

Increase client loyalty and customer support while driving sales by implementing OnState's live online business chat solution. With OnState's live chat, you can add online business chat directly to your website. Best of all, you can do all of this while using the chat protocol of choice, either Skype or Google Talk, with nothing extra required of your customers. Your employees have all the power and capability of Skype or GTalk combined with the OnState on-demand solution.

To activate live business chat functionality on your system, follow the instructions outlined in this guide.

1. [Create a chat destination name \(DN\)](#). This defines your call routing information.
2. [Prepare a few questions](#) so you know why your customers are trying to reach you. This information will be provided to your employees.
3. [Customize the automatic responses](#) displayed to your customers. (Optional)
4. [Generate the code](#) for the chat button that you'll put on your website.
5. [Enable your users](#) so they can answer chat calls.
6. [Configure your user's Skype or Google Talk client](#) so it supports OnState chat.

1. CREATE A CHAT DN

A chat destination name (DN) is a way to identify a click-to-chat button with your particular system. To create one, log into the OnState Supervisor and do the following:

- A. Go to **Contact Manager > Routing Trees**.
- B. Click the **Add DN** button.
- C. In the Dialed Number Configuration screen, enter a name in the "Dialed Number/Name" field. The easiest thing to do is to enter the word "chat."
- D. In the "Display as" field, enter how you want your chat DN displayed. Most people just enter the word "chat" here.
- E. Set the Route Type to **Chat**.
- F. Set the Priority of the chat call to any value between 1 and 10, where 1 is low.
- G. Hit **Save**.

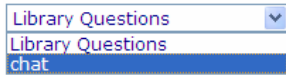
Dialed Number Configuration

Dialed Number/Name	<input type="text" value="chat"/>
Display as	<input type="text" value="chat"/>
Category (Optional)	<input type="text"/>
Route Type	<input type="text" value="Chat"/>
Use Chat Questions to complete configuration	
Welcome message	<input type="text" value="Default-Welcome-Alt"/> <input type="button" value="▶"/>
Forced message	<input type="text"/> <input type="button" value="▶"/>
URL	<input type="text"/>
Priority	<input type="text" value="5"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

2. CONFIGURE CHAT QUESTIONS

Before you send a chat call to one of your employees, you may want to know the reason your customer is contacting you and a little about who they are. With your customized chat questions, you can gather as much information as you need so your employees will know precisely how to handle the request.

- A. Go to **Contact Manager > Advanced Settings > Chat Questions**.
- B. Open the ChatDN drop-down list and select the chat DN you created in step 1.



- C. The Target Skill now appears. Select a skill to associate with your chat DN.
- D. Click the **Add** button to begin configuring your questions. The following screen now appears.

A screenshot of the 'Add Question' configuration form. It contains the following fields and controls:

- *Question :** A text area for entering the question.
- *Description :** A text box for entering a description.
- *Response Type :** A drop-down menu currently set to 'Text Input Field'.
- Compulsory Question**
- Add to Library**
- Save** button (with a floppy disk icon)
- Cancel** button (with a red X icon)

- E. Each question must be configured individually. Fields marked with a red asterisk (*) are mandatory.
 - **Question** - Enter a question you want your customer to answer.
 - **Compulsory Question** - Mark this box if you want the question to be mandatory. When enabled, the system will force your customers to respond to the question before allowing them to proceed.
 - **Add to Library** - Mark this box if you want this question to be added to your database of questions that can be used with other chat DN's.
 - **Description** - Enter a word or two to describe the question. This is for internal use only. For example, if your question is "What is your name?" the description could be "Name."
 - **Response Type** - From the drop-down list, choose how your customers will respond to your question.
 - **Text Input Field** - This option provides a text box where customers will type their response to your question.
 - **Check Box** - This option lets the customer choose from a list that you provide. If you select Check Box, additional fields will appear. For each choice you want to give your customer, type it in the **Responses** text box and click the blue Add button (+). If you want to set one of the choices as the default response, select it from the list and then click the Set Default button (👉).

Example: The following figure shows a chat question (What is your age?) configured with four check box responses. The “18-40” response is the default answer.

The screenshot shows the configuration for a chat question. The question is "What is your age?". The description is "Age". The response type is "Check Box". The responses are listed as "Under 18", "18-40", "41-65", and "66+". The "18-40" response is selected as the default. There are checkboxes for "Compulsory Question" and "Add to Library".

- **Radio Button** - This option is similar to check boxes except that the responses are each associated with their own skill, which overrides the Target Skill. This allows you to route calls to different employees based on your customer’s response. When you select Radio Button, additional fields appear. For each choice you want to give your customer, type it in the **Responses** text box, select a skill to correspond to it, and then click the blue Add button (⊕). If you want to set one of the choices as the default response, select it from the list and then click the Set Default button (📎). Example: The following figure shows a chat question (How can we assist you?) configured with three radio button responses. Each response is routed to a different skill. So, if the customer selected “Order status,” the call would be given to your employees who have the “shipping” skill.

The screenshot shows the configuration for a chat question. The question is "How can we assist you?". The description is "Reason". The response type is "Radio Button". The responses are listed as "Place a new order", "Order status", and "Get tech support". Each response is associated with a skill: "sales", "shipping", and "support" respectively. There is a dropdown menu for "Select Skill" and buttons for adding and setting default.

Responses	Associated Skill
Place a new order	sales
Order status	shipping
Get tech support	support

- F. Click **Save** to save your new question, or click **Cancel** to discard.
- G. Repeat steps D-F for each additional question.

3. CUSTOMIZE AUTO-RESPONSES

This is an optional step. OnState provides generic responses which are appropriate for most situations, however, you can customize them to suit your company’s language, branding, etc. The five messages you can customize are the introduction, welcome, agent greeting, delay announcement, and option to leave a message.

- A. **Introduction** - The introduction appears at the top of the chat window. The default message is: *Please provide the following information. This will be passed on to*

the agent. To change this message, select **Introductory Message** from the Configure Message drop-down list, as shown below.

Enter the new introduction in the text box that now appears. Your message can contain up to 160 characters including spaces, and it cannot be left blank. Click **Set** to save your new message.

- B. **Welcome Message** - The welcome message appears after your customers submit their responses to your questions. There are two welcome messages based on whether or not there is someone who is logged into your system with the appropriate skill to answer the chat call. The default message when there is at least one person who could take the call is: *Thank you for contacting us. Please wait while we find an agent to handle your request.*

The default message when there is no one logged in is: *Thank you for contacting us. There is no one to take your call right now. Please try again later.*

To change either of these messages, select **Welcome Message** from the Configure Messages drop-down list.

Enter the new message(s), which can contain up to 160 characters and cannot be left blank. Click **Set** to save your changes.

- C. **Agent Greeting** - The agent greeting appears when your employee first connects with your customer. The default message is: *Thank you for contacting us. How can I help you?* To change this message, select **Agent Greeting** from the Configure Message drop-down list.

Enter the new message in the text box that now appears. Your message can contain up to 160 characters, and it cannot be left blank. Click **Set** to save.

- D. **Delay Announcement** - The delay announcement appears when all employees who could answer the call are busy or unavailable. You can display a message that is repeated periodically. Optionally, you can offer your customers the option to send you an email instead of waiting in the queue. By default, the delay announcement is disabled. To enable it, select **Delay Announcement** from the Configure Message drop-down list.

Configure Messages Delay Announcement

Delay Announcement

Delay Text

Delay Interval 01 Minute Set

Use Leave a Message

Check this box to let callers to send a message instead of waiting. You must also configure "Leave a Message" to enable the feature and specify the text.

Enter a message of 1-160 characters. Select one of the standard time intervals from the Delay Interval drop-down list, or choose **Custom** and enter a number between 10 and 1000 if you want a different delay period. Click **Set** to save your settings.

- E. **Leave a Message** - This feature allows your customers to leave a message if no one is logged in to take their calls, or if all your employees are busy and the customer does not want to continue waiting. The message entered by your customer will be delivered to the email address you specify. By default, this feature is disabled. To activate it, begin by selecting **Leave a Message** from the Configure Message drop-down list.

Configure Messages Leave A Message

Leave A Message

Prompt Enable

Email to Save

This enables the caller to send an email if the chat cannot take place. This text will be presented to the caller if no agents are signed on or (optionally) as a response to the delay announcement.

By default, the email address is set to the same address specified in the Voice Mail Address for the default skill. Click **Save** to apply your changes. When your customer leaves a message for you, it will appear in your inbox as a message from the name of your OnState system. Below is an example.

☆ **JNW Incorporated** to me show details 10:20 PM (0 minutes ago) Reply

Skill: support

Prompt for Caller:
If you would like to leave us a message instead of calling back or waiting, please enter it below.

Caller response:
Hi. My computer is running really slowly. I need help getting it back to normal. Please call me at 555-666-7777.
Thanks.
-Amy

Thank you for using the OnState ACD for Skype.

OnState Communications Corp.

Reply Forward

4. GENERATE THE HTML CODE

You are now ready to produce the HTML code that will be added to the source code of the webpage where you want your click-to-chat button to appear.

- A. Go to **Contact Manager > Advanced Settings > CallMe Buttons**.
- B. Select the **Chat Button** tab.
- C. The chat DN you created in step 1 now appears in the ChatDN textbox. If you created more than one, select the one you to use from the drop-down list.
- D. Choose the call button style you want to use.
- E. Click the **Generate** button.

ChatDN: chat

Button Graphics:

Chat me!

Chat

Use custom button graphics

(Optional) Custom Button Caption Text

Generate

- F. The HTML code now appears. Copy the text and send it to your Web developer or paste it into the source of the webpage where you want the button to appear.

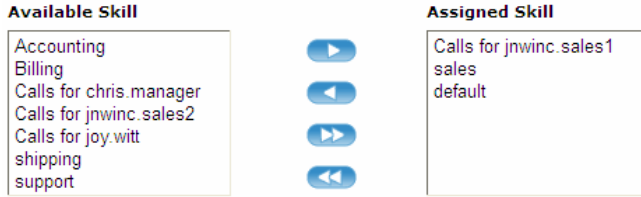
```
<a href="Javascript:var opener=window.open('http://onstate5.on-state.com:8080/chatproxy/servlet/ChatProxy?skill=chat&action=1000&tenantName=ics_jnw_inc&clientDomain=ics_jnw_inc&winLayout=advanced&wwwURL='+encodeURIComponent(window.location)+'&time='+new Date().getTime(),'ChatLobby','width=500,height=400');if(opener)opener.focus();"></a><br><a href='http://www.on-state.com' rel='nofollow'><i>powered by</i> <b>OnState</b></a>
```

5. ENABLE USERS FOR CHAT

To enable users to handle chat calls, you must first purchase chat licenses for them. Contact your OnState sales representative for pricing information. Assuming you have the necessary licenses, follow the steps below to enable a user for chat.

- A. Click on the **Users** tab and select the name of the user who needs to be enabled for chat.

B. Make sure that the user has the necessary skill(s) to handle the chat calls.



C. Open the **Advanced Settings** and check the **Chat** checkbox. Doing so will enable the Chat Protocol and Chat User ID fields.

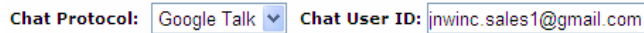


D. Do one of the following:

- If the user will be taking calls on Skype, set the Chat Protocol to **Skype** and enter his/her *Skype username* in the Chat User ID field.



- If the user will be taking calls on Google Talk, set the Chat Protocol to **Google Talk** and enter his/her *Google Talk address* in the Chat User ID field.

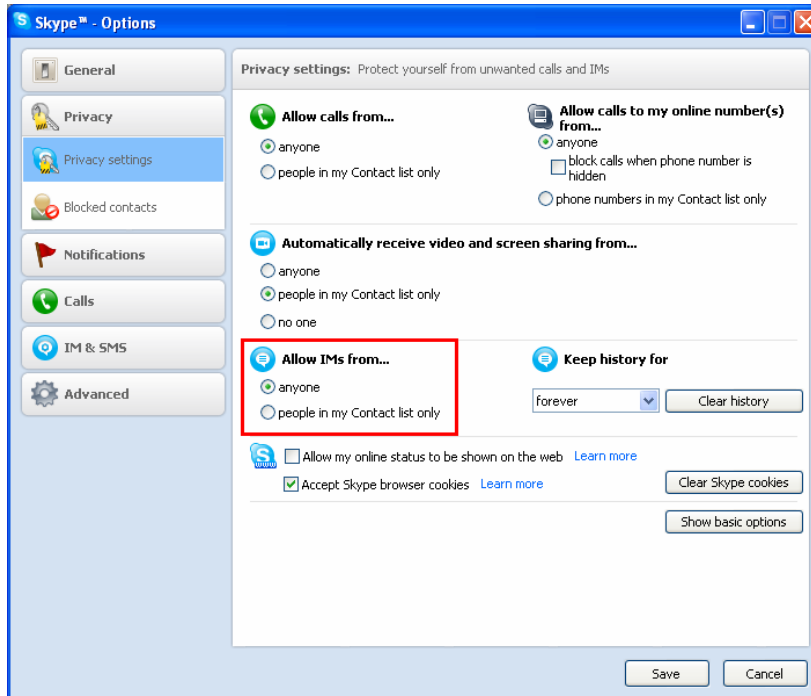


E. Scroll down and hit the **Save** button.

6. CHAT CLIENT SETUP

A. Skype

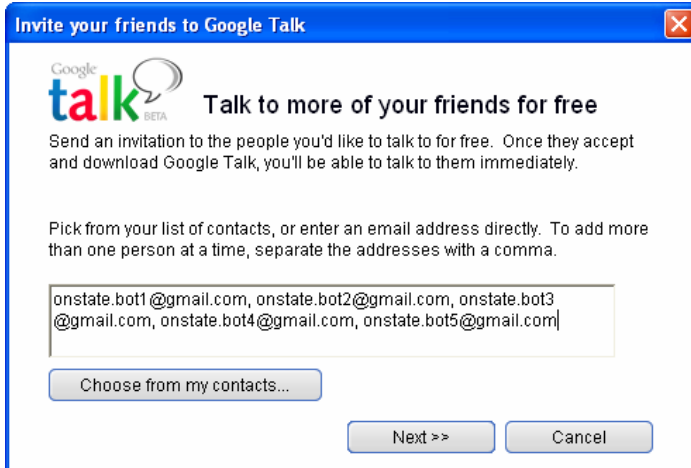
If your user will be taking calls on Skype, make sure his Skype application is configured to allow IMs from everyone, not just people in his/her list of Skype contacts. To check this, go to **Tools > Options** in Skype. When the Options window appears, select **Privacy** in the left column. Make sure “Allow IMs from...” is set to **anyone**. Click **Save** if you make any changes.



B. Google Talk

If your user will be taking chat calls on Google Talk, the OnState chat proxies must be added as contacts. To do this, the user must log into Google Talk, click the link to add contacts, and add the following addresses:

onstate.bot1@gmail.com, onstate.bot2@gmail.com, onstate.bot3@gmail.com,
onstate.bot4@gmail.com, onstate.bot5@gmail.com



The invitations will be accepted automatically and after a few seconds the user should see them listed with a green dot next to their names.

7. SET MAXIMUM NUMBER OF CHATS

This is an optional step. By default, your system is configured so each user can receive up to 4 simultaneous chat calls. If a voice call arrives, it will prevent any further chat calls from being delivered to the user. To change these system-wide systems, do the following:

- A. Go to **Contact Manager > Advanced Settings > ACD Admin > Global Attributes**.
- B. Scroll down to the Chat Properties section. If you want to change the maximum number of simultaneous chat calls that a user can receive, replace the number 4 with your preference.
- C. If you want to prevent voice calls from being delivered to users with a certain number of chat calls, enter the number in the "Do not send a voice call to any agent with ___ or more chat calls."
Chat Properties: Agents may take up to simultaneous chat calls.
Do not send a voice call to any agent with or more chat calls. (Leave blank for no limit)
- D. Hit **Save** after you make your changes.