustomButton` and `egainDockChat.IsChatLaunched` and set the values to **true** and if you wish to allow the docked chat entry point to be initiated through a custom button or offer banner other than “Docked Chat”.
12. Locate `egainDockChat.PostChatAttributes` and check the value of the property. By default, it is set to **false**. Set to **true** to enable posting attributes to the template in use. For example, if you wish to set customer parameters, you can set the following parameters within the chat entry point java script:

```
egainDockChat.PostChatAttributes = true;
<script language= javascript>
egainDockChat.SetCustomerParameters("full_name","Test");
egainDockChat.SetCustomerParameters("email_address","test@test.com");
egainDockChat.SetCustomerParameters("phone_number","12345");
egainDockChat.SetCustomerParameters("subject","Test");
</script>
```

After setting these parameters, you need to specify these parameters in `application-chat-defaults.js`. For example, to set the *full\_name* attribute, locate `loginParameters` and add the `providerAttributeName` as follows:

```
{
  "providerAttributeName": "full_name",
  "secureAttribute": 0,
  "eGainAttributeName": "full_name",
  "eGainParentObject": "casemgmt",
  "eGainChildObject": "individual_customer_data",
  "primaryKey": false,
  "controlType": "text",
  "label": "APP.EG_FULLNAME",
  "required": true,
  "minLength": "1",
  "maxLength": "120",
  "validationPattern": "^[^<>]+$"
}
```

If you wish to enable secure chat for the entry point, you also need to set the `egainDockChat.PostChatAttributes` property to **true** and add the following:

```
egainDockChat.SetCustomerParameters("SAMLResponse","")
```

Secure chat requires this change to the entry point in addition to the chat template. For more details on configuring the aqua template set for secure chat, see [“Configuring Aqua Templates for Customer SSO” on page 35](#).

13. Open the code view of the host web page and add the link code at the appropriate point. You may need to ask your webmaster to perform this task.

## Adding Undocked Text Chat and Collaboration Links to a Website

You can view the HTML code, and use it for pointing the chat help hyperlinks and buttons on your website to open chat sessions. In a web page, chat help can be invoked from either a hyperlink or from a form button, the HTML window displays code to be used for both these cases.

This section also talks about how to enable auto-login for an entry point and how to show the chat link based on agent availability.

The UI does not display the custom chat templates or languages added for chat. Before you begin this task, get the list of template names and language files names that you have created on the web server:

*Cisco\_Home\eService\templates\chat.*

### To add undocked chat and collaboration help links to a website:

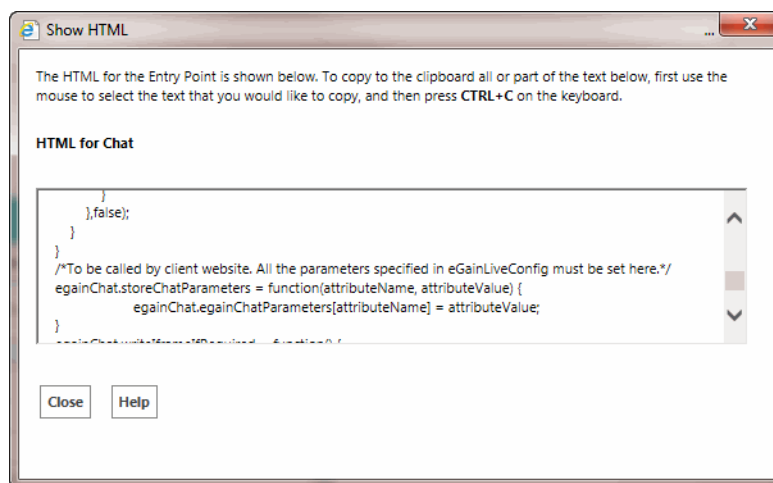
1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Entry Points**.
2. In the List pane, select an entry point.
3. In the Properties pane toolbar, click the **Show HTML** button.
4. The Select Template Folder window opens. From the window, select the templates you want to use for the entry point and select the Template Language from the dropdown list. Custom chat templates and languages are not displayed here.

When you have made your selection, click **OK**.

5. The Show HTML window appears. Here you can view the HTML code of the entry point.



**Important:** You can only view or copy the HTML. It cannot be edited or deleted. If you are creating a new entry point and want to view its HTML, you have to first save it to enable the Show HTML button.



*Sample HTML code*

6. Before adding the code to your website, ensure that you replace the server name in the value of the `egainChat.serverURL` property with the fully qualified domain name of the web server. If you are using custom templates and custom languages, change those values as well.

7. Locate the `iframe.src=egainChat.serverURL` property and make the following changes:
  - If the domain of the website in which the endpoint HTML is embedded is the top level domain in the browser tab, replace
 

```
iframe.src=egainChat.serverURL+'/web/view/live/customer/storeparams.html?wsn
ame='+window.location.protocol+'//'+window.location.host; with
iframe.src=egainChat.serverURL+'/web/view/live/customer/storeparams.html?wsn
ame='+ window.top.location.origin;
```
  - If the domain of the website in which the endpoint HTML is embedded is NOT the top level domain in the browser tab, replace
 

```
iframe.src=egainChat.serverURL+'/web/view/live/customer/storeparams.html?wsn
ame='+window.location.protocol+'//'+window.location.host; with
iframe.src=egainChat.serverURL+'/web/view/live/customer/storeparams.html?wsn
ame=<website domain name>;
```

where `<website domain name>` has the format `http(s)://<host name>`. For example, `https://www.google.com`.
8. Locate `egainChat.EntryPointId` and check the value of the property to see if you need to replace the entry point ID.
9. Locate `egainChat.Locale` and check the value of the property to see if you need to replace the language-country codes with custom languages.
10. Locate `egainChat.Template` and check the value of the property to see if you need to replace the template name with custom templates.
11. Locate `egainChat.PostChatAttributes` and check the value of the property. By default, it is set to **false**. Set to **true** to enable posting attributes to the template in use. For example, if you wish to set customer parameters, you can set the following parameters within the chat entry point java script:

```
egainChat.PostChatAttributes = true;
<script language= javascript>
egainChat.SetCustomerParameters("full_name","Test");
egainChat.SetCustomerParameters("email_address","test@test.com");
egainChat.SetCustomerParameters("phone_number","12345");
egainChat.SetCustomerParameters("subject","Test");
</script>
```

After setting these parameters, you need to specify these parameters in `application-chat-defaults.js`. For example, to set the *full\_name* attribute, locate `loginParameters` and add the `providerAttributeName` as follows:

```
{
  "providerAttributeName": "full_name",
  "secureAttribute": 0,
  "eGainAttributeName": "full_name",
  "eGainParentObject": "casemgmt",
  "eGainChildObject": "individual_customer_data",
  "primaryKey": false,
  "controlType": "text",
```

```

"label": "APP.EG_FULLNAME",
"required": true,
"minLength": "1",
"maxLength": "120",
"validationPattern": "^[^<>]+$"
}

```

If you wish to enable secure chat for the entry point, you also need to set the `egainChat.PostChatAttributes` property to **true** and add the following:

```
egainChat.SetCustomerParameters("SAMLResponse", "")
```

Secure chat requires this change to the entry point in addition to the chat template. For more details on configuring the aqua template set for secure chat, see [“Configuring Aqua Templates for Customer SSO” on page 35](#) or [“Configuring Kiwi Templates for Customer SSO” on page 65](#).

12. Edit the following parameters of the entry point code:

- a. Look for the parameter `var refererName`. By default, the parameter value is blank. Type in a name that describes the page that the hyperlink will appear in. In the following example, the name of the page is “Support.”

```
var refererName = "Support"
```

- b. Edit the following line to change the text that appears in the hyperlink. By default, it is “Test”. Substitute the word “Test” for wording which you deem appropriate, such as “Click here to chat with one of our agents.”

```
<a href="#" onClick="openHelp()" style=cursor:hand> Test</a>
```

13. Locate `var eGainChatUrl` and check the value of the property to see if you need to replace the template name, language code, and country codes with custom templates or custom languages.

14. To enable auto-login for an entry point, you need to modify the entry point code so that the customer information collected at the time of login on the website is passed on to the application when the customer initiates a chat session. The auto-login feature for the template must be enabled. For details, see [“Enabling Auto-Login” on page 65](#).

In the link, you need to add the customer details, which are provided by the customer. The name, email, and question fields are required to initiate the chat. The phone number field is optional.

For example, if the entry point is mapped to a template set which has name, email ID, and phone number as the login page fields, the following parameters should be added to the URL:

`&fieldname_1=<value1>&fieldname_2=<value2>&fieldname_3=<value3>`. Make sure that the values of the parameters are encoded in ASCII encoding.

Locate the following lines in the code:

```

var eGainChatUrl = egainChat.serverURL + '/templates/chat/' +
egainChat.Template + '/index.html?entryPointId=' + egainChat.EntryPointId;
eGainChatUrl += ' + '&templateName=' + egainChat.Template + '&locale=' +
egainChat.Locale + '&ver=v11';
eGainChatUrl += '&postChatAttributes=' + egainChat.PostChatAttributes +
'&eglvrefname=' + refererName + '&' + eglvcaseid + vhtIds;

```

And modify the following line:

```
eGainChatUrl += '&postChatAttributes=' + eGainChat.PostChatAttributes +
'&eglvrefname=' + refererName + '&' + eglvcaseid +
vhtIds+'&fieldname_1='+Name+'&fieldname_2='+EmailID+'&fieldname_3='+Phonenumber+vhtIds;
```

where *Name*, *EmailID*, *Phone-number* are the customer details collected at the time of login to the website.

15. Open the code view of the host web page and add the link code at the appropriate point. You may need to ask your webmaster to perform this task.

## Adding Callback Links to a Website

This section includes steps about how to enable auto-login for an entry point.

The UI does not display the custom templates or languages added. Before you begin this task, get the list of template names and language files names that you have created on the web server:

*Cisco\_Home\eservice\templates\callback.*

### To add a callback link to a website:

1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Entry Points**.
2. In the List pane, select an entry point.
3. In the Properties pane toolbar, click the **Show HTML** button.
4. The Select Template Folder window opens. From the window, select the templates you want to use for the entry point and select the Template Language from the dropdown list. Custom callback templates and languages are not displayed here.

When you have made your selection, click **OK**.

5. The Show HTML window appears. Here you can view the HTML code of the entry point.



**Important:** You can only view or copy the HTML. It cannot be edited or deleted. If you are creating a new entry point and want to view its HTML, you have to first save it to enable the Show HTML button.

---

6. To enable auto-login for an entry point, you need to modify the entry point code so that the customer information collected at the time of login on the website is passed on to the application when the customer initiates a callback session. The auto-login feature for the template must be enabled. For details, see [“Enabling Auto-Login” on page 99](#).

In the link, you need to add the customer details, which are provided by the customer. Callback entry points require 4 fields be provided: the customer’s name, email address, phone number, and question.

For example, if the entry point is mapped to a template set which has name, email ID, phone number, and question, as the login page fields, the following parameters should be added to the URL:  
&fieldname\_1=<value1>&fieldname\_2=<value2>&fieldname\_3=<value3>&fieldname\_4=<value4>. Make sure that the values of the parameters are encoded in ASCII encoding.

Locate the following lines in the code:

```
var eGainChatUrl =
egainChat.LiveServerURL+' /templates /callback /rainbow /call.html?subActivity=Callba
ck&entryPointId=<EntryPointId>&templateName=rainbow&languageCode=en&countryCode
=US&ver=v11&postChatAttributes='+egainChat.postChatAttributes+'&eglvrefname='+r
efererName+'&'+eglvcaseid+vhtIds;
```

And modify the following line:

```
var eGainChatUrl =
egainChat.LiveServerURL+' /templates /callback /rainbow /call.html?subActivity=Callba
ck&entryPointId=<EntryPointId>&templateName=rainbow&languageCode=en&countryCode
=US&ver=v11&postChatAttributes='+egainChat.postChatAttributes+'&eglvrefname='+r
efererName+'&'+eglvcaseid+vhtIds+'&fieldname_1='+Name+'&fieldname_2='+EmailID+'&
fieldname_3='+Phonenumber+'&fieldname_4='+Question;
```

where *Name*, *EmailID*, *Phone-number*, *Question* are the customer details collected at the time of login to the website.

7. Open the code view of the host web page and add the link code at the appropriate point. You may need to ask your webmaster to perform this task.

## Configuring Auto-Pushback Settings for Chats

The chat auto-pushback feature allows you to pushback chat activities to the queue, if the agents do not click on the new chats assigned to them in the configured time (default value is 2 minutes). Use these settings to enable auto-pushback and to define if agents should be made unavailable after a chat is pushed back automatically from the agent's inbox.

These changes take effect for all departments in the installation.

### To configure auto-pushback settings for chats:

- ▶ From the Administration Console, from the Partition Level settings, configure the following chat auto-pushback settings. For details about doing this task, see *Enterprise Chat and Email Administrator's Guide to Administration Console*.
  - Enable auto-pushback of chats
  - Expiry time for auto-pushback for chats (minutes)
  - Make agent unavailable on auto-pushback of chats

## Configuring Dynamic Messages for Chats and Callback

Dynamic Run Application Script Request (DRASR) allows you to display messages with dynamic text (such as expected wait time) to customers while chat and call requests are being processed by the ECE and Unified CCE integrated systems. While ECE provides wait time messages for chat customers to be handled by ECE agents by default, DRASR should be used if:

- ▶ You do not want to use the default wait time string

- ▶ You wish to display wait time value that is calculated in Unified CCE at the time of the Unified CCE script being run

You can use ECC variables and call variables to display the dynamic content. Dynamic messages can be displayed for chats and callback activities.

Configuring the dynamic messages includes the following steps:

1. Configure the Network VRU scripts in Unified CCE.
2. Identify the queues for which you want to display the dynamic messages.
3. Identify the ECC variables or call variables you want to use in the dynamic message and prepare the macros for the variables. For details about these objects and how they are used in Unified CCE, see the *Scripting and Media Routing Guide for Cisco Unified ICM/Contact Center Enterprise & Hosted* available here: [https://www.cisco.com/en/US/products/sw/custcosw/ps1001/products\\_user\\_guide\\_list.html](https://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html)
4. Configure the dynamic message.

## Preparing to Create Dynamic Messages

1. From Unified CCE, configure the Network VRU scripts and use them in the Unified CCE scripts used for chat activities. You will need the name of the Network VRU script for configuring the dynamic messages. For details about doing these tasks, see the *Enterprise Chat and Email Deployment and Maintenance Guide*.
2. From the Administration Console, identify the chat queues for which you want to display the dynamic messages.
3. To display the dynamic content using ECC variable macros, prepare your macros by doing the following:
  - a. Look at the “Call Variables” chapter in the *Enterprise Chat and Email Administrator’s Guide to Routing and Workflows* guide for the names of ECC variables that can be used.
  - b. Identify the ECC variables you want to use in the message. The macro will be added in the format `%ECC <Variable_Name>%`. For example, `%ECCuser.ece.activity.id%`



**Important:** While selecting ECC variables to be used in macros, make sure that the variables have valid values. If you use a variable that does not have a value, a run application script failure will occur and the customer will not be able to chat. The error template is displayed to the customer.

---

4. To display the dynamic content using call variable macros, prepare your macros by doing the following:
  - From the Administration Console, from the Call Variables tab of the queue properties, identify the call variables you want to use in the message and note down the number associated with the call variable. For example, in the following figure the number for `customer_phone_no` is 1 and for `activity_id`, the

number is 2. The macro is added in the format `%CVNumber%`. For example, `%CV1%` for `customer_phone_no`.

| Name                    | Description                 | Active | Default Chat Transfer Q... | Unified CCE Media Routi... |
|-------------------------|-----------------------------|--------|----------------------------|----------------------------|
| Call queue              | System provided queue fo... | Yes    | No                         | N/A                        |
| Chat queue              | System provided queue fo... | Yes    | Yes                        | N/A                        |
| Default exception queue | System provided queue fo... | Yes    | No                         | N/A                        |
| ECE_Chat_MRD_Chat_SS    |                             | Yes    | No                         | ECE_Chat_MRD               |
| ECE_Email_MRD_Email_SS  |                             | Yes    | No                         | ECE_Email_MRD              |
| ECE_Email_MRD_Service   | Supervisory Queue for MR... | Yes    | No                         | N/A                        |


  

| Available Call Variables | Selected Call Variables             |
|--------------------------|-------------------------------------|
| subject                  | contact_point_data<br>Callvariable1 |
| is_escalated             | delay_time_in_min<br>Callvariable2  |
| conference_flag          |                                     |
| case_type                |                                     |
| last_action_reason       |                                     |
| queue_id                 |                                     |
| description              |                                     |
| assigned_to              |                                     |

Order of call variables

## Configuring Dynamic Messages

### To configure dynamic messages:

1. In the Tree pane, browse to **Administration > Partition:** *Partition Name* > **Integration > Unified CCE > DRASR**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, on the General tab, set the following:
  - **Name:** The name of the script as it will be identified in the application.
  - **Description:** The description of the script.
  - **Script name:** From the dropdown, select the Network VRU script configured in Unified CCE. A script can be associated with only one message.
  - **Enabled:** Set to **Yes**.
  - **Display message is URL:** If the message is a URL, set to **Yes**.




**Important:** If enabled, the message must be a valid URL or it will not display properly.

- **Display message:** Provide the message that will be displayed to users upon accessing the entry point. If you have set the message to be a URL, provide a valid URL. In such cases, only provide the URL in the message and do not provide any text. A sample text message, with variable macros: An agent is

expected to be available in approximately %ECCuser.wait.time% minutes. While you are waiting, checkout the latest offers on our website. For your record, please save the case number %CVcase\_ID%

- Click the **Save**  button.



# Integration Using Chat Messaging APIs

- ▶ [About Chat Messaging API Integration](#)
- ▶ [Registering Applications](#)
- ▶ [App Authentication](#)
- ▶ [Creating Messaging Adapters](#)
- ▶ [Post Integration Configuration](#)

# About Chat Messaging API Integration

---

Chat Messaging APIs can be used to build external integrations with custom messaging apps, messaging channels like Facebook Messenger, and building custom web templates. The chats created from these Chat Messaging APIs are routed to agents like regular web chats and have the web chat features available.

The client applications for the integration is setup from the Enterprise Chat and Email Administration console.

In order to use chat messaging APIs, the following must first be performed:


1. Register a client application ([page 124](#)).
2. Register a Webhooks Callback URL to receive the chat messages and events ([page 124](#)).
3. Associate the client application with a chat entry point ([page 127](#)).
4. Create an end to end chat session using the REST APIs: Authenticate Client Application, Get Entry point Configuration, Start Conversation, Send Chat Message, End Conversation. For more information about these APIs, see *Enterprise Chat and Email Developer's Guide to Web Service APIs*.

## Registering Applications

---

While registering a client application, you must also register a Webhooks Callback URL to receive the chat messages and events.

### To register an application:

1. In the Tree pane, browse to **Administration > Partition: *Partition\_Name* > Integration > Applications > Register Applications**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, on the General tab, provide the following details.
  - **Name:** Type the name of the application. This is required information. For example, “Messaging App Integration”.
  - **Description:** Type a brief description.
  - **Application Type:** This is required information. Select an option from the dropdown:
    - **Chat:** Select this option to integrate Chat APIs for custom messaging channels, mobile messaging, and so on.

- **Application URL:** This field is disabled and cannot be changed.


| Name               | Value                          |
|--------------------|--------------------------------|
| Name *             | Chat Messaging API             |
| Description        | Chat Messaging API Integration |
| Application Type * | Chat                           |
| Application URL    |                                |
| Client Key         |                                |
| Client Secret      |                                |

*Provide the general information for the client application*

4. Click the **Callback URL** tab. In the Properties pane, on the Callback URL tab, provide the following details.
  - **Callback URL:** The Webhooks Callback URL to receive the chat messages and events. The same callback URL can be configured for multiple client applications.
  - **Callback Format:** Select the format of the messages or events that are posted to the callback URL. Options available include: **XML** and **JSON**.
  - **Callback Error Notification Email Address:** Provide the address to which email notifications are sent if the call to the callback URL fail.
  - **Authentication:** Select an authentication configuration to use for callback. For more information about creating authentication configurations, see [“App Authentication” on page 125](#).

| Name  | Value  |
|---|--|
| Callback URL *                              | https://callback.ucc.call/dfihjtkdja21445/ddcr |
| Callback Format *                           | JSON   |
| Callback Error Notification Email Address * | callbackerror@email.com                        |
| Authentication                              |  |

*Provide the Webhooks Callback URL information*



5. Click the **Save**  button. This generates the client key and client secret for the server configuration in the General tab. If you need to regenerate the client secret and key, click the **Regenerate Client Secret** button.

## App Authentication

### Configuring Basic Authentication





**To create a basic app authentication configuration:**

1. In the Tree pane, browse to **Administration > Partition:** *Partition\_Name* **> Integration > Authentication.**

2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, on the General tab, provide the following details.
  - **Name:** The name for the configuration.
  - **Description:** A brief description of the configuration.
  - **Authentication type:** Select Basic.
4. In the Properties pane, under the Configuration tab, provide the following details:
  - **User name:** The user name for the account the data adapter will use for authentication.
  - **Password:** The password for the account the data adapter will use for authentication.
5. Click the **Save**  button to save your configuration. This configuration can now be used when registering apps for Callback. For more information, see [“Registering Applications” on page 124](#).


## Configuring OAuth 2.0 Authentication

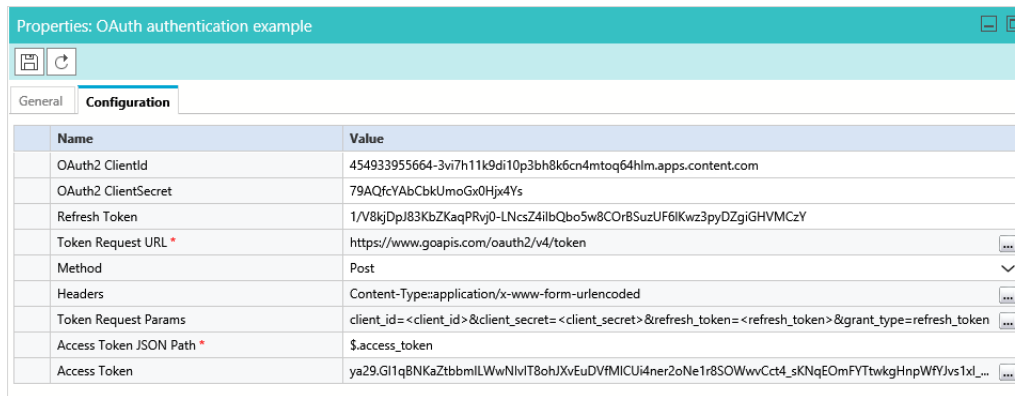
### To create an OAuth 2.0 app authentication configuration:

1. In the Tree pane, browse to **Administration > Partition:** *Partition\_Name* > **Integration > Authentication**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, on the General tab, provide the following details.
  - **Name:** The name for the configuration.
  - **Description:** A brief description of the configuration.
  - **Authentication type:** Select OAuth 2.0.
4. In the Properties pane, under the Configuration tab, provide the following details:
  - **OAuth2 ClientId:** The unique string representing the registration information provided by the service provider.
  - **OAuth2 ClientSecret:** The unique string provided by the service provider that acts as a means of authorizing a client that is requesting an access token.
  - **Refresh Token:** Credentials used to obtain new access tokens when the current access token expires.
  - **Token Request URL:** Click the **Assistance**  button. In the window that appears, provide the access token request URL and click **OK** to close the window. This field is required.
  - **Method:** Select the method in which the access token is retrieved. Select either **Post** or **Get**. The method selected depends on what the client authentication server supports.
  - **Headers:** Click the **Assistance**  button. In the window that appears, provide any necessary additional values to include in the response header by entering a Name and Value for the field. When you have entered all the necessary header values, click **OK** to close the window.
  - **Token Request Params:** Click the **Assistance**  button. In the window that appears, provide the parameters for the token request body. Format the parameters string property with variables and values to ensure that correct information is sent in the request.

For example:


```
client_id=<client_id>&client_secret=<client_secret>&refresh_token=<refresh_token>&grant_type=refresh_token
```

- **Access Token JSON Path:** The JSON query path of an attribute in the returned JSON response. For example, \$.access\_token.
- **Access Token:** If you wish to provide a current access token, click the **Assistance**  button and enter the string in the field. Click **OK** to close the window. Leave this field blank if you do not have an Access Token. New token will be requested by the application using the provided details.



| Name                     | Value  |
|--------------------------|--|
| OAuth2 ClientId          | 454933955664-3vi7h11k9di10p3bh8k6cn4mtoq64hlm.apps.content.com   |
| OAuth2 ClientSecret      | 79AQfcYAbCbkUmoGx0Hjx4Ys   |
| Refresh Token            | 1/V8kjDpJ83KbZKaqPRvj0-LNcsZ4iibQbo5w8COr8SuzUF6lKwz3pyDZgiGHVMCzY   |
| Token Request URL *      | https://www.goapis.com/oauth2/v4/token   |
| Method                   | Post   |
| Headers                  | Content-Type:application/x-www-form-urlencoded   |
| Token Request Params     | client_id=<client_id>&client_secret=<client_secret>&refresh_token=<refresh_token>&grant_type=refresh_token |
| Access Token JSON Path * | \$.access_token  |
| Access Token             | ya29.G11qBNKaZtbbmlLWwNviT8ohJXvEuDVfMICUj4ner2oNe1r8SOWwvCct4_sKNqEOmFYTtwkgHnpWfYjvs1xl...               |

*Provided the OAuth configuration details*


5. Click the **Save**  button to save your configuration. This configuration can now be used when registering apps for Callback. For more information, see [“Registering Applications” on page 124](#).


## Creating Messaging Adapters

Once the client application has been registered, along with the Webhooks Callback URL, the messaging adapters must be created. By creating messaging adapters, you are mapping client applications to a chat entry point.

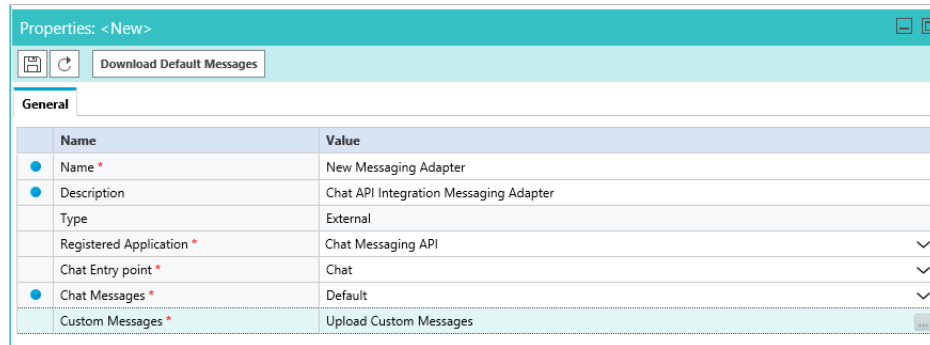
For more information about registering client applications, see [“Registering Applications” on page 124](#).


### To create messaging adapters:

1. In the Tree pane, browse to **Administration > Departments > *Department\_Name* > Chat > Messaging Adapters**.
2. In the List pane toolbar, click the **New**  button.
3. In the Properties pane, on the General tab, provide the following details.
  - **Name:** The name of the adapter.
  - **Description:** A description of the adapter.
  - **Type:** This is set to ‘External’ and cannot be changed.
  - **Registered Application:** Select a registered application from the dropdown. For more information about registering applications, see [“Registering Applications” on page 124](#).
  - **Chat Entry Point:** Select a chat entry point from the dropdown. For more information about registering applications, see [“About Entry Points” on page 103](#).
  - **Chat Messages:** Select one of the following options:
    - **Default:** Use default system-generated messages for the adapter.

- **Custom:** Configure and provide system messages for the adapter. This enables the Custom Messages field.
- **Custom Messages:** If Custom was selected in the chat messages field, this field is enabled. Before uploading custom messages, click the **Download Default Messages** button to download the default system-generated messages. Edit this zip file and use these messages as the template for your custom messages. When you have made the necessary edits to the default messages, click the **Assistance**  button and in the window that appears, provide the zip file that contains the custom messages.

If there are any errors in the custom messages that you have uploaded, the application validates the messages and notifies you of the errors that need to be corrected.



| Name                     | Value  |
|--------------------------|--|
| Name *                   | New Messaging Adapter  |
| Description              | Chat API Integration Messaging Adapter   |
| Type                     | External   |
| Registered Application * | Chat Messaging API   |
| Chat Entry point *       | Chat   |
| Chat Messages *          | Default  |
| Custom Messages *        | Upload Custom Messages  |

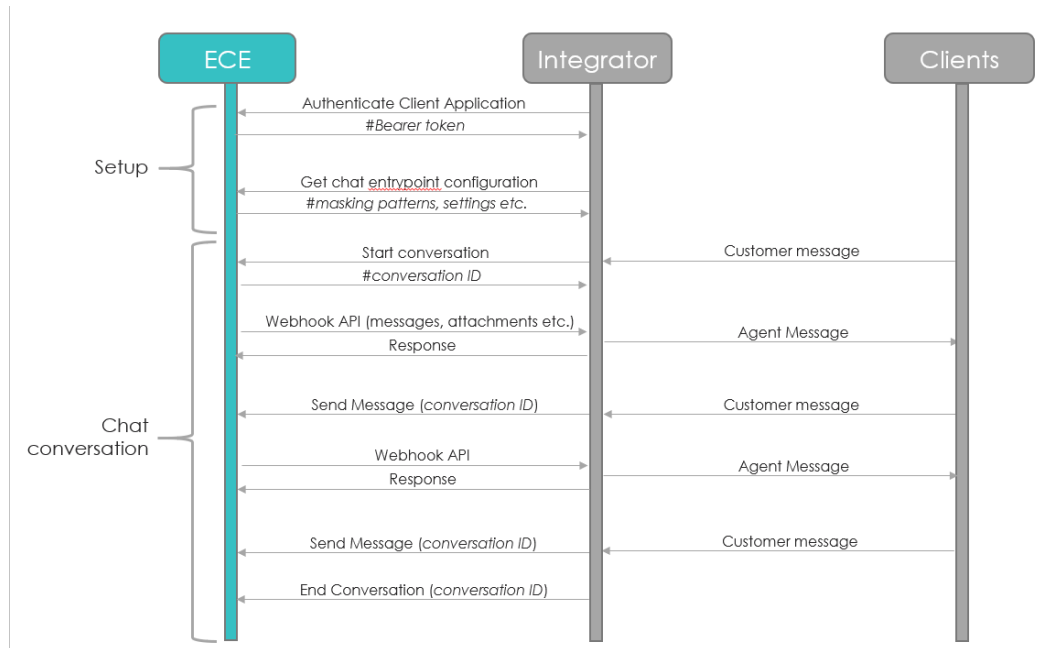
*Provide the details for the messaging adapter*

4. Click the **Save**  button.

## Post Integration Configuration

Once you have registered the client application, added the callback URL, and configured messaging adapter, you must use the Chat Messaging APIs to build the integration. For more information, see the *Enterprise Chat and*

*Email Knowledge Authoring and Interaction API Reference Guide.* For more information about the post-configuration process, see also the following diagram.



*With the client application registered and the messaging adapter created, you can follow the integration flow*