Digital Channels

Task Flow to Enable Digital Channels

To enable digital channels in your contact center solution, follow this task flow:

License Requirements

The digital channel features of Cisco Customer Collaboration Platform are available in the Premium license version of Cisco Unified Contact Center Express. The feature availability in Unified CCX is based on the type of license for Cisco Unified Contact Center Express.

Install Cisco Customer Collaboration Platform

Customer Collaboration Platform is installed as an appliance using the Cisco Unified Operating System (Unified OS). The operating system and the Customer Collaboration Platform application are installed together using a similar installation process as other Unified OS products such as Cisco Unified Communications Manager and Cisco Unified Intelligence Center.

Customer Collaboration Platform operates on a VMware Virtual Machine (VM) on hardware that is running a VMware Host Server. Customer Collaboration Platform currently supports installation of only a single node (as opposed to a duplexed or redundant system).

Perform the following steps to install Customer Collaboration Platform:

Procedure

Step 1	Create a virtual machine using a VMware Open Virtual Format template.
Step 2	Use the latest OVA template for the fresh installation of Customer Collaboration Platform release. Go to https://software.cisco.com/download/home/270569179 and download this template.
Step 3	When deploying the template, select either a large or a small deployment from the drop-down list.
Step 4	Mount the Customer Collaboration Platform DVD or ISO file to the virtual machine and set the virtual machine to boot from the Customer Collaboration Platform DVD. The installation wizard opens. Use Tab to navigate between elements and then press the space bar or the Enter key to select the element and proceed.
Step 5	Perform the media check when prompted.
Step 6	Follow the instructions on the screen and select Yes or Continue.
Step 7	Use the arrow keys to highlight the correct time zone and then use **Tab** to navigate to the **OK** button. Press **Enter** to proceed.
Step 8	Provide the network information for Customer Collaboration Platform. You must provide valid hostname with matching IP address. The system confirms that the hostname matches the IP address later in the installation process.
Step 9	Select **Yes** to provide DNS Client Settings for Customer Collaboration Platform. Provide DNS servers and the domain. Select **OK**. DNS configuration is mandatory.
Step 10	Provide an Administrator ID and password. This credential is for platform (Unified OS) administration.
Step 11	Provide information about your organization. This information generates the security (SSL) certificates for this server.
Step 12	You must provide at least one NTP Server. Enter the NTP host address and select **OK**.
Step 13	Provide a security password.
Step 14	Provide a username and password for the Customer Collaboration Platform administrator. You can import additional Customer Collaboration Platform users from Active Directory after the Customer Collaboration Platform installation is complete.
Step 15	The confirmation window opens. You can select **Back** to change settings or **OK** to complete the installation. Installation can take up to 2 hours. The server may reboot to complete the installation steps. If you install from an ISO file and see the virtual machine message, to "Disconnect anyway (and override the lock)?", select **Yes**. A sign-in prompt appears on the server console.
Step 16	After the installation is complete, perform the one-time setup tasks like:
	a) If your system is installed behind a firewall, set up an HTTP proxy so that feeds can access sites on the Internet.
	b) Configure Active Directory so that more users can sign in.
	c) If you want to use Cisco Unified Intelligence Center, set up the reporting user so that the reporting tool can access the reporting database.

Configure Customer Collaboration Platform in Unified CCX

Customer Collaboration Platform Configuration

Use the **CCP Configuration** web page to configure Cisco Customer Collaboration Platform. You must configure information only on this web page to enable the chat and email features.

Cisco Unified CCX does not support custom configuration changes on the chat and email campaigns or feeds from the Customer Collaboration Platform administration page.

This option is available only with the Unified CCX Premium license package. The email feature support for Unified CCX depends on the Customer Collaboration Platform version. For information about feature compatibility, see the Unified CCX Compatibility related information, located at: https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-device-support-tables-list.html.

Any configuration change using Customer Collaboration Platform Administration interface is not supported.

Note On a high availability setup, after the **Add to Cluster** operation is successful, the following message is displayed:

```
In case of HA, configure the CCP on secondary node after adding to
cluster in the secondary node.
```

Every time you navigate to this page, the state of feeds, campaigns, and notifications rules are validated for chat and email, the connectivity to the email server is checked, and the web page shows the appropriate status. Icons are used as visual indicators to display the status of each service. Hover the cursor over the icon to display a tool tip that explains the reason for the current state. As part of validation, Unified CCX checks the following:

- **CCP XMPP Service**

  Unified CCX checks the connectivity with the Customer Collaboration Platform XMPP service. If the XMPP service is down, the following message is displayed:

  ```
  CCP XMPP service is not accessible. Check the logs for more details.
  ```

- **CCP Runtime Service**

  Unified CCX checks the connectivity with the Customer Collaboration Platform runtime service. If the runtime service is down, the following message is displayed:

  ```
  CCP runtime service is not accessible. Check the logs for more details.
  ```

- **CCP Tomcat Service**

  Unified CCX checks the connectivity with the Customer Collaboration Platform Tomcat service. If the Tomcat service is down, the following message is displayed:

  ```
  Unable to communicate to the CCP on the IP address(Hostname) provided.
  Please verify whether CCP is running on this IP address(Hostname) or
  check the network connection and make sure that CCP is reachable from
  CCX.
  ```

- **CCP Status**

  - **Feeds**

    Unified CCX validates the status of the intended chat and email feeds in Customer Collaboration Platform.

    - —All the feeds are operating normally in Customer Collaboration Platform.

    - —One or more feeds mismatches with Customer Collaboration Platform.

- —All the feeds are missing in Customer Collaboration Platform.

- **Campaigns**

  Unified CCX validates the status of the intended chat and email campaigns in Customer Collaboration Platform.

    - —All the campaigns are operating normally in Customer Collaboration Platform.

    - —One or more campaigns mismatches with Customer Collaboration Platform.

    - —All the campaigns are missing in Customer Collaboration Platform.

- **Notifications**

  Unified CCX validates the status of the intended chat and email notifications in Customer Collaboration Platform.

    - —All the notifications are operating normally in Customer Collaboration Platform.

    - —One or more notifications mismatches with Customer Collaboration Platform. This status icon also appears after configuration, when no chat and email contact is injected yet. The status will change to normal after successful injection of chat and email contact.

    - —All the notifications are missing in Customer Collaboration Platform.

- **Email Cache**

  Unified CCX checks and alerts the user about the email cache.

    - —Email cache is operating normally.

    - —Unable to cache emails. No new emails will be fetched.

    - **Not Applicable**— Customer Collaboration Platform version is not compatible.

- **Email Server**

  Unified CCX checks the connectivity with the email server.

    - —Email server is operating normally.

    - **Not Configured**—Channel provider is not configured.

    - **Not Applicable**—The following are the reasons for the current state:

        - Cisco Finesse is not active.

        - Email CSQ is not configured.

        - Customer Collaboration Platform version is incompatible with the Email feature.

    - —Unable to reach the email server.

- **CCP Chat Gateway**

This indicates the status of the Customer Collaboration Platform Chat Gateway and the Channel that is integrated.

- **CCP Chat Gateway**

  - ✓ — The gateway is operating normally and is configured with a channel.

  - ✗ — The gateway is not in an operating state as it is either Unreachable or configurations are incorrect.

  - **Not Configured** — The gateway is not configured and no channels are configured.

  - **Not Applicable**—The following are the reasons for the current state:

    Cisco Finesse is not active.

    Customer Collaboration Platform version is incompatible or is not configured.

- **Facebook Messenger Integration** — This indicates whether the channel is enabled. It also indicates the last failure recorded in the channel. This helps to determine any intermittent or permanent errors.

Procedure

Step 1 From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat and Email > CCP Configuration** as applicable.

The **Configuration** web page appears.

Note You must perform the following actions:

- In the Unified CCX, upload Customer Collaboration Platform certificate to the Unified CCX Tomcat trust store using the Cisco Unified OS Administration interface. You can also use the `set cert import trust tomcat` CLI.

- In the Customer Collaboration Platform, upload Unified CCX certificate to the Customer Collaboration Platform Tomcat trust store using the Cisco Unified OS Administration interface.

Unified CCX and Customer Collaboration Platform servers must have DNS entries. Customer Collaboration Platform must be accessible to Unified CCX by hostname. If the entries are not valid, an error is displayed.

Step 2 Specify the following fields for Customer Collaboration Platform:

Field	Description
IP Address / Host Name	IP address or fully qualified domain name of the Customer Collaboration Platform server. For example, 192.168.1.5 or host.example.com.
User Name	Username of the Customer Collaboration Platform administrator.
Password	Password of the Customer Collaboration Platform administrator.

Note   When the Customer Collaboration Platform application password is reset, ensure that the new password is first updated in Unified CCX and then reset the password in Customer Collaboration Platform. This prevents the account getting locked due to the authentication attempts from Unified CCX with old password.

Step 3   Click **Save** to save the changes.

Note
- After saving a valid Customer Collaboration Platform configuration, you cannot change the **IP Address / Host Name** details. If you want to change the configuration, delete the existing configuration and create a new one.

- If you see an error message, click **Save** to re-create feeds, campaigns, and notifications for chat and email in Customer Collaboration Platform.

- When Unified CCX hostname is changed or when a new Unified CCX node is added, the Customer Collaboration Platform Configurations must be saved again. This enables the change to take effect to re-create all the notifications for email and chat in Customer Collaboration Platform.

Mail Server Configuration

Use the **Mail Server Configuration** web page to configure the mail server. This web page is available on the Unified CCX node with a premium license.

Before you begin

- Create accounts and email addresses that must be used for CSQ creation.

- **Local Exchange Server**

  - Execute the commands **set-service msExchangeIMAP4 -startuptype automatic**, and **start-service msExchangeIMAP4** on Microsoft Exchange to set the Microsoft Exchange IMAP4 service to start automatically.

  - Execute the command **set-service msExchangeIMAP4BE -startuptype automatic**, and execute **start-service msExchangeIMAP4BE** (for Microsoft Exchange 2013) on Microsoft Exchange to set the Microsoft Exchange IMAP4 Back End service to start automatically.

- **Gmail**

  - Two types of authentication, **Basic** and **OAuth 2.0** are available for Gmail. **OAuth 2.0** is more secure.

  - You can select the authentication type while configuring a CSQ.

  - To use OAuth, you have to create a service account in the Google Cloud server. While creating a service account, you must download the JSON file that has the Private Key details, which must be uploaded while configuring a Contact Service Queue (CSQ). For more information on creating a service account, see https://developers.google.com/identity/protocols/oauth2/service-account.

- To authorize a service account for accessing emails, ensure that "*https://mail.google.com/*" is entered in **API Scopes**.

Procedure

Step 1 From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat and Email** > **Mail Server Configuration**.
The **Mail Server Configuration** web page opens.

Step 2 Complete or modify the following fields for the mail server:

Field	Description
Mail Server Settings	
Mail Server	Choose the mail server that is required to be configured from the listed options: • MS Exchange Server / Office 365 • Gmail **Note** You must not perform any automatic or manual operations on the emails from the mail server. For example, create rules, move the emails manually to a different location, delete emails from the mail server, and so on. Unified CCX must be connected to a dedicated mail server. Ensure that the email account is not shared.
IMAP Folder Structure	
Sent Items Folder Name	The name of the sent items folder of the respective mail server that is configured. **Note** All the listed mail servers have the default folder names prepopulated for all the IMAP folders in English locale. These folder names can be edited and can have custom values.
Incoming (Secure IMAP)	
Host Name	Fully qualified domain name (FQDN) of the incoming (IMAP) server. Do not enter the IP address.
Port Number	Port number that is used to connect to the IMAP server. The default port number is 993.
Outgoing (Secure SMTP)	
Host Name	FQDN of the outgoing (SMTP) server. Do not enter the IP address.
Port Number	Port number that is used to connect to the SMTP server. The default port number is 587.
Proxy Settings	

Field	Description
HTTP	Choose the **Enable** or **Disable** radio button to use HTTP proxy for Mail Server connectivity. By default the **Disable** option is selected and **Enable** option is disabled. To enable **HTTP**, configure **Http** in **Proxy Parameters** section of **System Parameters** page. **Note** If Customer Collaboration Platform is able to access internet directly, HTTP proxy configuration is not required. Else, HTTP proxy configuration is required to invoke cloud services of mail servers (Gmail) to get the OAuth token. The OAuth token is used in SMTP/IMAP operations.
SOCKS	Choose the **Enable** or **Disable** radio button to use socks proxy for Mail Server connectivity. By default the **Disable** option is selected and **Enable** option is disabled. To enable **SOCKS**, configure **SOCKS Proxy** in **System Parameters** page.
Description	Description of the mail server.

Step 3   Click **Update** to save the changes.

Contact Service Queues

Before you begin

- You must create a skill before creating a CSQ. For information about creating a skill, see *Skill Configuration* section in the Cisco Unified Contact Center Express Administration and Operations Guide.

- Before creating an email CSQ, you must have configured the mail server.

Procedure

Step 1   From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat and Email** > **Contact Service Queues** as applicable.

The Contact Service Queues (CSQs) web page opens and displays the information for existing chat and email CSQs if any.

Step 2   To add a new chat or email CSQ, click the **Add New** icon that appears in the toolbar in the upper left corner of the window or the **Add New** button that appears at the bottom of the window.

The Contact Service Queue Configuration web page opens.

Step 3   Specify the following fields:

Field Name	Description
CSQ Name	Name for the CSQ.

Field Name	Description

Resource Selection Criteria	Resource selection criteria chosen for the chat CSQ.
	
	• **Longest Available**—Selects the agent who has been in the Available state for the longest amount of time.
	
	• **Most Skilled**—Used for expert agent chat distribution. Selects the agent with the highest total competency level. The total competency level is determined by adding the agent's competency levels for each assigned skill that is also assigned to the CSQ.
	
	    • Example 1: If Agent1 is assigned Skill1(5), Skill2(6), and Skill3(7) and CSQ1 specifies Skill1(min=1) and Skill3(min=1), the total competency level for Agent1 for CSQ1 is 12.
	
	    • Example 2: If Agent1 is assigned Skill1(5) and Skill2(6), and Skill3(7) and CSQ1 specifies Skill1(min=1), only, the total competency level for Agent1 for CSQ1 is 5.
	
	Note • To change the competence level for an already configured agent, change the agent skill level and save the CSQ.
	
	    • If two agents score equal in the primary selection criteria, the agent who was updated first will be assigned to the incoming chat until the maximum chats threshold is reached.

Table 1: CSQ Type—Chat

Field Name	Description
CSQ Type	Choose Chat.

Table 2: CSQ Type—Email

Field Name	Description
CSQ Type	Choose Email. **Note** You can create up to 100 email CSQs. If you exceed the limit, the following error is displayed: `Cisco Unified CCX supports a maximum of 100 Email CSQs. Exceeded maximum limit for Email CSQs.`
Mail Server	Fully Qualified Domain Name (FQDN) of email server. This field displays the mail server that you configured.

Field Name	Description
Authentication Type	The type of authentication that is used to access the configured email account.
	Basic is used to access both types of email, Office 365 and Gmail by using username and password. By default, this option is selected.
	OAuth is used to access Gmail by using the **OAuth Private Key** file that is downloaded from the Gmail mail server. Supports OAuth 2.0 protocol.
	Note This field is displayed only when you have configured Gmail mail server.
Email username	The email address to which emails are sent or retrieved.
Email password	Password for the email account.
	Note This field is displayed when **Authentication Type** is **Basic**.
Private Key	The JSON file that contains the OAuth Private Key, which is generated while creating Service Account in Google Cloud server. Click **Upload** to select the file.
	Note This field is displayed only when **Authentication Type** is **OAuth**.
Inbox Folder Name	The folder from which emails will be fetched and queued for the Contact Service Queue.
	Default value = Inbox folder of the selected mail server type
	Note If you change the Inbox folder name, which is already in use, the emails that are downloaded and cached by Customer Collaboration Platform are made available to agents. The remaining emails in the folder are ignored.
Sent Items Folder Name	The folder to which Customer Collaboration Platform will move the response email to, when it is sent.
Test Configuration	This checks the following:
	• Connectivity from Customer Collaboration Platform to the configured mail server by using the user credentials that is specified in the Contact Service Queue (CSQ) configuration.
	• Presence of and permissions to the Inbox, Drafts, Outbox, and Sent Items folder for the user, that is specified in the CSQ configuration.
Poll Interval (Seconds)	Frequency in seconds to fetch emails from the server.
	Default value = 180, Range = 60 to 3600
Snapshot Age (Minutes)	Specify the time in minutes from when the emails are to be fetched.
	Default value = 120, Range = 60 to 43200
	For example, if you specify 120 minutes, this field fetches the emails from the last two hours.

Step 4 Click **Next**.

The Skill Association for CSQ area opens with the newly assigned CSQ name.

Note   You can create up to 100 email CSQs. If you exceed the limit, the following error is displayed:

```
Cisco Unified CCX supports a maximum of 100 Email CSQs. Exceeded maximum
limit for Email CSQs.
```

Step 5   From the Available Skills list, choose the skill that you want to associate with the CSQ by clicking it. To choose more than one skill, press the **Ctrl** key and click the skills that you want to associate with the CSQ.

Step 6   Click **Add**.

The chosen skill and the minimum competence level for that skill are displayed in the right pane under the heading **Selected.**

Note   To delete the skill from the Skills Required list, click the **Delete** icon next to **Minimum Competence**.

Step 7   Specify a minimum competence level for the skill assigned to the CSQ.

Step 8   To view the associated resources, click **Show Resources**.

Step 9   Click **Save** to save the changes for the CSQ.

The newly added CSQ appears in the **List of CSQs**.

Note   You can create up to 100 email CSQs. If you exceed the limit, the following error is displayed:

```
Cisco Unified CCX supports a maximum of 100 Email CSQs. Exceeded maximum
limit for Email CSQs.
```

You can sort the CSQs by title by clicking the **CSQ Name** header and by type by clicking the **CSQ Type** header.

Step 10   To view the printable report and associated resources, click the CSQ for which you want to view the report and the associated resources and then click **Open Printable Report**.

Note   To delete a CSQ, click the CSQ that you want to delete and then click **Delete**. A warning dialog box appears, asking you to confirm the deletion. To delete, click **OK**.

Caution   Deletion of the chat CSQ affects the associated chat web forms. After deleting, modify the corresponding chat web form configurations and generate the HTML code.

Predefined Responses

You can add a maximum of ten chat predefined responses. These predefined responses are available to all the agents in the Manage Chats Gadget on the Finesse Agent Desktop. Use the **Predefined Responses** page to configure and manage chat predefined responses. To access the predefined responses, choose **Subsystems > Chat > Predefined Responses**.

Note	Predefined responses are not available in the Cisco Agent Desktop. They are only available with the Finesse Agent Desktop.

Predefined Responses

Using this web page, you can add, modify, and delete predefined responses.

You can add a maximum of 500 chat and email predefined responses in total.

Note	To modify an existing predefined response, click the Title header for the predefined response that you want to modify. To delete an existing predefined response, click the **Delete** icon for the predefined response that you want to delete.

Procedure

Step 1 From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat** > **Predefined Responses**.

The **Predefined Responses web page** opens, displaying the information for existing responses, if any.

Step 2 Click the **Add New** icon that is displayed in the toolbar in the upper left corner of the window or the **Add New** button that is displayed at the bottom of the window to create a new response.

The **Predefined Response Configuration web page** opens.

Step 3 Specify the following information:

Field	Description
Title	Unique identifier of the predefined response. **Note** The special characters angle brackets (< >), parentheses (( )), double quotation marks (" "), and pipe symbol (|) are not allowed.
Type	Types of media.

Field	Description
Response Description	Description for the predefined response. • Rich Text Editor is available to create an HTML-based email predefined response. Use the supported tags as provided in the Rich Text Editor for formatting purpose. • Plain Text Editor is available to create a chat predefined response. **Note** The special characters angle brackets (< >), parentheses (( )), double quotation marks (" "), and pipe symbol (|) are not allowed in Plain Text Editor for Chat Predefines Response. The maximum characters limit for predefined response for chat and email is 1500. In case of email, rich text is supported and includes the HTML tag characters for representing rich text.
Tags	Choose a tag for the predefined response. • **Global for all CSQs**: The predefined response is available to all the agents that are associated with all the CSQs. • **Customize (Maximum 10 CSQs)**: The predefined response is available only to the agents that are associated with the selected CSQs. If you choose this option, select the CSQs from the **Available CSQs** pane, and then click the left arrow to assign them. **Note** Predefined responses can be used only for emails sent in HTML format and not plain text.

Step 4 Click **Save**.

The newly added predefined response appears with the assigned tags in the **List of Predefined Responses**.

You can sort the predefined responses by title by clicking the Title header and by type by clicking the Type header.

Wrap-Up Reasons

To access the Wrap-Up Reasons, choose **Subsystems** > **Chat and Email** > **Wrap-Up Reasons**.

Use the **Wrap-Up Reasons** page to configure and manage Wrap-Up categories and reasons for chat and email Contact Service Queues (CSQs). Use the Ellipsis (...) to view all the Wrap-Up Reasons that are added for each Wrap-Up category.

Wrap-Up Reasons

Using this web page, you can add, modify, and delete the Wrap-Up Reasons.

You can add a maximum of 25 Wrap-Up categories. If you exceed the maximum number of categories, the **Add New** button is disabled.

Procedure

Step 1 From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat and Email** > **Wrap-Up Reasons**.
The **Wrap-Up Reasons** web page opens, displaying the information for existing Wrap-Up Reasons, if any.

Step 2 Click the **Add New** icon or the **Add New** button that is displayed in the toolbar in the upper left corner of the window.

The **Wrap-Up Reasons** web page opens.

Step 3 Specify the following information:

Field	Description
Category	Specify the name for the Wrap-Up category. Allows up to 40 characters.
Wrap-Up Reasons	Enter the Wrap-Up Reasons for the specified category. Allows up to 40 characters. Click the **Add** button to add up to 25 Wrap-Up Reasons for each category.
Tags	Choose a tag for the Wrap-Up category. • **Global for all CSQs**: The Wrap-Up reason is available to all the agents that are associated with all the CSQs. • **Customize** : The Wrap-Up reason is available only to the agents that are associated with the selected CSQs. If you choose this option, select the CSQs from the **Available CSQs** pane, and then click the left arrow to assign them. **Note** You can associate a maximum of 10 Wrap-Up categories to a CSQ.

Step 4 Click **Save**.

The newly added Wrap-Up category appears with the assigned tags in the **List of Wrap-Up Reasons**.

Note   When you reskill or modify a category, the logged in agents can apply Wrap-Up Reasons from the updated list of categories for the new non-voice contacts only.

Email Signatures

To access the email signatures, choose **Subsystems** > **Chat and Email** > **Email Signatures**.

Email Signature Configuration

Using this web page, you can add, modify, and delete email signatures.

✎

Note To modify an existing email signature, click the Title header for the email signature that you want to modify. To delete an existing email signature, click the **Delete** icon for the email signature that you want to delete.

Procedure

Step 1 From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat and Email** > **Email Signatures**.

The **Email Signature web page** opens, displaying the list of existing email signatures that are configured, if any.

Step 2 Click the **Add New** icon that is displayed in the toolbar in the upper left corner of the window or the **Add New** button that is displayed at the bottom of the window to create a new email signature.

The **Email Signature Configuration web page** opens.

Step 3 Specify the following information:

Field	Description
Name	Unique name of the email signature. **Note** The name can have a maximum of 100 characters.
Content	The email signature content. **Note** The email signature can have a maximum of 1500 characters. You may format the text of the email signature content, add images, add URL to the email signature, and add the Agent alias information. The Agent alias variable appears by default when any new email signature is created. If it is removed from the email signature it can be reinserted at the cursor location in the email signature by clicking on the Agent alias variable icon. When there is no alias configured for an agent, the Agent ID is presented in the email signature by default.

Field	Description
Tags	Choose a tag for the email signature.
	• **Global for all CSQs**: The email signature is available to all the agents that are associated with all the CSQs.
	• **Customize (Maximum 10 CSQs)**: The email signature is available only to the agents that are associated with the selected CSQs.
	If you choose this option, select the CSQs from the **Available CSQs** pane, and then click the left arrow to assign them.
	Note Only one (1) email signature can be tagged as Global for all CSQs.
	A CSQ can be tagged with only one (1) email signature.
	When an email is responded by an agent of a particular CSQ, the system will check if there is any email signature tagged for that CSQ. The different scenarios are:
	• If there is an email signature tagged to a CSQ, that will be appended in the email response.
	• If there is no CSQ specific email signature, the global signature is appended in the email response.
	• If there is no global email signature and no customized email signature tagged to the CSQ then there will be no email signature appended in the email response.

Step 4   Click **Save**.

The newly added email signature appears with the assigned tags in the **List of Email Signatures**.

You can sort the email signatures by title by clicking the Title header and by type by clicking the Type header.

Channel Parameters

Use the Channel Parameters web page to configure channel parameters.

Procedure

Step 1   From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat** > **Channel Parameters** OR **Subsystems** > **Chat and Email** > **Channel Parameters** as applicable.

The Channel Parameters Configuration web page opens.

Step 2   Use this web page to specify or modify the following fields for channel parameters:

Field	Description
No Answer Timeout (Seconds)	The time for an agent to respond to the chat request after which, the chat request is routed back to the chat queue and for the chat toaster to fade out.
	This is applicable for the Group Chat request also. However when the chat is not accepted, the chat request is not routed back to the chat queue.
	Note When you use Chrome or Firefox, the browser overrides the chat toaster notification to fade out in 20 seconds, even if it is configured to a higher value.
Join Timeout (Minutes)	The time after which the customer initiates a chat and, if an agent is not joined, the customer gets a message as per the configuration in the **Chat Web Form Configuration** page. But an agent can still join the chat after this timeout. The default timeout is one minute and the maximum timeout value allowed is 60 minutes.
Inactivity Timeout (Minutes)	The customer inactivity time after which, the system ends the chat. This timeout is on the customer side only.
	The agent gets a message **"You are alone in the chat room. Click End to close the chat interface."**.
	The customer gets a message **"Warning: the server connection was lost due to an inactivity timeout or connection failure."**.
	Inactivity timeout may also apply to contacts in queue that have not yet been accepted by agents. This scenario occurs only when the Join Timeout value is greater than the Inactivity Timeout value.
	The customer then gets a message **"Sorry, the chat service is currently not available. Please try again later."**
Offer Chat Contact When On Voice Call	Click Yes if agents are allowed to handle a chat session during a voice call.
	Note This setting takes effect when the agent ends the current voice call.
	Chats are presented to agents even when they go off-hook or busy in a Non ICD call.
Offer Voice Call When On Chat	Click Yes if agents are allowed to handle a voice call during a chat session.
	Note This setting takes effect when the agent receives a new incoming chat.
	Direct/Consult Transfer to an IPCC extension is an exception. Even if agents are busy on a chat they would still get calls that are transferred to their extension directly.
Maximum Number Of Chat Sessions Per Agent	Number of chat sessions (ranging from 1 to 5) that an agent is allowed to handle.
	This includes the group chat sessions also.
	Note This option is available only if Finesse service is activated. For Cisco Agent Desktop, the value is set to 1.

Field	Description
Maximum Number Of Email Sessions Per Agent	Number of Email sessions (ranging from 1 to 5) that an agent is allowed to handle.
Sticky Email Timeout (Hours)	Specify the amount of time for which an email message waits in a specific agent CSQ. Sticky email routing (Last-agent email routing) is a mechanism to route an email message to the agent who handled the last leg of the email conversation. When an email message, which is part of an ongoing conversation, comes in and the agent who handled the last leg of the conversation is not available, then the email does not wait indefinitely in that agent queue. After the configured time expires, the email message is placed on the intended CSQ to be handled by any available agent. **Note** Last-agent email routing is not available if the customer changes the subject line of the email message. Default = 4 hours, Range = 1 to 120 hours.

Step 3 Click **Save** to save the changes for the channel parameters.

Note If any of the above parameters are changed during the call center operation, the updated values are not applied to the existing contacts in the system. The changed parameters will affect only the new contacts coming into the system.

Chat Widgets

Use the **Chat Widgets** section to configure the Bubble Chat widget and generate HTML code snippet that can be hosted on the customer website.

The Bubble Chat interface supports accessibility for the visually challenged. To use this feature, users must configure Job Access With Speech (JAWS) and enable Accessibility mode in their system. When users navigate across UI elements by using the keyboard, the screen reader announces the focused elements such as fields, buttons, icons, and the incoming messages.

Note Website developers must localize the accessibility messages of Bubble Chat to ensure that the announcements are in the appropriate language.

To access the **Chat Widgets** page, choose **Subsystems** > **Chat and Email** > **Chat Widgets**.

Chat Widgets Page

The **Chat Widgets** page lists the following information and options for each chat widget:

Field	Description
Name	Name of the chat widget.
Description	A brief description.
Post Chat Rating	Whether post chat rating is available for the chat. **Note** Post chat rating can be configured for only bubble chat.
Code	Option to generate the web form code for the configured chat widget.
Delete	Option to delete the chat widget.

Chat Widget Configuration

You can add, modify, and delete chat widgets. You can select any one of the following calendars:

- 24 Hours X 7 Days

- Custom Calendar, which has been configured by using the Calendar Management in Finesse desktop.

Note
- To modify an existing chat widget, click the chat widget name.

- To delete an existing chat widget, click the delete icon. Ensure that the widget is removed from the customer website before deleting the widget.

You can configure or modify the Bubble Chat widget.

Classic Chat Widget

To configure a Classic Chat widget, complete the following steps:

Procedure

Step 1 From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat and Email** > **Chat Widgets**.

The **Chat Widgets** web page opens, displaying information for existing chat widgets and widget type, if any.

Note You can preview the Classic Chat and Bubble Chat widgets from the **Chat Widgets** web page.

Step 2 Click the **Add New** icon or the **Add New** button.

The **Add New Chat Widget** web page opens.

Step 3 Select **Classic Chat** and click **Next**.

The **Chat Web Form Configuration** web page opens.

Step 4 In the **Widget Details** area, specify the following information:

Field	Description
Name	Unique name of the chat widget.
Description	Chat widget description.
Logo URL	Location of the logo file that appears in the widget. **Note** The custom logo size is resized to 300 x 300 pixel by default.
Widget Wait Message	Message that appears to the customer when the customer starts a chat session. Default message: "Welcome. Please wait while we connect you to a customer care representative."
Join Time-out Message	Message that appears to the customer when a chat request is not handled within the set time. Default message: "All customer care representatives are busy. Please wait or try again later."
Error Message	Message that appears to the customer when Unified CCX or chat service is not available to handle chat requests. Default message: "Sorry, the chat service is currently not available. Please try again later."

Step 5   In the **User Form Fields** area, select the desired field from the **Available Fields** and move it to the **Selected Fields**.

To create new field(s) in addition to the list of available fields, click **Add Custom Field**, enter the name of the new custom field in the pop-up window and click **OK**. The new custom field appears in the list of **Selected Fields**.

Step 6   Click **Next**.

The **Add problem Statement CSQ mapping** area opens.

Step 7   Enter the problem statement for the Chat Web Form and map the same with an existing chat CSQ from the **CSQ List** drop-down list.

To add more problem statements and associate these statements with the Chat CSQs, click **Add More**. Click the delete icon beside the **CSQ List** drop down to delete the newly created problem statement.

Step 8   Click **Next**.

Step 9   In the **Schedule Business Hours** area, select one of the following options to configure the Business Days:

- 24 hours x 7 days
- Custom Business Hours

Note
- The **Chat Schedule Configuration** is based on the Unified CCX server time zone.

- Ensure that the moment.js library is accessible in the client environment. If this is not accessible, reference to the correct location where the moment.js is available.

- During an upgrade to Unified CCX 11.6(1), by default the **24 hours x 7 days** is selected as the **Business Days**.

Step 10   In the **Schedule Holidays** area, configure holidays.

a) To add more holidays, click **Add More**. Click the delete icon to delete a configured holiday.

Step 11   In the **Schedule Custom Business Days** area, configure business hours for a custom business day.

Note   Scheduling business hours for a custom business day overrides any previous schedule that was configured in **Custom Business Hours** for the same day.

a) To add more custom business days, click **Add More**. Click the delete icon to delete a custom business day.

Step 12   In the **Off Hours Details** area, enter a message in the **Off Hours Message** text box.

Step 13   Click **Next**.

The Web Form Preview area displays a preview of the Chat Web Form as per the configured schedule. It displays all the fields that you had selected for the user form and problem statements along with CSQ mapping.

Step 14   Click **Finish** to generate the web form code.
The code for the Chat Web Form is generated and appears onscreen.

Note   The Chat Web Form that is generated uses JavaScript. You must access this web page where it is loaded using a JavaScript enabled browser.. The default Chat Web Form displays a warning message to the user if JavaScript is not enabled on the browser where it is loaded.

Step 15   Click **Save Code to File** to save the generated code. To go to the main **Chat Widgets** page, click **Back to Chat Widgets**.

Note   You can also generate the code from the main **Chat Widgets** page by clicking on the **Code** icon against the chat widget name. The generated code appears in a pop-up window. To save this code, click **Save Code to File**.

Bubble Chat Widget

To configure a Bubble Chat widget, complete the following steps:

Procedure

Step 1   From the Unified CCX Administration menu bar, choose **Subsystems** > **Chat and Email** > **Chat Widgets**.

The **Chat Widgets** web page opens, displaying the information for existing chat widgets.

Note   During the widget configuration, live preview of the widget is possible.

Step 2   Click the **Add New** icon or the **Add New** button.

The **Bubble Chat Configuration** web page opens. The administrator can configure the messages and labels in any language.

Step 3   In the **Widget Details** area, specify the following information:

Field	Description
Name	Unique name of the chat widget.

Field	Description
Description	Chat widget description.

Step 4 Click **Next**.
The **Attributes - Branding and Identity** area appears.

Step 5 Specify the following information:

Section	Field	Description
Font Family	Typeface	Font family used for the text in the Chat Web Form and chat window. **Note** The default font family is Helvetica. You can change the font family by either selecting from the drop-down or entering a new name. If the selected font family is not available in the system where from the AppAdmin page is accessed, it will display an alert message. When you enter a new name, ensure that the correct spelling (case sensitive) is used. The system does not indicate if you enter an invalid name. Ensure that you use commonly available fonts so as to make it easy for the customers to view the information. Before proceeding, the administrator should ensure that the selected font family is applied on the Chat Web Form preview.
Chat Title	Text	Title text displayed on the Chat Web Form and Chat Bubble.
	Text Color	Color of the title text.
Button	Text	Text displayed on the button of the Chat Web Form.
	Color	Color of the button.
	Text Color	Color of the text displayed on the button.
Agent Message	Message Color	Background color of the agent message in the chat window.
	Text Color	Color of the agent message text.

Note As you specify the attributes, the **Preview** area dynamically displays the preview of the Chat Web Form and chat window based on your specifications.

Step 6 Click **Next**.
The **Attributes - Post Chat Rating** areas open.

Step 7 Specify the following information:

Field	Description
Enable Post Chat Rating	If this checkbox is checked, post-chat rating will be available for the chat. The **Post Chat Rating** column in the **Chat Widgets** page indicates whether post chat rating is available for a chat.

Field	Description
Label	Text asking the user to rate the chat experience.
Button Text	Text displayed on the button that is used to submit the rating.

Note The **Preview** area dynamically displays the preview of the rating window based on the information specified.

Step 8 Click **Next**.
The **User Form Fields** and **Problem Statements and CSQ Mapping** areas open.

Step 9 In the **User Form Fields** area, specify the following information:

a. From **Available Fields**, select the desired fields and move it to **Selected Fields**.

To create new fields in addition to the list of available fields, click **Add Custom Field**, enter the name of the new custom field in the pop-up window and click **OK**. The new custom field appears in the list of **Selected Fields**.

Step 10 In the **Add problem Statement CSQ mapping** area, specify the following information:

a. In **Problem Statement Caption**, enter the label for the problem statement field.

b. Enter the problem statement for the Chat Web Form and map the problem statement with an existing chat CSQ from the **CSQ List** drop-down list.

To add more problem statements and associate them with a chat CSQ, click **Add More**. Click the delete icon for a problem statement to delete that problem statement.

Step 11 Click **Next**. The **Chat Messages** area appears.

Step 12 Specify the following information:

Section	Field	Description
Initialization Messages	Widget Wait Message	Message displayed to the customer when the customer submits the chat form and waits for an agent to join.
	Join Time-out Message	Message displayed on the chat window to inform the customer that no agent is available currently.
In Progress Messages	Text for Text Typing Box	Text directing the customer to enter a message. This text appears in the text box of the chat window where the customer enters messages to be sent.
	Agent Joined Message	Message displayed on the chat window to inform the customer that an agent has joined. This message has the Agent Alias or Agent ID. Two text boxes are available to enter text to be displayed before and after the Agent Alias or Agent ID.
	Agent Left Message	Message displayed on the chat window to inform the customer that the agent has left. This message will have the Agent Alias or Agent ID. Two text boxes are available to enter text to be displayed before and after the Agent Alias or Agent ID.

Section	Field	Description
End Messages	Close Chat Confirmation Pop-up message	Message displayed on the pop-up window to confirm if the customer wants to close the chat. In the **Negative Response** and **Positive Response** text boxes, enter the text to be displayed on the pop-up window buttons that allows the user to either accept or reject the chat closure.
	Close Chat and Download Transcript Confirmation Pop-up Message	Message displayed on the pop-up window to inform the customer that the chat has ended and the chat transcript is ready for download. In the **Negative Response** and **Positive Response** text boxes, enter the text appears on the pop-up window buttons that allows the user to either accept or reject the transcript download. **Note**　　By default, the **enableTranscriptDownload** attribute is set to True in the generated chat widget HTML code snippet.
Error Messages	System Error Message	Message displayed to the customer when the chat service is not available to handle chat requests.
	Connectivity Error Message	Message displayed to the customer when the chat is disconnected due to inactivity timeout or connection failure.

Step 13　　Click **Next**. The **Service Hours** page appears.

Step 14　　In **Service Hours** area, select one of the following options to configure the business hours.

- **Default (24 hours x 7 days)-** Select this option if the contact center works 24 hours and 7 days in a week.
- **Select Calendar-** Select this option to configure the business hours. Calendar drop-down is enabled for this selection.

Step 15　　Select the desired calendar from the drop-down list and click the **View** link to preview the calendar details such as **Business Hours**, **Custom Business Days**, and **Holidays**.

Step 16　　In the **Messages** area, specifiy the following:

Field	Description
Holiday	Message displayed on the bubble chat widget to inform the customer during a holiday.
Off Hours	Message displayed on the bubble chat widget to inform the customer during non-working hours.
Label	Heading text displayed on the bubble chat widget to inform the customer for the business hours details.

Step 17　　In the **Label for Days of Week** area, specify a label for each day of the week.

Step 18　　Click **Finish**.
　　　　　　The code for the Chat Web Form is generated and appears onscreen.

Note   The Chat Web Form that is generated uses JavaScript. You must access this Chat Web Form from a JavaScript enabled browser.

Step 19   Click **Save Code to File** to save the generated code. Click **Back to Chat Widgets** to go to the main **Chat Widgets** page.

Note   You can also generate the code from the main **Chat Widgets** page by clicking on the **Code** icon against the chat widget name. The generated code appears on a pop-up window. To save this code, click **Save Code to File**.

Teams

Choose **Subsystems > Chat > Teams** from the Unified CCXAdministration menu bar to access this configuration area.

Note   The team configuration for chat is the same as it is for voice.

Change the Desktop Layout

The default desktop layout xml must be modified to enable the digital channel gadgets on the Finesse desktop. You must contact the contact center Administrator to make changes to the desktop layout xml.

Procedure

Step 1   Sign in to **Cisco Finesse Administration Console**.

Step 2   In the **Desktop Layout** tab, you can define the layout of the Finesse desktop .

Step 3   In the Finesse Layout XML area, make changes to the XML as required to include the new gadgets.

Step 4   Click **Save**. Finesse validates the XML file to ensure that it is a valid XML syntax and confirms to the Finesse schema.

Note   For more details on managing the Finesse desktop layout see, **Manage Desktop Layout** section in Cisco Unified Contact Center Express Administration and Operations Guide.

Configuration of Proxy Based on Deployment of Customer Collaboration Platform

Proxy settings must be configured for Cisco Customer Collaboration Platform based on the deployment type.

Procedure

Step 1	Sign in to **Cisco Unified Contact Center Express Administration**.
Step 2	Navigate to **System Menu** > **System Parameters** to modify the fields in Proxy Parameters.

Note For more details on the System Parameters see, **System Parameters** section in Cisco Unified Contact Center Express Administration and Operations Guide.

Certificate Management

The digital channel gadgets to load on the web browsers in the Unified CCX system must have the self-signed and certificate authority (CA) signed certificates. The same signing authority must sign the certificates of Customer Collaboration Platform and Unified CCX. For more information on how to trust the self-signed certificates and to obtain and upload CA certificates see, Cisco Unified Contact Center Express Administration and Operations Guide.

Procedure

Step 1	Sign in to **Cisco Unified OS Administration** using your administrator password.
Step 2	Navigate to **Security** > **Certificate Management** menu.
Step 3	You can use the Find controls to filter the certificate list.
Step 4	Click the file name of the certificate. The **Certificate Configuration** window appears and perform the necessary actions.

Unified CCX Agent Email

As part of the Unified CCX Premium license, Unified CCX supports agent email with Finesse.

Administrators should edit the Cisco Finesse Desktop Layout to enable the gadgets to appear on the agent desktop.

As part of the Premium license, Unified CCX agents can service customer email requests using the Agent Email gadget in Cisco Finesse

For more information, see "Cisco Finesse" section in the *Cisco Unified Contact Center Express Administration and Operations Guide* at :

https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-maintenance-guides-list.html.

The Agent Email feature requires the deployment of Cisco Customer Collaboration Platform to handle the email and relay the contact requests from a mail server. One Customer Collaboration Platform deployment can serve only one Unified CCX deployment (single-node or high-availability deployment), and vice versa.

The Agent Email feature requires the use of an external mail server (Microsoft Exchange 2013, 2016, 2019, Office 365, and Gmail are supported). This mail server is not provided, installed, or configured as part of the Unified CCX installation. To communicate with the Exchange Server, Customer Collaboration Platform uses secure IMAPS (for message retrieval) and secure SMTP (for message sending). On the Exchange Server, enable IMAPS (SMTP is enabled by default).
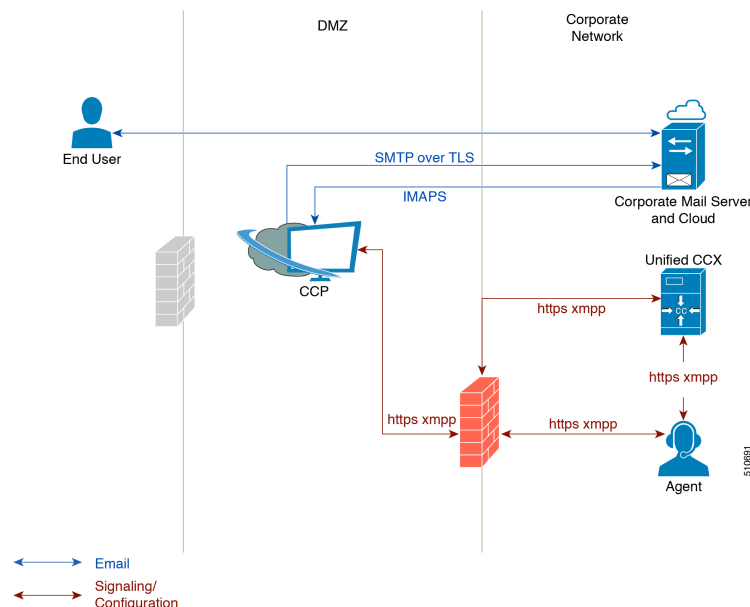
For more information about enabling IMAPS, see section "Mail Server Configuration" in *Cisco Unified Contact Center Express Administration and Operations Guide* at:

https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-maintenance-guides-list.html.

For details on the integration of Unified CCX with Customer Collaboration Platform for Agent Email see, https://www.cisco.com/c/en/us/support/docs/customer-collaboration/socialminer/200892-Integrate-UCCX-with-SocialMiner-for-Agen.html.

For details on the unsupported configurations in integration of Unified CCX with Customer Collaboration Platform see, https://www.cisco.com/c/en/us/support/docs/customer-collaboration/unified-contact-center-express/211530-Unsupported-configurations-for-UCCX-and.html.

Figure 1: Customer Web Site in DMZ

Unified CCX allows email contacts to be routed to agents based on the email addresses to which they are sent by the customers. Cisco Finesse Agent Email feature uses skill-based routing and last-agent email routing.

Separate CSQs are required for Email. You must associate each Email CSQ with a separate email account on the mail server. This account must be dedicated to the Email CSQ feature and must not be used for other purposes. Agent association with Email CSQs is configured in the same manner as Voice CSQs by assigning skills and competency levels to the CSQ.

Cisco Finesse provides a common chat and email state, separate from voice state. Blending ensures that agents can handle voice, email, and chat contacts from the same desktop.

When an agent replies to a customer's email, the reply email is always in HTML format. The email address depends on the information in the customer's email. If the customer's email contains the Reply-to header field, the agent's reply email is sent to the email address in the Reply-to header. If the Reply-to header is missing

in the customer's email, the agent's reply email is sent to the From address in the customer's email. The sender address of agent's email is the email account associated with the Email CSQ from which the reply is being sent. Upon requeue, Unified CCX ensures that the response is sent with the email address of the requeued CSQ as the From address.

Agent Email Features

The following table describes the email features that are available with the premium package.

Finesse Email is available with Microsoft Exchange, Office 365, and Gmail with a Cisco Customer Collaboration Platform configured within Unified CCX.

Table 3: Agent Email Features Available with Premium Package

Feature
Fully integrated with Cisco Finesse agent desktop.
Visible alert. Email alert along with pending email count.
Toaster Notification. Toaster Notification. Agent receives a notification when a new email is received when the Cisco Finesse Desktop is not active.
Auto accept email. Incoming emails are automatically presented to the agent without any explicit accept (button click).
Email contact handling Agents can be configured to handle up to five email contacts.
Requeue email. Agent can re-queue an email to another CSQ.
Reply To Header. If the Reply To header is present, the agent's response is sent to that address. Otherwise, it uses the From address of that email to respond.
Reply To, Reply All, Cc, Bcc, Forward Agent can respond to the from email address, edit the **To** field, can add email addresses in the **Cc** and **Bcc** fields to mark copy or blind copy to other contacts, do a **Reply All** to all the email addresses existing in the email, and **Forward** the email to any other email address.
Save drafts. The system periodically saves the email drafts.
Discard email. Discards email from the agent desktop, but mails are not deleted from the server.
Rich Text. Rich text is available for the email body, predefined response and email signature.
Predefined Responses. Administrator can configure up to 500 Predefined Responses across chat and email. These Predefined Responses can be tagged Global or with up to 10 CSQ tags.
Email Signatures Administrator can configure email signatures for the Global CSQs and Multiple CSQs. The email signatures can be tagged Global or Custom to upto 10 CSQs.
Wrap-Up Reasons. Agents can select Wrap-Up Reasons for the emails handled by them. A maximum number of five (5) Wrap-Up Reasons can be selected. Wrap-Up Reasons are available only after the Administrator has configured the same for the CSQs.

Feature
Attachments. Supported. **Attachment size limit** The total attachment file size limit in an agent's reply is 20MB. The size limit of a single file attachment is 10 MB. The total size limit of attachments in the incoming email from the customer is 20 MB. **Note**   The email attachment size limit must be configured on the mail server.
Historical Reports. See the *Cisco Unified CCX Reporting Guide* for more details on the reports at, http://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-user-guide-list.html.
Email Live Data Reports. See the *Cisco Unified CCX Reporting Guide* for more details on the reports at, http://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-user-guide-list.html.
Microsoft Exchange. Supported email service. This must be purchased separately by customer.
Office 365. Supported email service. This must be purchased separately by customer.
Gmail. Supported email service. This must be purchased separately by customer.
Dedicated or Blended email agents. Agents can be configured to handle emails only or both, email and chat.
Email Routing. • Last Agent Email Routing where an attempt is made to route an email to the last agent who handled the email last. • Skill and competency based routing that applies to new emails or when Last Agent Email Routing expires. • The longest available or most skilled agent selection algorithm.
Dynamic reskilling. Changes to CSQ skills and competencies and agent skills and competencies (either through Admin interface or Advanced Supervisor Capabilities in Finesse) are applied immediately. Emails that are currently being worked by the agents are not affected.
High Availability (HA) failover. HA is supported in Unified CCX. Upon Unified CCX failover, all emails in the system are automatically requeued and rerouted. Emails are presented to the agents after the failover.
Keyboard shortcuts. Use the keyboard shortcuts for easy access to the Cisco Finesse agent and supervisor desktop features. The keyboard shortcuts are available for both agent and supervisor.

Email Enhancements

Few of the email enhancements that are available with the Cisco Finesse Email feature:

- The agent can add and modify the To, Cc, and Bcc recipients in the email reply and forward.

- The agent has an option to click Reply All to send the email response to all the recipients that were initially included in the email

- The agent has an option to forward the email to any other recipient.

- The agent can send and receive email messages with attachments of maximum size upto 20 MB.

- An administrator can create, modify, delete and view email signatures.

  The email signature gets automatically appended to the email response that is sent by the agent.

  In the email signature, the agent details are automatically inserted based on the Agent Alias system variable value. If the Agent Alias value is available, the alias name is inserted. If the alias name is not available, then the Agent ID is inserted in the signature.

  The email signatures are configured and tagged as Global for all CSQs or Customize for selected CSQs. Following are the important criteria while tagging an email signature to CSQs:

  - A CSQ can be tagged with only one email signature.

  - Only one email signature can be tagged as Global for all CSQs.

  - If there are no email signatures configured for a CSQ, there will not be any email signature that gets appended to the email sent by the contact center agent.

Unified CCX Web Chat

As part of the Premium license, Unified CCX agents can service customer chat requests using the Agent Web Chat gadget in Cisco Finesse.

This feature requires a Customer Collaboration Platform deployment to accept and relay the contact requests from a customer website. One Customer Collaboration Platform deployment can serve only one Unified CCX deployment (single node or high availability deployment). Customer Collaboration Platform does not support redundancy.

Note The Chat Web Form that is generated uses JavaScript. The web page where this is loaded must be accessed using a JavaScript enabled browser. The default Chat Web Form displays a message to the user if JavaScript is not enabled on the browser where it is loaded.

An audio alert is played when the agent receives a new chat request or when there is a new message on an inactive chat session tab. With multiple chat session tabs, the selected chat session tab is considered as active. All other chat session tabs are considered as inactive.

Web Chat Features

The following table describes the web chat features in addition to the chat features that are available in premium package.

Note The Web Chat (or Classic Chat) is deprecated from the next release of Unified CCX.

Table 4: Web Chat Features Available in Premium Package

Feature
Agent Alias. During a chat session, the customer sees the alias that has been configured for the agent by the administrator. The Agent Alias now supports the character, Space.
Typing Indicator. The agent or customer can see when the customer or agent is typing a message.
Chat Transcript. Chat transcripts can be downloaded by the customer after the chat session. Administrators can login to Customer Collaboration Platform to retrieve chat transcripts. Administrators can also disable the download transcript option.
Visual Customization of the Chat Form. A customizable customer chat form.
Business Hours Setting. The Administrator can configure a schedule for the chat web form based on the business days, working hours, and holidays. This is available for the Classic Chat only.
Chat Widgets - There are two types of chat widgets available, Classic Chat and Bubble Chat.
Post Chat Rating The customers can rate the chat experience after chat is ended.

Group Chat

The group chat feature is used when the agent would like to involve another agent in an ongoing chat session to support the customer. This can be used for seeking further information or support for the ongoing chat. A group chat enables an agent to:

- Send a chat invite to an available agent of the selected CSQ.

- Enter the summary of the ongoing chat for the other agent. This helps the agent to understand the background of the ongoing chat.

- Accept or decline the incoming group chat invitation.

Few reporting considerations for the Group Chat feature are:

- The Historical reports, **Chat Agent Details Report** and **Chat Agent Summary Report** reflect the chat session information handled by the agents only after the contact is ended.

- In Chat Agent Details Historical report (in the case of group chat):

- **Chat Routed CSQ** column will show the name of the csq to which the chat contact was initially injected to the agents.

- **Chat Type** column will show as 'group chat' for the agents whoever is involved in a group chat.

• Contacts Abandoned count will now also include the Group Chat contacts which the customer ends while it is being offered to the second Agent.

Manage Digital Channels

Manage Chat and Email Gadget

The following figure shows the Cisco Finesse Manage Chat and Email gadget for agents.
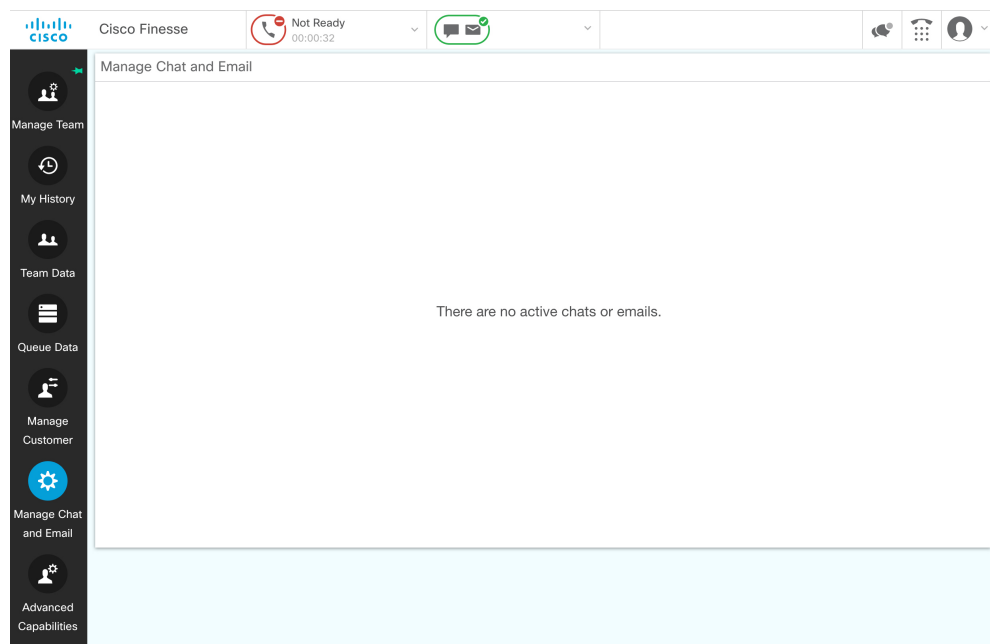
The Manage Chat and Email gadget allows you to manage chat and email contacts. Chat and email contacts that are assigned to you appear in tabs on the left. You can click each individual tab to view and reply to the contact.

Chat contacts are denoted by a chat icon. The following information appears on each chat contact tab:

• Customer name

• Total chat time: Indicates the duration of the chat session.

• New message indicator: If you receive a message on a chat contact that is not your current contact, the tab flashes for a few seconds. A number appears on the tab that indicates how many messages the customer sent since you last replied.

Email contacts are denoted by an envelope icon. When you begin typing a reply to the email contact, a pencil icon appears on the envelope icon.

The following information appears on each email contact tab:

- Customer information: Customer email address, customer name (if available).

- Email timestamp: Indicates the time that the system received the email contact.

- Email subject: Hovering the mouse over the email tab, displays the subject of the email in a tool tip.

Note   When you accept a chat request, Finesse automatically switches to the Manage Chat and Email tab and the chat becomes the active contact. When you are assigned an email contact, Finesse does not switch tabs and the contact does not become the active contact. An orange icon appears on the envelope icon in the Chat and Email Control gadget.

Email Features

Let us see how we can now use the available email features. You can also see the Cisco Finesse Agent and Supervisor Desktop User Guide for Cisco Unified Contact Center Express for more information.

Email Reply Panel

The following figure shows the Email Reply panel of the Manage Chat and Email gadget.

Figure 2: Email Reply panel
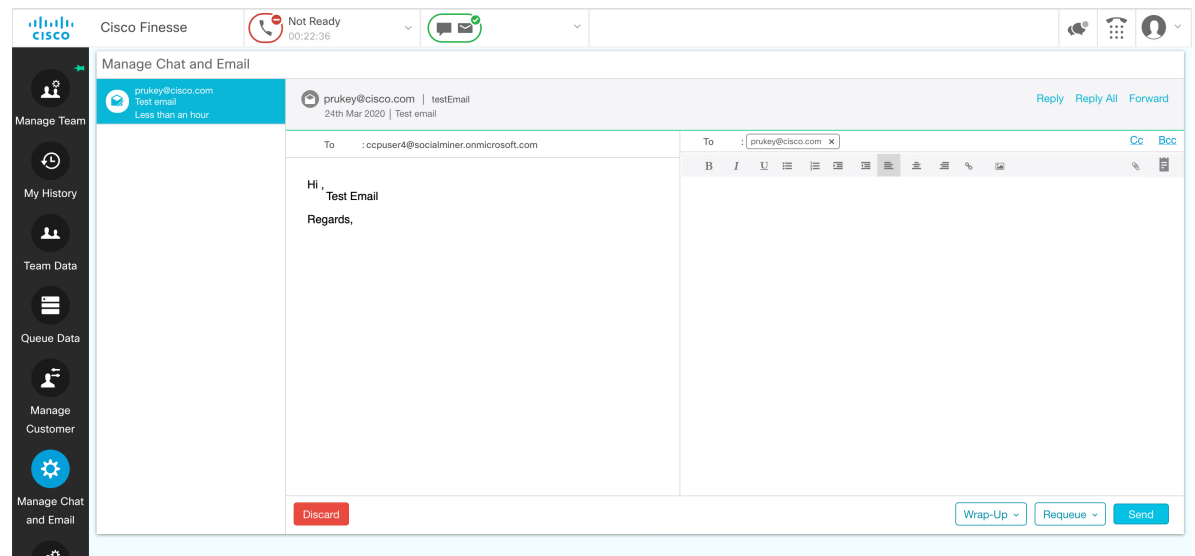
The customer email appears on the left. The area where you type the response appears on the right. After you begin your reply, Finesse automatically saves a draft of your message every 3 minutes.

Note   Do not close or reload the browser when you reply to an email or when the email loads on the desktop.

The Email Reply panel provides the following functionality:

Button	Name	Description
	Requeue	Requeues an email contact to a new CSQ.
	Discard	Discards an email.
↩ Reply	Reply	Sends a reply to the email address of the customer.
↩ Reply All	Reply All	Sends a reply to the customer and to all other email addresses that the customer had included in the original email.
Cc	Cc	Allows to include other email addresses to send a copy of the email to them.
Bcc	Bcc	Allows to include other email addresses to send a blind copy of the email to them.
↪ Forward	Forward	Forwards an email to other email addresses.
B	Bold	Applies bold to the selected text.
I	Italic	Applies italics to the selected text.
U	Underline	Underlines the selected text.
	Bulleted List	Inserts a bulleted list.
	Numbered List	Inserts a numbered list.
	Increase Indent	Increases the space between the left margin and the content.
	Decrease Indent	Decreases the space between the left margin and the content.
	Align Left	Aligns the content to the left margin.
	Align Center	Aligns the content to the center.
	Align Right	Aligns the content to the right margin.
	Add/Edit Link	Creates or modifies a hyperlink of the selected text to the specified URL.
	Add Image	Adds a specified image to your reply.

Button	Name	Description
	Attach a file	Attaches a specified file to the email reply.
	Predefined Response	Inserts a predefined response into your reply. **Note** If a Predefined Response is not configured, this button is disabled. If the email is in Plain text format, this button is disabled.
	Send	Sends your reply to the customer.

Accept an Email

You must be in Ready state to receive an email contact. When an email contact arrives on your desktop, it is automatically accepted and an orange icon appears on the envelope on the Chat and Email Control gadget.

To view the contact, you must click the **Manage Chat and Email** tab to go to the Manage Chat and Email gadget. If you have more than one contact assigned to you, in the left panel, click the tab for the email contact that you want to view.

Reply to an Email Contact

Procedure

Step 1   On the Manage Chat and Email gadget, click the email contact that you want to reply to.

Step 2   Click **Reply/Reply All** to reply to the email address of the customer or to any other email addresses copied by the customer. You may modify or add email addresses in the **To** field. You may also include **Cc** and **Bcc** to include more email addresses by clicking the respective fields.

The maximum number of recipients allowed per field (**To**, **Cc**, and **Bcc**) is 20.

Step 3   In the Email Response area, enter your response to the customer.

You can use a predefined response or type your own response.

Note   If you select a predefined response, it is inserted at the end of your email.

If **Email Signature** is configured, it gets appended at the end of the email before sending. The Email Signature is not visible to the sender.

Step 4   When you are finished, click **Send**.

Forward an Email

Procedure

Step 1   On the Manage Chat and Email gadget, click the email contact that you want to reply to.

Step 2   Click **Forward** to forward an email to add any other email addresses that you may want to send the email to. You may modify or add email addresses in the **To** field. You may also include **Cc** and **Bcc** to include more email addresses by clicking the respective fields.

Note
- The maximum number of recipients allowed per field (**To**, **Cc**, and **Bcc**) is 20.

- No further attachments can be attached to the outgoing emails.

- The **Reply To** field is modified appropriately such that the recipient of the forwarded email can reply to the original sender of the email directly and not send it back to the Contact Center.

- The **Requeue** is disabled if you have initiated to forward the email. You must cancel **Forward** and click **Reply/Reply All** to requeue the email.

Step 3   In the Email Response area, enter your response.

You can use a predefined response or type your own response.

Note   If you select a predefined response, it is inserted at the end of your email.

If **Email Signature** is configured, it gets appended at the end of the email before sending. The Email Signature is not visible to the sender.

Step 4   When you are finished, click **Send**.

Download Customer Attachments

If a customer includes attachments in an email, the attachment file names appear under the subject of the email. Finesse imposes the following limitations on customer email attachments:

- The total file size limit in an agent's reply is 20 MB.

Note   Images within the body of the email are counted as attachments.

- The size limit of a single file attachment is 10 MB.

- The total size limit of attachments in the incoming email from the customer is 20 MB.

Procedure

Step 1   Click the filename of the attachment you want to open or download.

You are prompted to open or save the file.

Step 2   Choose whether to open the file or save the file to your computer.

Step 3   Repeat Step 1 and Step 2 for each attachment that you want to open or download.

Add a Hyperlink to an Email

Procedure

Step 1   In your email reply, select the text that you want to turn into a hyperlink.

Step 2   Click the **Add/Edit Link** button.
A dialog box opens where you can enter the URL for the link.

Step 3   In the **Please enter a URL to insert** box, enter the URL for the link.

Step 4   Click **OK**.

Add an Image to an Email

Procedure

Step 1   Place your cursor where you want the image to appear.

Step 2   Click the **Add Image** button.
A dialog box opens where you can enter a URL for the image.

Step 3   In the **Please enter a URL for the image** box, enter the URL.

Step 4   Click **OK**.
The image appears inline in the email response.

You can also copy and paste an image into the email response.

Add an Attachment to an Email

You can add up to 10 attachments to an email reply to a customer. The following limitations apply:

- The size of a single attachment must not exceed 10 MB.

- The total size of all attachments must not exceed 20MB.

Procedure

Step 1   Click the **Attach a file** button.

Step 2	Navigate to the file that you want to send attach to the email.
Step 3	Click **Open**.
	The file appears below the reply panel.
Step 4	Repeat Step 1 and Step 2 for each file that you want to attach (up to 10).

If you want to remove an attachment, click the **X** to the right of the attachment filename.

Requeue an Email Contact

You can transfer an email contact either to the same Contact Service Queue (CSQ) or to any other CSQ. After you initiate the transfer from the agent desktop, the contacts are requeued to a CSQ.

Last-agent email routing is a mechanism to route an email message to the agent who handled the last leg of the email conversation. When you requeue an email, the email will be routed to the intended CSQ to be handled by any available agent, and last-agent email routing is not considered.

Note The requeued contact is not requeued to the same agent even if the agent is part of the requeued CSQ and is available to handle more contacts.

When you sign out or refresh your browser, any contacts that you were handling are disassociated from you and requeued to the same CSQ.

Procedure

Step 1	Select the email that you want to requeue.
Step 2	Click the **Requeue** button.
	The list of CSQs is displayed with a search option.
Step 3	Type the CSQ name into the **Search** box to bring up the desired CSQ or select the CSQ from the list.
	A confirmation dialog appears.
Step 4	Click **Yes** to confirm.

The email is removed from the multiple email sessions panel and requeued to the selected CSQ.

Discard an Email Message

Procedure

Step 1	On the **Manage Chat and Email** gadget, select the email message that you want to discard.
Step 2	Click the **Discard** button on the Email Reply panel.

You are prompted to discard the selected email message.

Step 3   Click **Yes** to confirm.

The email message is discarded.

When you discard an unsent reply that has attachments, the draft of the reply from the agent and the attachments are deleted. The original email message sent by the email contact remains in the Exchange mailbox.

Chat Features

Chat Interaction Panel

The following figure shows the Chat Interaction panel of the Manage Chat and Email gadget.

Figure 3: Chat Interaction Panel
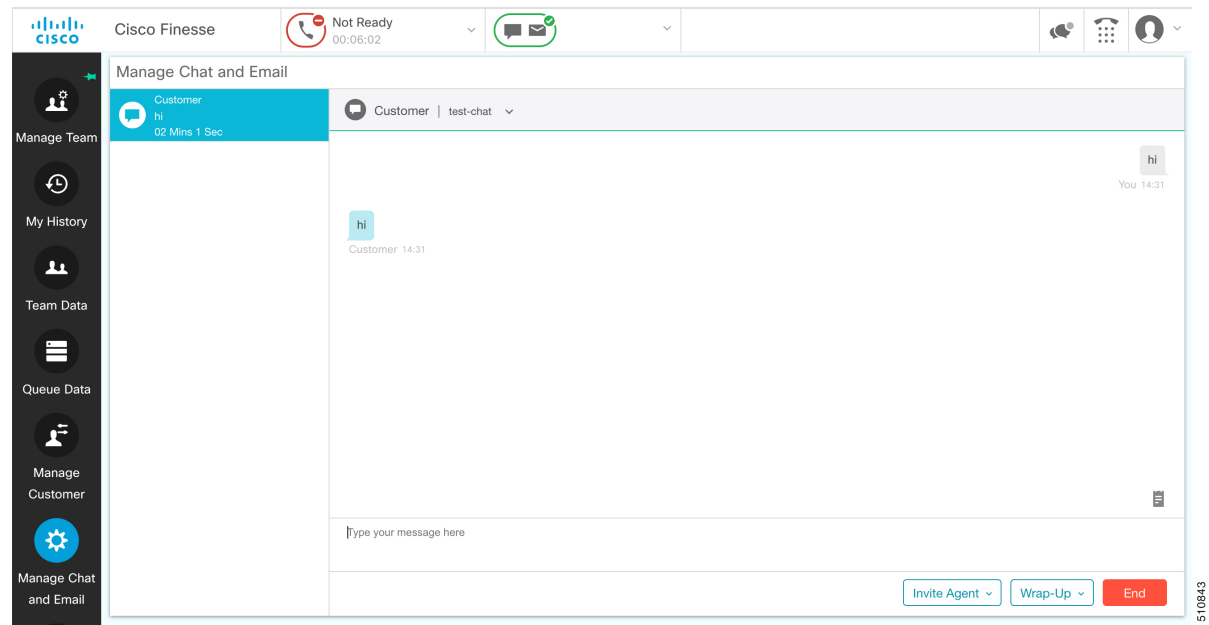
The Chat Interaction panel provides the following functionality:

- Typing area: Type your message in the typing area. Right-click to perform basic clipboard operations, and to check spelling.

- The typing awareness indicator shows when the other participant is typing.

- Group Chat icon: Allow you to initiate a group chat with another agent or supervisor.

- Group Chat invite appears for the agent to accept or decline the invite.

- In Group Chat, an agent can click **Leave** to leave the group chat whenever required.

- Predefined responses: Click ▦ to select a predefined response from the list. When you insert a predefined response, it is placed at the position of your cursor.

- End chat session: Click **End** to end a chat session.

- Customer details area: Click the drop-down arrow next to the customer details to minimize or maximize this area.

Accept a Chat

When a customer initiates a chat session from a website, Unified CCX Web Chat:

- Sends incoming chat to an available agent.

- Plays an audio alert (For a, new chat request and new message on an inactive chat).

Note   With multiple chat session tabs, the selected chat session tab is considered as active. All other chat session tabs are considered as inactive.

- Displays contact details of the customer.

When a customer initiates a chat from Facebook Messenger, Unified CCX Web Chat:

- Prompts agent to accept chat before the time counter expires.

- Sends incoming chat from Facebook Messenger to an available agent with a distinct icon that differentiates Facebook Messenger chat from a regular chat.

  - Only agents can end Facebook Messenger chats. Customers cannot end chat.

  - Agents cannot see typing indicator from Facebook users. However, Facebook users can see typing indicator from agents.

  - Facebook users see the business entity name in the chat. Agent name is not displayed to Facebook users.

  - Group chat is supported in Facebook Messenger chat, however Facebook users continue to see the business entity name.

You are presented with incoming chats until you reach the maximum active chat sessions that are set by administrator.

Note   The maximum length of a chat message from the agent is 1500 Unicode characters.

Procedure

Step 1   Click **Accept** in the incoming chat bar within the specified time to accept the chat.

If this is the first chat, the Manage Chats gadget opens, the chat session starts, and you are connected to the customer.

| Note	Repeat Step 1 when you are presented with a new incoming chat.
	A new tab opens for the chat session and new chat session becomes the current session.

Step 2   To end the chat session, click **End**.

Initiate a Group Chat

You can initiate a Group Chat when you wish to involve another agent in an ongoing chat session to support the customer. This can be used for seeking further information or support for the ongoing chat. A group chat enables you to:

- Send a chat invite to an available agent of the selected CSQ.

  The CSQ names are displayed with the number of available agents in that CSQ.
- Enter the summary of the ongoing chat for the invited agent. This helps the invited agent to understand the context of the ongoing chat.

Figure 4: Initiate Group Chat Invite Interface
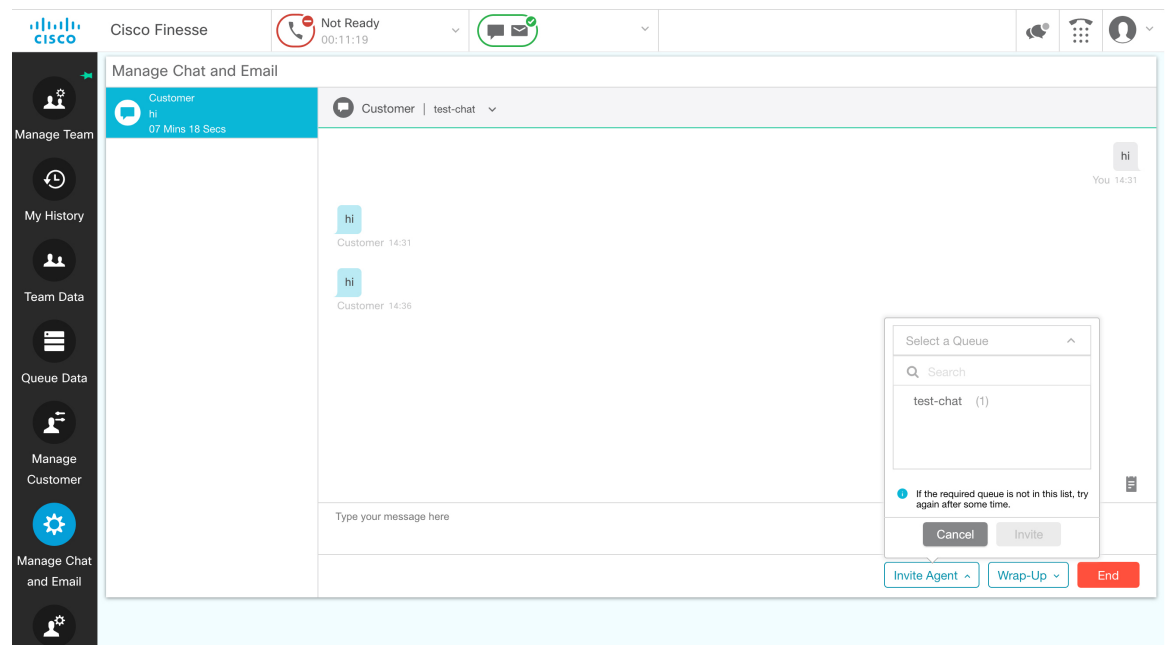
Procedure

Step 1   Click **Group Chat** icon to initiate a group chat with another agent or supervisor.

Step 2   **Select a Queue** from the list to invite any available agent to join the chat session.

Step 3   You may enter a summary of the chat in the **Enter Notes** text box. This helps the invited agent to know the context of the chat. This is optional.

Note	The summary notes are visible only when the first agent enters the notes when the chat session was initiated.

The notes entered by the invitee is displayed only to the invited agent.

Step 4 Click **Invite**.

The available agent gets a notification to **Accept** or **Decline** the chat. When an available agent accepts the group chat, the three participants (the two agents and the customer) may exchange information in the chat window.

Step 5 To leave the chat session, click **Leave**.

When there is only one agent and the customer in the chat session, the chat can be ended by the Customer or the Agent by clicking **End**.

Accept a Group Chat

You will receive an incoming group chat notification on the Finesse desktop. You may see the notes of the ongoing chat along with the invite. This helps you to understand the issue for which the group chat was initiated by the inviting agent.
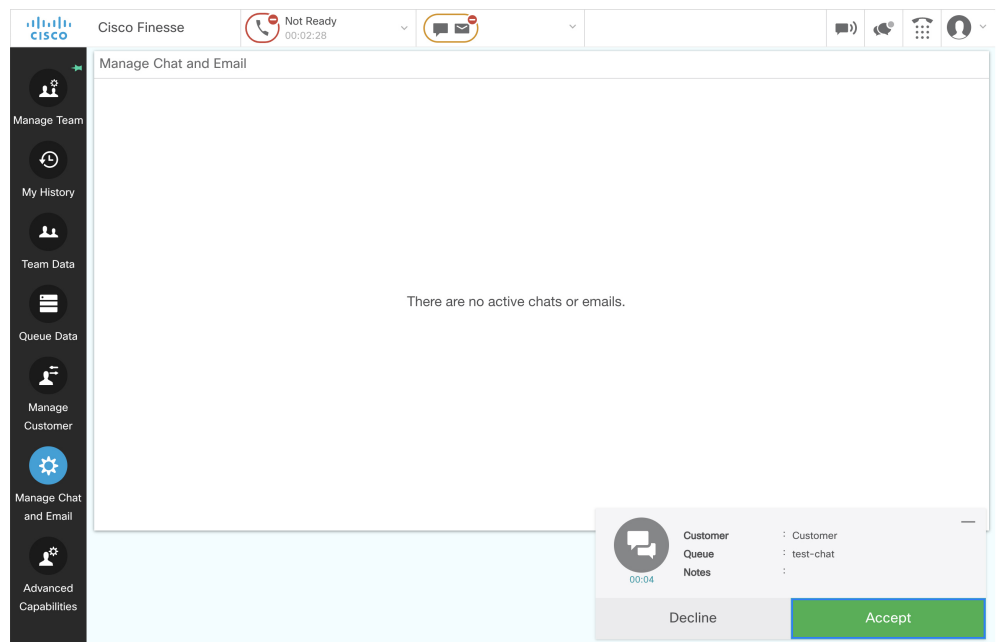
Procedure

Step 1 Click **Accept** when you see the new group chat notification to join the chat session.

The agent can see chat history upto 100 messages after joining the group chat.

Step 2 You may now exchange information with the other two participants (inviting agent and the customer).

| Note | • The **Group Chat** icon is disabled till the time there are two agents in the ongoing chat. Only when one agent chooses to leave the chat session, the **Group Chat** icon will be enabled again. The agent who wishes to leave the chat session may choose to click **Leave**. The agent who is still active in the group chat session can initiate another group chat by following the steps detailed in the **Initiate a Group Chat** section.
| | • The maximum number of participants in a Group Chat including the customer is three (3).
| | • The notes are not persisted for any subsequent chat sessions with the same customer.

Decline a Group Chat

You will receive an incoming group chat notification on the Finesse desktop. You may also see a summary of the ongoing chat along with the invite. This will help you to know the issue for which the group chat was initiated by the inviting agent.

Procedure

Click **Decline** when you see the new group chat notification to decline the chat invite.

| Note | The agent who declined the group chat invite is not offered any successive group chat invites for the same chat session till another agent accepts a group chat invite for the same chat session. |

Apply Wrap-Up Reasons for Chat and Email

Wrap-Up Reasons are the logical explanations that you can apply when you wrap up the chats and emails handled by you. If your administrator has assigned Wrap-Up Reasons for you, the Wrap-Up Reasons appear in the drop-down list that can be selected. If there are no Wrap-Up Reasons configured by the administrator, it appears blank.

Wrap-Up Reasons that your administrator modifies is available only to the new contacts and not for the contacts that you are currently handling.
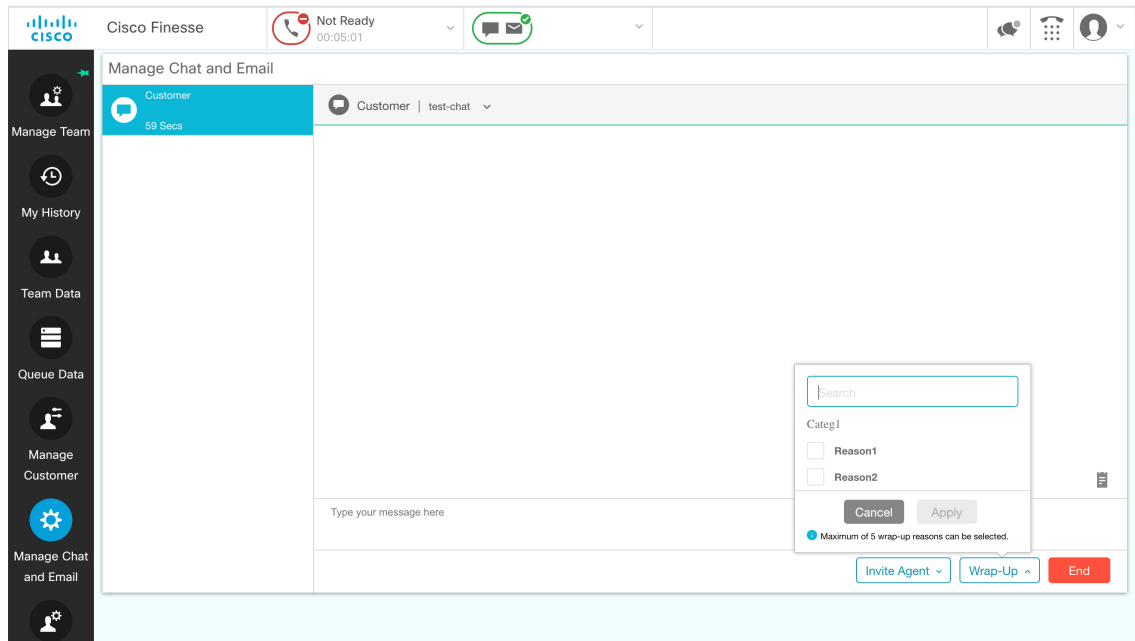
Procedure

Step 1   Click **Wrap-Up Reasons(0)**.

In a chat interaction panel you see the **Wrap-Up Reasons(0)** beside the **End** and in a group chat interaction panel beside the **Leave**. In an email reply panel, this is found beside the **Send**. The number in brackets indicates the count of Wrap-Up Reasons selected. This dynamically changes based on your selection.

Step 2   Select the appropriate Wrap-Up Reasons from the drop-down list.

Step 3   Click **OK** to close the Wrap-Up Reasons selection pane.

You can change your selection at any time. Click **Wrap-Up Reasons(0)**; to open the Wrap-Up Reasons selection pane. You can select a maximum number of five (5) Wrap-Up Reasons.

Digital Channel Reports

There are multiple historical and live data reports that provide information on the digital channels. The reports provide agent detail, agent summary, CSQ activity, CSQ agent summary in context to the digital channels.

All the historical and live data reports are available at the following location, https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-express/products-user-guide-list.html.