

# Chat / WhatsApp Connectors

## Introduction

The CHAT role is used for conducting chat sessions with agents from external websites. In addition, the CHAT role can also be converted into a WhatsApp Connector with the provider TynTec. This allows clients to offer their customers the option to send requests through WhatsApp, instead of a Web-Based CHAT. Chat and WhatsApp Connectors can be used in parallel.

## Requirements

- The jtel Chat Module
- The installation can either be done in parallel with an already existing web server or load balancer - with a corresponding RAM extension of about 4 GB per server - or on a separate server

## Configuration

### Creating a new Chat Connector

A new Connector can be created via the web-interface. Logged in as a Client Administrator, navigate to "Menu Chat Chat Connectors" and press "new". In the resulting popup, the assigned Client ID is shown, as well as the fields to provide a name and title for the Connector.

After clicking "Save", you can enter the configuration page by clicking "Edit" on the Connector.

### Settings

#### Master Data

Field	Explanation
<b>Client ID</b>	ID of the client in which the Connector is created
<b>Name</b>	Name of the Connector
<b>Title</b>	Title of the Connector
<b>WhatsApp</b>	When inactive, the Connector is a Chat Connector When active, the Connector functions both as a Chat and a Whatsapp Connector

#### Distribution

Field	Explanation
<b>ACD Group</b>	The ACD-Group inside which the events are distributed
<b>Max Chats all Agents</b>	The maximum amount of simultaneous chat events that can be handled by the Connector amongst all agents in the configured ACD-Group

<b>Priority</b>	The priority of incoming chat events. Used primarily when more than one Connector is attached to the same ACD-Group
<b>Maximum connect wait time (s)</b>	The amount of time that can pass before an agent must have opened the incoming chat event by pressing on the indicator. If the configured value is exceeded, the event will be redistributed to another agent
<b>Maximum agent answer time (s)</b>	The amount of time that can pass before the agent has sent the first reply to the customer. If the configured value is exceeded, the event will be redistributed to another agent
<b>Maximum free agent search time (s)</b>	The maximum amount of time the system will search for an available agent. If the configured value is exceeded the event will be closed and the customer will be informed
<b>Skill 1</b>	The first skill which can be attached to incoming events.
<b>Minimum Skill 1</b>	The minimum value of skill 1 required by an agent to have the event distributed to him
<b>Ignore skill 1 after timeout (s)</b>	The amount of time that will pass until skill 1 is ignored and not considered in event distribution
<b>Skill 2</b>	The second skill which can be attached to incoming events.
<b>Minimum Skill 2</b>	The minimum value of skill 2 required by an agent to have the event distributed to him
<b>Ignore skill 2 after timeout (s)</b>	The amount of time that will pass until skill 2 is ignored and not considered in event distribution
<b>Skill 3</b>	The third skill which can be attached to incoming events.
<b>Minimum Skill 3</b>	The minimum value of skill 3 required by an agent to have the event distributed to him
<b>Ignore skill 3 after timeout (s)</b>	The amount of time that will pass until skill 3 is ignored and not considered in event distribution
<b>Ignore Skills after timeout (s)</b>	The amount of time that will pass until all configured skills are ignored and not considered in event distribution
<b>Ignore skills if no agents with skills available</b>	If checked, skill distribution will be inactive when no agents with the required skills are available in the ACD-Group

## Code

Field	Example Configuration
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**Configuration**

```
{
  "noAgents": "Sorry, currently there are no agents available. Please try again later.",
  "noAgents#de": "Es tut uns leid, aber derzeit sind keine Agenten verfügbar. Bitte probieren Sie etwas später nochmal.",
  "outOfService": "Sorry, but the service is not available at the moment.",
  "outOfService#de": "Es tut uns leid, aber der Service steht derzeit nicht zu Verfügung",
  "agentTyping": "Agent $agent is typing...",
  "agentTyping#de": "Agent $agent schreibt ...",
  "bye": "Thank you for using our service. Goodbye.",
  "bye#de": "Danke, dass Sie unseren Service genutzt haben. Auf Wiedersehen.",
  "byeNoAgent": "Sorry, currently there are no agents available. Please try again later.",
  "byeNoAgent#de": "Es tut uns leid, aber derzeit sind keine Agenten verfügbar. Bitte probieren Sie etwas später nochmal.",
  "welcomeMessage": "Welcome!",
  "welcomeMessage#de": "Herzlich willkommen!.",
  "editorPlaceholder": "Enter your message here.",
  "editorPlaceholder#de": "Geben Sie Ihre Nachricht hier ein."
}
```

**Explanation:**

<b>noAgents</b>	When no agent is available, the configured message is sent to the customer.
<b>outOfService</b>	When the service is not available at the moment.
<b>agentTyping</b>	<p>When the agent enters a response to the customer, the customer is informed by a notification in the chat window.</p> <p>In this resource the placeholder \$agent can be used. It will be replaced with agent nick name and if the field is empty with UsersUID.</p> <p>WhatsApp</p> <p>This message is not displayed to customers who use WhatsApp</p>
<b>bye</b>	When the chat event is closed, the configured message is sent to the customer.
<b>byeNoAgent</b>	When no agent is available, the configured message is sent to the customer.
<b>welcomeMessage</b>	After a customer has sent a message and opened a new event, the configured message is sent to the customer.
<b>editorPlaceholder</b>	<p>This message is displayed to the customer after the window for chat is opened at the external website.</p> <p>WhatsApp</p> <p>This message is not displayed to customers who use WhatsApp</p>

Code

```
<script src='https://websiteurl.de:3003/gui//chat.js'></script>
<script type="text/javascript">
  JTEL.initChat({
    Hash: 'ZkGgUcDkLPEY',
    BaseWSURI: 'wss://chatserverurl.de:3003',
    BaseResourceURI: 'https://storageserverurl:3003/gui', //optional
    pdata: {name:'John Doe', email:'john.doe@example.com', sender:'John Doe', receiver:'My Chat Connector', userdata:'123456',
userdata2:'userdata2', userdata3:'userdata3'},
    udata: {anyfield1:'Any Field 1', anyfield2:'Any Field 2' }});
</script>
```

Explanation:

To access the jtel server, the code is embedded into the external website. The code is generated with the settings from the parameters in the jtel portal, as well as the settings from the page Master Data in the chat Connector configuration.

REST

Token Post

Field	Example Configuration
Url	<div>https://myrestservice.example.com/service/GetToken</div>
Header	<div>Cache-Control: no-cache Content-Type: application/x-www-form-urlencoded;charset=UTF-8 Authorization: Basic XX</div>
Body	<div>grant_type=client_credentials&amp;redirect_uri=https://myrestservice.example.com/service/api/v1/Customers/Contacts</div>

Report Export Post

Field	Example Configuration
Url	<div>https://myrestservice.example.com/service/api/v1/Customers/Contacts</div>

<b>Header</b>	<pre>Cache-Control: no-cache Content-Type: application/json Authorization: Bearer \$tokenResponse.body.JSON.access_token</pre>
<b>Body</b>	<pre>{ "CustomerNumber": "\$chatConnector.id",   "XMLCodedData": "\$xmlTemplate.encoded.base64" }</pre>
<b>Xml Template</b>	<pre>&lt;?xml version="1.0" encoding="utf-8"?&gt; &lt;chatReport&gt; &lt;Size&gt;\$report.bytes&lt;/Size&gt; &lt;Content&gt;\$report.encoded.base64&lt;/Content&gt; &lt;/chatReport&gt;</pre>


See also: [Chat Report Export](#)

## Portal Configuration

Additional configuration in the portal is necessary, regarding the distribution of Chat and WhatsApp events

### Agent Status

Agent status for chat - or an existing status - must be configured to allow a chat event to be distributed to the agent:

 Edit Agent Status "Chat"

Master Data

Skill Adjustment

Translations

ID :

79

Status :

Chat

Status (short) :

Ch

Status (abbreviation) :

Ch

Font Colour :

Yellow

Background Colour :

MediumPurple

Chat

Restrict to specific ACD groups :

☐

Restricts the visibility of this status to users who are members of certain ACD groups only.

Settable by Agent :

☒

Logged-In :

☐

In Location :

☐

Holiday :

☐

Pause :

☐

Calls :

☐

Post Call :

☐

Voice Mail :

☐

Outbound :

☐

Fax :

☐

Callback :

☐

SMS :

☐

Email :

☐

Ticket :

☐

Chat :

☒

Quick Status Buttons (Supervisor) :

☐

Distribute During Call :

☐

DTMF-Input :

6

Prompt File :

Test 01s

Call Forwarding :

☐ On ☒ Off

Save

Cancel

## Max chats per agent

The maximum number of parallel chats per agent must be configured. This value is set to 0 by default for all agents. The checkmark at "Ticket via Web Interface" has to be checked.



## Edit User "admin"

Maximum call recordings each day :

This counter applies only to call recording every x calls

### Web Logout Options

Agent status change after "Logout" in web :

☐

Agent status after "Logout" in web :

### Auto-Logoff Options

Maximum Missed Calls - Busy :

Agent Status after Logout - Busy :

Maximum Missed Calls - No Answer :

Agent Status after Logout - No Answer :

Maximum Missed Calls - Rejected :

Agent Status after Logout - Rejected :

Maximum Missed Calls - Total :

Agent Status after Logout - All :

Notify Auto-Logout by Email :

☐

### Daily Autologout

Daily Autologout Active :

☐

Execution Time :

Agent Status after Logout :

Deactivate Daily Autologout ACD Groups :

☐

If this option is selected, autologout is not performed for individual ACD groups.

### Media Delivery Options

Voicemail via Web Interface :

☒

Fax via Web Interface :

☒

SMS via Web Interface :

☒

Callback via Web Interface :

☒

Email via Web Interface :

☒

Ticket via Web Interface :

☒

Max Chats Per Agent :

Save Cancel



## Additional configurations for WhatsApp

Additional parameters are required for WhatsApp connectors

### Master Data

Field	Explanation
<b>WhatsApp</b>	When active, the Connector is changed to a WhatsApp Connector
<b>Whatsapp ApiKey</b>	The TynTec API Key is entered in this field
<b>Whatsapp Number</b>	The phone number is entered in E.164 format

The additional configuration required on the server side is described here: [Role CHAT](#)