uWebChat

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1   What is uWebChat?

1.1   An introduction

uWebChat is a Microsoft Teams app that integrates with your existing website and offers a live web chat that enables your organization to interact with visitors on your website. uWebChat uses the Microsoft Teams client to hunt agents directly or via an agent group. While hunting an agent, uWebChat determines if the agent is available by using MS Teams or Skype for Business presence functions.

1.2   Terminology

Term	Meaning
Agent	A Teams user who has been registered in uWebChat and is able to receive chat requests.
Admin agent	An agent with permissions to manage agents, groups, opening hours.
Chat user / website visitor	Website visitor who initiates a conversation with an agent (using uWebChat).
Presence	The status of the MS Teams client. For example: available, busy, offline, away. The presence will be used to decide whether an agent can be hunted or not.
Hunting	The process of finding an agent that can respond to a chat invite. When a chat user initiates a new conversation, uWebChat will check if the requested agent or group is available.
Group	A group of agents (group members), which will be hunted one by one when a chat user requests a new group conversation.
Group member	Agents who have been added to a group are called group members.

1.3 Card interaction / uWebChat bot interaction

uWebChat uses **Rich Cards**; cards that contain dynamic content and require user interaction. There are three kinds of rich cards: one that has buttons, a multiple-choice card and one that requires text input.

In the image below, an example of a rich card with buttons is shown. This specific card appears when using the **Upgrade** command in uWebChat. Simply click on a button to continue
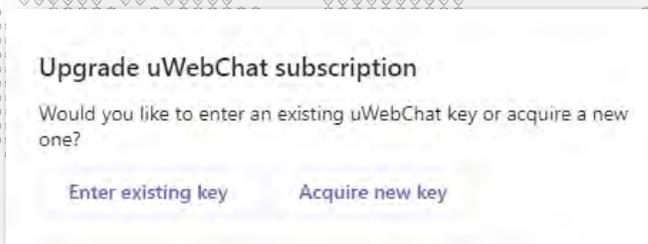
In the image below, an example of a multiple-choice rich card is shown. This specific card appears when using the **Edit group** command. Select the desired option and click the button to continue.
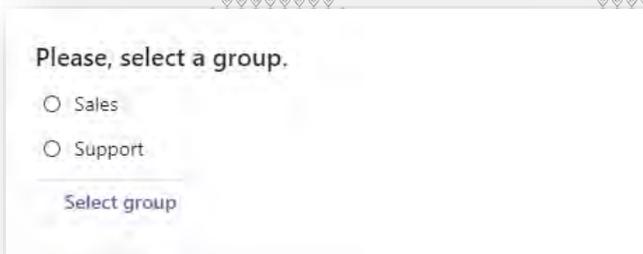
In the image below, an example of a text input rich card is shown. This specific card appears when trying to enter a license key for uWebChat. Interact with it by typing text into the text input field and clicking on the button. Typing text in the regular chat window of Teams will not work for this type of card.
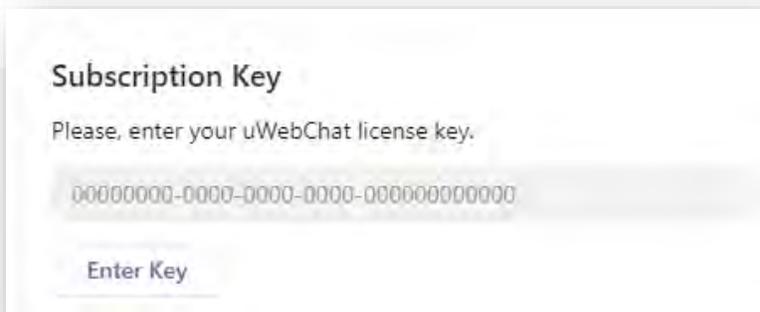
1.4 Requirements

Before you can use uWebChat, there are requirements that must be met.

- Valid license to use Microsoft Teams per agent using uWebChat.
- Agent e-mail and User Principal Name (UPN) must match. This requires one of the below requirements.
    - Valid Exchange Online license per agent using uWebChat.

OR

    - Synchronization on-premises Exchange to Exchange Online using Azure AD Connect.
- Valid license to use OneDrive (for chat log saving feature).
- In the Teams Admin Center, **External access** to other Microsoft 365 Teams users must be **Enabled**. If you are using domain whitelisting, please add domain **uWebChat.com** to your domain list.
- Teams setting **EnablePrivacyMode** in your Microsoft 365 tenant must be set to value **False**. This can only be done through PowerShell. When this value is set to **True**, external tenants cannot view presence information. This results in uWebChat not being able to read presence information and not hunting agents correctly.

1.5 uWebChat editions

uWebChat is available in four different subscriptions. The free version of uWebChat is available in the Teams app catalogue by default, while the other versions require a license key.

You can find up-to-date feature list and which subscriptions they are associated with on https://uwebchat.com/pricing/.

2   Installation

To start using uWebChat, you will need Microsoft Teams. This can either be the Microsoft Teams client or the Microsoft Teams web application. Both can be found at https://teams.microsoft.com/
Microsoft Teams can only be accessed by Microsoft accounts. This could be for example a personal Microsoft account, a Microsoft work or school account, or an account from a different e-mail provider (e.g. Gmail) that has been activated as a Microsoft account.

2.1   Get a license key (optional)

As described in chapter 1.4 uWebChat editions, uWebChat has four different kinds of subscriptions. If you need the additional features that are included in one of the paid versions, please continue reading this paragraph.

Before you can activate a paid uWebChat subscription, you first need to acquire a license key. License keys can be purchased from Microsoft AppSource: https://appsource.microsoft.com/en-us/product/web-apps/universalcloud.uwebchatappsource2019?tab=Overview

Alternatively, you can search for **uWebChat License** using the search function on https://appsource.microsoft.com.

On the uWebChat product page, click on **GET IT NOW**. This can be found at the left side of the page. Afterwards, enter your Office 365 or Microsoft account and follow the steps to start using uWebChat.
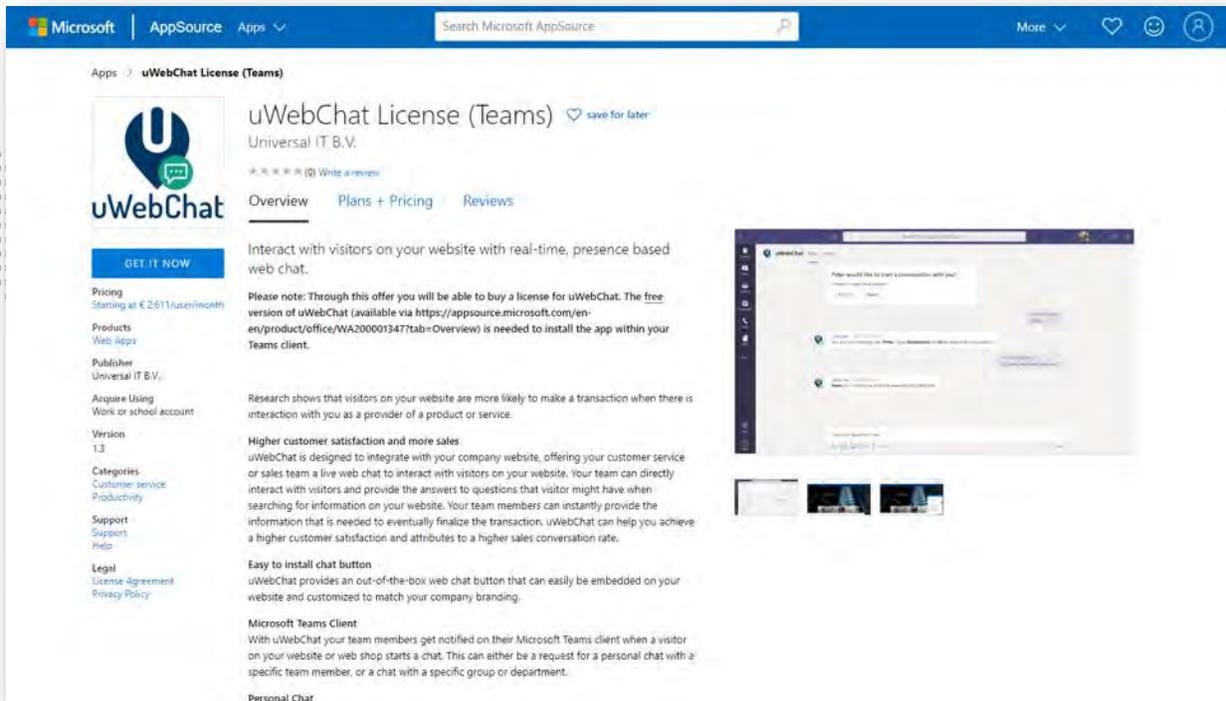
After successfully ordering a uWebChat license, you will see a confirmation screen with a summary of your order. If the information on this screen is correct, please select **Confirm order**.
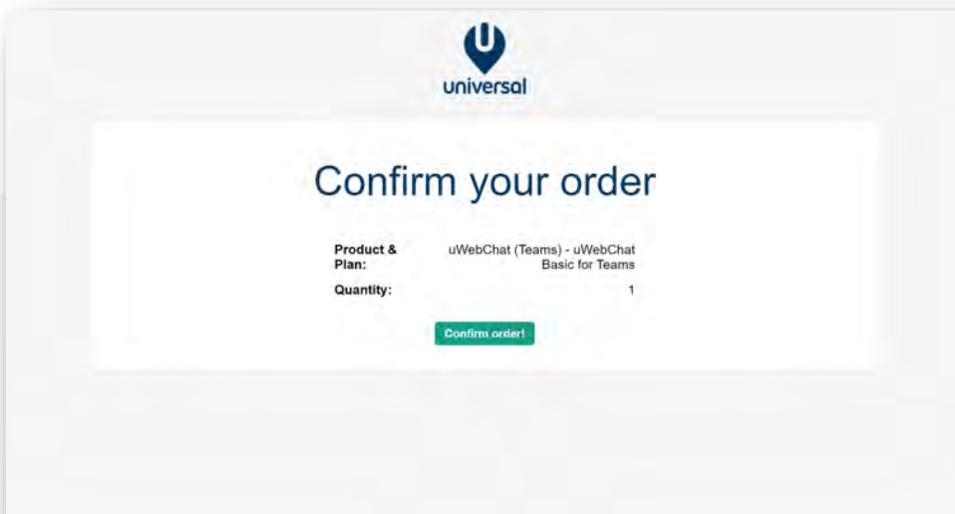
After confirming your order, your activation key will appear. Copy this code and store it somewhere safe. You will not be able to recover this key if you lose it.
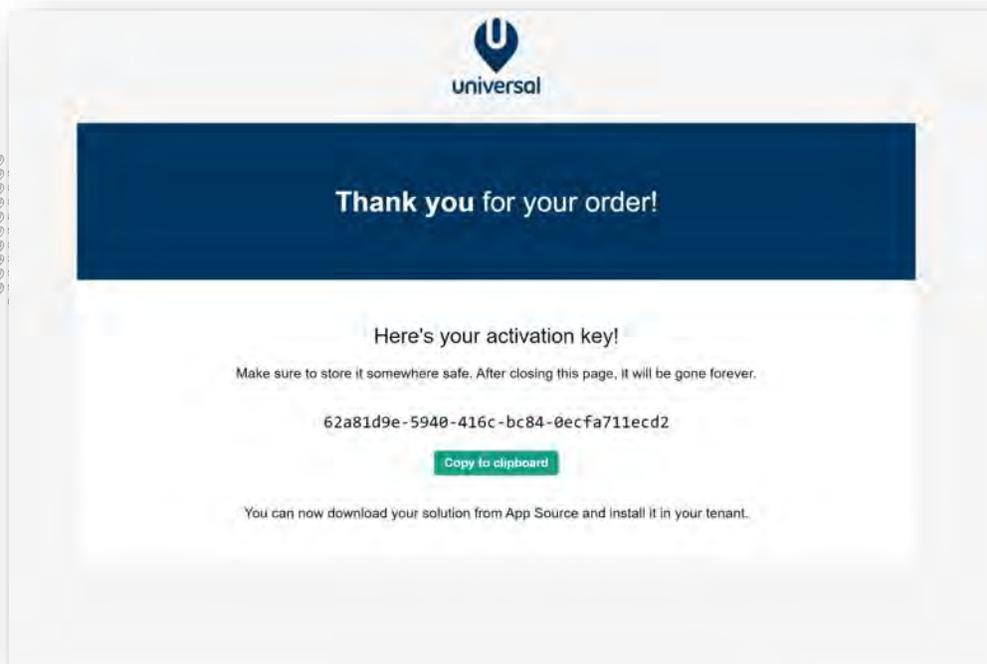
If you have already setup uWebChat before, use the command **Upgrade** to upgrade your subscription using the newly acquired license key.

3 Configuration of uWebChat

Before being able to chat with your website visitors, you must setup uWebChat in your Teams client. Once you added uWebChat from Microsoft AppSource or through the Teams store, you can initiate a conversation with the bot to start the initial configuration.

3.1 First time setup

The first time when someone in your tenant starts a conversation with uWebChat, a configuration dialog will appear. Enter your company name in the field as shown below.
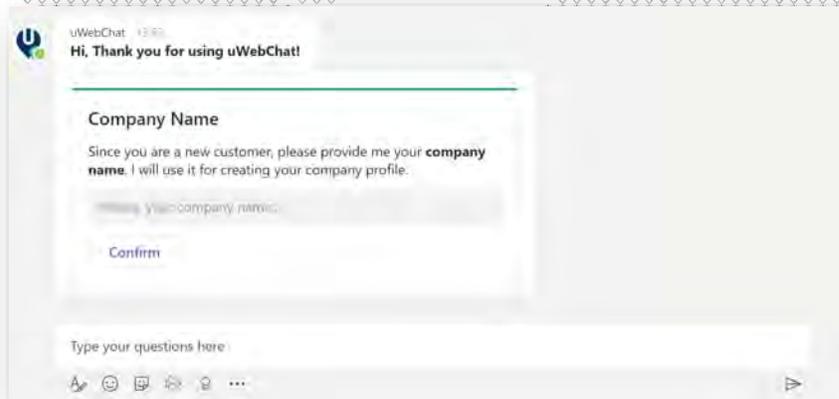
It is not required to activate a paid version of uWebChat during the initial setup. You can start using uWebChat without entering a licence key, this will give you access to the features of the Free edition. You can choose to enter the license key later by using the **Upgrade** command.
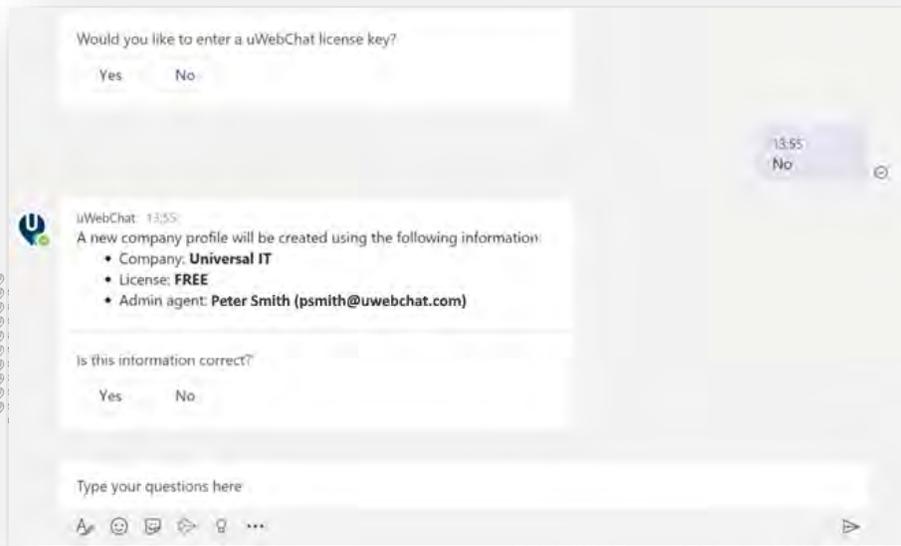
If you select **Yes**, you can enter the licence key as shown below
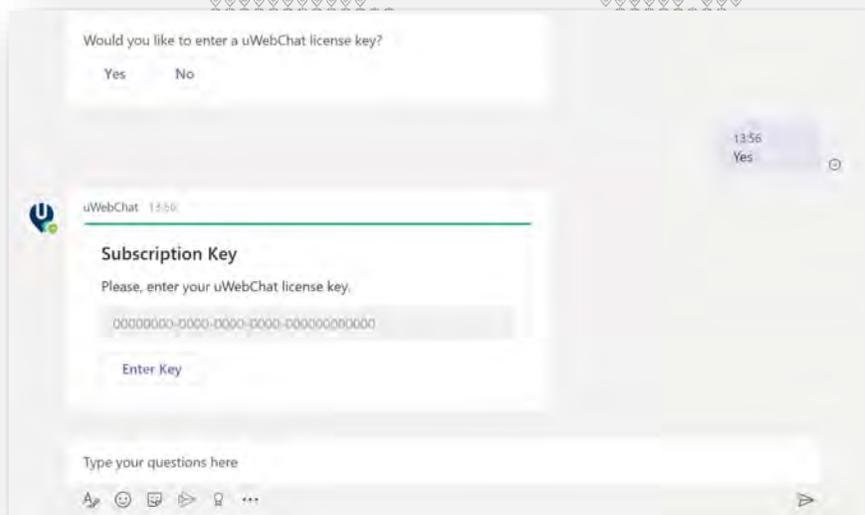
After confirming the entered information, a new company profile will be created. uWebChat has now been configured in your tenant!

uWebChat 13:55

A new company profile will be created using the following information::
- Company: **Universal IT**
- License: **FREE**
- Admin agent: **Peter Smith (psmith@uwebchat.com)**

Is this information correct?

Yes   No

13:57
Yes

uWebChat 13:57

Your customer profile is ready! Type "**Help**" to view a list of commands you can say to me. Type "**Subscribe**" to make yourself available for chat.

Adding more agents: For other people to start using uWebChat, they must install and register themselves in uWebChat first. After that, you will receive a notification to activate or remove the newly registered agents.

Type your questions here

3.2   Changing Settings and Commands

In this manual we will refer to direct text commands when configuring uWebChat. Commands such as **Subscribe, Debug** and **Stop** can be typed into your Teams chat bar to directly interact with uWebChat.

However, uWebChat also offers a method for a more graphical configuration. Using the **Help** command in the Teams chat bar will show you a Teams rich card which can be used to select the settings you wish to modify. You can always replace the commands described in this manual with going to the **Help** command and clicking the relevant setting.
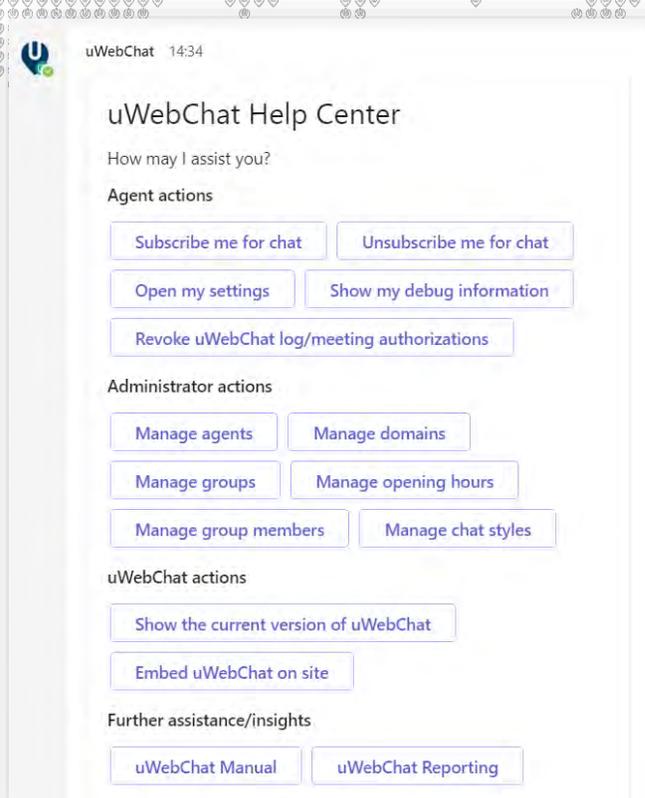
Simply click on one of the buttons to start configuring your instance of uWebChat!

Depending on your permissions (admin or user) you will see the settings relevant to you.

3.3 Subscribing

uWebChat uses a mechanism called *subscribing* which enables agents to decide whether they want to be able to receive chat requests.

To make yourself available for chat, type **Sub**, **Subscribe** or **Subscribe me** in uWebChat. Once you are subscribed, website visitors can start a chat with you This also depends on your Teams presence.
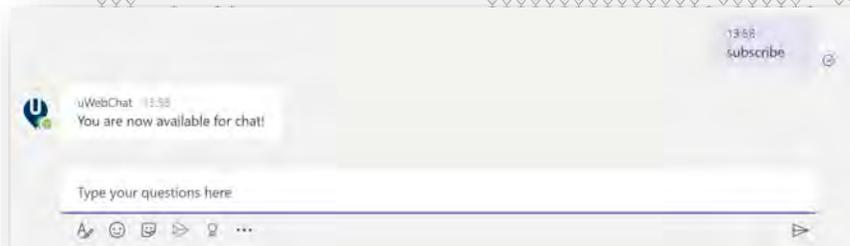
To make yourself unavailable for chat, type **Unsub**, **Unsubscribe** or **Unsubscribe me** in uWebChat. Once you are unsubscribed, website visitors can not start a chat with you anymore. Your Teams presence will not affect this.

There is no limit to the number of times an agent can subscribe or unsubscribe. When an agent registers with uWebChat for the first time, they will already be subscribed, and they do not need to subscribe themselves.

3.4 Embed uWebChat on a website

Please note: Embedding uWebChat inside a website requires access to edit HTML code for the specific website. If you do not have access to do this, please contact the person or organization that is responsible for you maintaining your website.

3.4.1 Domain whitelisting

uWebChat requires adding your domain(s) before you can embed it on a website. This is a security measure to ensure that only authorized domains can start a chat with your agents. The number of domains you can add to uWebChat is dependent on which license you use. Please see https://www.uwebchat.com for more details.

Please note, wildcard domains and sub-domains are not supported. This means that if you own **example.com** and you wish to add a chat to websites **example.com, sales.example.com, marketing.example.com**, this will count as 3 domains.

3.4.2 Add and manage domain

You can add a domain to uWebChat by using the **Add Domain** command. You can enter the domain name in a rich card.
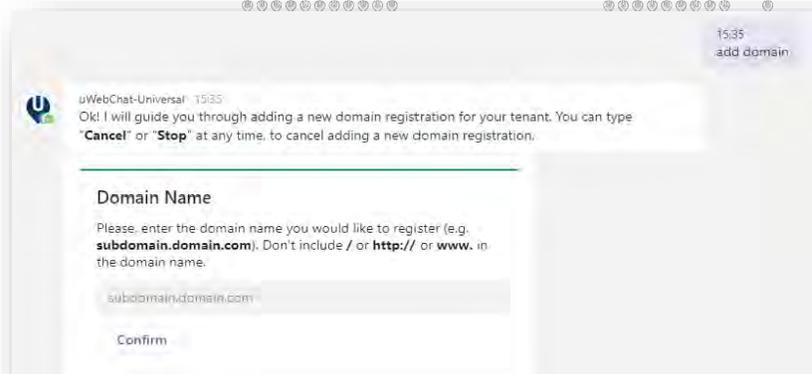
By using the **Edit Domain** command, you can change an already registered domain. After entered the command, select the domain which you want to change and enter the new domain in the rich card. Click the **Confirm** button to save your changes.
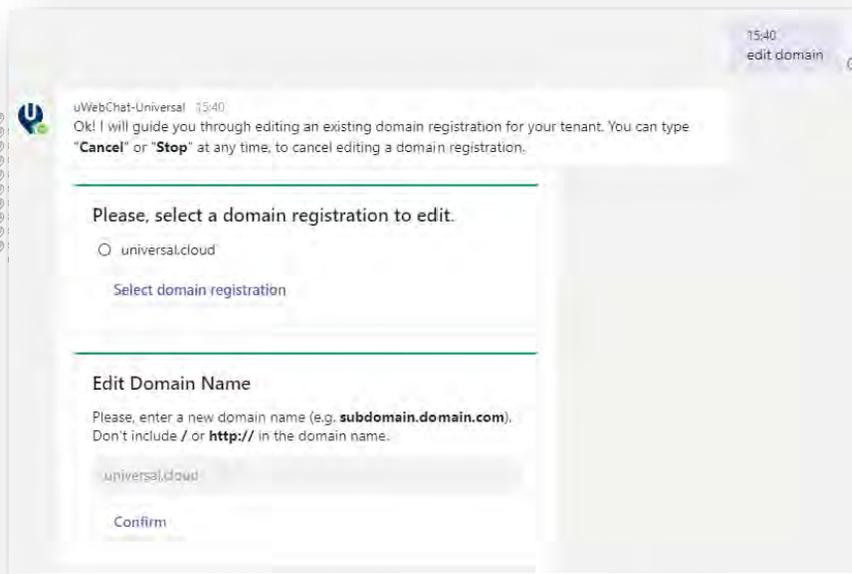
With the command **Show Domains** you can see which domains have already been registered.
With the command **Remove Domain** you can remove an already registered domain.

3.4.3   Add uWebChat to a website

To integrate uWebChat in your website, type the command **Embed** or **Embed Webchat** in uWebChat. This command will generate a code snippet which you can use to integrate uWebChat in your website.

You can either select to generate a code snippet for a direct chat with a specific agent or a code snippet that allows your customers to chat with a group (see 5. Working with agent groups). Select which agent or group you would like to embed. After that, a short manual will appear that will guide you through the steps required to embed uWebChat inside a website.
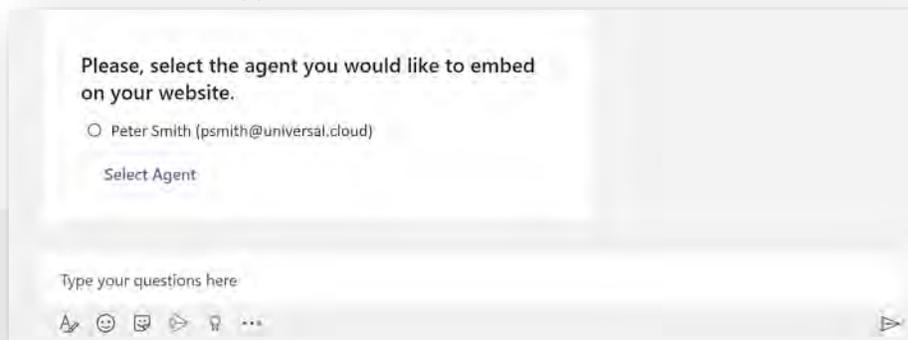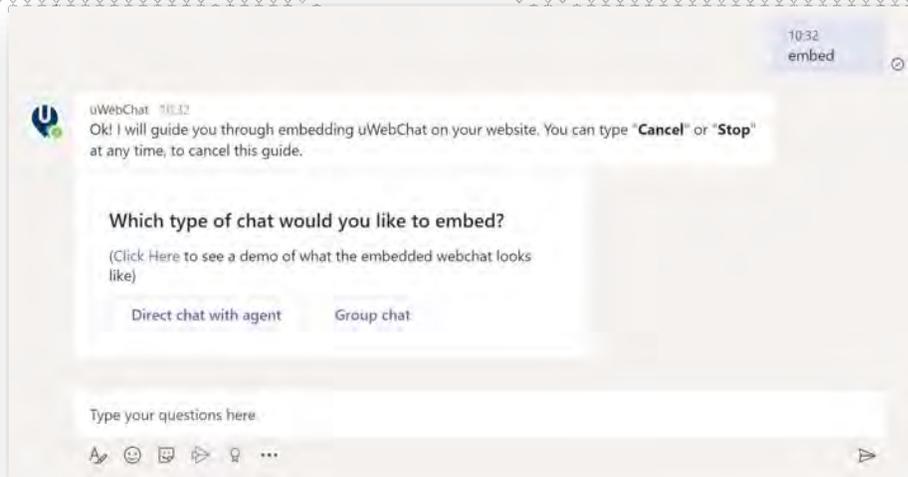
Embedding step 1

First make sure you embed the following code in the `<head>` tag of the page you want the chat window on:

```
<meta name="viewport" content="width=device-width, initial-scale=1">
<link rel="stylesheet" href="https://pool01.uwebchat.com/webchat-button.css">
<script src="https://pool01.uwebchat.com/webchat-button.js"></script>
```

Embedding step 2

After that, add the following code somewhere in the `<body>` tag of your page:

```
<div>
<button id="uwebchat-open-button" class="uwebchat-open-button" onclick="toggleWebChat()"></button>
<div id="uwebchat-popup" class="uwebchat-chat-popup">
<button class="uwebchat-close-button" onclick="toggleWebChat()">X</button>
<iframe class="uwebchat-window-style" src="https://pool01.uwebchat.com/uwebchat.html?agent=a9710e6a-41be-4f26-bb1f-ceaabd6abac1&customer=bfa1b017-fcde-4666-b224-88c8fcb47f26"></iframe>
</div>
</div>
```

Embedding step 3 (optional)

The out-of-the-box webchat button uses a default color and image. You can change these by adding extra CSS properties to the chat button.

You're done!

Type your questions here

You can copy and paste the code snippets inside the HTML code of your website.

In the screenshot below you will see uWebChat integrated into an existing website. The default out-of-the-box chat button can be found on the bottom right corner of the screen. You can customize this button by using CSS.
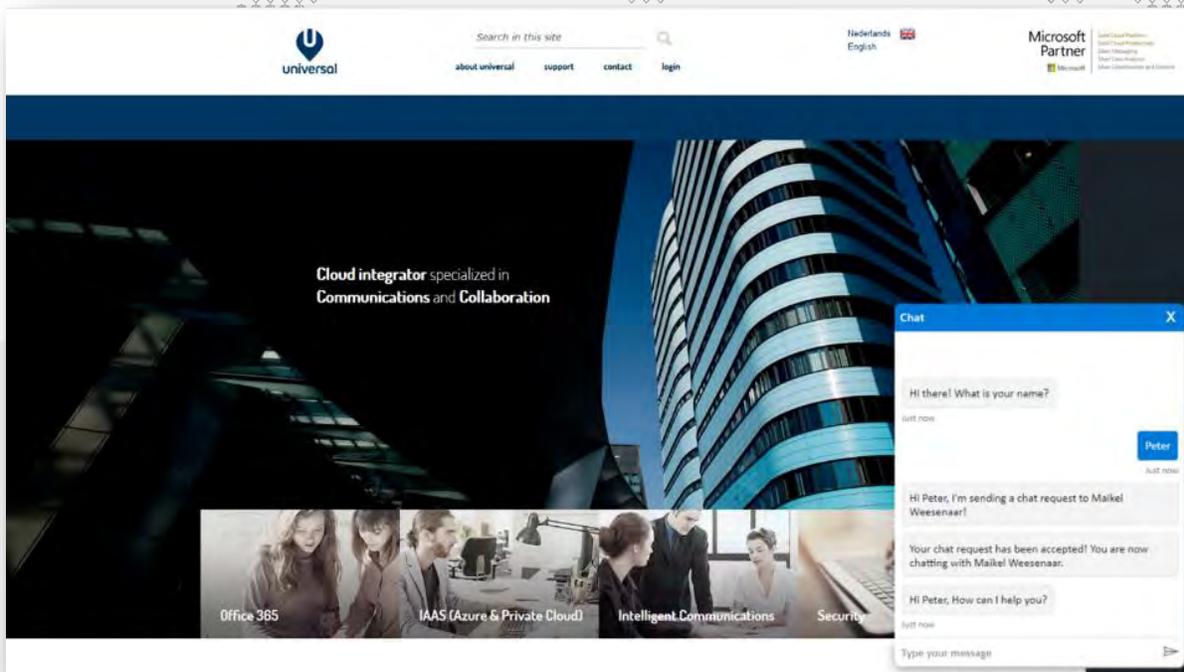
4   Basics of Chat

4.1   Website visitors

Website visitors can start a chat by clicking on the embedded uWebChat button on your website. From there they can enter in their name. After a visitor has entered in its name, a chat request will be sent to the designated agent or group.
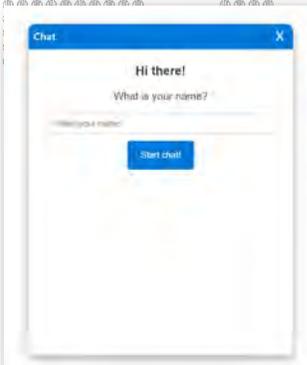
(With the free edition of uWebChat, there will be a banner at the bottom of the chat window. When having purchased a Basic, Professional and Enterprise license, the banner will not be present)
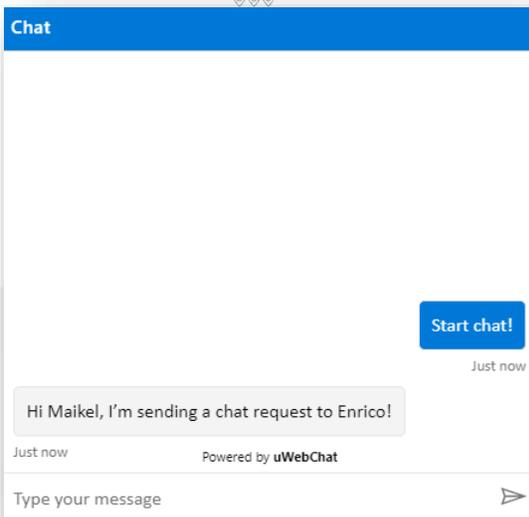
4.2   Chatting with an agent directly

When initiating a chat with an agent directly, the agent will receive a notification card in its Teams client, notifying him/her about the new chat request. The agent can choose to accept or reject the chat request. When accepting the request, the agent can chat with the chat user by typing a message and sending it to uWebChat.

4.3 Chatting with a group

When initiating a chat with an agent group, all agents assigned to the group will be hunted one by one. The order in which agents are hunted is determined by a *Hunt Order Number*. Every agent will be hunted for 15 seconds. If the agent does not accept a chat request within 15 seconds, the request will pass on to the next agent. If no agent accepts the chat requests within 60 seconds, the chat request will time-out.
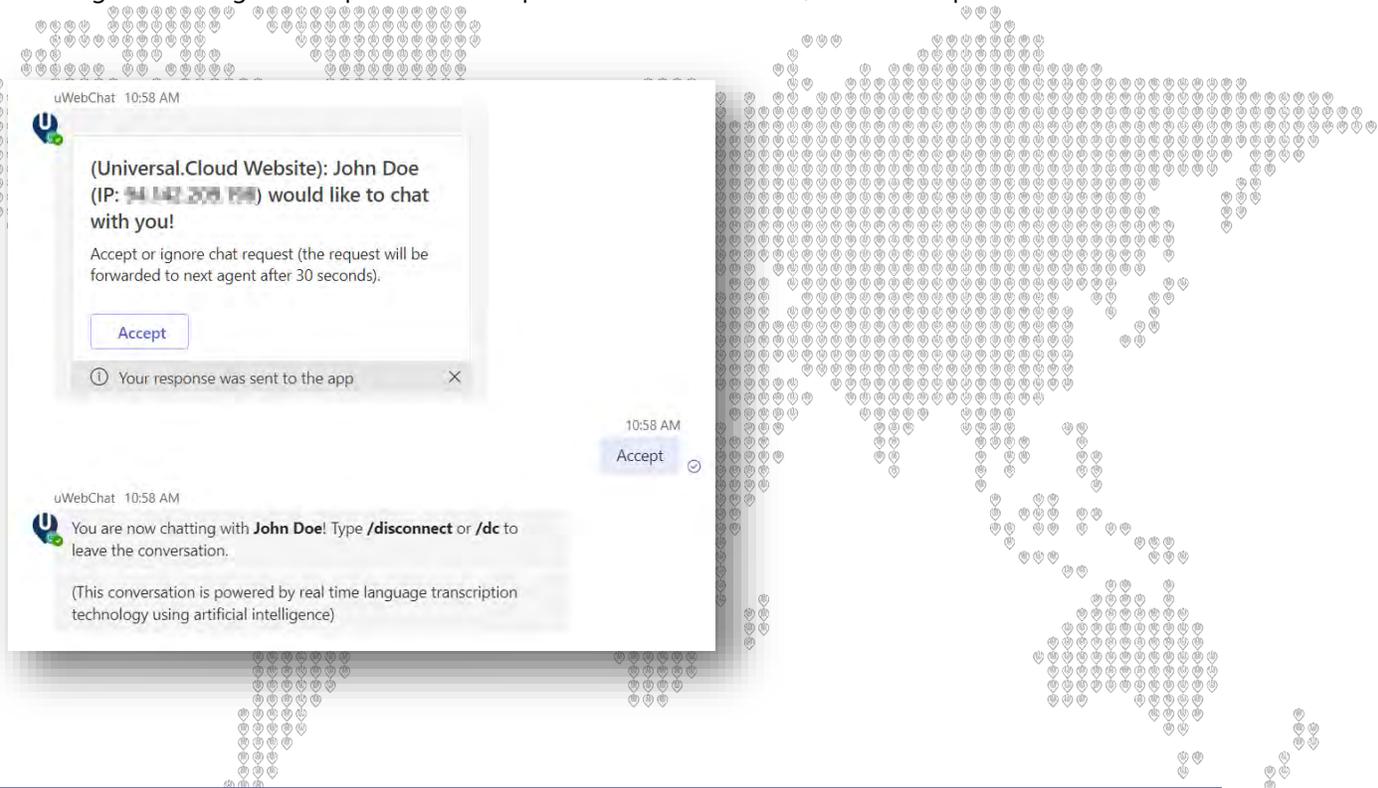
4.4 Disconnect from a chat

To disconnect from a chat, the agent can either use the ellipsis (**...**) button on a chat rich card and choose **Disconnect** or use the direct commands **/dc** or /**disconnect**.

The agent will get a card for confirming if they want to disconnect from the conversation. When ending the chat, the website visitor will receive a message saying that the conversation has ended.

Please note when using the **/dc** or **/disconnect** command, make sure to include the slash (**/**). uWebChat will recognize words starting with **/** as a command and will not send it to the chat user.

4.5   Rich Card conversations

Website visitor messages will display as rich cards to the agent using Teams. This allows the use of selecting commands using the **ellipses (...) button** on a message.
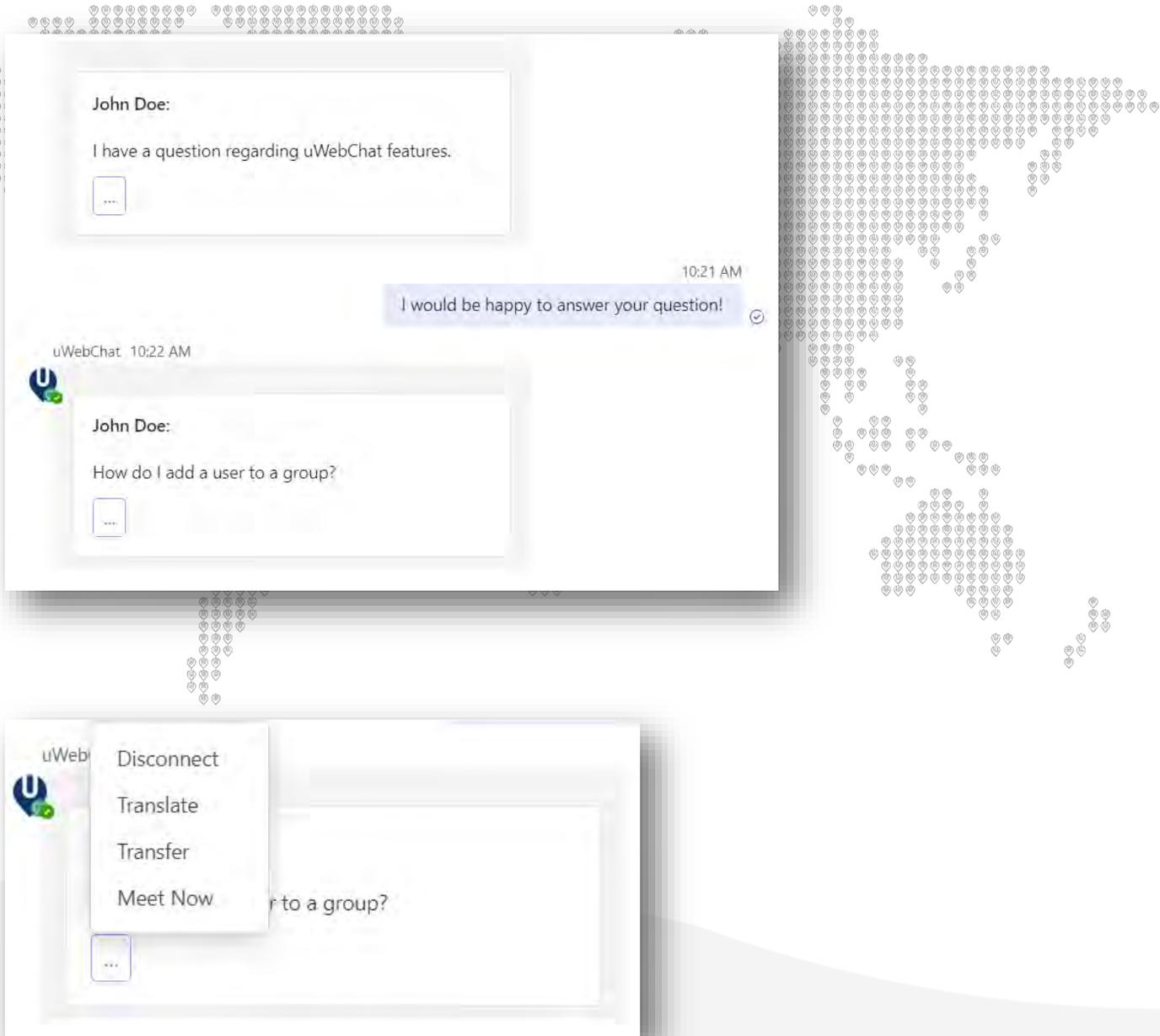
This will help agents not familiar with the text commands of the respective features such as /disconnect or /meetnow.

Available on
Microsoft AppSource

5 Features

5.1 Persistent chat

uWebChat offers persistent chat on your website(s). This means that when website visitors start a chat and navigate to other pages on your website, the current chat session will remain. Once an agent has disconnected a chat using **/dc** or **/disconnect**, the chat session will be closed on the website visitor side. This allows website visitors to start up new chat conversation on your website.

5.2 Save chat logs to OneDrive

uWebChat offers integration to Microsoft OneDrive to save the chat logs of an agent to their OneDrive. This requires a valid Microsoft 365 license to use OneDrive. A Global Administrator within your Microsoft 365 tenant must allow uWebChat to access OneDrive through the Microsoft Graph API.

To activate this feature, a conversation needs to be started with a uWebChat agent who is also a Global Administrator for the Microsoft 365 tenant. After ending a web chat conversation, the agent will get prompted to save their conversation to OneDrive. Accept this to continue.

uWebChat will then prompt for authorization. When clicking on the **Authorize uWebChat** button, the page below will be opened in a web browser. On this page, the tenant admin will be able to authorize uWebChat organization wide. This will make sure agents are able to use the save chat to OneDrive function.
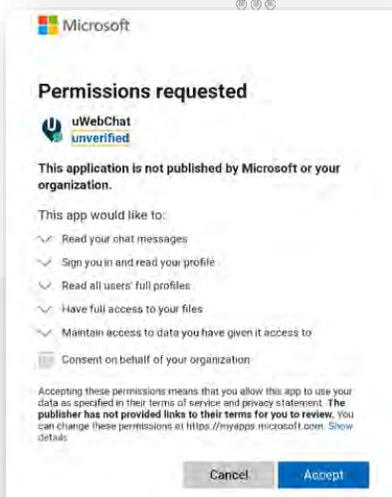
Once this has been done, every agent on your tenant is able to activate saving their chat logs to OneDrive.

After an agent ends their first chat session, uWebChat will ask if the agent would like to save chat logs to OneDrive. The agent's choice will be remembered and not prompted for again after ending future chats.
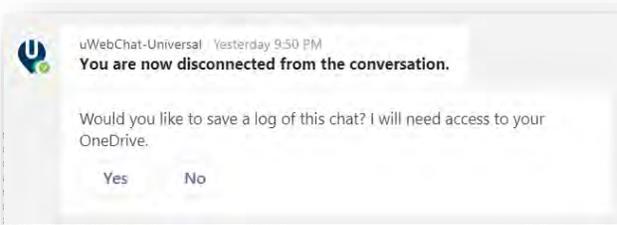
To use the save to OneDrive feature, agents will also need to approve uWebChat individually. This will permit uWebChat to use the Microsoft Graph API when trying to fetch the uWebChat chat history.

The following dialog is shown when a chat has finished:
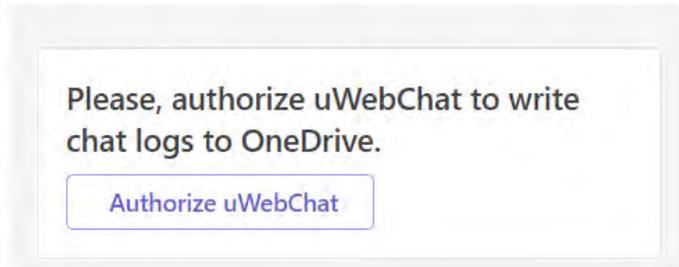
After clicking the **Authorize uWebChat** button, an agent will be redirected to a webpage within their web browser in which he/she needs to login to Office 365. When logged in, the agent needs to authorize uWebChat. After authorizing uWebChat, the agent will be redirected to a webpage in which a 6-digit code has been generated. The agent needs to copy this code and send it to uWebChat using the uWebChat chat window (within Teams). See example below:
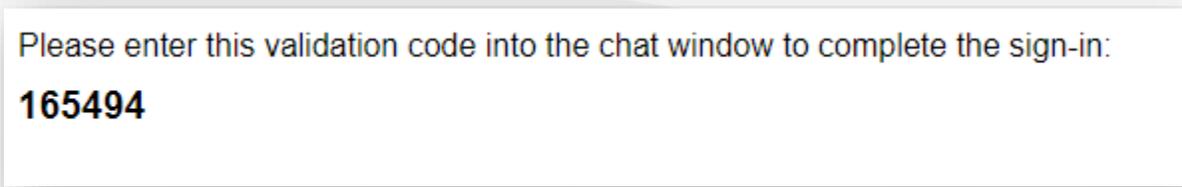
After all steps have been completed, the uWebChat Bot will remember this setting and stores it for future use. The option can always be changed in the personal settings of the agent.

*Note: uWebChat conversations are <u>not</u> stored outside your organization's security context within Microsoft 365. Chatlogs stay within the users' personal context.

The chat log files can be found in a subfolder under the user's OneDrive named **uWebChat Chat History**.

The files are **.txt** files, viewable with almost any editor. The files themselves have the following naming convention**: yyyy-mm-dd timestamp [agent email] – visitor name.txt**

5.3   Chatting via Speech-to-Text

With the uWebChat Professional and Enterprise license it is possible for chat users to communicate with Speech-to-Text. This means that chat users can talk (using speech) to uWebChat and the messages will be sent to the agent. To use this feature, chat users can click the microphone icon (see below).

The browser the website chat user uses may ask for permissions to access the computer's microphone. This needs to be allowed, before this feature works.

5.4 Real Time Translation

The Enterprise edition of uWebChat has access to the real time translation feature. This feature allows agents and chat users to see messages in their preferred language. This feature is enabled automatically when an Enterprise license has been registered.

To give your customers the option to contact you in multiple languages, simply setup multiple groups and assign a designated group language. See **Real Time Translation** for more information.

After assigning a group a language, you can also set the option if your website visitors will be prompted which language they would like to use, based on either their browser language or the set group language. See **Visitor Language Prompt** for more information.

Agents can set their preferred language. Once this has been set, all messages from website chat users will appear in the preferred language of the agent. See **Agent personal settings** for more information.

It is possible that an agent wants to disable real-time translation during a conversation. This might be because your agent is comfortable using multiple languages. During a chat with a website user, the agent can use the **/translate** command to either enable or disable real-time translation. The website user will not see the command in their chat. Changing this setting during a chat does not translate previously sent messages.

5.5 Customize Look and Feel

It is possible for you to change the look and feel of uWebChat. There are two ways you can achieve this:
- Changing the embedded button on your website
- Changing colors for your chat window for a Group chat

5.5.1 Changing the embedded uWebChat button on your website

When embedding uWebChat to your website (See **Embed uWebChat on a website**), you are able to change the look and feel of the button and it's placement. This can be done through CSS. When you receive the code snippet for embedding uWebChat to your website, you can substitute your own style sheet (CSS file) to change the look and location of the button.

5.5.2 Changing colors in Group Chat

You can change the colors of a group chat to match your organization's style guidelines. This requires a Professional or Enterprise license. See **Group styles** on how to set this up.

5.6 Leave a Message

When a website visitor wants to contact you, but there are no agents available or you are outside of business hours, there is the option to leave a message. These messages will be received by agents to read later. See **Leave a Message Prompt** for more information.

5.7   Meet Now – Teams Meetings

Starting from the Basic license, agents are able to start Microsoft Teams meetings with your website visitors during a chat. Your website visitors can chat with your agents either by using their existing Teams account or through their browser without an account.

During a chat, agents are able to start a meeting by using the **/meetnow** command. A rich card will appear for both the agent and the website visitor to invite them to a Teams meeting.
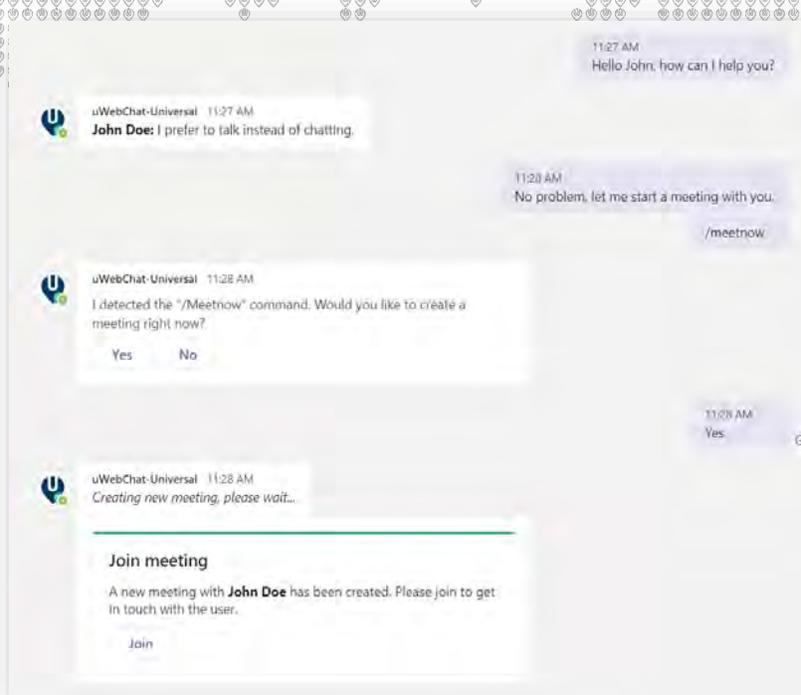
When the agent joins the meeting, the standard meeting workflow for Teams applies, see Microsoft documentation for more information. https://support.microsoft.com/en-us/office/join-a-teams-meeting-078e9868-f1aa-4414-8bb9-ee88e9236ee4

5.7.1 Authorize Graph API per Agent

When an agent starts a meeting using the **/meetnow** command for the first time they will be prompted to authorize uWebChat to make use of the MS Graph API. The Meet Now feature requires the ability to start a meeting from the Graph API.
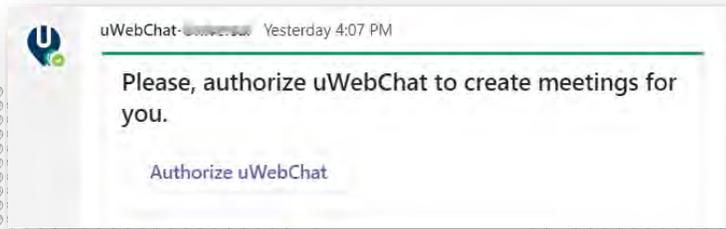
When an agent clicks the **Authorize uWebChat** button, a request is sent to authorize the agent to start meetings through uWebChat. If the agent has already logged in with their Microsoft account on their default browser, no further action is needed, and you will get a confirmation message that the authorization has been completed.

If the agent is not logged in to their Microsoft account when clicking the button, they will be brought to a page requiring them to login. After the login, a page appears displaying a numeric code. Simply enter the numeric code into uWebChat to complete the authorization.

5.8 Ban uWebChat visitors

Starting from the Basic license, agents are able to ban uWebChat visitors. When agents receive unwanted chat requests from possible spammers, the **/ban** command can be used to temporarily block the IP address of the visitor.

After this command, the IP address of the visitor will temporarily be banned for all users within your uWebChat tenant. When banning an IP for the first time, it will be banned for 7 days. Subsequent bans are calculated on the amount times that specific IP has been banned.
The penalty is the future date calculated by the following formula:
- P = 7 + (number of times an IP has been banned * 7)

So, the second time an IP is banned, it will last 14 days, the third time 21 days and so forth.

uWebChat-Universal 4:34 PM
Ok, I've banned the user and disconnected this chat session.

5.9   Idle conversation reminders

When ending a conversation with a website visitor, the agent is required to manually disconnect the conversation using **/dc** or **/disconnect**. When the agent does not disconnect from the conversation, they will be unavailable for future chat requests.

To remind agents to disconnect, the Idle Conversation Reminders feature was introduced. If a website visitor has not sent a message within 5 minutes, a reminder message will be sent to the agent:
No response received for 5 minutes – please disconnect if needed or keep the chat open
When the visitor replies, the 5-minute timer will be reset. If the visitor does not respond, the agent will receive the reminder every 5 minutes.

5.10 Reporting

To get statistics about your uWebChat environment, such as the number of groups, agents and the number of conversations there were in the past, you can use uWebChat Reporting.

This can be accessed by going to **https://report.uwebchat.com/**. You can sign in with the same Microsoft account that is currently an uWebChat admin and you can view the required information. Sign in using the button **Sign in with Microsoft**.

After signing in, navigate the different tabs on the bottom of the page to lookup your preferred information.

5.11 Enable additional fields

When embedding uWebChat to your website, your website visitors will have the option to start a chat by first entering their name. It is now possible to enable additional fields for your website visitors and even make them required.

We provide the following fields:
- E-mail
- Company
- Phone
- Country

You can enable these fields with the following steps. When you use the **Embed** command to generate code to embed to your website, you change the code to include the new fields.

For example, here is a code snippet of the embedding code without the custom fields:

```
<iframe allow="microphone" class="uwebchat-window-style"
src="https://pool01.uwebchat.com/uwebchat.html?agent=11111111-AAAA-2222-BBBB-
333333CCCCCC&customer=11111111-AAAA-2222-BBBB-333333CCCCCC"></iframe>
```

If you wish to add additional fields, change the following. The changes are marked as **bold text** in this example.

```
https://pool01.uwebchat.com/uwebchat.html?&fields=email,company,phone,country&agent=1
1111111-AAAA-2222-BBBB-333333CCCCCC&customer=11111111-AAAA-2222-BBBB-
333333CCCCCC></iframe>
```

If you wish to make one or more of these fields required, add the **&required=** field.

```
<iframe allow="microphone" class="uwebchat-window-style"
https://pool01.uwebchat.com/uwebchat.html?&fields=email,company,phone,country&require
d=email,company&agent=11111111-AAAA-2222-BBBB-333333CCCCCC&customer=11111111-AAAA-
2222-BBBB-333333CCCCCC></iframe>
```

5.12 Avatars

Microsoft 365 allows your users to set a profile picture (avatar) to their account. This picture will be visible in Microsoft 365 applications such as Microsoft Teams. You can enable uWebChat to use the same avatar for your agents. This allows your website visitors to see the avatars of the agent they are having a conversation with.

To enable this feature, the following steps need to be made:
- A uWebChat administrator that is also a Microsoft 365 administrator, needs to enable uWebChat to allow agents to use their Microsoft 365 avatar. You may be prompted by the Microsoft 365 Graph API to allow uWebChat to read the avatars from your users' profiles.
- A uWebChat agent needs to enable the use of avatars in their uWebChat settings.

Example of avatar in action:
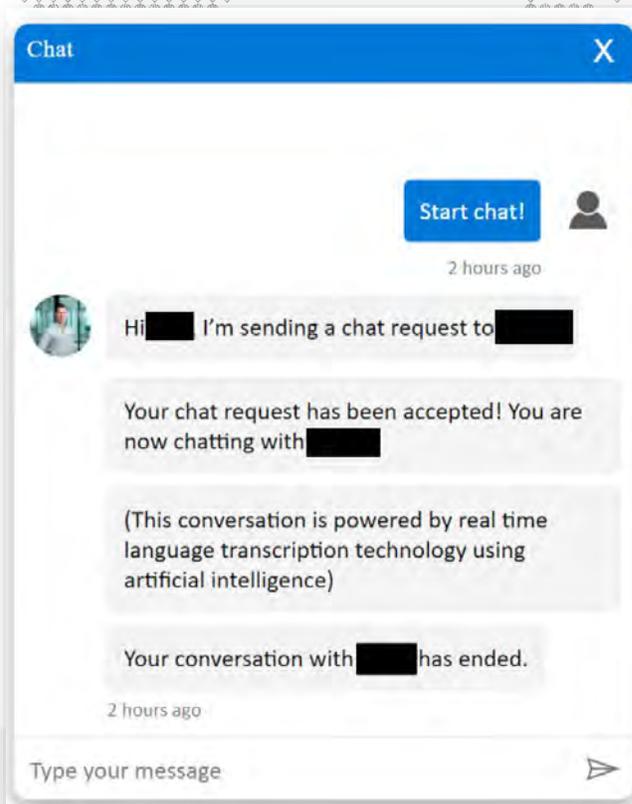
5.12.1 Enable avatars as an administrator

We will start with the instructions on the actions to perform as an administrator.

Enter the **help** command in uWebChat to get an overview of options. Under **Administrator Actions**, select **Manage Customer Settings**. In the next prompt, select **Avatar**.

Avatar

Please, select to allow agents to use their MS Teams profile as an avatar within chats for your tenant. Current value: True

Select an option ⌄

Confirm
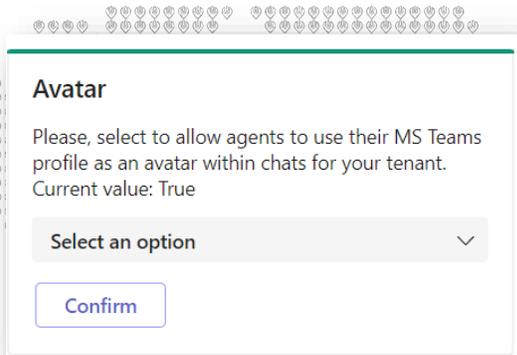
Select **Yes** in the dropdown field to enable agents to set their avatars. You may receive a prompt to authorize the use of the Microsoft 365 Graph API to retrieve your avatar settings.

5.12.2 Enable avatar as an agent

Use the **settings** command or **help > Open My Settings**. Go to **Avatar**.

Which setting would you like to edit?

Chat logs | Language | Translation
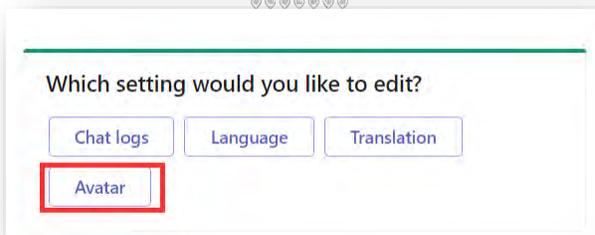
Avatar

Set the value in the dropdown menu to **Yes**, to allow uWebChat to use your Microsoft 365 avatar.

Avatar

Please, select if you want to use avatars within your chats. Current value: False

Yes ✕

Confirm
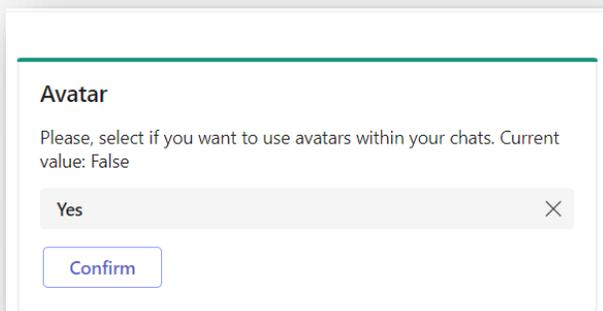
You will be asked to authorize uWebChat to the Microsoft 365 Graph API, so that it can read your avatar.

Please, authorize uWebChat to read your profile.

Authorize uWebChat
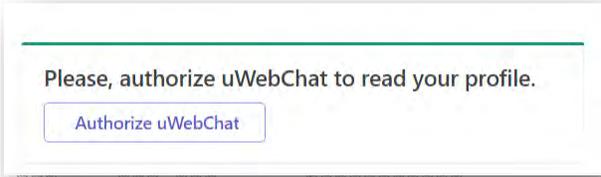
A browser window will open. Login with your Microsoft 365 account to enable the authorization.

5.13 Transfer conversations to another agent

During a conversation with your website visitor, there is a possibility that the agent that has started the chat is not the right individual to handle the question or request. uWebChat offers the transfer function to transfer a conversation to another agent within the same uWebChat group.

During a conversation, agents can use the **/transfer** command to start the process. They will receive a prompt to continue or cancel the transfer.
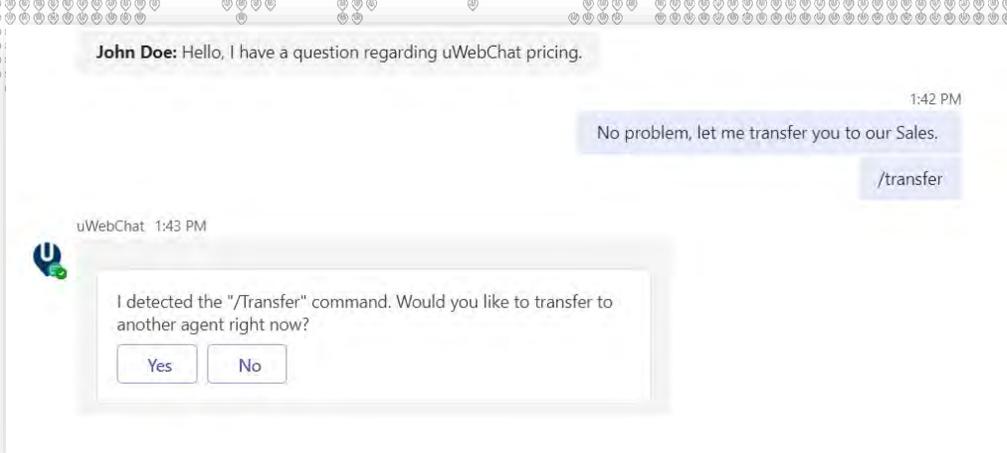
If the agent continues with the transfer, they will receive a prompt where they can select other agents in a dropdown menu.
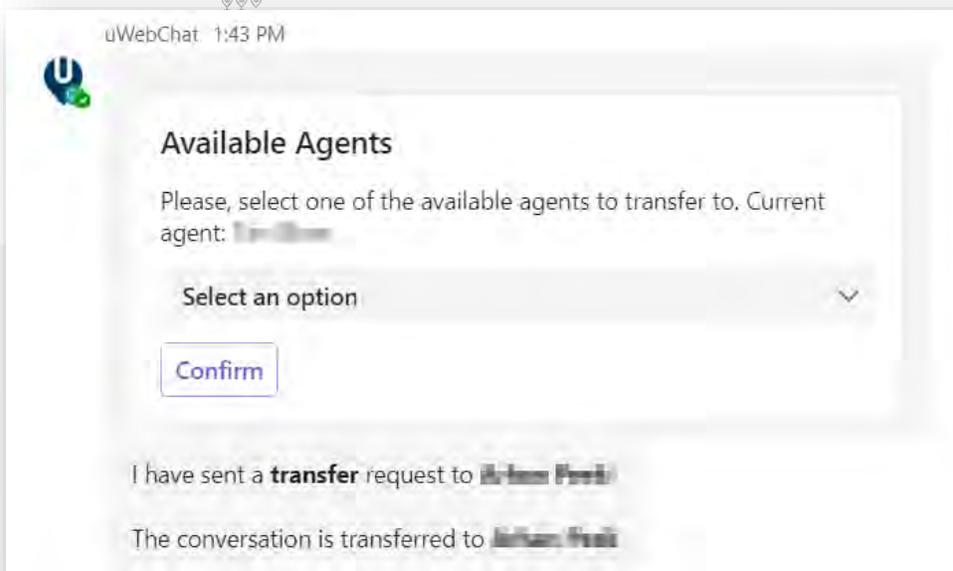
The other agent will receive a request to accept the transfer.

Finally, the original agent will receive a message that the transfer has been completed and disconnect from the original conversation.
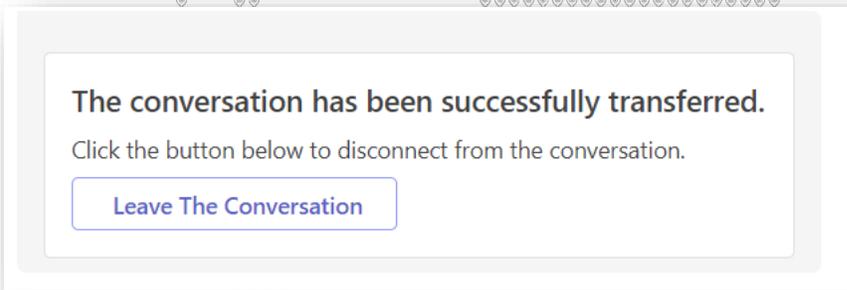
6 Managing agents

Once you have set up uWebChat, you might want other users in your tenant to start using uWebChat as well. This chapter will explain how to register new agents and how to manage them.

6.1 Installing uWebChat for additional agents

Once you have setup your initial uWebChat tenant, other agents can be added to use uWebChat. First, they must install uWebChat inside either their Teams desktop client, or within the web client of Teams.

uWebChat can be installer per user by simply opening Teams, clicking on the ellipsis (**…**) button on the left side and searching for uWebChat.

From there, they can click on the uWebChat button and then clicking **Add**.
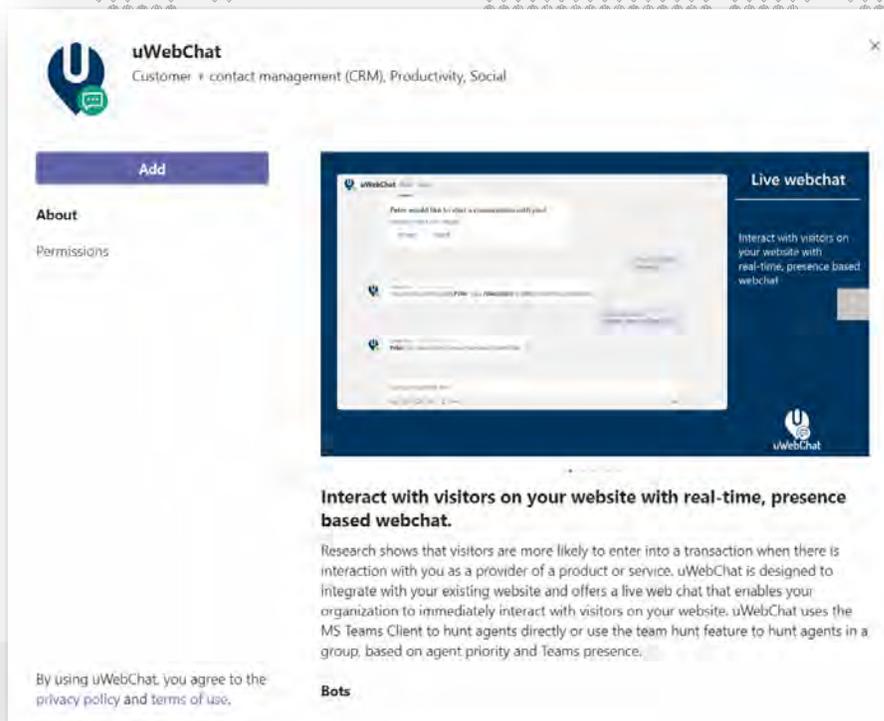
Once uWebChat has been added, it may be useful for the agent to pin the uWebChat application to the left bar of Teams, so that it is always available. Simply right-click on the uWebChat icon on the left bar and select the **Pin** option.

If your users are unable to add uWebChat to their Teams, this might be related to a permission issue on your Microsoft 365 tenant. By default, all users can add applications to their Teams client. If you or your IT team have setup limited permissions for installing apps, it may be required to whitelist uWebChat. This can be done from the Teams Admin Center by an administrator that has either the Teams Admin or Global Admin role. See this Microsoft article for more details:" https://docs.microsoft.com/en-us/microsoftteams/admin-settings

6.2   Register other agents

To register new agents in uWebChat, the Teams user you want to add needs to start a conversation with uWebChat. This will initiate a registration dialog the user needs to complete.

Please note: the user you want to add needs to be a user in your Teams tenant.

After the user has registered himself as an agent in uWebChat, the admin agent will receive a message as shown in the image below.

The admin can choose to activate the agent or remove its registration from uWebChat. If the admin chooses to activate the agent, the agent will have access to uWebChat.

Admin agents can activate and remove agents at any time by using the **Activate Agent** and **Remove Agent** commands.

6.3   Managing agents

There are three commands that are designed to manage the agents in your uWebChat tenant:
- **Show me all agents** – This shows all the agents in your uWebChat tenant, whether they are active or not.
- **Activate agent** – Guides you through activating an agent.
- **Remove agent** – Guides you through removing an agent.

6.4 Agent personal settings

Every agent has personal settings which the agent can manage by themselves. An agent can change three options:

- **Chat logs –** Allows the agent to enable or disable the saving of chat logs to OneDrive
- **Language –** Allows the agent to select a primary language. When website users talk to the agent in a language different than the set primary language, the agent will see the messages translated to their set primary language.
- **Translation –** Enable or disable the use of real time translation.
- **Avatar –** Enable or disable the use of an avatar being visible to your website visitors. This will use the avatar you have setup in your Microsoft 365 account.

The agent can use the command **My Settings** or **Settings** to change these options.

Which setting would you like to edit?

Chat logs   Language   Translation

Avatar
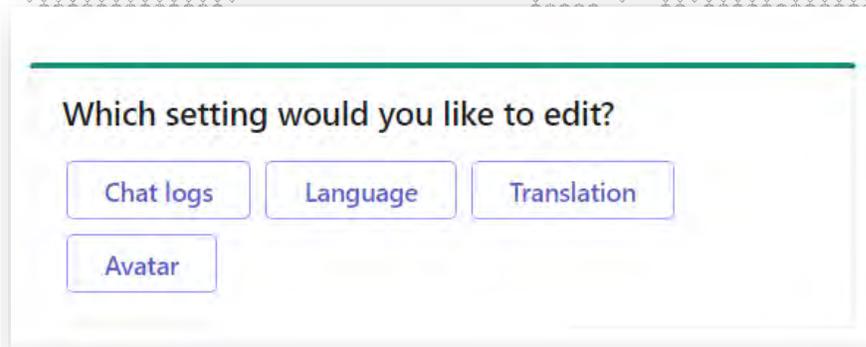
7 Managing groups

A group is a collection of agents which can be hunted in a pre-defined order. When a chat user initiates a group chat, uWebChat will hunt the first available agent in that group (using the pre-defined order).

7.1 Managing groups

You can use the following commands to manage groups:

- **Show groups** - Show all the groups you created (if there are any).
- **Add group** - Guides you through creating a new group.
- **Remove group** - Guides you through deleting an existing group.
- **Edit group** – Guides you through editing group properties you set during the creation of the group.
- **Create style** – Create a style for the group. For example: in which colour the group is shown. This can later be changed with the command **Edit Group**.

7.2 Group styles

If you own a Professional or Enterprise license, it is possible to change the appearance of a group chat on your website. You can for example change the background colour of the chat window, the text colour of the agent-messages and the text-colour of the chat user's messages.

The following commands are available for managing styles:

- **Show styles** – Show a list of all created web chat styles
- **Create style** – Create your own style
- **Edit style** – Edit a created style
- **Remove style** – Remove a created style

When creating or editing a style, you will see a list with colours which you can change.

Using the **Preview web chat** button will show you a preview image of your settings. You will be asked if you wish to save your changes. When a style is applied, it will take about 15 minutes before this will be visible in your web chat. When a style is deleted, the default uWebChat style will be applied.

7.3   Create group

When creating a group with the command **Add Group**, the first thing that will be asked is to enter a group name. After that, you will be asked if you wish to enable certain features. These can always be changed by using the **Edit Group** command. This manual will cover these features in detail in other chapters. You will be asked to select:

- **Group Language** – Set the preferred language of the group.
- **Prompt for visitor language** – Decide whether website visitors get to choose between the group language or their browser language.

- **Prompt for leave a message dialog** – Decide if the Leave a Message functionality should be enabled for the group. If there are no available agents or the group is outside business hours, website users can leave a message that can later be picked up by an agent.
- **Prompt for what style to use** – Able to select a custom group style for the appearance of your chat window.
- **Opening Hours or Always Open** – Define the availability of the group. Always Open makes your group available, regardless of time. Opening Hours lets you define the hours your group is available.
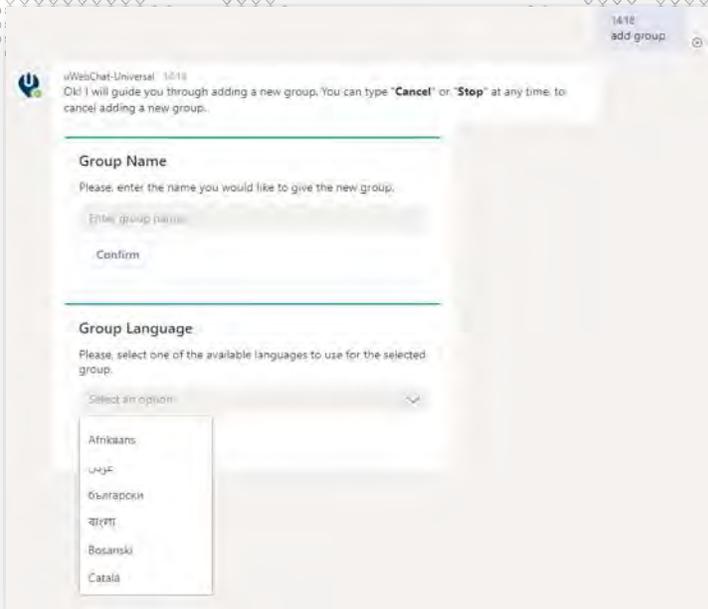
The language of the group can later be changed with the command **Edit Group**.
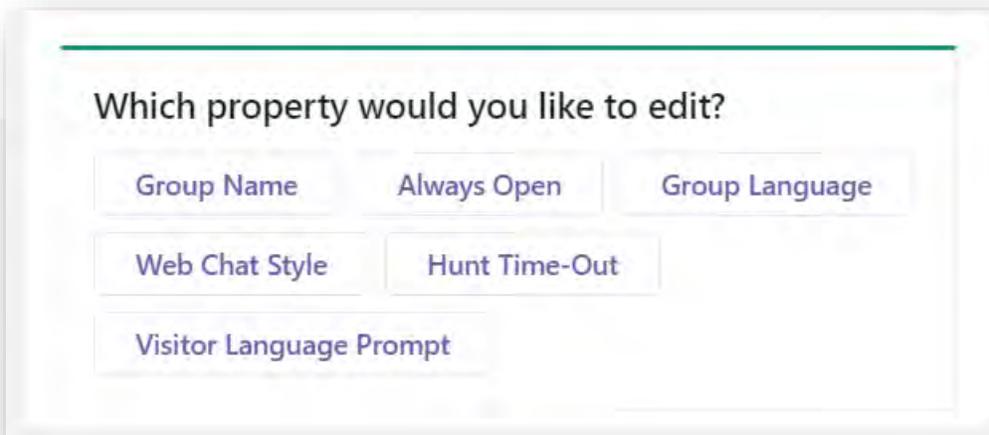
7.4   Real Time Translation

The Enterprise edition of uWebChat has access to the real time translation feature. This feature allows agents and chat users to see messages in their preferred language. You can decide what language your group is during the creation of a group or you can use the **Edit Group** command and selecting the **Group Language** to change this later.

When a chat user has started a group chat, the web chat window will be translated to the chosen language of the group (below: Dutch).
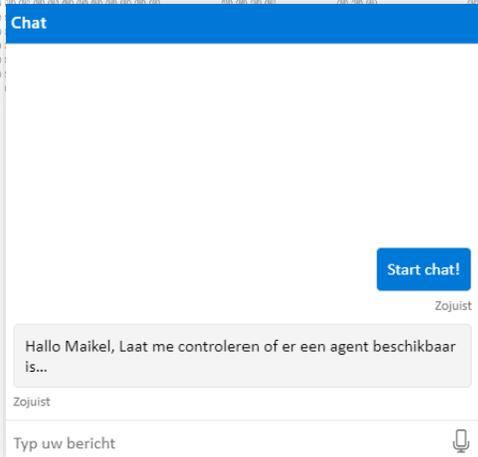
The screen where the chat user must enter his/her name will always be translated to the same language that is set in the chat user's browser (below: English).
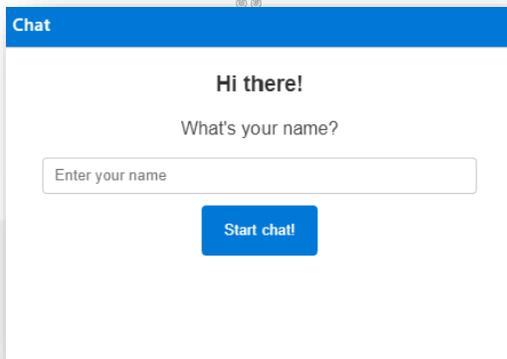
It is possible that an agent wants to disable real-time translation during a conversation. This might be because your agent is comfortable using multiple languages. During a chat with a website user, the agent can use the **/translate** command to either enable or disable real-time translation. The website user will not see the command in their chat. Changing this setting during a chat does not translate previously sent messages.

7.5   Always Open vs Business Hours

When creating or editing a group, you have a choice to either select Always Open or Business Hours. Always Open makes your group available, regardless of time. Opening Hours lets you define the hours your group is available. See **Managing opening hours** for more information.

7.6   Visitor Language Prompt

When creating or editing a group, you have the choice to select either **Yes** or **No** to the Visitor Language Prompt feature. This feature lets website users decide whether they can contact the group in their browser language or use the group language that has been set.
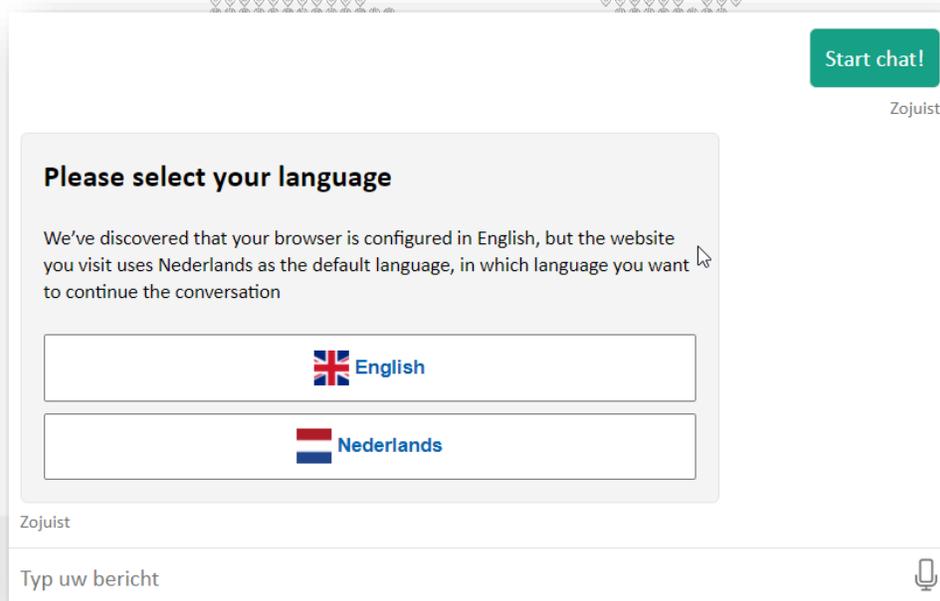
Messages will be translated to the website user's preferred language.

7.7 Leave a Message Prompt

It is possible that a website user wants to chat with an agent, but nobody is available, or the group is outside of Business Hours. You can enable Leave a Message Prompt when creating or editing a group. When this feature is enabled, website users can leave messages to your agents. Agents can acknowledge these messages at their preferred time.

The website user will get the following message.
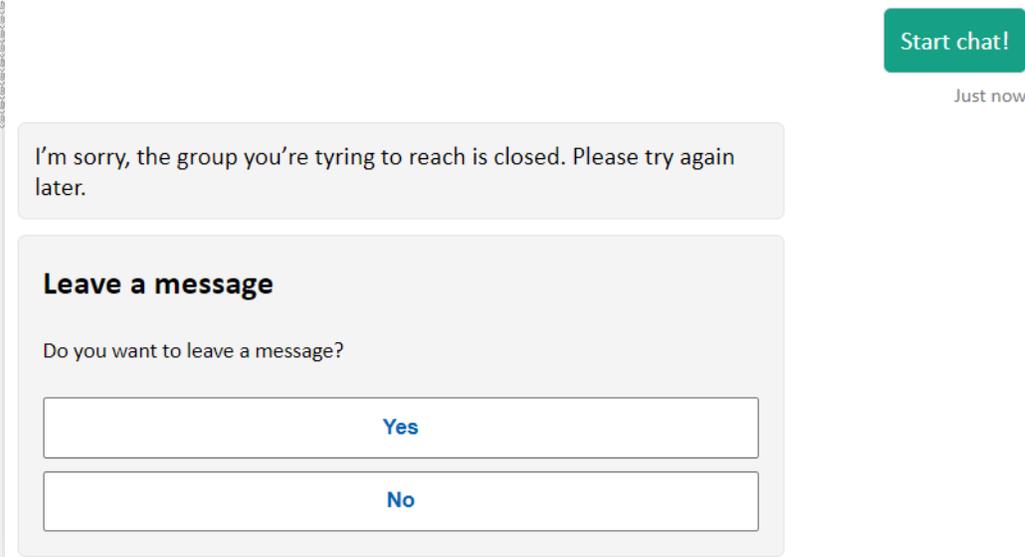
When they select **Yes** to leave a message, they will receive a form where they can register their details.
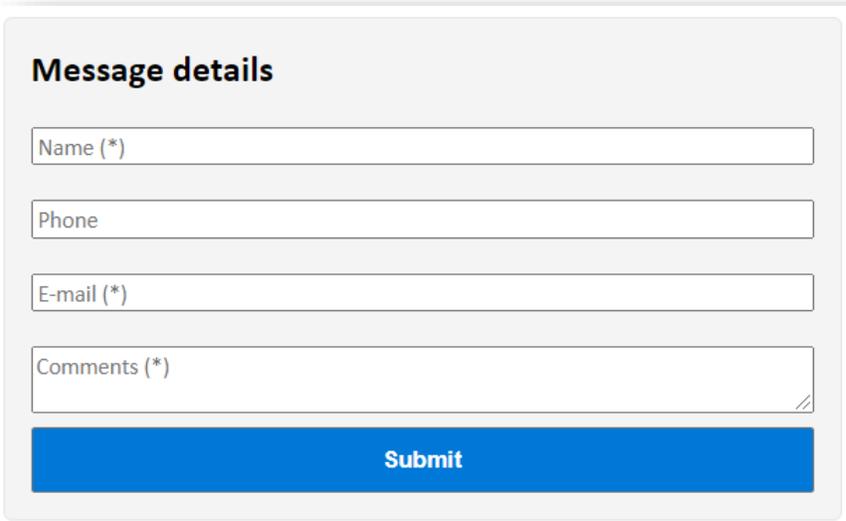
After filling in and submitting the form, all agents that are member of the group will receive a message in the form of a rich card.

When an agent presses the **View and acknowledge** button, they will see the message that was left behind.
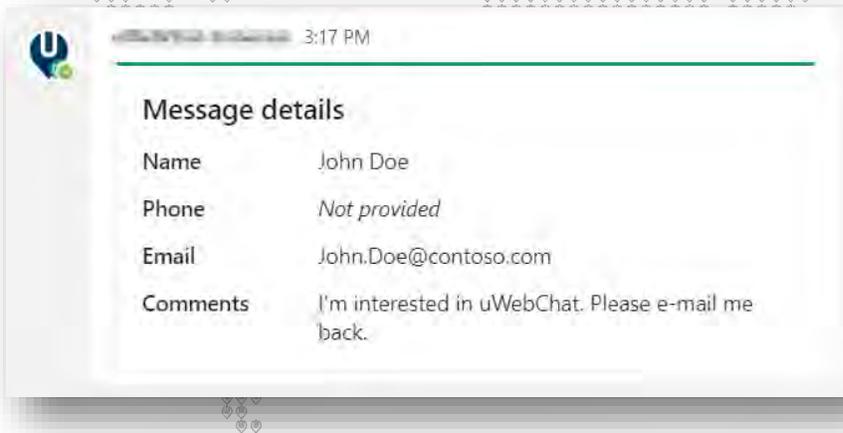
Once a message has been acknowledged, other agents cannot receive the message anymore. They will get the notification below.
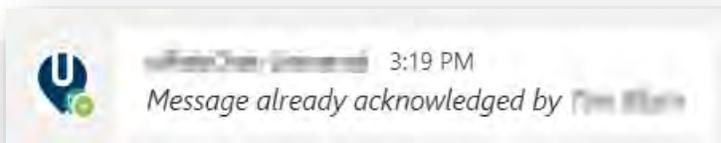
Multiple messages are supported. Agents will receive a unique notification per message.

7.8 Managing group members

Group members represent agents that are assigned to a specific group.

You can use the following commands to manage group members of a group:

- **Show members** - Show the members (agents) of a group.
- **Add member** - Guides you through adding an agent to a group.
- **Edit member** - Guides you through editing group member properties you set during the creation of the group member.
- **Remove member** - Remove an agent from a group. Removing an agent from a group does not delete the agent itself.

7.9 Group hunting methods

To reach agents for chat conversations, we offer three hunting methods: **Default, Round Robin** and **Simultaneous Hunting**

Default provides hunting based on the *Hunt Order Number* assigned to agents. A group member with the lowest number (e.g. 1) will be hunted first. If the agent did not accept a chat request within 15 seconds, the request will pass on to a group member with a higher number. If nobody accepted the request within Total Hunt Time-Out time, the hunting stops (these time intervals can be changed using Hunt Time-Out settings).

If you have multiple agents with the same priority, those agents will be hunted based on agent creation date.

Round Robin provides hunting based on the Hunt Order Number assigned to agents. However, it also hunts based on the last agent that has accepted a chat. The last person that has accepted a chat will be excluded from the hunting unless there are no other agents available.

Simultaneous Hunting ignores all Hunt Order Numbers assigned to agents. Instead, it will hunt all agents in a group simultaneously, until one agent accepts the chat.

7.10 Managing opening hours

In the free version of uWebChat, all groups will be *Always Open*. This means that website visitors can hunt the group any time there is an agent available. Starting from the professional version of uWebChat, your groups will be able to have opening hours. By using opening hours, you can define at what times the group should be open and closed. The group can only be hunted while it is open.

You can use the following commands to manage opening hours of a group:

- **Show hours** – Show all opening hours assigned to a group.
- **Add hours** – Guides you through adding opening hours to a group.
- **Remove hours** – Guides you through removing opening hours from a group.

7.11 Managing Hunt Time-Out

When a website visitor starts a chat, uWebChat will try to find available agents to accept the chat request. This process is called **hunting**. You can adjust the duration of the hunting process per group.

Use the **Edit Group** command and select **Hunt Time-Out**. From here you will get a rich card with available options.
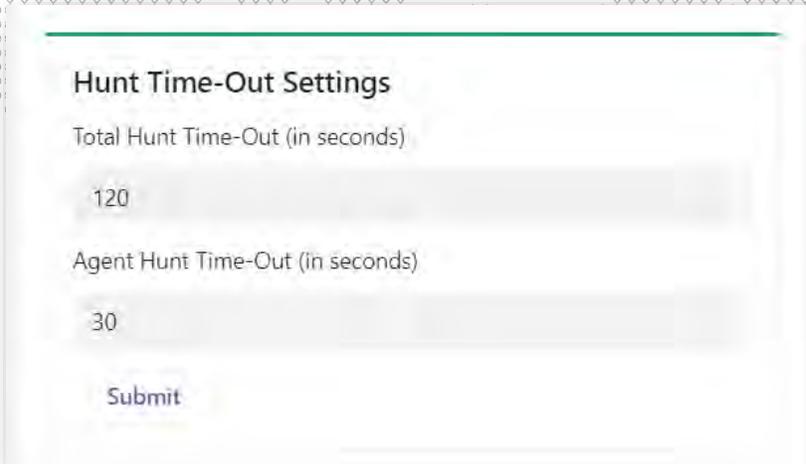
Hunt Time-Out Settings

Total Hunt Time-Out (in seconds)

120

Agent Hunt Time-Out (in seconds)

30

Submit

Total Hunt Time-Out (in seconds) – The maximum amount of time the hunting process can last. After this period has expired, website visitors will receive a message that there are no agents available and if they would like to leave a message (if enabled).

Agent Hunt Time-Out (in seconds) – The maximum amount of time an agent is hunted before switching to another agent. If you have multiple agents within a group, you can decide how long the hunting process will last per agent. After this period has expired, uWebChat will forward the chat request to the next agent in the group.

8 Agent and group presence

uWebChat uses an agent's Teams presence to determine whether the agent can be hunted. This chapter explains how agent presence in uWebChat works and how this effects agent groups.

8.1 Agent presence

When registering yourself as an agent, uWebChat will try to monitor your Teams presence based on your email address. By having information about your presence, uWebChat is able to prevent chat users from starting a conversation with you whenever you are unavailable.

The table below describes in what scenario's an agent can be hunted by chat users.

MS Teams / S4B status	Can be hunted?
Online	YES
Busy	YES
Do not disturb	NO
Be right back	NO
Away	NO
Offline	NO

Exceptions to the above scenarios:
- When an agent issued the **Unsubscribe** command to uWebChat, he cannot be hunted by chat users, even if his status is ONLINE or BUSY.
- When an agent is already having a conversation with a chat user, he cannot be hunted by other chat users.
- When no MS Teams presence can be fetched by uWebChat, it will be ignored. Chat users will always be able to start with the agent unless the agent unsubscribes.

8.2 Group presence

To determine if chat users should be able to hunt an agent group, groups have their own presence. This presence is determined using the conditions described in the table below.

Condition	Status
Contains available group members	AVAILABLE
Group members are unavailable	BUSY
Outside of opening hours (does not apply when group is *Always Available*).	AWAY

A group can be hunted if any agents assigned to the group are available. When using opening hours, the group can only be hunted when the current time is between the defined hours.

9 Upgrading your licence

After using the free version of uWebChat, you might want to upgrade to a paid subscription so you can benefit from extra features (see 1.4. uWebChat editions). This chapter will explain how to upgrade your current uWebChat subscription.

9.1 Upgrading free license

In order to upgrade your uWebChat subscription, you can either type **Upgrade** or **Upgrade Subscription** in uWebChat.

As an admin, you can also say the following commands to me:
- "**Upgrade subscription**" or "**Upgrade**": Upgrade your uWebChat subscription by entering a license key.

After the command has been entered, a rich card will appear, prompting you to enter an existing key or to acquire a new key.
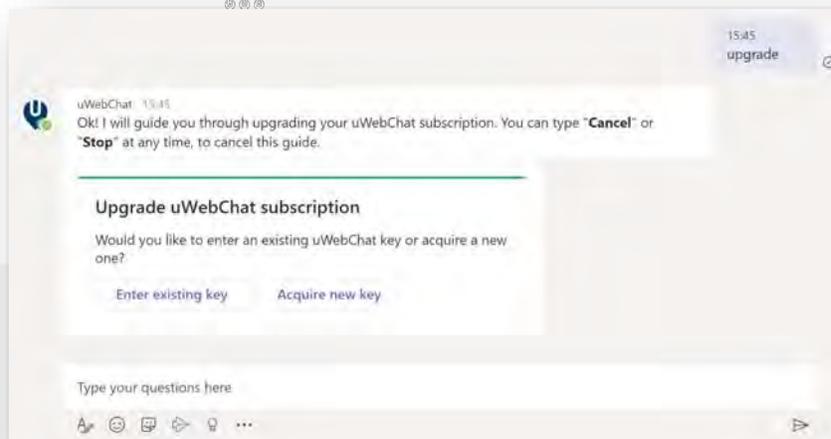
If you choose **Enter Existing Key**, a new rich card will appear in which you can activate your license key.
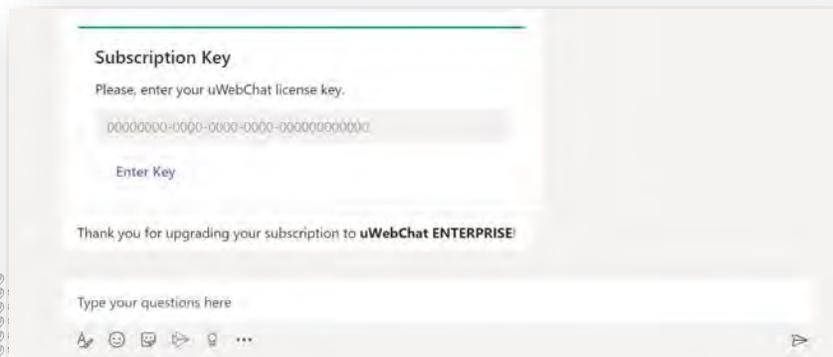
If you choose **Acquire New Key**, a link will appear which will redirect you to Microsoft AppSource. On this page, you can acquire a new licence key. Once the licence key has been acquired, you can type **Upgrade** in uWebChat and enter the newly acquired licence key.

9.2   Purchase additional licenses

If you have purchased one of the commercial editions of uWebChat and you wish to purchase additional licenses to expand the maximum amount of the agents, please follow the following steps.

1. On the AppSource store, purchase the amount of licenses of the **total** amount of users that will be using uWebChat.
2. Provide the new license key to support@universal.cloud with the request to change the license key due to additional licenses.
3. Once you have received confirmation from support@universal.cloud that your license has been changed, you can cancel your old order on Microsoft AppSource.

9.3   Change commercial license type

If you have purchased one of the commercial editions of uWebChat and wish to change the license type (example: Basic to Enterprise), please follow the following steps.

In Microsoft AppSource, cancel your existing order and go through the process to order licenses that you wish to use. Once you have received your license key, please contact support@universal.cloud to help you activate your new purchased key.

If you have any issues during this process, please contact support@universal.cloud.

10 FAQ & Troubleshooting

I want to activate my uWebChat subscription, but I'm getting the error "Could not fetch your subscription. Please try again later".
Please contact Universal IT support when you see this error.

None of the uWebChat commands seem to work. Not even "Help". I'm stuck in a dialog or rich card.
You might still have an active dialog open. Type "**Stop**","**Cancel**", "**Quit**" or **"Close"** to exit the current dialog. After you have stopped a dialog or rich card, use the **"Help"** command to see available commands.

I cannot create more groups.
This is a subscription limitation. Please refer to **uWebChat editions** to see your subscription limitations.

I do not remember the command for…
Type **Help** in uWebChat to find a list of commands you can use in uWebChat.

I want to change the administrator for my organization.
Please contact Universal IT support (support@universal.cloud) to perform this action.

I have lost my licence key after purchase.
Please contact Universal IT support.

Is it possible to mix commercial licenses? For example, 5 Basic and 5 Enterprise licenses?
This is not possible. If you have accidently ordered different licenses from the AppSource store, please cancel the order of the license type that you do not wish to have and create a new order.

10.1 Exit current dialog or Rich Card

If you are stuck in a dialog or Rich Card when talking to uWebChat, you can always use specific commands to return to a neutral state. To exit a current dialog or Rich Card, you can always type **Stop**, **Cancel, Quit** or **Close**. This will terminate the dialog or Rich Card and bring you back to the beginning. After that, you can type **Help** to see the different options.

10.2 Removing Graph API permissions

When your agents are using the **Save to OneDrive** or **Meet Now** functionality, they need to authorize the Graph API from Microsoft to enable these features. If these features are not working correctly or if you wish to remove the permissions, use the command **Logout** to log out of the Graph API as that agent. When the agent wants to use the features associated with the Graph API again, they will get the initial

prompt to grant permissions to the Graph API before the features are able to function.

10.3 Agent hunting issues

You may notice that your agents are not being hunted properly. This can have a variety of reasons on why this is happening. These are some of the most common issues and solutions to this problem.

Agent(s) are not subscribed
Agents are not available yet to receive chats. They need to use the **Subscribe** command to make themselves available for chat.

Agent(s) not in group
If you have embedded a group of agents to your website, verify that all the agents are in this group. Use the **Help** command and go to **Manage Group Members** to change group membership.

Agent presence set incorrectly
Agents will only be hunted on **Available** or **Busy** presence in Teams. **Away** agents will not be hunted.

Agent(s) being hunted too quickly/slowly
Change your total hunting time-out or agent time-out **in Help > Manage Groups > Edit an existing group > Hunt Time-Out.**

Group not within Opening Hours
Make sure your opening hours are set correctly. uWebChat uses **UTC** time zone for setting up Opening Hours, so translate your time zone to **UTC** where needed.

Presence not visible to Teams users outside your Microsoft 365 causing uWebChat not to fetch presence within your tenant.
Make sure of the following:

1. In the Teams Admin Center**, External access** to other Microsoft 365 Teams users must be **Enabled**. If you are using domain whitelisting, please add domain **uWebChat.com** to your domain list. You can change these settings in **Teams Admin Center > External Access**.

2. Microsoft 365 tenant and users co-existence mode set to **Teams Only**. For the tenant wide setting, you can go to **Teams Admin Center > Org-wide settings > Teams upgrade**. Per user configuration can overwrite this, you can change this per user in **Teams Admin Center > Users > Select user > Change co-existence mode**.

3. The setting **EnablePrivacyMode** is a setting that can only be changed through PowerShell using the Microsoft Teams PowerShell module. When set to **True**, it will block outside Teams users from seeing your users' presence. Use the following link to install this module: **https://docs.microsoft.com/en-us/microsoftteams/teams-powershell-install**

After connection to your Teams tenant, use the command below to disable Privacy Mode.
Set-CsPrivacyConfiguration -Identity Global -EnablePrivacyMode $false

11 Feedback and support

If you experience issues, have questions or want to share feedback, please contact Universal IT support.

Webchat: uWebchat support
E-mail: support@universal.cloud

Available on
Microsoft AppSource