CISCO Live!

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GO BEYOND

Webex Contact Center Enterprise digital channels implementation and troubleshooting powered by Webex Connect

LTRCCT-2003

Speakers: Joshua Raja / Robert W. Rogier

Learning Objectives

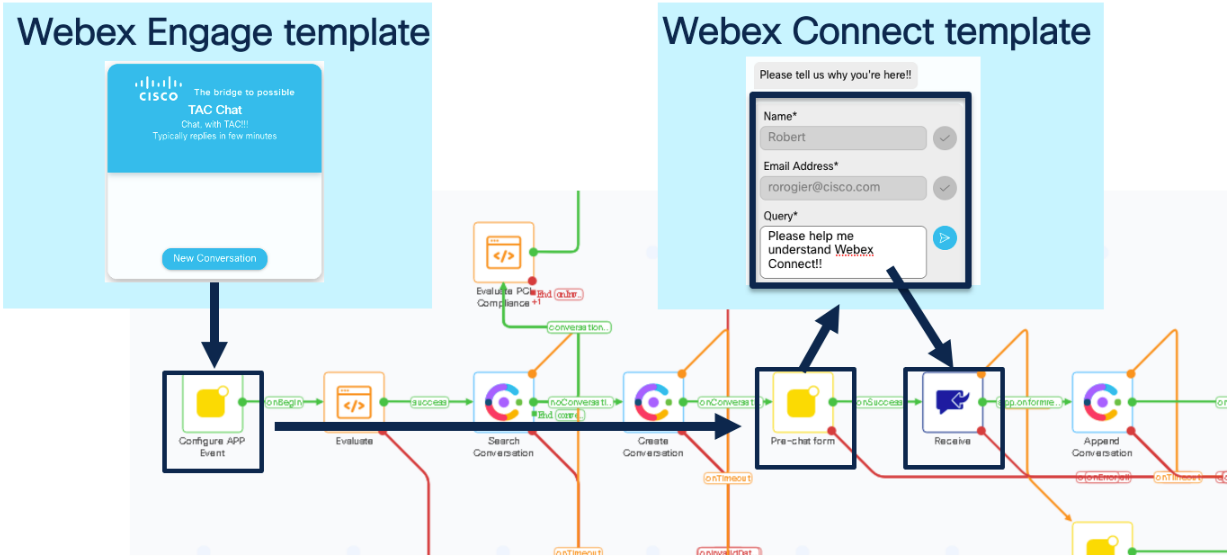
Upon completion of this lab, you will be able to:

- Understand how to create a Chat application and register it with Engage
- Know where to create questions used in Chat entry points
- Know what documentation resources are available

Scenario

This lab is designed to introduce the audience to the digital channels (Webex Connect) platform, its architecture, and its provisioning. This lab will show how to create the Live Chat application as well as the questions you will ask customers.

Live Chat Flows and Templates



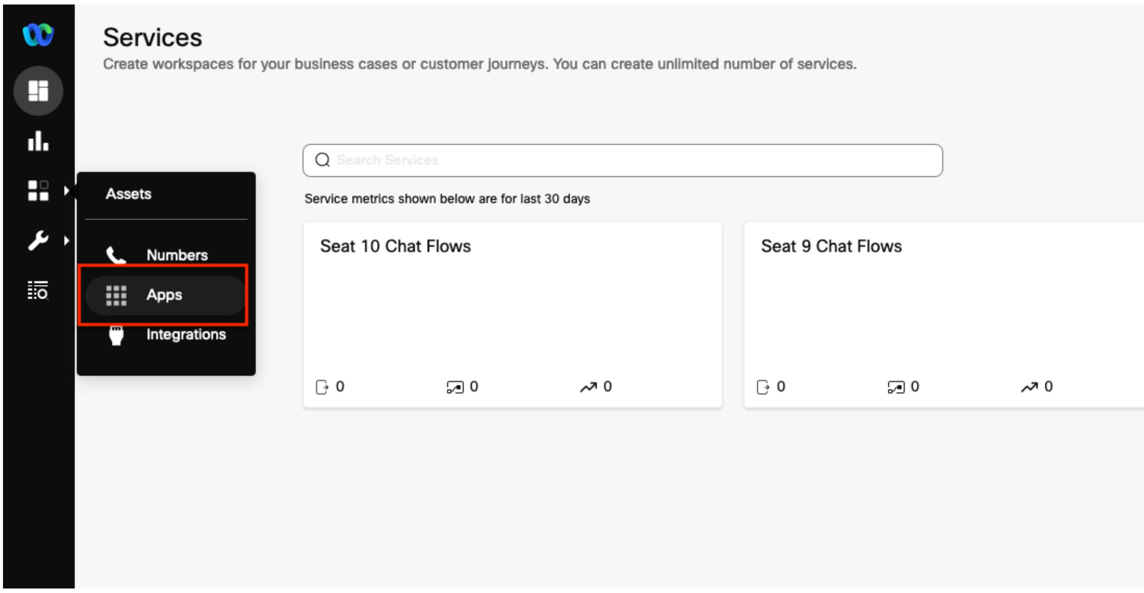
There are two templates in Webex Connect. The first is the Webex Engage template. This is the “look and feel” of your chat entry point and can have custom colors, icons, etc. The second is the Webex Connect template. This template defines the questions you ask to customers to know what they are opening the chat for so your agents can help them.

Task 1: Login to Webex Connect Tenant

Step 1. Login to Webex Connect

You will need the Connect URL from the Credentials document. Open a browser and enter this URL, then login using the User and Password found in this document. You can access this site from any computer. You do not need to use the workstation to access this site. You can access this from any computer you wish.

Step 2. Navigate to Assets > Apps

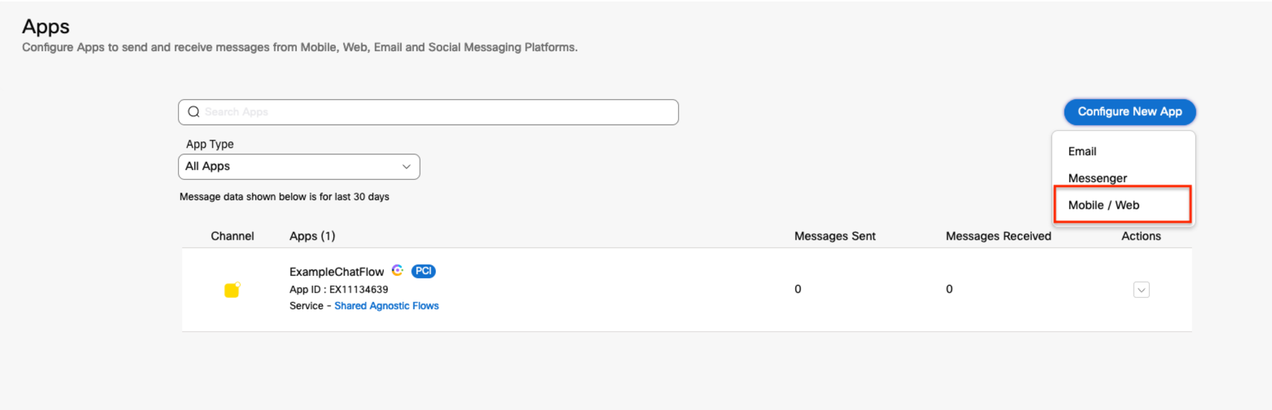


Task 2: Create the Chat App

In this task, you will create the chat application to use. There are three different types of apps you can create, Email, Messenger, and Mobile / Web. CCE currently supports Email and Mobile / Web apps. Messenger support is coming very soon.

Help Link: https://help.imiconnect.io/docs/live-chat

Step 1. Select Configure New App -> Mobile / Web



Step 2. Fill out the form

There are only a few details required for the Chat application. Since we are using a shared tenant, you will need to ensure that the names are unique. Before you begin, you need to check the Credentials Document for the Service that is assigned to you. This will be in the format of Seat # Chat Flows. This will be used when you register the App to Engage.

Fill out the form as follows:

1. Name: Provide the name in the format of, Seat#ChatEntryPoint.
2. Live Chat / In-App Messaging: Ensure this is selected to true.
3. Primary/Secondary Transport Protocol: Select one as MQTT and the other as Web Socket. It does not matter which is selected a primary.
4. Use Secured Port: Ensure this is selected to true.

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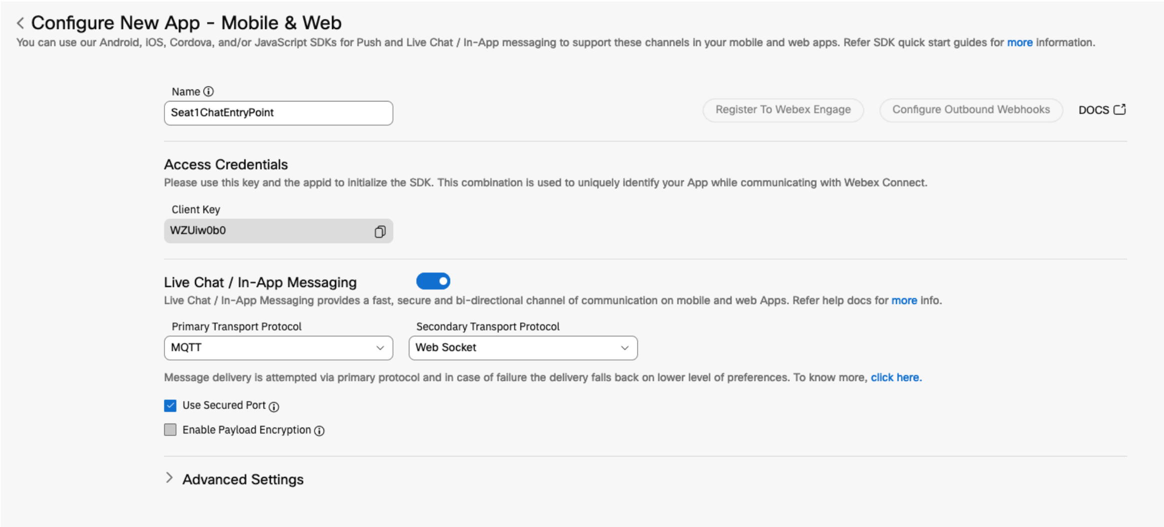
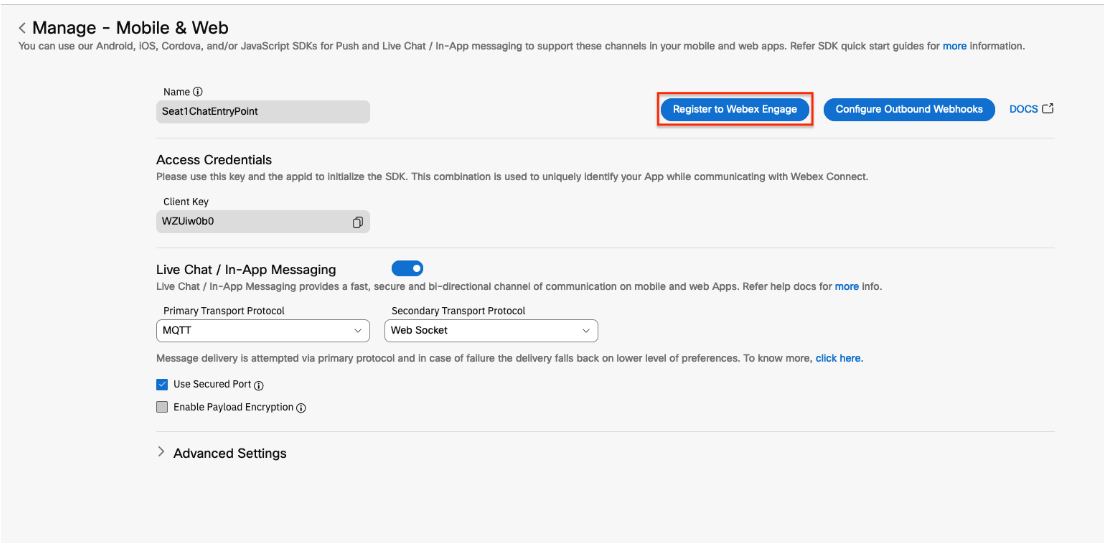


Select Save at the bottom of the page once you have filled out all the required options.

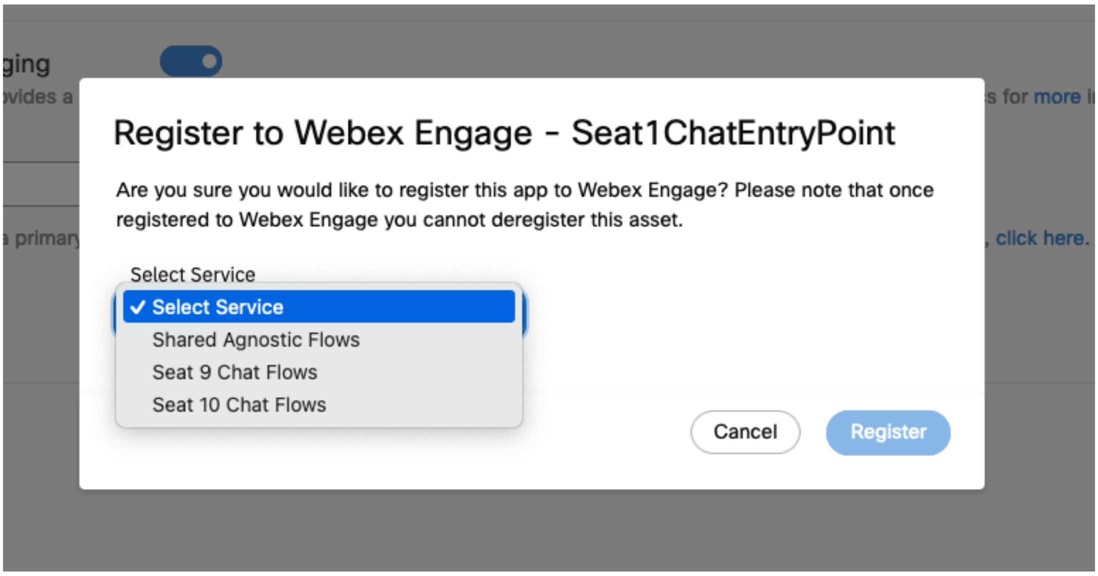
Step 3. Register the App to Engage

The app must be registered to Engage. Remember, that Engage is where the template is hosted. This is where all the look and feel items are configured. When you register the application to Engage you must choose the Service to register the App to. This cannot be changed after it is registered. In addition, you cannot delete the App from Connect as it leaves the resources in Engage. Ensure that you have carefully chosen the name and service as this is an irreversible operation.

1. Select **Register to Webex Engage** at the top of the form.



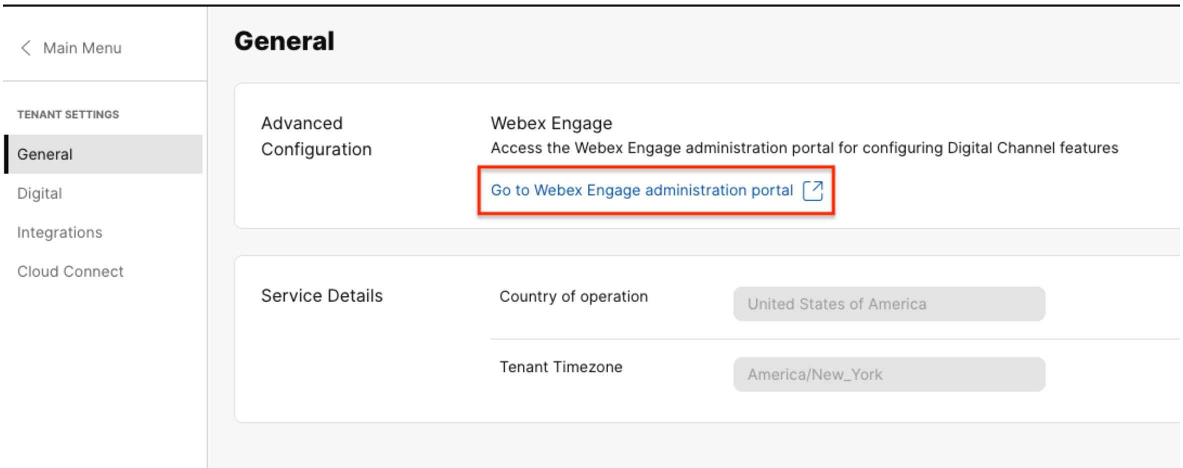
2. In the pop-up form, select the service you want to register to. For this class, use the service in your Credentials document.



3. Select the "Register" button.
   NOTE: You *must* get this correct. Once the app is registered, it is not possible to update or change the name or the service to which it is registered. Please check before you select the Register button.

Step 4. Open the Engage portal

Back in your Control Hub, ensure you are in the **General** menu under **Contact Center**, then select the link, **Go to Webex Engage administration portal.**



Step 5. Review App in Engage

Select the **Assets** link in the menu bar, then ensure that **Channel Assets** is selected. Find the asset you created above, then select the edit icon.

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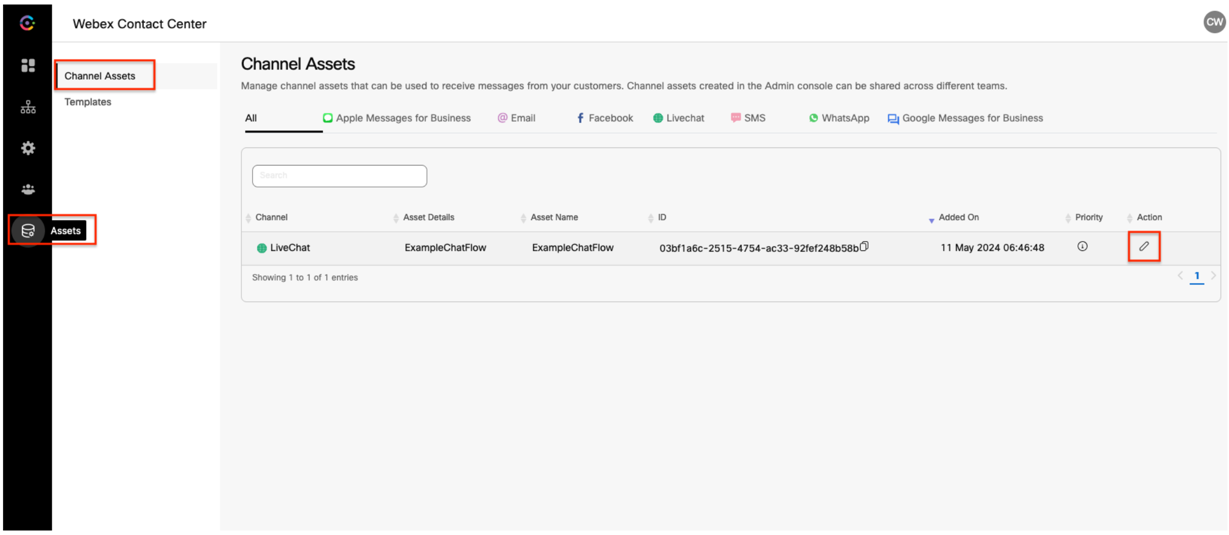


Take a few minutes to look around. You will return to this in another lab where you will be able to make this chat interface look how you like.

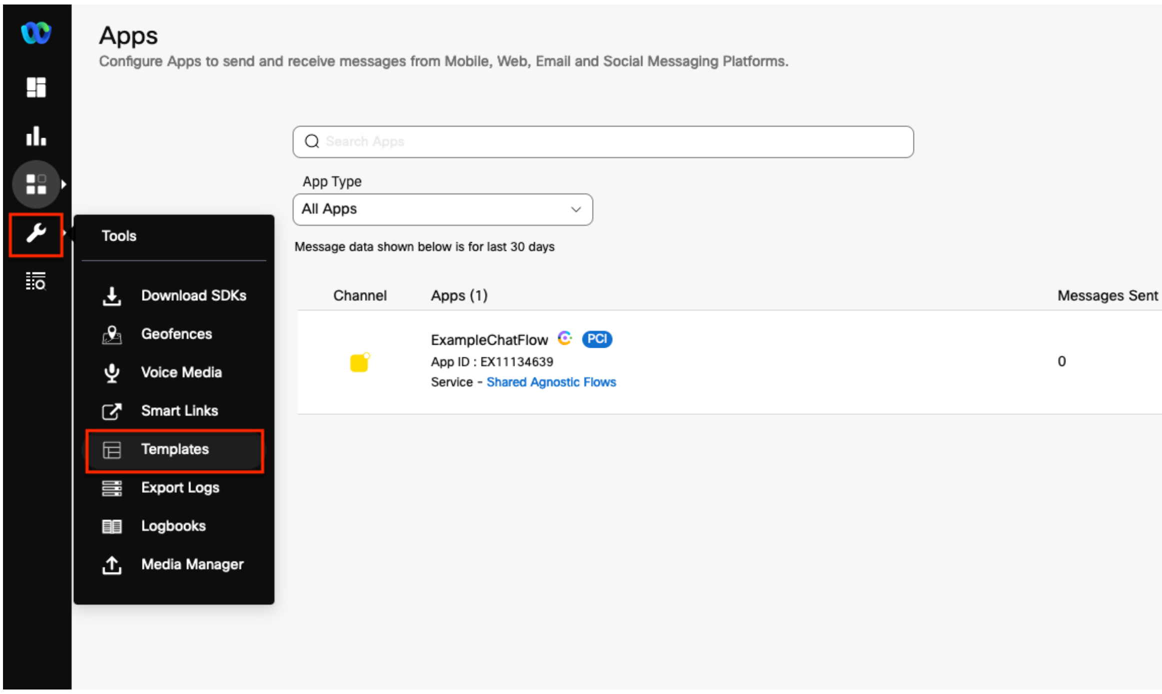
Task 3. Create Questions for your chat

Every chat entry point needs to ask the customer for some information. Depending on the business requirements, this may be as simple as an email address and phone number and may be more complex. The answers to these questions can be stored and used in the flows. This class will not show this usage but will instead focus on a basic chat.

Ensure that you are logged into your Connect tenant before you start the steps in this task.

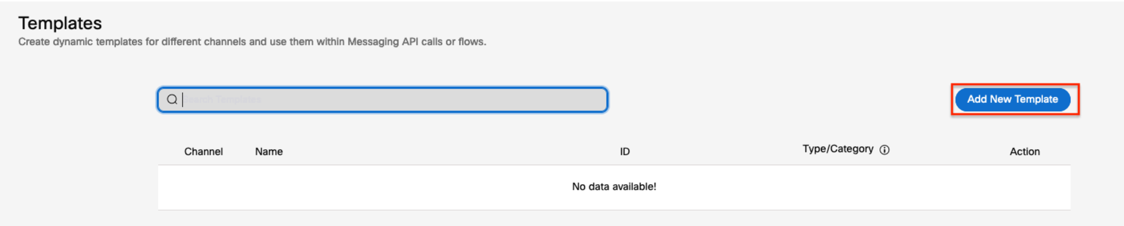
Step 1. Select Tools > Templates

We need to go into the templates configuration section of Webex Connect.

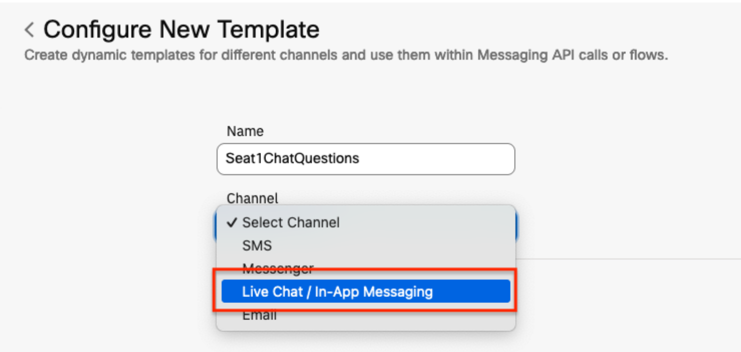


Step 2. Add initial template configuration

Select the **Add New Template** button at the top of the page.



Provide a name for the template. For this class, give the name in the format of *Seat#ChatQuestions*. Select *Live Chat / In-App Messaging* from the Channel drop-down.



Step 3. Create the questions

For this example, we will use a Form to create the questions. There are other alternatives that you can find in the help.imiconnect.io documentation.

- Select **Form** from the Message Type drop-down. Notice that you will see a preview of the form. As you add questions, you will see how they will look to the customer.

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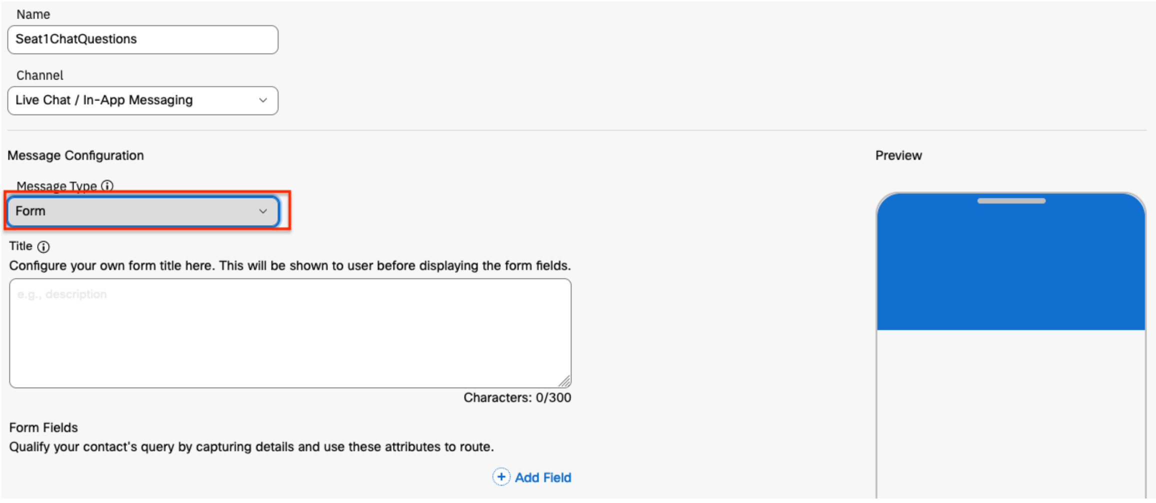
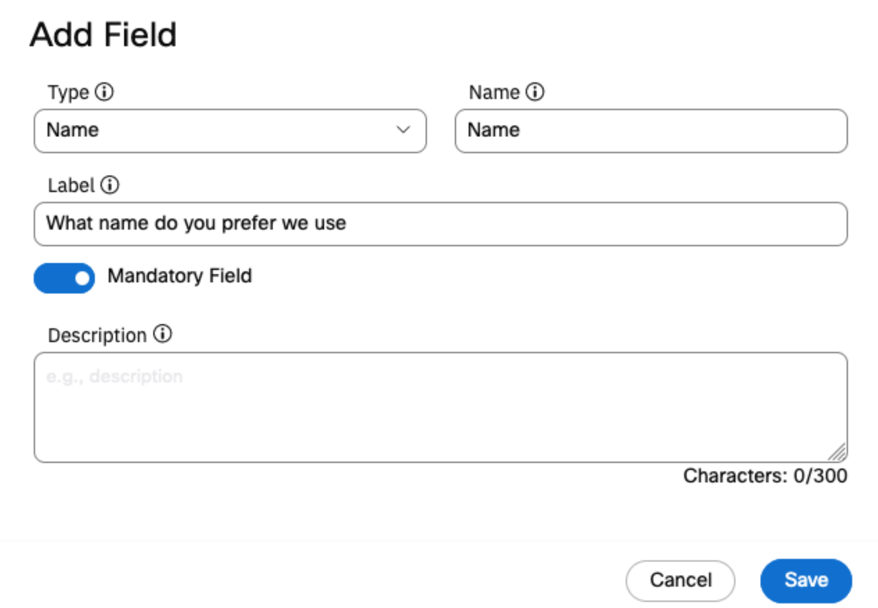
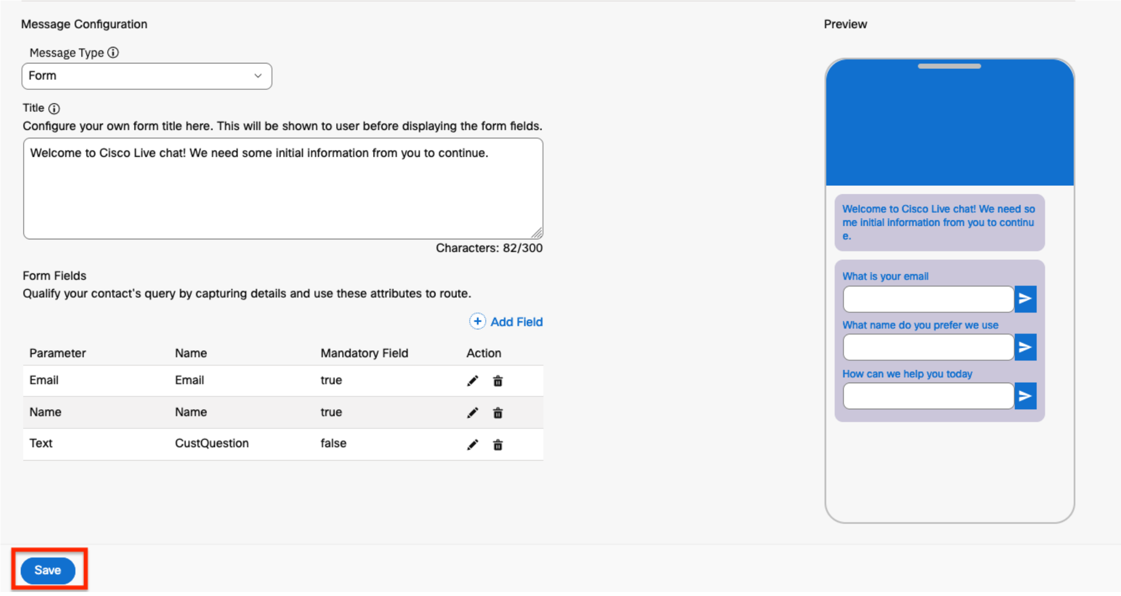


- Create a Title – The title is how you will greet your customers. This is the first thing that the users of this form will see. Create a title that you like.

- Add the Form Fields – You will repeat the next steps several times.
  Note: the order that you create the questions is the order in which they will be asked to the customer. You must delete and recreate the questions if you find they are out of order.
  - Type – There are several pre-defined types that can do validation.
  - Name – This is how you will see the value of the field in the flows if you wish later.
  - Label – This is what is shown to the customer to prompt for information. Do not include any punctuation.
  - Mandatory Field – Select this for any field which the customer must provide



- Select Save once you have added all the fields you wish



Note: For this lab, you MUST have the following fields defined:

- Customer's Email
  - Type: Email
  - Name: Email
  - Mandatory: True
- Customer's Name
  - Type: Name
  - Name: Name
  - Mandatory: True

You may create any additional questions you wish, but these two must exist for proper routing.

You have now completed this portion of the lab.