



Overview of Channels

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1. Channels

1.1 Overview

This section describes the channels that Syntelate XA offers:

- » Telephony
- » Email
- » Facebook Messenger chat
- » SMS
- » SMS chat
- » Web chat
- » WhatsApp chat

All channels except web chat are provided by integration with third-party services.

Unlike the other channels, Syntelate XA's prebuilt web chat app does not depend on integrations. However, you can add integrations to your web chat channel to take advantage of extra features. To learn more about web chat features, see the [Web Chat](#) on page 136 section.

1.2 Integrations

Explore this section to find out which integrations are offered for each channel.

1.3 Azure OpenAI API Connectors

Syntelate XA's integration with the Azure OpenAI API provides the following connectors to the Syntelate XA Agent Desktop and Syntelate XA Dashboard Desktop.

- » **Rewriter:** A writing assistant for [Web Chat](#) on page 136, [Facebook](#) on page 122, [SMS Chat](#) on page 130, [WhatsApp](#) on page 148, and [Email](#) on page 107. See how agents use it: Using Rewriter.
- » **Sentiment Analysis:** For [Web Chat](#) on page 136, [Facebook](#) on page 122, and [Email](#) on page 107, sentiment analysis rates customer and agent messages as positive, neutral or negative and shows the result to the agent. See the agent experience: Chat Sentiment Analysis and Email Sentiment Analysis.
- » **Report Summarizer:** For the Syntelate XA Dashboard Desktop, Report Summarizer provides an executive summary of a report's data. See Dashboard Desktop for details.

The Azure OpenAI API operates a token system for using its API. The Syntelate XA connectors control the usage of tokens by restricting the number available each month. The balance resets each month and unused tokens are not carried over.



Note: If you would like information on pricing, contact us at sales@inisoft.com and tell us about your requirements.

1.4 Request an Integration

If you need to discuss an integration that's not covered in this document, contact our sales team at sales@inisoft.com, or use the [Contact Us form](#) on the Inisoft website.

2. Avaya Aura CM

Syntelate XA supports several CTI (computer telephony integration) solutions for voice calls. One of these solutions is integration with Avaya Aura® Communication Manager via Avaya Aura® AE Services TSAPI.

Our integration with TSAPI has been compliance tested by Avaya.

2.1 How It Works

At a very high level, here's how Syntelate XA's integration with TSAPI works.

2.1.1 Telephony Login

Where a Syntelate XA workzone has been configured to use TSAPI, the agent will see the **Telephony Login** dialog box upon selecting that workzone.

Telephony Login

Extension *

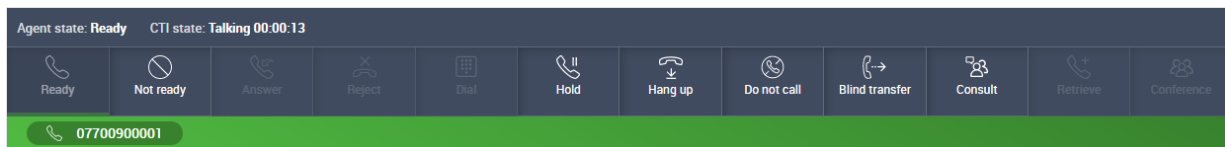
Agent ID *

Password

LOG IN
CANCEL

2.1.2 Telephony Toolbar

Once logged in to the TSAPI-enabled workzone, a telephony toolbar is pinned to the top of the agent’s desktop. It is via this that the agent performs most telephony operations.




The current CTI state (shown at the top of the toolbar) defines the buttons that are shown and whether they are clickable or grayed out.


The following table lists the CTI states in which each button is visible and clickable.

Button	CTI State(s) in Which Visible and Clickable
Answer	Ringing
Dial	Preview, Wrap Up, Worklist
Cancel preview	Preview
Hold	Talking, Consult Dialing, Consult, Consult Receiver, Conference, Conference Receiver
Unhold	Hold
Hang up	Dialing, Talking, Consult Receiver, Conference, Conference Receiver
Blind transfer	Talking
Consult	Talking
Retrieve	Consult Dialing, Consult, Conference
Transfer	Consult Dialing, Consult, Conference
Conference	Consult

The agent can both hang up and close an interaction record by clicking a completion button. A completion button is clickable in the following CTI states: Preview, Talking, Wrap Up, Conference.

 **Note:** Any buttons in the telephony toolbar that you do not wish to use can be hidden. This is done via the **appsettings.config** file for Syntelate XA.

2.1.3 Telephony Logout

When the agent logs out of a TSAPI-enabled workzone (by clicking  and then **Log out**), Syntelate XA logs them out of TSAPI.

The agent can only log out when their agent state is **Not ready**.

2.2 Supported Functionality

The following functionality is supported:

- » Go ready / not ready
- » Answer (inbound calls)
- » Dial (outbound calls)
- » Cancel preview
- » Hold/unhold
- » Hang up (by agent/customer)
- » Blind transfer
- » Consult
- » Conference

2.2.1 Going Ready

When an agent clicks **Ready** in the CTI toolbar, their phone is also set to ready, if they are set up to receive inbound calls.

For each workzone, you can define whether:

- » The workzone is outbound only.
- » The workzone accepts inbound calls but only for agents in a particular agent group.
- » The workzone accepts inbound calls for all agents.

If an agent is not set up to receive inbound calls, their phone is never set to ready.

Clicking **Ready** in Syntelate XA does, however, allow them to be passed other types of interaction, such as outbound calls to make, emails, or chats.

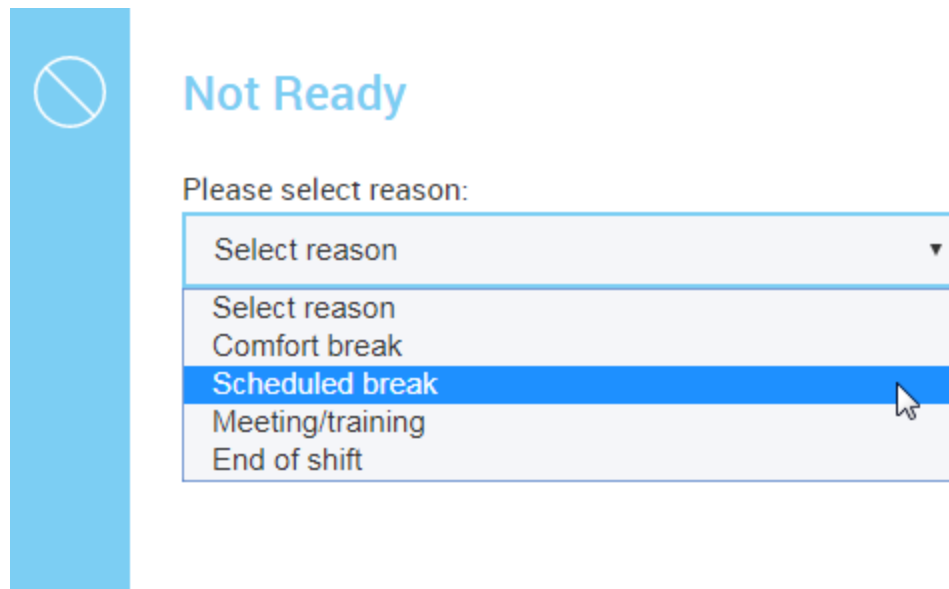


Note: At the end of each call, Syntelate XA checks whether the agent is set up to receive inbound calls. Syntelate XA also performs this check every 30 seconds while the agent is waiting for a call.

This lets you move an agent into or out of the inbound agent group to meet demand.


2.2.2 Going Not Ready

When the agent clicks **Not ready**, Syntelate XA prompts the agent to select a not ready reason.



You must define the not ready reasons that you want to use and also associate each with an Aux reason code. Syntelate XA passes this Aux reason code to TSAPI when the agent's state is set to **Not Ready**.

If the agent goes not ready while on a call, their agent state is set to **Pending Not Ready**. This changes to **Not Ready** upon completion of the call.

 **Note:** If you have not set any not ready reasons, the agent will be set **Not Ready** or **Pending Not Ready** immediately upon clicking **Not ready** (without having to first select a reason).

2.2.3 Answer

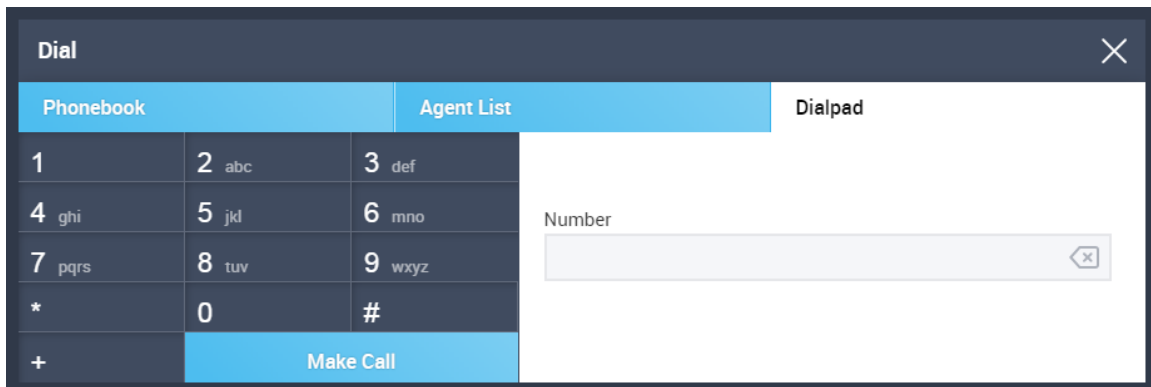
When an agent clicks **Answer** to accept an inbound call, the following fields are populated in the interaction record:

- » **LKTL_CLI**: Calling line identification
- » **LKTL_DDI**: Direct dial-in
- » **LKTL_UCID**: Universal call identifier
- » **LKTL_UUI**: User-to-user information




For existing customers, this lets Syntelate XA match on the customer’s phone number and then display the customer’s details to the agent.



2.2.4 Dial

If the agent clicks **Dial**, the **Dial** window shows.



The agent can use this window to make outbound calls.

 **Note:** If the agent is viewing a record that contains a phone number, the agent can also click the  or  button beside the phone number to dial it.

 immediately dials the customer, whereas  sends the customer's number to the **Dial** window.

2.2.5 Cancel Preview

Syntelate XA can pass outbound calls to the agent in preview. This lets the agent preview the customer's details before making the call.

If the agent decides not to make the call, they can click **Cancel preview**. This completes the call using the completion code that has been defined for the workzone. The agent then moves onto the next item in their workload.

If the agent is set up to receive inbound calls, an outbound record in preview can be interrupted by an inbound call.

2.2.6 Hang Up

If the agent is disconnected from the customer during a call – for example, due to the customer hanging up – a message informs the agent of this.

The agent can hang up by clicking **Hang up** in the CTI toolbar. Alternatively, the agent can both hang up and close the interaction record by clicking a completion button.

2.2.7 Blind Transfer

There are two ways in which the agent can transfer the customer to another number:

- » Blind transfer
- » Warm transfer (in other words, transferring from a consult)

With blind transfer, the agent is immediately disconnected from the customer upon initiating the transfer. As such, the party to whom the call is transferred comes at it “blind” (with no introduction from the initial agent about what the customer is calling about).

2.2.8 Consult and Conference

Consult lets the agent speak to another party while the customer is on hold. To use consult, the agent’s phone must have exactly two line appearances. Syntelate XA does not support more than two line appearances for an agent phone.

While on a consult, the agent can do the following:

- » **Transfer:** Transfers the call to the other party and ends the call for the agent (“warm transfer”).
- » **Retrieve:** Drops the other party from the call and takes the customer off hold.
- » **Conference:** Takes the customer off hold and lets them participate in a three-way call with the agent and the other party.

Syntelate XA supports both **agent consult** and **external consult**.

With agent consult, the other party is another agent in Syntelate XA who is logged into a workzone that uses the same universe (“agent B”). While on a consult, agent B can see

the customer's details in their desktop but cannot edit them. Agent B's telephony toolbar shows appropriate buttons based on their role as consult receiver.

If agent A transfers the call, agent B's desktop becomes editable and their telephony toolbar updates as appropriate.

With external consult, the other party is either:

- » Anyone other than an agent logged in to Syntelate XA
- » An agent logged in to Syntelate XA but on a workzone that uses a different universe.



Note: With agent consult, transfer immediately closes the record for agent A and puts agent A into a ready or not ready state as appropriate.

With external consult, transfer puts agent A into wrap-up.

EXAMPLE

Emily, a customer of Inisoft Travel, has a query about her hotel. She calls Inisoft Travel but mistakenly dials the Business Travel number instead of the Personal Travel number. She gets through to Zac.

Zac quickly realizes that Emily has got through to the wrong person, and so he clicks **Consult** and then selects the Personal Travel hunt group (**agent consult**). This puts Emily on hold. Zac's call is passed to Jack, and Zac briefly explains to Jack what Emily is calling about. He then **transfers** the call to Jack (**warm transfer**).

Jack speaks with Emily to find out more about her problem. Realizing that he needs to speak with the hotel to sort the matter, he clicks **Consult** and then dials the hotel's number (**external consult**). This again puts Emily on hold. Jack speaks with the hotel and gets to the bottom of the matter.

Jack now clicks **Retrieve**, which ends the call with the hotel and takes Emily off hold. Jack is now able to tell Emily the answer to her query.

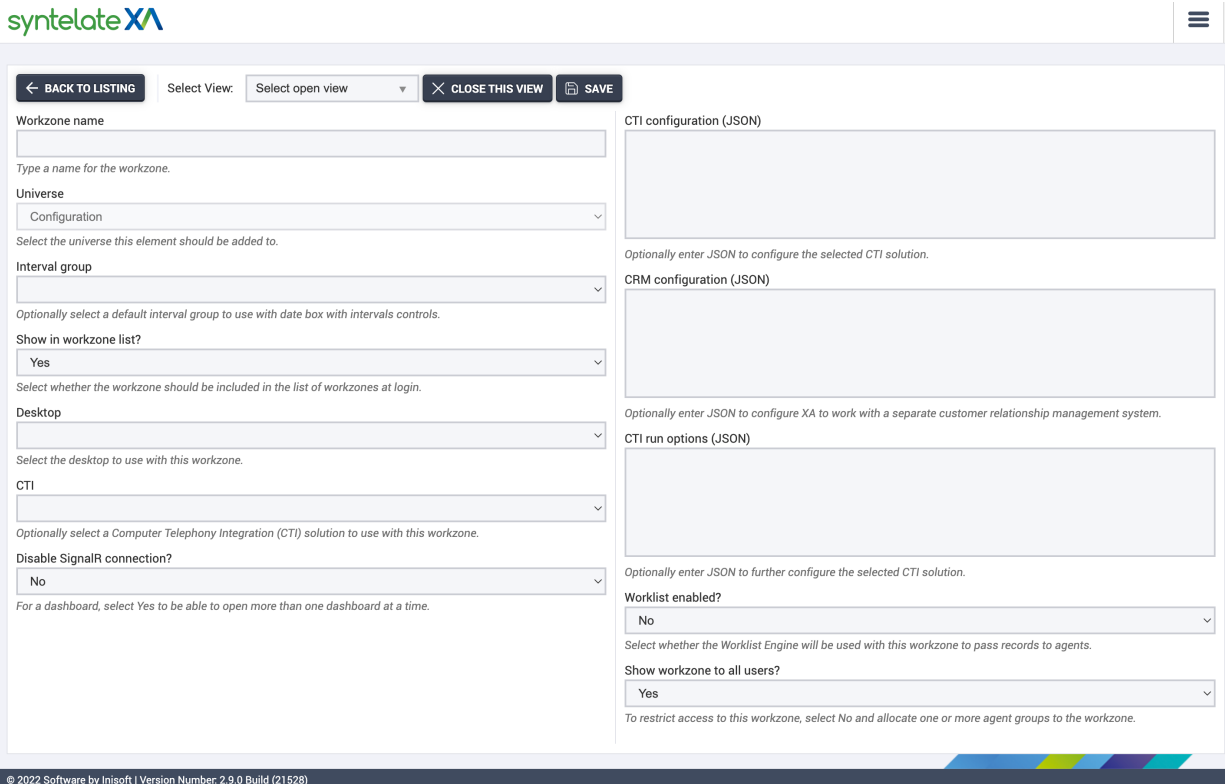
2.3 What You Need

For Syntelate XA to integrate with Avaya TSAPI, you must have:

- » Avaya Aura® Communication Manager
- » Avaya Aura® Application Enablement Services
- » The TSAPI Client installed on the Syntelate XA server

2.4 Workzone Configuration

In Syntelate XA, all CTI integrations are configured in Designer's Workzone Editor. Here is a screenshot of the configuration screen in Workzone Editor.



The following three settings in a CTI workzone must be completed to create a telephony channel in Syntelate XA:

- » **CTI:** Offers types of telephony to choose from.
- » **CTI configuration (JSON):** This is where you specify the telephony server connections.
- » **CTI run options (JSON):** This is where you specify the telephony behavior at runtime, in other words, how Syntelate XA should handle calls on the Syntelate XA Agent Desktop.

The CTI configuration and run options need to be provided in JSON format.

Below, you'll see examples and descriptions of each option.

2.4.1 CTI configuration (JSON)

```
{  
  
  /* Standard settings */  
  
  "CtiSource": "TSAPI",  
  
  "CtiApiUrl": " ",  
  
  "AutoLogin": false,  
  
  "RecordLoginDetails": true,  
  
  "PopOnOutgoing": true,  
  
  
  
  /* TSAPI server settings */  
  
  "ServerName": " ",  
  
  "Username": " ",  
  
  "Userpassword": " ",  
  
  "TimeoutSeconds": " ",
```

```
"PrivateDataVersions": " ",
```

```
"LoginShortCode": "# ",
```

```
"cancelPreviewCode": "~PrvCnc1~",
```

```
/* Mobile XA (telecommuter mode) settings */
```

```
"DMCC": {
```

```
  "AESAddress": "xxx.xxx.x.x",
```

```
  "AESPort": "xxxx",
```

```
  "CMAAddress": "xxx.xxx.x.x",
```

```
  "CertificateName": "",
```

```
  "UseSSL": false,
```

```
  "Protocol": "x.x.x",
```

```
  "Extensions": [
```

```
    {
```

```

    "ExtnNo": "xxxxx-xxxxx",

    "ExtnPwd": "xxxxxxx"

  }

],

  "PstnPrefix": "x"

}

}

```

2.4.1.1 Standard Settings

The standard settings are required.

JSON Key	Description
CtiSource	Default value: An empty string. Valid values: A string that is either "POM", "TSAPI" or "IPOffice". Defines the type of telephony integration.
CtiApiUrl	Default value: An empty string. Valid values: A string that contains an absolute URL.

JSON Key	Description
	<p>Defines the URL of the Syntelate XA Web API for the CTI, hosted on your Syntelate XA instance. We recommend you host Syntelate XA near the phone system (on the same domain or in the same data center) to avoid latency issues.</p>
<p>AutoLogin</p>	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether Syntelate XA will automatically log in the agent. If AutoLogin fails for any reason, Syntelate XA shows the log in dialog to the agent so they can log in manually. We recommend setting this to true.</p>
<p>RecordLoginDetails</p>	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the agent's login details will be stored in the AGENTLASTLOGIN table after they first successfully log in. We recommend setting this to true.</p>
<p>PopOnOutgoing</p>	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the Dial telephony button will pop a new interaction record to the agent desktop if it doesn't already have a interaction record open. Only affects agents who dial an outbound call while in Not Ready or Waiting.</p>

2.4.1.2 TSAPI Settings

JSON Key	Description
<p>ServerName</p>	<p>Default value: An empty string.</p> <p>Valid values: A string.</p> <p>Defines the TServer name for the Avaya Communication Manager (CM).</p>
<p>Username</p>	<p>Default value: An empty string.</p> <p>Valid values: A string.</p> <p>Defines the CT user name for Avaya Aura® AE Services.</p>
<p>Userpassword</p>	<p>Default value: An empty string.</p> <p>Valid values: A string.</p> <p>Defines the CT user's password.</p>
<p>TimeoutSeconds</p>	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the number of seconds that Syntelate XA should wait for a response from a command.</p>
<p>PrivateDataVersions</p>	<p>Default value: An empty string</p> <p>Valid values: A string that is a series of positive numbers delimited by full points, for example, "4.2.0".</p>

JSON Key	Description
	<p>Defines the TSAPI version.</p>
LoginShortCode	<p>Default value: An empty string.</p> <p>Valid values: A string that is a positive number prefixed by a hash symbol.</p> <p>This is not required but can be used if the softphone cannot log in to TSAPI using the TSAPI setAgentState command. In which case, you can specify a LoginShortCode to enable agents to log in. The code is in the format of a hash key and integer, for example, "#11".</p>
cancelPreviewCode	<p>Default value: An empty string.</p> <p>Valid values: A string that is a completion code present in the COMPLETION_CODES table.</p> <p>Defines the completion code to use when the agent clicks Cancel preview. References the CODE field of the COMPLETION_CODEStable.</p>

2.4.1.3 DMCC Settings

AE Services Device, Media, and Call Control (DMCC) is used by Syntelate XA Mobile (the telecommuter mode of Syntelate XA). You should only include the following settings if you are using Syntelate XA Mobile.

JSON Key	Description
AESAddress	<p>Default value: An empty string.</p> <p>Valid values: A string that is an IP address.</p> <p>Defines the IP address of your Avaya Aura Application Enablement Services (AE Services) server.</p>
AESPort	<p>Default value: An empty string.</p> <p>Valid values: A string that is a positive number.</p> <p>Defines the port number of the AES IP address.</p>
CMAddress	<p>Default value: An empty string.</p> <p>Valid values: A string that is an IP address.</p> <p>Defines the IP address of your AES Communication Manager.</p>
CertificateName	<p>Default value: An empty string.</p> <p>Valid values: A string.</p> <p>Defines the name of the SSL certificate.</p>
UseSSL	<p>Default value: false</p> <p>Valid values: true false</p> <p>Dependent on CertificateName. If CertificateName is provided, UseSSL determines whether the SSL certificate is enabled.</p>
Protocol	<p>Default value: An empty string.</p>

JSON Key	Description
	<p>Valid values: A string that is a series of positive numbers delimited by full points, for example, "2.4.5".</p> <p>Defines the DMCC version number.</p>
<p>Extensions [{ "ExtnNo": " ", "ExtnPwd": " " }]</p>	<p>ExtnNo: Defines the extension number or range of extensions that represent the Syntelate XA Mobile agents' phone numbers.</p> <p>Default value: An empty string.</p> <p>Valid values: A string that is a positive number or a range of positive numbers, for example, "5" or "0000-1111".</p> <p>ExtnPwd: Defines the password for the extensions.</p> <p>Default value: An empty string.</p> <p>Valid values: A string.</p>
<p>PstnPrefix</p>	<p>Default value: An empty string.</p> <p>Valid values: A string that is a positive number, for example, "9".</p> <p>Defines the prefix Syntelate XA Mobile should use when dialing external numbers.</p>

2.4.2 CTI run options (JSON)

```
{  
  
  /* Go ready options */  
  
  "GoReadyOptions": {  
  
    "IncomingCallsAgentGroup": 0,  
  
    "OutboundOnly": false,  
  
    "OutboundOnlyAuxCode": 0,  
  
    "GoReadyWithManualIn": false  
  
  },  
  
  /* Call options */  
  
  "CallOptions": {  
  
    "ExtnLength": 5,  
  
    "ExtnLengthComparison": ">",  
  
    "ExternalPrefix": "0",  
  
  }  
}
```

```
"SupportDeviceIdPartialMatch": true,
```

```
"HangupClearCall": false,
```

```
"NailupAni": "00000"
```

```
},
```

```
/* Wrap timer options */
```

```
"WrapTimer": {
```

```
"Countdown": true,
```

```
"CountdownTimeoutSecs": 30,
```

```
"CountdownAddTimeCount": 1,
```

```
"CountdownAddTimeSecs": 10,
```

```
"autoCompleteCode": "AUTOWRAP"
```

```
},
```

```
/* Inbound options */
```

```
"InboundOptions": {
```


```
"PopInboundInNotReady": true,  
  
},  
  
/* Blind transfer options */  
  
"BlindTransfer": {  
  
    "OriginCompare": "9999",  
  
    "TransferTimeout": "00:10:00",  
  
    "ShowSameInteractionRecord": true,  
  
    "FieldsToCopy": [  
  
        "FORENAME",  
  
        "SURNAME",  
  
        "LKTL_AGENTNOTES"  
  
    ]  
  
}  
  
/* Consult options */
```

```
"ConsultAsExternalOnly": false,

}
```

2.4.2.1 Go Ready Options

The GoReadyOptions settings determine whether the agent state will remain Not Ready in TSAPI even if the agent is Ready in Syntelate XA.

 **Note:** You can override these settings by providing skill membership settings on the phone system.

JSON	Description
IncomingCallsAgentGroup	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the agent group number that will be set Ready for inbound calls. References the AgentGroupNo field of the AGENTGROUPS table. If you omit this setting, then all agents will be available for inbound calls (unless you also set OutboundOnly to true).</p>
OutboundOnly	<p>Default value: false</p> <p>Valid values: true false</p> <p>Determines whether the workzone is outbound only. Set to</p>

JSON	Description
	false if it will handle both inbound and outbound calls.
OutboundOnlyAuxCode	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the Aux reason code that tells the CTI system that the agent is busy handling calls and it should not pass the agent inbound calls.</p>
GoReadyWithManualln	<p>Default value: false</p> <p>Valid values: true false</p> <p>Determines whether the agent needs to manually click Answer to pick up an inbound call. Set to false if inbound calls should be answered automatically. Exception: the settings of the agent's phone (their extension number) can override this.</p>

2.4.2.2 Call Options

The CallOptions group lets you configure the agent phone.

JSON	Description
ExtnLength	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the number of digits in internal agent phone</p>

JSON	Description
	<p>extensions. If you have varying lengths of internal extension (for example, a mix of 4 digit and 5 digit extensions) then set this to the higher number (and set ExtnLengthComparison accordingly).</p>
ExtnLengthComparison	<p>Default value: Empty string.</p> <p>Valid values: An operator (such as !=, >, or >=).</p> <p>Determines when ExternalPrefix is assigned to a phone number, based on ExtnLength. For example, if ExtnLength is 5 and ExtnLengthComparison is !=, then ExternalPrefix is assigned to any phone number with a length other than 5 (numbers with 4, 7 or 11 digits, and so on).</p>
ExternalPrefix	<p>Default value: Empty string.</p> <p>Valid values: A positive number.</p> <p>Defines the prefix Syntelate XA should use when dialing external numbers.</p>
SupportDeviceIdPartialMatch	<p>Default value: true</p> <p>Valid values: true false</p>
HangupClearCall	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the Hang up button completes the</p>

JSON	Description
	interaction record in Syntelate XA and also disconnects the call in Avaya Aura CM.
NailupAni	<p>Default value: Empty string.</p> <p>Valid values: The POM ANI (CLI) number.</p> <p>Defines the POM Automatic Number Authentication (ANI), also known as the caller line-in (CLI) number. Applies exclusively to POM Blend environments where TSAPI handles inbound calls. NailupAni establishes a persistent, nailed-up call via TSAPI and prevents nail-up calls from popping a record in Syntelate XA. You can find the POM ANI (CLI) number in your Avaya Experience Portal, under POM Global Settings.</p>

2.4.2.3 Wrap Timer Options

JSON	Description
Countdown	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether automatic wrap-up of calls is enabled. If true, calls are wrapped up when the countdown is complete. When true, Countdown is dependent on the other wrap timer options in this group.</p>
CountdownTimeoutSecs	Default value: 0

JSON	Description
	<p>Valid values: A positive integer.</p> <p>Defines the number of seconds that the wrap timer counts down from.</p>
<p>CountdownAddTimeCount</p>	<p>Default value: 0</p> <p>Valid values: 0 1 (as integers, not strings)</p> <p>Determines whether the + ADD TIME button is displayed on the Agent Desktop. 0 is false and 1 is true. If you set this to 1, then you need to include the option CountdownAddTimeSecs. See below.</p>
<p>CountdownAddTimeSecs</p>	<p>Default value: 0</p> <p>Valid values: A positive integer that represents a time in seconds.</p> <p>Dependent on CountdownAddTimeCount. If you have set CountdownAddTimeCount to 1, then you need to include this option to specify how much time the +ADD TIME button adds to the timer. You can set it to 0 to force the wrap timer to count up rather than down.</p>
<p>autoCompleteCode</p>	<p>Default value: Empty string.</p> <p>Valid values: A string.</p> <p>Dependent on Countdown. If you set Countdown to true, when the timer reaches zero, the autoCompleteCode is</p>

JSON	Description
	<p>stamped on the interaction record to log that it has been completed.</p>

2.4.2.4 Inbound Options

JSON	Description
PopInboundInNotReady	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether an inbound call will pop an interaction record to agents in Not Ready.</p>
WorklistNotReadyDelay	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the number of seconds that the Syntelate XA Worklist Engine waits before passing the call to the Workload of an agent in Not Ready.</p>

2.4.2.5 Blind Transfer Options


JSON	Description
OriginCompare	<p>Default value: An empty string.</p> <p>Valid values: A string.</p> <p>Defines the location code of the call to be transferred. An</p>

JSON	Description
	<p>inbound call is assigned a call ID (the location code) by Avaya Aura CM. When the call is transferred it needs to preserve the call ID so that Avaya Aura CM knows that the transferred call is a continuation of the original call and not a new call. You need to specify this to enable Blind Transfers.</p>
TransferTimeout	<p>Default value: An empty string.</p> <p>Valid values: A string that is a time formatted as "HH:MM:SS".</p> <p>Defines the time in HH:MM:SS format that a transferred call will wait for the third party to answer it before the transfer is abandoned. In which case, the call remains live with the agent and must be completed by them.</p>
ShowSameInteractionRecord	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether Blind Transfer will transfer Agent A's interaction record to Agent B (true) or create a new interaction record for Agent B (false). If you want a new interaction record to be created, then you also need to specify the FieldsToCopy (see below).</p>
FieldsToCopy	<p>Default value: An array of empty strings.</p> <p>Valid values: Comma-delimited strings of field names in Agent A's interaction record.</p>

JSON	Description
	<p>Dependent on ShowSameInteractionRecord. If ShowSameInteractionRecord is false, you need to include this option if you want Blind Transfer to create a new interaction record for Agent B when Agent A transfers a call to them. FieldsToCopy lets Syntelate XA populate the new interaction record with data copied from Agent A's interaction record.</p>

2.4.2.6 Consult Options

JSON	Description
ConsultAsExternalOnly	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether, for consult calls, Syntelate XA pops a new interaction record to the consulted party.</p> <ul style="list-style-type: none"> » When ConsultAsExternalOnly is true, Syntelate XA does not pop an interaction record to Agent B. The record can only be seen by Agent A. » When ConsultAsExternalOnly is false, a new interaction record is popped to Agent B's desktop. Agent B sees an empty record and cannot see the customer details in Agent A's record.

JSON	Description
ShowConsultToastMessage	<p>Default value: true</p> <p>Valid values: true false</p> <p>Defines whether the agent will be notified by Windows that Syntelate XA has passed a Consult to them. The notification is displayed in the bottom-right corner of the Windows desktop.</p> <div data-bbox="740 730 1406 1062" style="border: 1px solid #003366; padding: 10px;"> <p> Note: To enable Windows toast notifications, you need to add the following key to your Syntelate XA AppSettings.config file:</p> <pre data-bbox="821 999 1338 1033"><add key="Notifications" value="true" /></pre> </div>
ShowConsultNotificationMessage	<p>Default value: true</p> <p>Valid values: true false</p> <p>Defines whether the agent will be notified by Syntelate XA that an agent has passed a Consult to them. The notification is displayed in the bottom-left corner of the Syntelate XA Agent Desktop.</p>

2.4.2.7 Admin Options

JSON	Description
ListenFac	Default value: An empty string

JSON	Description
	<p>Valid values: A string in the format of an asterisk and a positive number, for example, "*90".</p> <p>Defines the Feature Access Code (FAC) number used by Avaya Aura CM to initiate a Service Observing Call. In Syntelate XA, you can use the Listen button in the Agent Control Centre to silently dial into and listen to the agent's call.</p>
BargeFac	<p>Default value: An empty string</p> <p>Valid values: A string in the format of an asterisk and a positive number, for example, "*91".</p> <p>Defines the Feature Access Code (FAC) number used by Avaya Aura CM to initiate a Service Observing Call. In Syntelate XA, you can use the Barge button in the Agent Control Centre to barge into (in other words, join) the agent's call.</p>

2.4.3 Not Ready Reasons

Not ready reasons are held in the CTINOTREADYREASONS database table.

You can manage the not ready reasons either from the configuration desktop or directly in the database.

For guidance on using the configuration desktop to manage the not ready reasons, see the section 'Not Ready Reasons' in the PDF Guide, *Syntelate XA - Supervisor*.

If you prefer to use the database, ensure that you add a new record for each not ready reason. For guidance, see the PDF Guide *Syntelate XA - Database Tables*.

3. Avaya IP Office

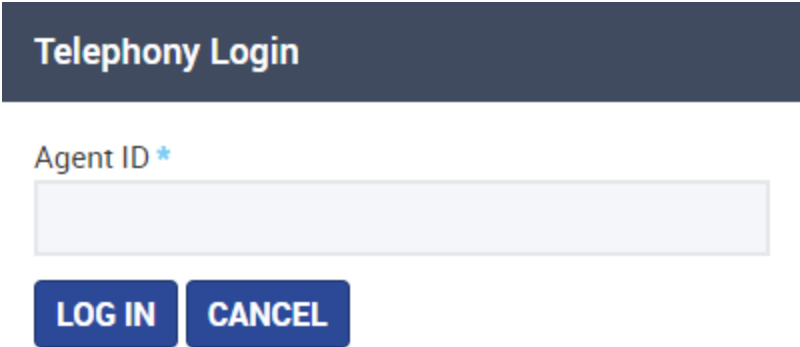
Syntelate XA supports several CTI (computer telephony integration) solutions for voice calls. One of these solutions is integration with Avaya IP Office™ via the Telephony API (TAPI). This is done using TAPILink Pro.

3.1 How It Works

At a very high level, here's how Syntelate XA's integration with IP Office works.

3.1.1 Telephony Login

Where a Syntelate XA workzone has been configured to use IP Office, the agent will see the **Telephony Login** dialog box upon selecting that workzone.



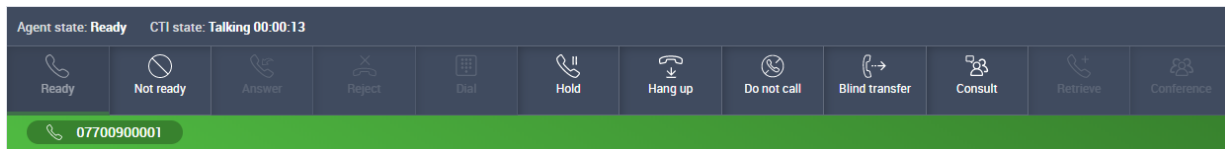
Telephony Login

Agent ID *

LOG IN **CANCEL**

3.1.2 Telephony Toolbar

Once logged in to the IP Office workzone, a telephony toolbar is pinned to the top of the agent’s desktop. It is via this that the agent performs most telephony operations.



The current CTI state (shown at the top of the toolbar) defines the buttons that are shown in the toolbar and whether they are clickable or grayed out.

The following table lists the CTI states in which each button is visible and clickable.

Button	CTI State(s) in Which Visible and Clickable
Answer	Ringing
Dial	Preview, Wrap Up, Worklist
Cancel preview	Preview
Hold	Talking, Consult Dialing, Consult, Consult Receiver, Conference, Conference Receiver
Unhold	Hold
Hang up	Dialing, Talking, Consult Receiver, Conference, Conference Receiver
Blind transfer	Talking


Button	CTI State(s) in Which Visible and Clickable
Consult	Talking
Transfer	Consult Dialing, Consult, Conference
Retrieve	Consult Dialing, Consult, Conference
Conference	Consult

The agent can both hang up and close an interaction record by clicking a completion button. A completion button is clickable in the following CTI states: Preview, Talking, Wrap Up, Conference.



Note: Any buttons in the telephony toolbar that you do not wish to use can be hidden. This is done via the **appsettings.config** file for Syntelate XA.

3.1.3 Telephony Logout

When the agent logs out of an IP Office workzone (by clicking  and then **Log out**), Syntelate XA logs them out of IP Office.

The agent can only log out when their agent state is **Not ready**.

3.2 Supported Functionality

The following functionality is supported:

- » Go ready / not ready
- » Answer (inbound calls)
- » Dial (outbound calls)
- » Cancel preview
- » Hold/unhold
- » Hang up (by agent/customer)
- » Blind transfer
- » Consult
- » Conference

3.2.1 Going Ready


When an agent clicks **Ready** in the CTI toolbar, in IP Office their phone is taken out of “do not disturb”. They can then receive inbound calls.

For each workzone, you can define whether:

- » The workzone is outbound only.
- » The workzone accepts inbound calls but only for agents in a particular agent group.
- » The workzone accepts inbound calls for all agents.

If an agent is not set up to receive inbound calls for a particular workzone in Syntelate XA, then going ready while logged into that workzone does *not* turn off do not disturb in IP

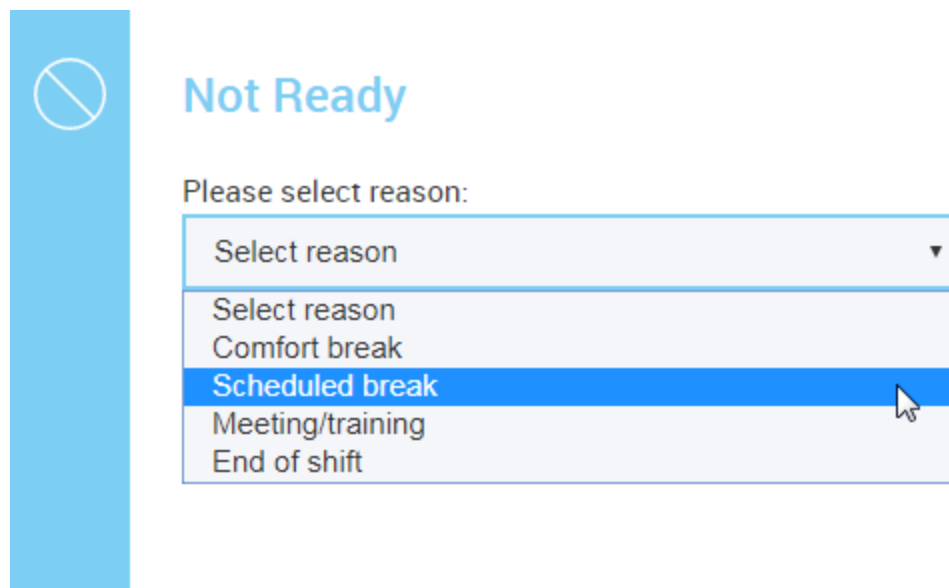
Office. Clicking **Ready** in Syntelate XA does, however, allow them to be passed other types of interaction, such as outbound calls to make, emails, or chats.

 **Note:** At the end of each call, Syntelate XA checks whether the agent is set up to receive inbound calls. Syntelate XA also performs this check every 30 seconds while the agent is waiting for a call.

This lets you move an agent into or out of the inbound agent group to meet demand.

3.2.2 Going Not Ready

When the agent clicks **Not ready**, Syntelate XA prompts the agent to select a not ready reason.



You must define the not ready reasons that you want to use.

If the agent goes not ready while on a call, their agent state is set to **Pending Not Ready**. This changes to **Not Ready** upon completion of the call.

Going not ready turns on do not disturb in IP Office.



Note: If you have not set any not ready reasons, the agent will be set **Not Ready** or **Pending Not Ready** immediately upon clicking **Not ready** (without having to first select a reason).

3.2.3 Answer

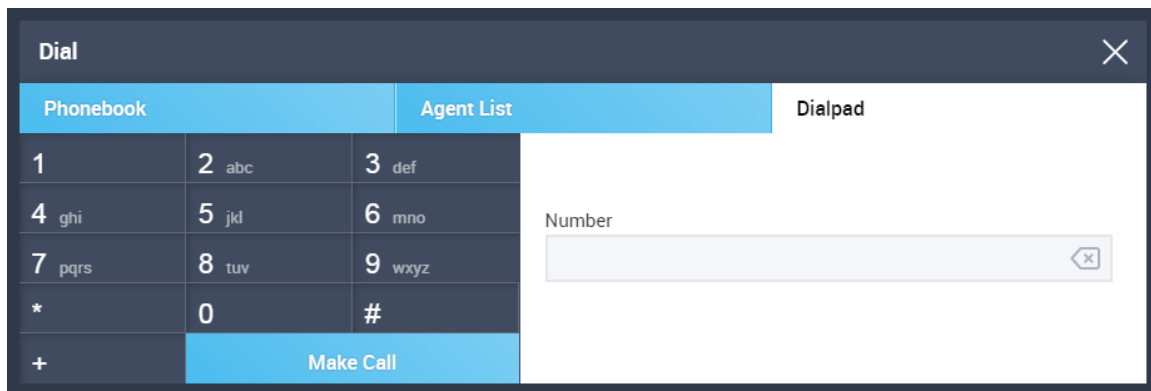
When an agent clicks **Answer** to accept an inbound call, the following fields are populated in the interaction record:

- » **LKTL_CLI:** Calling line identification
- » **LKTL_DDI:** Direct dial-in
- » **LKTL_UCID:** Universal call identifier
- » **LKTL_UUI:** User-to-user information




For existing customers, this lets Syntelate XA match on the customer's phone number and then display the customer's details to the agent.



3.2.4 Dial

If the agent clicks **Dial**, the **Dial** window shows.



The agent can use this window to make outbound calls.

 **Note:** If the agent is viewing a record that contains a phone number, the agent can also click the  or  button beside the phone number to dial it.

 immediately dials the customer, whereas  sends the customer's number to the **Dial** window.

3.2.5 Cancel Preview

Syntelate XA can pass outbound calls to the agent in preview. This lets the agent review the customer's details before making the call.

If the agent decides not to make the call, they can click **Cancel preview**. This completes the call using the completion code that has been defined for the workzone. The agent then moves onto the next item in their workload.

If the agent is set up to receive inbound calls, an outbound record in preview can be interrupted by an inbound call.

3.2.6 Hang Up

If the agent is disconnected from the customer during a call – for example, due to the customer hanging up – a message informs the agent of this.

The agent can hang up by clicking **Hang up** in the CTI toolbar. Alternatively, the agent can both hang up and close the interaction record by clicking a completion button.

3.2.7 Blind Transfer

There are two ways in which the agent can transfer the customer to another number:

- » Blind transfer
- » Warm transfer (in other words, transferring from a consult)

With blind transfer, the agent is immediately disconnected from the customer upon initiating the transfer. As such, the party to whom the call is transferred comes at it “blind” (with no introduction from the initial agent about what the customer is calling about).

3.2.8 Consult and Conference

Consult lets the agent speak to another party while the customer is on hold. To use consult, the agent’s phone must have exactly two line appearances. Syntelate XA does not support more than two line appearances for an agent phone.

While on a consult, the agent can do the following:

- » **Transfer:** Transfers the call to the other party and ends the call for the agent (“warm transfer”).
- » **Retrieve:** Drops the other party from the call and takes the customer off hold.
- » **Conference:** Takes the customer off hold and lets them participate in a three-way call with the agent and the other party.

Syntelate XA supports both **agent consult** and **external consult**.

With agent consult, the other party is another agent in Syntelate XA who is logged into a workzone that uses the same universe (“agent B”). While on a consult, agent B can see the customer’s details in their desktop but cannot edit them. Agent B’s telephony toolbar shows appropriate buttons based on their role as consult receiver.

If agent A transfers the call, agent B’s desktop becomes editable and their telephony toolbar updates as appropriate.

With external consult, the other party is either:

- » Anyone other than an agent logged in to Syntelate XA
- » An agent logged in to Syntelate XA but on a workzone that uses a different universe



Note: With agent consult, transfer immediately closes the record for agent A and puts agent A into a ready or not ready state as appropriate.

With external consult, transfer puts agent A into wrap-up.

EXAMPLE

Emily, a customer of Inisoft Travel, has a query about her hotel. She calls Inisoft Travel but mistakenly dials the Business Travel number instead of the Personal Travel number. She gets through to Zac.

Zac quickly realizes that Emily has got through to the wrong person, and so he clicks **Consult** and then selects the Personal Travel hunt group (**agent consult**). This puts Emily on hold. Zac's call is passed to Jack, and Zac briefly explains to Jack what Emily is calling about. He then **transfers** the call to Jack (**warm transfer**).

Jack speaks with Emily to find out more about her problem. Realizing that he needs to speak with the hotel to sort the matter, he clicks **Consult** and then dials the hotel's number (**external consult**). This again puts Emily on hold. Jack speaks with the hotel and gets to the bottom of the matter.

Jack now clicks **Retrieve**, which ends the call with the hotel and takes Emily off hold. Jack is now able to tell Emily the answer to her query.

3.3 What You Need

For Syntelate XA to integrate with IP Office, you must have:

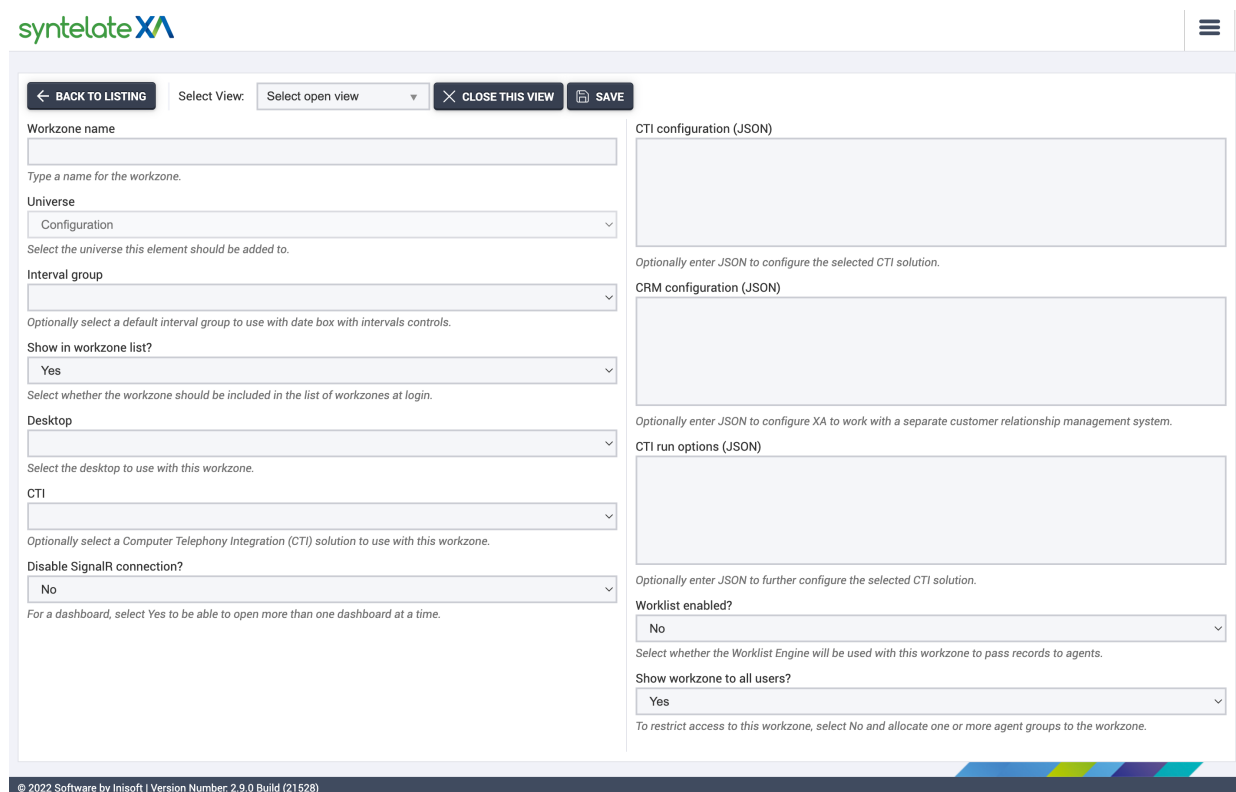
- » Avaya IP Office™
- » TAPILink Pro configured for third-party call control and installed on the Syntelate XA server

3.4 Avaya Contact Center Select

Syntelate XA also supports the use of Avaya Contact Center Select (ACCS) with IP Office.

3.5 Workzone Configuration

In Syntelate XA, all CTI integrations are configured in Designer's Workzone Editor. Here is a screenshot of the configuration screen in Workzone Editor.



The following three settings in a CTI workzone must be completed to create a telephony channel in Syntelate XA:

- » **CTI:** Offers types of telephony to choose from.
- » **CTI configuration (JSON):** This is where you specify the telephony server connections.
- » **CTI run options (JSON):** This is where you specify the telephony behavior at runtime, in other words, how Syntelate XA should handle calls on the Syntelate XA Agent Desktop.

The CTI configuration and run options need to be provided in JSON format.

Documentation of each option is given in the sections below.

3.5.0.1 IP Office and ACCS

To set up IP Office to use ACCS, make sure you include the ACCS settings that are in the CTI configuration documentation below.

3.5.1 CTI configuration (JSON)

```

TAPI configuration

{

  /* Standard settings */

  "CtiSource": "IPOffice",

  "CtiApiUrl": " ",

```

```
"LoginRequired": true,
```

```
"AutoLogin": true,
```

```
"RecordLoginDetails": true,
```

```
"PopOnOutgoing": true,
```

```
/* TAPI server settings */
```

```
"cancelPreviewCode": "~PrvCncl~",
```

```
/* ACCS settings */
```

```
"CctConfig": {
```

```
  "Primary": " ",
```

```
  "Domain": " ",
```

```
  "Port": " ",
```

```
  "SingleSignOn": true,
```

```

    "AfterCallWorkCode": ""
  }
}

```

3.5.1.1 Standard Settings

The standard settings are required.

JSON Key	Description
CtiSource	<p>Default value: An empty string.</p> <p>Valid values: A string that is either "POM", "TSAPI" or "IPOffice".</p> <p>Defines the type of telephony integration.</p>
CtiApiUrl	<p>Default value: An empty string.</p> <p>Valid values: A string that contains an absolute URL.</p> <p>Defines the URL of the Syntelate XA Web API for the CTI, hosted on your Syntelate XA instance. We recommend you host Syntelate XA near the phone system (on the same domain or in the same data center) to avoid latency issues.</p>
AutoLogin	<p>Default value: true</p> <p>Valid values: true false</p>

JSON Key	Description
	<p>Determines whether Syntelate XA will automatically log in the agent. If AutoLogin fails for any reason, Syntelate XA shows the log in dialog to the agent so they can log in manually. We recommend setting this to true.</p>
RecordLoginDetails	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the agent's login details will be stored in the AGENTLASTLOGIN table after they first successfully log in. We recommend setting this to true.</p>
PopOnOutgoing	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the Dial telephony button will pop a new interaction record to the agent desktop if it doesn't already have a interaction record open. Only affects agents who dial an outbound call while in Not Ready or Waiting.</p>

3.5.1.2 TAPI Settings

The TAPI setting is required.

JSON Key	Description
cancelPreviewCode	<p>Default value: An empty string.</p> <p>Valid values: A string that is a completion code present in the</p>

JSON Key	Description
	<p>COMPLETION_CODES table.</p> <p>Defines the completion code to use when the agent clicks Cancel preview. References the CODE field of the COMPLETION_CODES table.</p>

3.5.1.3 ACCS Settings

You only need to include the ACCS settings if you are using IP Office with ACCS.

JSON Key	Description
Primary	<p>Default value: An empty string.</p> <p>Valid values: A string that is an IP address.</p> <p>Defines the IP address of ACCS.</p>
Domain	<p>Default value: An empty string.</p> <p>Valid values: A string that is a domain address.</p> <p>Defines the domain that points to the IP address for ACCS.</p>
Port	<p>Default value: An empty string.</p> <p>Valid values: A string that is a whole number.</p> <p>Defines the port number that is required by the IP address of ACCS.</p>
AfterCallWorkCode	<p>Default value: An empty string.</p>

JSON Key	Description
	<p>Valid values: A string.</p> <p>Defines the code that tells ACCS not to pass calls to agents who are in wrap-up.</p>

3.5.2 CTI run options (JSON)

TAPI runtime options

```

{
  /* Go ready options */
  "GoReadyOptions": {
    "IncomingCallsAgentGroup": 0,
    "OutboundOnly": false,
    "OutboundOnlyAuxCode": 0,
    "GoReadyWithManualIn": false
  },
  /* Call options */

```

```
"CallOptions": {  
  
  "ExtnLength": 5,  
  
  "ExtnLengthComparison": ">",  
  
  "ExternalPrefix": "0",  
  
},  
  
/* Wrap timer options */  
  
"WrapTimer": {  
  
  "Countdown": true,  
  
  "CountdownTimeoutSecs": 30,  
  
  "CountdownAddTimeCount": 1,  
  
  "CountdownAddTimeSecs": 10,  
  
  "autoCompleteCode": "AUTOWRAP"  
  
},  
  
}
```

3.5.2.1 Go Ready Options

JSON	Description
IncomingCallsAgentGroup	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the agent group number that will be set Ready for inbound calls. References the AgentGroupNo field of the AGENTGROUPS table. If you omit this setting, then all agents will be available for inbound calls (unless you also set OutboundOnly to true).</p>
OutboundOnly	<p>Default value: false</p> <p>Valid values: true false</p> <p>Determines whether the workzone is outbound only. Set to false if it will handle both inbound and outbound calls.</p>
OutboundOnlyAuxCode	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the Aux reason code that tells the CTI system that the agent is busy handling calls and it should not pass the agent inbound calls.</p>
GoReadyWithManualIn	<p>Default value: false</p> <p>Valid values: true false</p> <p>Determines whether the agent needs to manually click</p>

JSON	Description
	<p>Answer to pick up an inbound call. Set to false if inbound calls should be answered automatically. Exception: the settings of the agent's phone (their extension number) can override this.</p>

3.5.2.2 Call Options

JSON	Description
<p>ExtnLength</p>	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the number of digits in internal agent phone extensions. If you have varying lengths of internal extension (for example, a mix of 4 digit and 5 digit extensions) then set this to the higher number (and set ExtnLengthComparison accordingly).</p>
<p>ExtnLengthComparison</p>	<p>Default value: Empty string.</p> <p>Valid values: An operator (such as !=, >, or >=).</p> <p>Determines when ExternalPrefix is assigned to a phone number, based on ExtnLength. For example, if ExtnLength is 5 and ExtnLengthComparison is !=, then ExternalPrefix is assigned to any phone number with a length other than 5 (numbers with 4, 7 or 11 digits, and so on).</p>
<p>ExternalPrefix</p>	<p>Default value: Empty string.</p>

JSON	Description
	<p>Valid values: A positive number.</p> <p>Defines the prefix Syntelate XA should use when dialing external numbers.</p>

3.5.2.3 Wrap Timer Options

JSON	Description
<p>Countdown</p>	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether automatic wrap-up of calls is enabled. If true, calls are wrapped up when the countdown is complete. When true, Countdown is dependent on the other wrap timer options in this group.</p>
<p>CountdownTimeoutSecs</p>	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the number of seconds that the wrap timer counts down from.</p>
<p>CountdownAddTimeCount</p>	<p>Default value: 0</p> <p>Valid values: 0 1 (as integers, not strings)</p> <p>Determines whether the + ADD TIME button is displayed on the Agent Desktop. 0 is false and 1 is true. If you set this to 1, then you need to include the option</p>

JSON	Description
	<p>CountdownAddTimeSecs. See below.</p>
<p>CountdownAddTimeSecs</p>	<p>Default value: 0</p> <p>Valid values: A positive integer that represents a time in seconds.</p> <p>Dependent on CountdownAddTimeCount. If you have set CountdownAddTimeCount to 1, then you need to include this option to specify how much time the +ADD TIME button adds to the timer. You can set it to 0 to force the wrap timer to count up rather than down.</p>
<p>autoCompleteCode</p>	<p>Default value: Empty string.</p> <p>Valid values: A string.</p> <p>Dependent on Countdown. If you set Countdown to true, when the timer reaches zero, the autoCompleteCode is stamped on the interaction record to log that it has been completed.</p>

3.5.3 Not Ready Reasons

Not ready reasons are held in the CTINOTREADYREASONS database table.

You can manage the not ready reasons either from the configuration desktop or directly in the database.

For guidance on using the configuration desktop to manage the not ready reasons, see the section 'Not Ready Reasons' in the PDF Guide, *Syntelate XA - Supervisor*.

If you prefer to use the database, ensure that you add a new record for each not ready reason. For guidance, see the PDF Guide *Syntelate XA - Database Tables*.

4. Avaya POM

Syntelate XA supports several CTI (computer telephony integration) solutions for voice calls. One of these solutions is integration with Avaya Proactive Outreach Manager (POM) via Avaya Aura® AE Services TSAPI.

Our integrations with POM and TSAPI have been compliance tested by Avaya.

At a very high level, here's how Syntelate XA's integration with POM works.

4.1 Telephony Login

If a Syntelate XA workzone has been configured to use POM, after logging in to that workzone, agents will see the **Telephony Login** dialog.

Telephony Login

Extension *

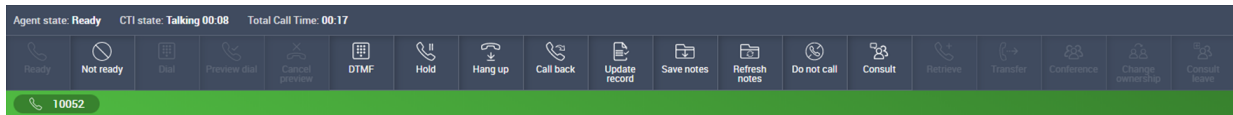
Agent ID *

Password

LOG IN
CANCEL

4.2 Telephony Toolbar

For all telephony workzones, a telephony toolbar is pinned to the top of the desktop.



The toolbar consists of three parts:

1. Session status bar
2. Telephony buttons
3. Call status bar

4.2.1 Session Status Bar

The session status bar displays the following information on the agent's current session:

- » Agent state
- » CTI state
- » Timer
- » Total call time

4.2.1.1 Agent state

The possible agent states are:

- » **Ready:** when an agent is active and taking calls.
- » **Pending not ready:** when an agent has clicked on the **Not ready** telephony button while on a call. Once that call is completed, the agent's state changes to not ready.
- » **Not ready:** when an agent has chosen to go not ready, for a reason such as going on a lunch break, end of shift, training session etc.

4.2.1.2 CTI state

The possible CTI states are:

- » **Idle:** when an agent is between calls.
- » **Preview:** when an agent is on a preview call.
- » **Dialing :** when a number is being dialed.
- » **Talking:** when a call is connected.
- » **Wrap up:** when an agent or a customer has disconnected the call.
- » **Held:** when a call is on hold.
- » **Consult:** when an agent initiates a consult or a consult is in progress.
- » **Callback:** when a callback record returns.
- » **Conference owner** or **Conference passive:** when in a conference call, indicates which role the agent has.

The current **CTI state** determines which buttons will be active.



Note: Any buttons in the telephony toolbar that you do not wish to use can be hidden. This is done via the **appsettings.config** file for Syntelate XA.

4.2.1.3 Timer and Total Call Time

The **Timer** displays the duration of the current CTI state. The **Total call time** displays the duration of the entire call.

4.2.2 Telephony Buttons

The following functionality is supported:

- » Ready and Not ready
- » Preview dial, Dial and Cancel preview
- » DTMF
- » Hold and unhold
- » Hang up (by agent or customer)
- » Callback
- » Update record
- » Save agent notes
- » Refresh agent notes
- » Do not call

- » The workzone is outbound only.
- » The workzone accepts inbound calls but only for agents in a particular agent group.
- » The workzone accepts inbound calls for all agents.

If an agent is not set up to receive inbound calls, their phone is never set to ready.

Clicking **Ready** in Syntelate XA does, however, allow them to be passed other types of interaction, such as outbound calls to make, emails, or chats.

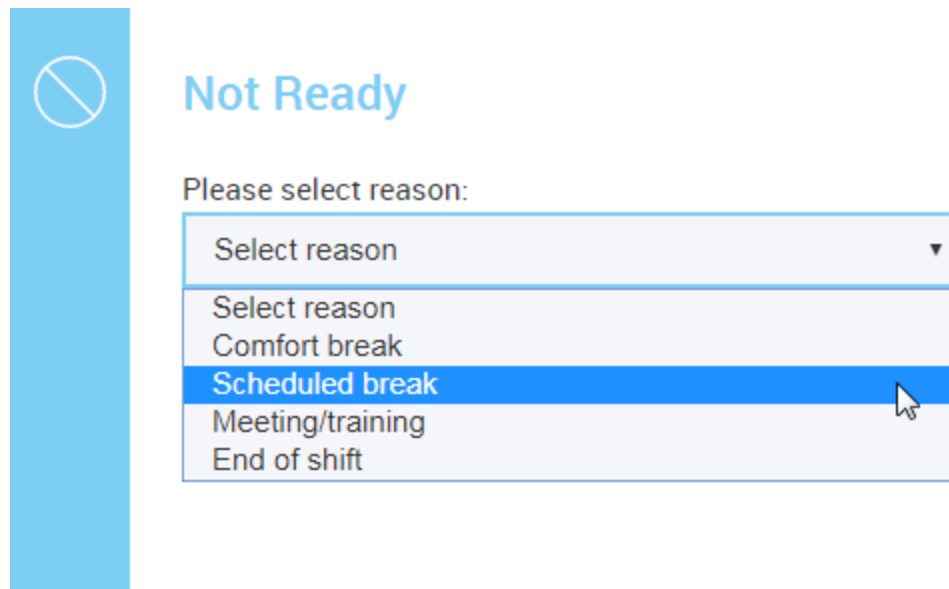


Note: At the end of each call, Syntelate XA checks whether the agent is set up to receive inbound calls. Syntelate XA also performs this check every 30 seconds while the agent is waiting for a call.


This lets you move an agent into or out of the inbound agent group to meet demand.

4.2.2.2 Not ready

When the agent clicks **Not ready**, Syntelate XA prompts the agent to select a not ready reason.

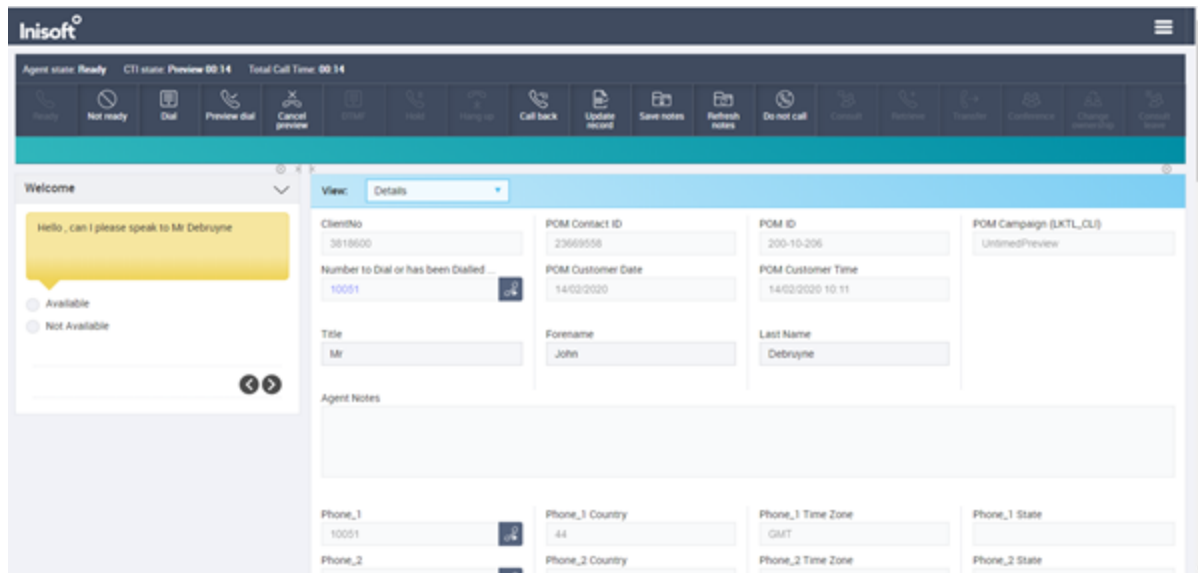


If the agent goes not ready while on a call, their agent state is set to pending not ready. This changes to not ready upon completion of the call.

 **Note:** If you have not defined any not ready reasons, the agent will be set to not ready or pending not ready immediately upon clicking the **Not ready** button without having to first select a reason.

4.2.2.3 Preview dial, Dial and Cancel Preview

In a POM channel in Syntelate XA, when an agent receives an outbound record from POM, and the POM record is either Timed or Untimed, the agent's CTI state is automatically switched to Preview. This lets the agent preview the customer's details before making the call.

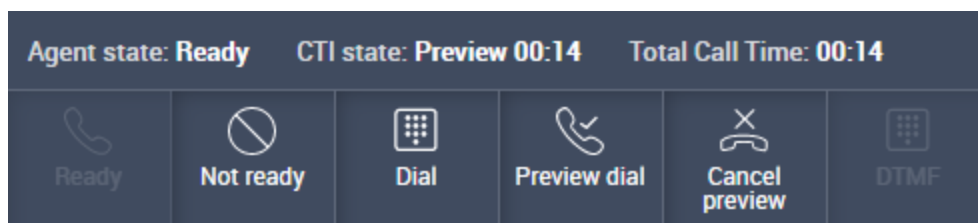


There are two types of Preview:

- » Timed: when the **timer** reaches zero (0), the default number will automatically be dialed.
- » Untimed: the **timer** counts up indefinitely unless the call is initiated or canceled.

If the POM job is a Timed Preview job, then the agent has a set number of seconds to browse the record before the default number is automatically dialed. Alternatively, the agent can also press Preview Dial or Dial before the timer runs out.

If the POM job is an Untimed Preview job, then the agent will be in Preview until they press either Preview Dial to dial the default number or Dial to dial a different number.



If an agent clicks the **Preview dial** button, Syntelate XA will dial the default number associated with the customer record. The default number is specified in the POM configuration.

The **Dial** button displays the **Dial** window. It contains a phonebook and dialpad. Agents can use the **Dial** window to make outbound calls.

If an agent decides not to make the call, they can click **Cancel preview**. As a result, the interaction record is placed into Wrap Up, which initiates a countdown timer.

When the countdown reaches 0, the record is automatically completed with the completion code that has been assigned to the POM job; as a result, the agent will be free to work on another interaction.

However, during the countdown, the agent can choose to complete the call manually if they want to complete the record sooner.



Note: Unlike other telephony integrations, in POM if an agent is in a group that handles inbound calls, an outbound record in Preview *cannot* be interrupted by an inbound call.

4.2.2.4 Hold

If an agent clicks on the Hold button, the customer will be placed on hold and unable to hear the agent. To retrieve the customer the agent needs to click on the button again.

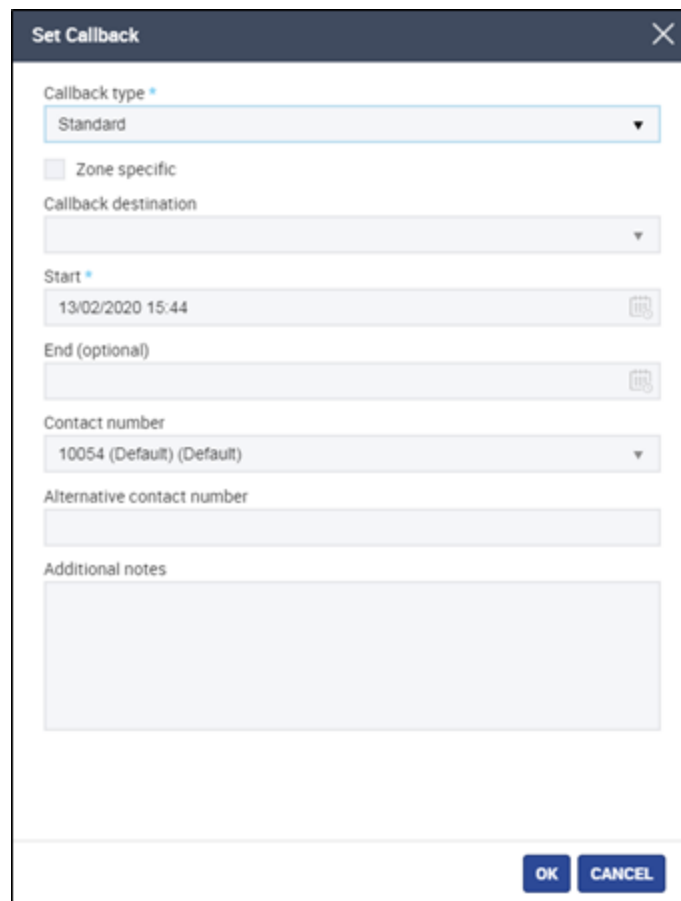
4.2.2.5 Hang Up

If an agent is disconnected from the customer during a call – for example, due to the customer hanging up – a message informs the agent of this.

Agents can hang up by clicking **Hang up** in the CTI toolbar. Alternatively, agents can both hang up and close the interaction record at the same time by clicking a completion button.

4.2.2.6 Callback

Agents can book a callback at any point in their current session. If they click the **Callback** button they see the **Set Callback** dialog.



The image shows a 'Set Callback' dialog box with the following fields and controls:

- Callback type ***: A dropdown menu currently set to 'Standard'.
- Zone specific**: An unchecked checkbox.
- Callback destination**: A dropdown menu.
- Start ***: A date and time field showing '13/02/2020 15:44' with a calendar icon.
- End (optional)**: A date and time field with a calendar icon.
- Contact number**: A dropdown menu showing '10054 (Default) (Default)'.
- Alternative contact number**: A text input field.
- Additional notes**: A large text area for entering notes.
- OK** and **CANCEL** buttons at the bottom right.

4.2.2.7 Update record

POM data can be updated at anytime by clicking on the **Update record** button, which will write any POM data back to the server. If there is a validation error, the agent will see a

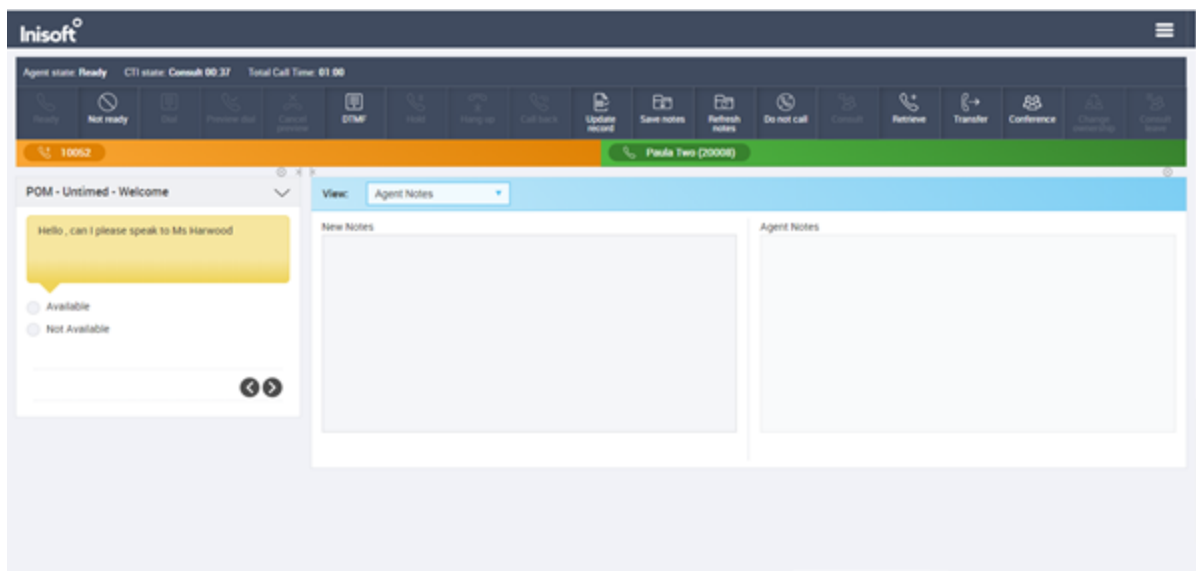
notification.

4.2.2.8 Agent notes

Agents can use the **New Notes** and **Agent Notes** text areas while in a consult or conference call. During the call, both the owner and the recipient of the consult or conference can enter notes at the same time.

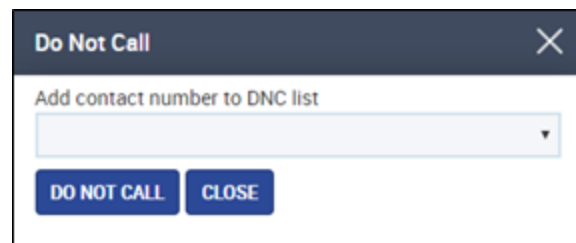
New notes are typed into the **New Notes** text area and are saved to the interaction record using the **Save notes** button. Once saved, notes appear in the read-only **Agent Notes** text area.

Agents can click on the **Refresh notes** button during a consult or conference if they want to check if the other party has added new notes.



4.2.2.9 Do not call

If agents click the Do not call button, Syntelate XA displays the Do not call dialog, which contains a dropdown and two buttons.



4.2.2.10 Consult and Conference

Consult lets an agent speak to another party while the customer is on hold. To use consult, the agent's phone must have exactly two line appearances. Syntelate XA does not support more than two line appearances for an agent phone.

While on a consult, an agent can do the following:

- » **Transfer:** Transfers the call to the other party and ends the call for the agent ("warm transfer"). The agent will be presented with a new call.
- » **Retrieve:** Drops the other party from the call and takes the customer off hold.
- » **Conference:** Takes the customer off hold and lets them participate in a three-way call with the agent and the other party.
- » **Change ownership:** Assigns the call to the other party's ownership, giving them full

- » control over the call.
- » **Consult leave:** Visible only to a recipient of a conference or consult, this button lets them exit the call.

Syntelate XA supports both agent consult and external consult.

With agent consult, the other party is another agent in Syntelate XA who is logged into a workzone that uses the same universe ("agent B"). While on a consult, agent B can see the customer's details in their desktop but cannot edit them. Agent B's telephony toolbar shows appropriate buttons based on their role as consult receiver.

If agent A transfers the call, agent B's desktop becomes editable and their telephony toolbar updates as appropriate.

With external consult, the other party is either:

- » Anyone other than an agent logged in to Syntelate XA
- » An agent logged in to Syntelate XA but on a workzone that uses a different universe.



Note: With agent consult, transfer immediately closes the record for agent A and puts agent A into a ready or not ready state as appropriate.

With external consult, transfer puts agent A into wrap-up.

EXAMPLE

Emily, a customer of Inisoft Travel, has a query about her hotel. She calls Inisoft Travel but mistakenly dials the Business Travel number instead of the Personal

Travel number. She gets through to Zac.

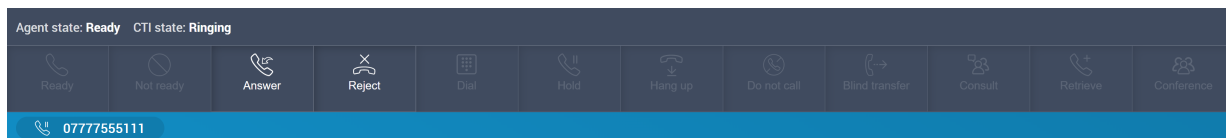
Zac quickly realizes that Emily has got through to the wrong person, and so he clicks **Consult** and then selects the Personal Travel hunt group (**agent consult**). This puts Emily on hold. Zac’s call is passed to Jack, and Zac briefly explains to Jack what Emily is calling about. He then **transfers** the call to Jack (**warm transfer**).

Jack speaks with Emily to find out more about her problem. Realizing that he needs to speak with the hotel to sort the matter, he clicks **Consult** and then dials the hotel’s number (**external consult**). This again puts Emily on hold. Jack speaks with the hotel and gets to the bottom of the matter.

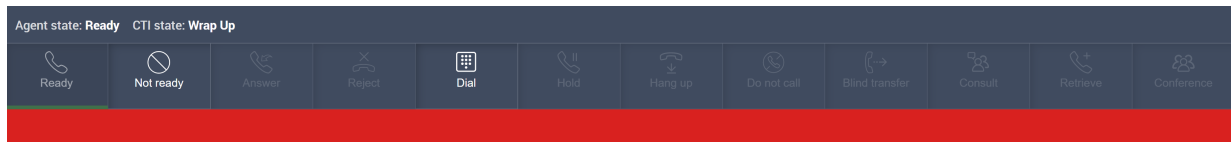
Jack now clicks **Retrieve**, which ends the call with the hotel and takes Emily off hold. Jack is now able to tell Emily the answer to her query.

4.2.3 Call State Banner

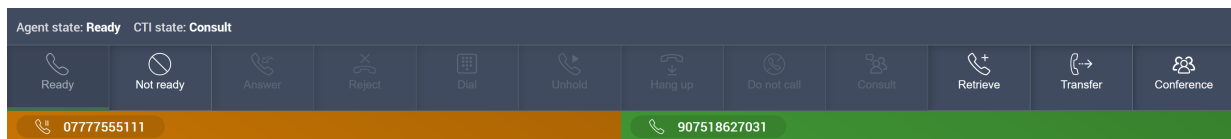
The call state banner indicates your agent and CTI states and provides other information about the current call, such as the external party's phone number. The banner also changes color to help you manage your calls. For example, the banner is blue when your CTI state is Ringing.




Where the customer has been disconnected, the **call state banner** turns **red**, indicating you’re in wrap-up.



When you're on a consult or conference, the banner splits in two to show the two parties you're speaking with. On a consult that you have initiated, click on a banner to switch between the party whom you are speaking with and the party on hold.



4.2.4 Telephony Logout

When the agent logs out of a POM-enabled workzone (by clicking  and then **Log out**), Syntelate XA logs them out of POM.

The agent can only log out when their agent state is **Not ready**.

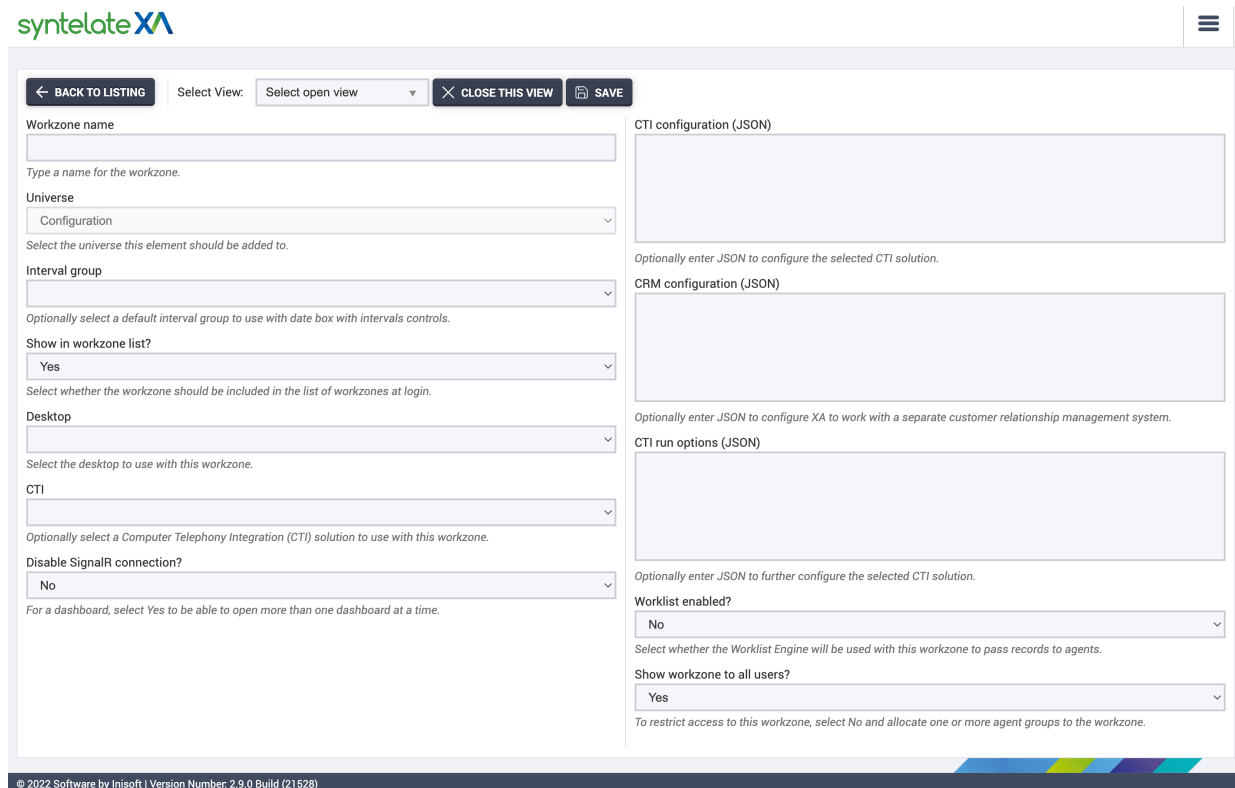
4.3 What You Need

For Syntelate XA to integrate with Avaya POM, you must have:

- » Avaya Aura® Communication Manager.
- » Avaya Aura® Application Enablement Services.
- » The TSAPI Client installed on your Syntelate XA server.

4.4 Workzone Configuration

In Syntelate XA, all CTI integrations are configured in Designer's Workzone Editor. Here is a screenshot of the configuration settings page in Workzone Editor.



The following three fields in a CTI workzone must be completed to create a telephony channel in Syntelate XA:

- » **CTI:** Offers types of telephony to choose from.
- » **CTI configuration (JSON):** This is where you specify the telephony server connections.

- » **CTI run options (JSON):** This is where you specify the telephony behavior at runtime, in other words, when it's handling calls on the Syntelate XA Agent Desktop.

The CTI configuration and run options need to be provided in JSON format.

Below, you'll see examples and descriptions of each option.

4.4.1 CTI configuration (JSON)

```

{
  /* Standard settings */

  "CtiSource": "POM",

  "CtiApiUrl": "",

  "LoginRequired": true,

  "AutoLogin": false,

  "RecordLoginDetails": true,

  /* Localization settings */

```



```
/* server 1 */ {
```

```
  "Name": "",
```

```
  "Ip": "",
```

```
  "Port": ""
```

```
},
```

```
/* server 2 */ {
```

```
  "Name": "",
```

```
  "Ip": "",
```

```
  "Port": ""
```

```
}
```

```
],
```

```
/* REST or SOAP settings */
```

```
  "WebService": {
```

```
"Server": "https://xxx.xxx.xxx",
```

```
"Username": "",
```

```
"Password": ""
```

```
}
```

```
/* Inbound settings for blended POM */
```

```
"PassThru": {
```

```
"CtiSource": "TSAPI",
```

```
"CtiApiUrl": "",
```

```
"LoginRequired": true,
```

```
"cancelPreviewCode": "~PrvCncl~",
```

```
"ServerName": "",
```

```
"Username": "",
```

```
"Userpassword": "",
```

```

"TimeoutSeconds": "10",

"PrivateDataVersions": "8"

},

}

```

4.4.1.1 Standard Settings

The standard settings are required.

JSON Key	Description
CtiSource	<p>Default value: An empty string.</p> <p>Valid values: A string that is either "POM", "TSAPI" or "IPOffice".</p> <p>Defines the type of telephony integration.</p>
CtiApiUrl	<p>Default value: An empty string.</p> <p>Valid values: A string that contains an absolute URL.</p> <p>Defines the URL of the Syntelate XA Web API for the CTI, hosted on your Syntelate XA instance. We recommend you host Syntelate XA near the phone system (on the same domain or in the same data center) to avoid latency issues.</p>
AutoLogin	<p>Default value: true</p>

JSON Key	Description
	<p>Valid values: true false</p> <p>Determines whether Syntelate XA will automatically log in the agent. If AutoLogin fails for any reason, Syntelate XA shows the log in dialog to the agent so they can log in manually. We recommend setting this to true.</p>
RecordLoginDetails	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the agent's login details will be stored in the AGENTLASTLOGIN table after they first successfully log in. We recommend setting this to true.</p>
PopOnOutgoing	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the Dial telephony button will pop a new interaction record to the agent desktop if it doesn't already have a interaction record open. Only affects agents who dial an outbound call while in Not Ready or Waiting.</p>

4.4.1.2 Localization Settings

These are required settings.

JSON Key	Description
Zone	Default value: "Default"

JSON Key	Description
	<p>Valid values: A string.</p> <p>The name of the POM zone. We recommend using the default value.</p>
Locale	<p>Default value: "Default"</p> <p>Valid values: A string that is an ISO language code. Examples: "en-US" for US English or "en-GB" for British English.</p>
Tz	<p>Default value: "Default"</p> <p>Valid values: A string that is the ISO time zone abbreviation for the local region where Syntelate XA is being used. For example, "UTC".</p>

4.4.1.3 General Options

These are optional settings.

JSON Key	Description
AutoWrapup	<p>Default value: true</p> <p>Valid values: true false</p> <p>When true, this will automatically assign a completion code to the interaction record and close it when the WrapUp timer reaches zero.</p>
ValidateCertificate	<p>Default value: true</p> <p>Valid values: true false</p> <p>When true, this will validate the POM certificate when the agent logs</p>

JSON Key	Description
	in to POM. When false, validation is disabled.

4.4.1.4 List of Servers

These are required settings.



Note: The server group of settings is formatted as an array. If you are using failover for Syntelate XA, then in this array you must specify the details of each POM server that's part of the failover infrastructure. But if you are not using failover, then you only need to provide the details for one server.

JSON	Description
Name	<p>Default value: "Default"</p> <p>Valid values: A string that is the name of the Avaya POM server.</p>
Ip	<p>Default value: "Default"</p> <p>Valid values: A string that is the IP address of the Avaya POM server.</p>
Port	<p>Default value: "Default"</p> <p>Valid values: An integer that is the port of the Avaya POM server.</p>

4.4.1.5 Web Service Settings

The WebService group is a required setting and it defines the connection to your Avaya POM Web API, which is a RESTful API.

JSON Key	Description
Server	<p>Default value: An empty string.</p> <p>Valid values: A string that is the absolute URL for the Avaya POM server and its POM web service. Use the following URL, replacing SERVERNAME with the name of your Avaya POM server:</p> <p>"https://#SERVERNAME#/VP_POM_Service/v4/"</p>
Username	<p>Default value: An empty string.</p> <p>Valid values: A string that is your username for the web service.</p>
Password	<p>Default value: An empty string.</p> <p>Valid values: A string that is your password for the web service.</p>

4.4.1.6 PassThru Options

The PassThru group is an optional setting, only used in POM blend implementations where Syntelate XA is used as both the inbound and outbound desktop. The PassThru group configures the inbound phone system.



Note: PassThru is an abbreviation of **Pass through Telephony Server**.

JSON Key	Description
CtiSource	<p>Default value: An empty string.</p> <p>Valid values: "TSAPI" or "TAPI"</p> <p>The type of inbound phone system being blended with POM.</p>

JSON Key	Description
CtiApiUrl	<p>Default value: An empty string.</p> <p>Valid values: A string that is the URL to the inbound phone system's API.</p>
LoginRequired	<p>Default value: true</p> <p>Valid values: true false</p> <p>Ensures that users can log in to the inbound phone system.</p>
ServerName	<p>Default value: An empty string.</p> <p>Valid values: A string that is the name of the server used by the inbound phone system.</p>
Username	<p>Default value: An empty string.</p> <p>Valid values: A string that is your username for the inbound phone system.</p>
Userpassword	<p>Default value: An empty string.</p> <p>Valid values: A string that is your password for the inbound phone system.</p>
TimeoutSeconds	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>The number of seconds that Syntelate XA will wait for a response from TSAPI for any command. We recommend using 10 seconds.</p>

JSON Key	Description
PrivateDataVersions	<p>Default value: An empty string.</p> <p>Valid values: A string that defines the release version of the TSAPI interface.</p> <p>Required only if TSAPI is the inbound phone system.</p>

4.4.2 CTI run options (JSON)

```

{

  /* Privacy option */

  "hidePhoneNumbers": true,

  /* Notification options */

  "ShowConsultNotificationMessage": "true",

  "ShowConsultToastMessage": "true",

  /* Call settings */

```

```

"CallOptions": {
    "IsCopyToDB": true,
    "DateFormat": "DD-MM-YYYY",
    "TimeFormat": "HH:MM:SS",
    "ResponseTimeout": 30,
    "BooleanTrue": true,
    "BooleanFalse": false,
    "OutboundGoReadyTimeoutSecs":15
},

/* Blend settings */

"PassThru": {
    "GoReadyOptions": {
        "IncomingCallsAgentGroup": 0,

```

```
"OutboundOnly": false,
```

```
"OutboundOnlyAuxCode": 5,
```

```
"GoReadyWithManualIn": false,
```

```
"SendNailupToastPopup": true
```

```
},
```

```
"CallOptions": {
```

```
"ExtnLength": 5,
```

```
"ExtnLengthComparison": ">",
```

```
"ExternalPrefix": ""
```

```
}
```

```
},
```

```
/* Wrap timer */
```

```
"WrapTimer": {
```

```
"Countdown": true,
```

```

    "CountdownTimeoutSecs": 15,

    "CountdownAddTimeCount": 1,

    "CountdownAddTimeSecs": 5,

    "autoCompleteCode": "AUTOWRAP"
  },

  /* POM dialer options */

  "DialerOptions": {

    "InteractionLookup": true,

    "InteractionField": "LKTL_POMID",

    "DatasetField": "LKTL_POMID"

  }

}

```

4.4.2.1 Privacy Option


This is an optional setting.

JSON	Description
hidePhoneNumbers	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the phone number fields in the Callback and DNC dialogs display the POM attribute name, PHONE 1 instead of the caller's number.</p>

4.4.2.2 Notification Options

These are optional settings.

JSON	Description
ShowConsultNotificationMessage	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether an agent will see a notification briefly appear in the Syntelate XA browser when a consult call is passed to them.</p>
ShowConsultToastMessage	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether an agent will see a notification</p>

JSON	Description
	<p>in the Windows task tray when a consult call is passed to them.</p> <div style="border: 1px solid #0056b3; padding: 10px; margin-top: 10px;"> <p> Note: If using toast notifications, in the AppSettings.config of Syntelate XA set the following key to true:</p> <pre data-bbox="821 701 1333 730"><add key="Notifications" value="true" /></pre> </div>
SendNailupToastPopup	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether a notification will be displayed on the Syntelate XA Agent Desktop when a POM Nailup Call is passed to the agent.</p>

4.4.2.3 Call Options

These are optional settings.

JSON	Description
IsCopyToDB	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether Syntelate XA will save the call details to its database.</p>

JSON	Description
DateFormat	<p>Default value: An empty string.</p> <p>Valid values: A string; "DD-MM-YYYY"</p> <p>Defines the format for saving date information for an interaction record in Syntelate XA.</p>
TimeFormat	<p>Default value: An empty string.</p> <p>Valid values: A string; "HH:MM:SS"</p> <p>Defines the format for saving time information for an interaction record in Syntelate XA.</p>
ResponseTimeout	<p>Default value: 0</p> <p>Valid values: A positive integer that represents a time in seconds.</p> <p>Defines when Syntelate XA will terminate an attempted call if there has been no answer.</p>
BooleanTrue	<p>Default value: true</p> <p>Valid values: true a string a positive integer</p> <p>We recommend using true.</p>
BooleanFalse	<p>Default value: false</p> <p>Valid values: false a string a positive integer</p> <p>We recommend using false.</p>

JSON	Description
OutboundGoReadyTimeoutSecs	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Specifies how long (in seconds) agents need to be in a Waiting CTI State on inbound before they will be nailed up for POM outbound.</p>

4.4.2.4 PassThru Options

The PassThru group of options are only required for POM blend implementations. A POM blend implementation is one that uses Syntelate XA as both the inbound and the outbound desktop. The PassThru group configures the inbound phone system.



Note: PassThru is an abbreviation of **Pass through Telephony Server**.

PassThru contains two groups:

- » GoReadyOptions
- » CallOptions

Go Ready Options

JSON	Description
IncomingCallsAgentGroup	<p>Default value: 0</p> <p>Valid values: A positive integer.</p>

JSON	Description
	<p>Defines the agent group number that will be set Ready for inbound calls. References the AgentGroupNo field of the AGENTGROUPS table. If you omit this setting, then all agents will be available for inbound calls (unless you also set OutboundOnly to true).</p>
OutboundOnly	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the workzone is outbound only. Set to true if the workzone uses just POM. Set to false if the workzone uses POM blended with TSAPI or TAPI.</p>
OutboundOnlyAuxCode	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the Aux reason code that tells TSAPI the agent is busy handling calls and it should not pass the agent inbound calls. For use only when TSAPI is the inbound phone system in POM blend.</p>
GoReadyWithManualIn	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether the agent needs to manually click Answer to pick up an inbound call. Set to false if inbound calls should be answered automatically. Exception: the settings of the agent's phone (their extension number) can</p>

JSON	Description
	override this.
SendNailupToastPopup	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether a toast notification is displayed to the agent when a nail-up call starts ringing.</p>

Call Options

The CallOptions group for PassThru lets you configure the agent phone that handles inbound calls.

JSON	Description
ExtnLength	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the number of digits in internal agent phone extensions. If you have varying lengths of internal extension (for example, a mix of 4 digit and 5 digit extensions) then set this to the higher number (and set ExtnLengthComparison accordingly).</p>
ExtnLengthComparison	<p>Default value: An empty string.</p> <p>Valid values: An operator (such as "!=", ">", or ">=").</p> <p>Determines when ExternalPrefix is assigned to a phone</p>

JSON	Description
	<p>number, based on ExtnLength. For example, if ExtnLength is 5 and ExtnLengthComparison is !=, then ExternalPrefix is assigned to any phone number with a length other than 5 (numbers with 4, 7 or 11 digits, and so on).</p>
ExternalPrefix	<p>Default value: Empty string.</p> <p>Valid values: A positive number.</p> <p>Defines the prefix Syntelate XA should use when dialing external numbers.</p>

4.4.2.5 Wrap Timer Options

JSON	Description
Countdown	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether automatic wrap-up of calls is enabled. If true, calls are wrapped up when the countdown is complete. When true, Countdown is dependent on the other wrap timer options in this group.</p>
CountdownTimeoutSecs	<p>Default value: 0</p> <p>Valid values: A positive integer.</p> <p>Defines the number of seconds that the wrap timer counts down from.</p>

JSON	Description
<p>CountdownAddTimeCount</p>	<p>Default value: 0</p> <p>Valid values: 0 1 (as integers, not strings)</p> <p>Determines whether the + ADD TIME button is displayed on the Agent Desktop. 0 is false and 1 is true. If you set this to 1, then you need to include the option <code>CountdownAddTimeSecs</code>. See below.</p>
<p>CountdownAddTimeSecs</p>	<p>Default value: 0</p> <p>Valid values: A positive integer that represents a time in seconds.</p> <p>Dependent on <code>CountdownAddTimeCount</code>. If you have set <code>CountdownAddTimeCount</code> to 1, then you need to include this option to specify how much time the +ADD TIME button adds to the timer. You can set it to 0 to force the wrap timer to count up rather than down.</p>
<p>autoCompleteCode</p>	<p>Default value: Empty string.</p> <p>Valid values: A string. We recommend "AUTOWRAP".</p> <p>Dependent on <code>Countdown</code>. If you set <code>Countdown</code> to true, when the timer reaches zero, the <code>autoCompleteCode</code> is stamped on the interaction record to log that it has been completed.</p>

4.4.2.6 Dialer Options

DialerOptions are required settings. They enable POM to pop existing POM interaction records to the Syntelate XA Agent Desktop.

JSON	Description
InteractionLookup	<p>Default value: true</p> <p>Valid values: true false</p> <p>Determines whether Syntelate XA will search the INTERACTION_X table for a match on the POM interaction data. In other words, when true, Syntelate XA will look for an existing interaction record that matches a value in the POM dialer data. The DatasetField and InteractionField settings tell Syntelate XA which fields to search on.</p>
DatasetField	<p>Default value: An empty string.</p> <p>Valid values: A string that specifies a field in the dialer.</p> <p>Defines the POM dialer field that you want Syntelate XA to look for in the InteractionField in the INTERACTION_X table.</p> <p>Tip: You need to specify the same value for DatasetField and InteractionField to allow InteractionLookup to work.</p>
InteractionField	<p>Default value: An empty string.</p> <p>Valid values: A string that specifies a field in the INTERACTION_X table. We recommend: "LKTL_POMID".</p> <p>Defines the INTERACTION_X field that Syntelate XA will search to find a match on the DatasetField value.</p>

JSON	Description
	<p>Tip: You need to specify the same value for InteractionField and DatasetField to allow InteractionLookup to work.</p>

4.4.3 Not Ready Reasons

Not ready reasons are held in the CTINOTREADYREASONS database table.

You can manage the not ready reasons either from the configuration desktop or directly in the database.

For guidance on using the configuration desktop to manage the not ready reasons, see the section 'Not Ready Reasons' in the PDF Guide, *Syntelate XA - Supervisor*.

If you prefer to use the database, ensure that you add a new record for each not ready reason. For guidance, see the PDF Guide *Syntelate XA - Database Tables*.

5. Email

Syntelate XA's email channel gives agents the ability to handle customer emails directly from their agent desktop.

An agent desktop can be set up for either basic email handling or advanced email handling.

Syntelate XA also supports automated emailing. See: [Key Features](#).

EXAMPLE

Inisoft Travel automatically send an email to the customer after each voice call, requesting that they complete a short survey about their experience.

5.1 Simple Email Handling

Where simple email handling is used, agents can reply to customer emails or create **unsolicited emails** (emails that are not sent in response to a customer email).

Simple email handling is intended for contact centers where there is a one-to-one relationship between a customer email and an agent's reply.

Forename
Emily

Surname
Coleman

Email address
emilyc@example.com

Email

View: Email

Subject
Forgotten password

Email address
emilyc@example.com

Hi

I've forgotten the password to my account. Please can you help?

Best wishes

Emily Coleman

REPLY

To
emilyc@example.com

Subject
re: Forgotten password

✂️ 📄 📧 ↶ ↷ **B** *I* U ☰ ☷ ☹️ ☰

A ▾ A ▾ Verdana ▾ 14px ▾ ☰ ☷

Salutation ▾ Insurance ▾ Loans ▾ Specialists ▾ Investments ▾ FAQs ▾

Dear Emily,

Kind regards

Gavin

SEND

Current workload

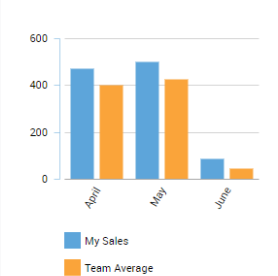
- Email: 1000

Upcoming workload

- Email 1000: 07/06/2019 10:20
- Email 1001: 07/06/2019 11:00
- Callback 1004: 07/06/2019 11:45
- Email 1005: 07/06/2019 12:10
- Callback 1006: 07/06/2019 14:15

My Charts

Chart: My Sales



Month	My Sales	Team Average
April	~480	~400
May	~500	~420
June	~100	~50

5.2 Advanced Email Handling

With an advanced email-handling setup, agents can forward and transfer emails, as well as access additional features when creating or replying to emails.



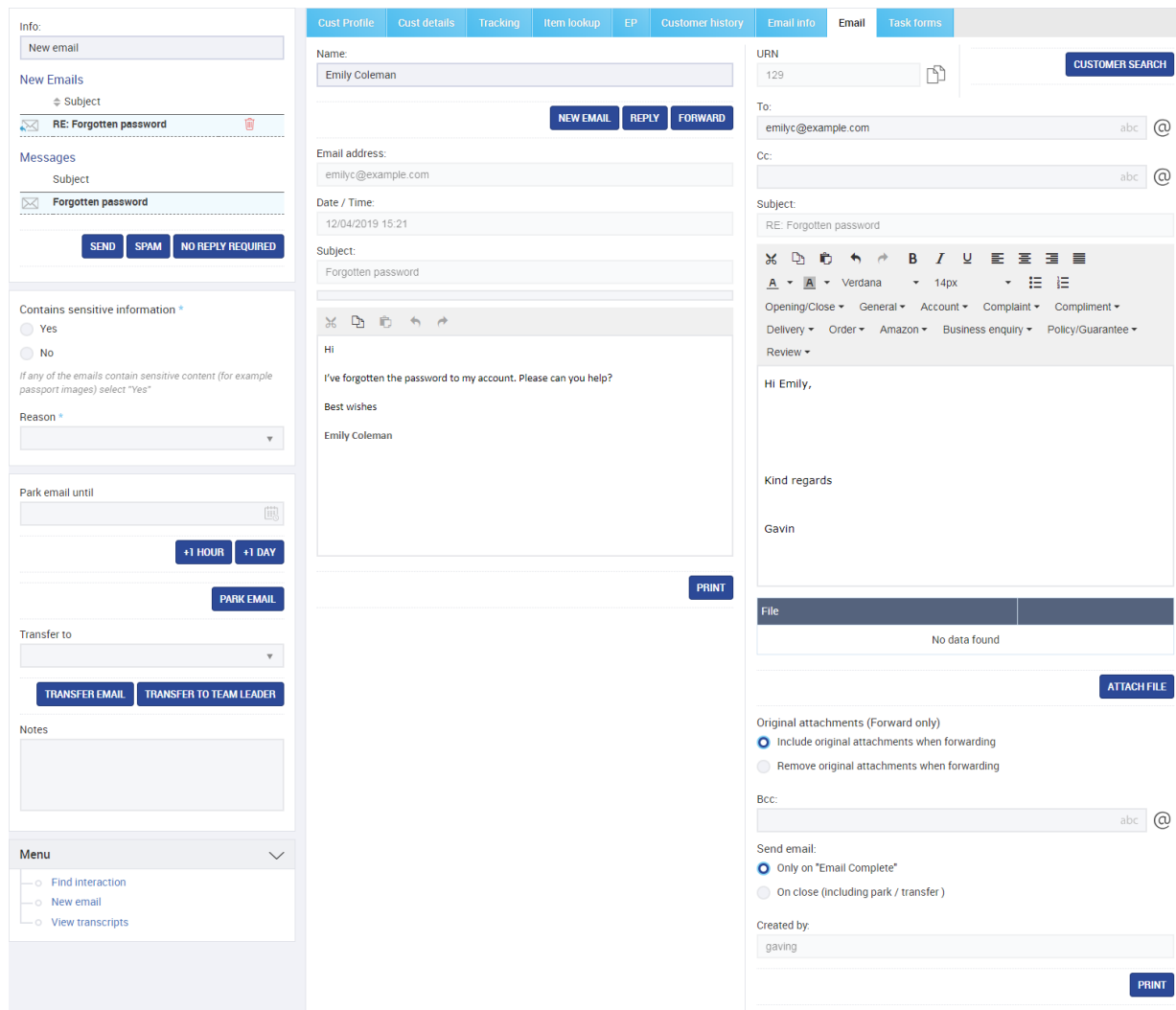
Note: For general information and instructions on transferring emails, see the document *Syntelate XA - Handling Emails*.

Unlike with simple email handling, many emails can be grouped into a single interaction record. For example, in response to a single customer email, an agent could:

- » Reply to the email saying that they are going to pass the customer’s query on to another department.
- » Forward the email to another department.

Similarly, let’s say a customer sends an email and then shortly thereafter sends a further email with additional details (such as “Forgot to add the attachment!”). With advanced email handling, these two emails would be presented to the agent at the same time.

The agent could view both emails and then decide to respond to just one or both of them.



The screenshot displays the Syntelate XA email management interface. On the left, there's a sidebar with sections for 'New email', 'New Emails' (with a subject filter), 'Messages' (with a subject filter), 'Contains sensitive information' (with Yes/No radio buttons and a reason dropdown), 'Park email until' (with time selection buttons and a 'PARK EMAIL' button), 'Transfer to' (with a dropdown and 'TRANSFER EMAIL'/'TRANSFER TO TEAM LEADER' buttons), 'Notes' (with a text area), and a 'Menu' (with options for 'Find Interaction', 'New email', and 'View transcripts').

The central main area shows the email details for 'Emily Coleman'. It includes fields for 'Name', 'Email address', 'Date / Time', and 'Subject'. Below this is a rich text editor with the content: 'Hi I've forgotten the password to my account. Please can you help? Best wishes Emily Coleman'. There are 'NEW EMAIL', 'REPLY', and 'FORWARD' buttons above the editor, and a 'PRINT' button below it.

The right sidebar contains the 'Email info' section with fields for 'URN', 'To', 'Cc', and 'Subject'. Below this is a rich text editor for the email body. Underneath is a 'File' section showing 'No data found' and an 'ATTACH FILE' button. The 'Original attachments (Forward only)' section has radio buttons for 'Include original attachments when forwarding' (selected) and 'Remove original attachments when forwarding'. The 'Send email' section has radio buttons for 'Only on "Email Complete"' (selected) and 'On close (including park / transfer)'. There's also a 'Created by' field with the name 'gaving' and a 'PRINT' button.

5.3 Key Features

Some of the key features of email support that are common to both simple email handling and advanced email handling are described below.



Note: For information about features specific to advanced email handling, see the document *Syntelate XA - Handling Emails*.

5.3.1 Record Matching

When an agent opens a customer email in their unified agent desktop, Syntelate XA automatically matches upon the customer's email address and, for existing customers, retrieves the customer's full details.

This provides the agent with the necessary context to fully understand the customer's email. For example, a desktop can show the customer's full interaction history across all channels, allowing the agent to view previous emails with the customer, web chat transcripts, and so on.

5.3.2 HTML Emails

Agents can compose HTML emails to customers that include formatting such as bold, color, links and so on.

5.3.3 Snippets

Snippets are small chunks of content that an agent (or email rule) can insert into an email, such as a response to a common question or an email signature.

They help agents by removing the pressure of writing to customers. Instead of writing emails from scratch, agents use snippets as building blocks to compose an email quickly.

Snippets can include references to data. For example, an email signature snippet might include the agent's first name. When an agent called Jack, say, uses this snippet, the snippet would include the name Jack.

See the document *Syntelate XA - Snippet Editor* for more information.



Tip: For guidance on how to insert snippets in automated email replies, see Email Rules in the Configuration Desktop section of *Syntelate XA - Supervisor*.

5.3.4 Rewriter

Agents can use Rewriter to paraphrase part or all of their email message before they send it.

See [Using Rewriter](#) to learn how an agent uses Rewriter.

5.3.5 Sentiment Analysis

The sentiment analysis feature is available as an add-on and is provided by Syntelate XA's **Sentiment Analysis** connector to the Azure OpenAI API.

5.3.5.1 Inbound Behavior

When enabled, sentiment analysis is performed automatically on all inbound emails prior to passing them to the agent desktop.

The analysis checks the language used in the message and scores it on sentiment quality, using a classification of positive, neutral or negative. The result is displayed in a sentiment rating bar that's displayed at the foot of the inbound email window.

5.3.5.2 Outbound Behavior

Sentiment analysis of outbound emails is not automatic but instead is done on demand.

An agent can choose to submit their email draft for sentiment analysis before they send the email. They can do this by selecting the body of their draft email message and clicking the Sentiment button in the HTML Editor toolbar.

When an agent clicks the Sentiment button, the selected text will be analyzed and rated. Syntelate XA displays the sentiment rating in a dialog on the agent desktop. The agent can choose to dismiss the dialog and either send or edit the email.

If they choose to edit the email, they can use sentiment analysis again if they wish.

5.3.5.3 Configuration

If you add **Sentiment Analysis** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Sentiment Analysis** is on or off. You can switch **Sentiment Analysis** on and off using the `SentimentAnalysis` setting in the [GENERAL table](#).

5.3.5.4 Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

5.3.5.5 Agent Experience

For more information on the agent experience of **Sentiment Analysis**, see Email Sentiment Analysis.

5.3.5.6 Sentiment Analysis Reporting

You can add a **Sentiment Analysis** report to your Syntelate XA Dashboard Desktop. With this report, supervisors can monitor the average sentiment ratings of customer interactions by channel. See 'Dashboard Desktop' in the PDF Guide, *Syntelate XA - Supervisor*.

5.3.6 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- » Analyzes the agent's written content,
- » Corrects any spelling, grammatical, and punctuation errors,
- » Rewrites it in a formal style,
- » And presents the agent with suggested replacements.

5.3.6.1 Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the **AIRewrite** setting in the [GENERAL table](#).

5.3.6.2 Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

5.3.6.3 Agent Experience

See Using Rewriter to understand how it works in practice for agents.

5.3.7 Outbound Email Options

Syntelate XA supports the following outbound email options as standard:

- » New
- » Reply
- » Forward

On request, we can implement **Reply All**, too.

5.3.8 Mailboxes

You can monitor multiple email mailboxes, such as *personaltravel@inisoft.com* and *businesstravel@inisoft.com*. Emails to each email address can be assigned to a specific agent group.

Agents' replies are sent from the appropriate email address.

EXAMPLE

Inisoft Travel have an agent group for Personal Travel and another agent group for Business Travel. They configure the *personaltravel@inisoft.com* email address to use the Personal Travel agent group and the *businesstravel@inisoft.com* email address to use the Business Travel agent group.

This ensures that emails are always passed to an agent who has been appropriately trained to answer it.

5.3.9 Read Receipts

Read receipts are an optional feature of Syntelate XA for Microsoft Exchange mailboxes.

When the read receipt feature is enabled, a **Read receipt** check box is displayed on the agent desktop. Agents can request a read receipt for an outbound email by selecting that check box.

If you would like to enable read receipts on your Microsoft Exchange email channel, contact your Inisoft professional services consultant to discuss your requirements.

5.3.10 Workload

Emails that Syntelate XA assigns to an agent are put into that agent's workload. The agent can then freely work through emails in their workload in the order that they see fit. For example, an agent may wish to first quickly reply to all "easy" emails before then returning to "harder" emails.

An agent can start to compose a reply and then return to it later. In addition, where you blend different types of activity, an agent working on an email can be interrupted by an inbound call.

To move between items in their workload, agents use a workload control on their desktop.

5.3.11 Route to Supervisor for Approval

Syntelate XA lets you route an agent's email to a supervisor for approval before actually sending the email to the customer.

Maybe you only wish to do this for certain agents, such as newly trained agents. Or perhaps you only wish to do this where the agent has manually edited the email but not where the email consists only of snippets.

With Syntelate XA, this is all possible.



Note: To route all emails by a particular agent to a supervisor before sending, populate the EMAILESCALATE_GRP field in the AGENT table. This should reference an agent group of supervisors.

To query whether an email was manually edited by the agent or solely built up using snippets, use the LKTL_MANUALLYEDITED field in the INTERACTION_X_NEWMESSAGE table.

5.3.12 Attachments

Syntelate XA supports email attachments, allowing agents – right from their agent desktop – to view any photographs or documents that a customer has attached to an

email. Syntelate XA also lets agents attach files to outbound emails.

For Office 365 integrations, the maximum file size for attachments in an outbound email is 15 MB.

5.3.13 Change Priority over Time

You can change the prioritization of emails over time. This is achieved via the Fulfilment Server.

EXAMPLE

Inisoft Travel have configured Syntelate XA so that, when an email first comes in, Syntelate XA marks it as low priority. After 24 hours, if an agent has not replied to the email, Syntelate XA increases its priority. After 48 hours, if the email has still not been responded to, Syntelate XA sets its priority to priority 1.

5.3.14 Supported Email Providers

Syntelate XA currently integrates with the following email providers:

- » Microsoft Exchange
- » Microsoft Office 365
- » Gmail
- » Any provider that offers SMTP

The following email functionality is supported:

Functionality	Exchange	Office 365	Gmail	SMTP
Inbound messages	x	x		
Outbound messages	x	x	x	x
Booking appointments	x	x	x	x
Syntelate Studio compatibility	x	x*	x*	x*

* Requires additional information from the email account holder to be compatible with Syntelate Studio.



Note: You can easily configure an integration with Microsoft Exchange or Microsoft 365 in Syntelate XA by using the Message Gateway configuration tool. See Syntelate XA - Message Gateway Configuration. To discuss how to use other email services, contact Inisoft Support.

5.4 Technical Details

An inbound email from a customer adds a record to the INTERACTION_X table, as with all other types of interaction. This is then picked up by the Worklist Engine and assigned to an agent.

For outbound email, you simply need to add a new record to the INTERACTION_X_NEWMESSAGE table. This is then picked up the Outbound Gateway service and sent to the customer.

You can add new records to the INTERACTION_X_NEWMESSAGE table in a variety of ways. For example:

- » You can add an email control to your agents' desktop that writes to the INTERACTION_X_NEWMESSAGE table.
- » You can add an action to a completion button that writes to the INTERACTION_X_NEWMESSAGE table.
- » You can set up a fulfilment that runs at set intervals and, where certain conditions are met, adds new records to the INTERACTION_X_NEWMESSAGE table.

5.5 Settings

Advanced configuration options for emails are held in app settings files.

It is in the app settings that you, for example, configure the file name extensions to allow for email attachments. If a customer tries to send a file that is not in the permitted list, it will not be saved and your agents will not be able to view it.

5.6 More Information

Document	Description
<i>Syntelate XA - Designer</i>	Explains how to design desktops for your agents.
<i>Syntelate XA - Message Gateway Configuration</i>	Explains how to configure the monitoring of mailboxes. Monitored mailboxes can also be used to send outbound emails.
Syntelate XA - Supervisor	Explains how to set up email rules.

Document	Description
<i>Syntelate XA - Snippet Editor</i>	Explains how to configure snippets for email.
<i>Syntelate XA - Fulfilment Server</i>	Explains how to set up fulfilments, which you can use for automated email communication.

6. Facebook

With Syntelate XA's Facebook integration, customers can send your agents chat messages in Facebook Messenger ("Messenger").

6.1 Agent Experience

Agents will see Facebook chats on their Syntelate XA Agent Desktop.

Their messages are sent to Messenger.

6.2 Customer Experience

A Facebook chat begins when a customer sends a message in Messenger on a monitored Facebook page or in the Messenger app.

6.3 Features

Some of the key features of Facebook chat in Syntelate XA are described below.

6.3.1 Sentiment Analysis

Sentiment Analysis helps agents create a positive experience for customers. When **Sentiment Analysis** is enabled, Syntelate XA displays a sentiment rating for each inbound and outbound chat message. Possible ratings are positive, neutral or negative. The customer does not see the sentiment ratings. Only the agent can see them.

6.3.1.1 Configuration

If you add Sentiment Analysis to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether Sentiment Analysis is on or off. You can switch Sentiment Analysis on and off using the `SentimentAnalysis` setting in the [GENERAL table](#).

6.3.1.2 Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

6.3.1.3 Agent Experience

For more information on the agent experience of **Sentiment Analysis**, see Handling Chats.

6.3.1.4 Sentiment Analysis Reporting

You can add a **Sentiment Analysis** report to your Syntelate XA Dashboard Desktop. With this report, supervisors can monitor the average sentiment ratings of customer interactions by channel. See 'Dashboard Desktop' in the PDF Guide, *Syntelate XA - Supervisor*.

6.3.2 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer's first name: *Hi, Emily. I can help you with that.*

6.3.3 Multiple Facebook Pages

You can monitor multiple Facebook pages, such as Inisoft Travel Personal and Inisoft Travel Business. You can associate each Facebook page with a different agent group.



Note: When a user comments on a Facebook page, Facebook assigns them a unique ID *for that page*.

Because of this, if you wish to support multiple Facebook pages, you must store (or at least be able to store) multiple Facebook IDs per customer. For more information, see document *Syntelate XA - Message Gateway Configuration*.

6.3.4 Transfer

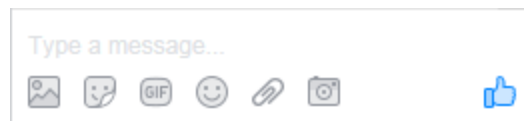
Agents can transfer a Facebook chat. Syntelate XA will then pass the chat to another agent who is assigned to the same Facebook page.

6.3.5 Handle Multiple Chats

Agents can handle multiple chats at a time – you can choose how many. This can even be multichannel: Facebook, web, SMS, and other social media chats.

6.3.6 Attachments and Embedded Media

Facebook Messenger lets your customers send the following content to your agents:



- » Photos
- » Stickers
- » Animated GIFs
- » Emojis
- » Files
- » Likes



Note: Syntelate XA does not let agents send your customers any photos or other types of multimedia.

6.4 Integration

To use Facebook with Syntelate XA, your company needs its own Syntelate XA Facebook app and then needs to create a social media message gateway in Syntelate XA. See the document *Syntelate XA - Message Gateway Configuration*.

6.5 More Information

Document	Description
<i>Syntelate XA - Handling Chats</i>	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
<i>Syntelate XA - Designer</i>	Explains how to design desktops for your agents. To let your agents handle chats, add a chat to the desktop.
<i>Syntelate XA - Smart Text Editor</i>	Explains how to configure smart text for chat.

7. Outbound SMS

Syntelate XA's outbound SMS functionality lets you send SMS text messages to your customers. This can either be via automated communication or by the agent manually sending an SMS.

- » **Automated communication:** Perhaps you'd like to ask each customer about their experience after a voice call. Or maybe your agents book appointments for your customers, and you'd like to send a reminder SMS to the customer 24 hours before their appointment.
- » **Manual communication:** Let an agent send an SMS to a customer while on a call with them to provide written confirmation of some details, for example. The content of such SMS messages can be automatically generated and sent upon the click of a button. Alternatively, you can allow the agent to manually type the SMS.

7.1 Outbound SMS vs SMS Chat

Syntelate XA offers two types of SMS functionality.

7.1.1 Outbound SMS

Allows outbound SMS communication to the customer, either by automated communication or by the agent manually sending an SMS.

7.1.2 SMS Chat

Allows back-and-forth chat between an agent and a customer via SMS. Initiated by the customer sending an SMS.

For more information about SMS chat, see [SMS Chat](#) on page 130.

7.2 Integration Services

Syntelate XA supports the following integration services for outbound SMS:

- » Kapow
- » Textlocal
- » Avaya OneCloud CPaaS

See the service provider's website for details of costs.



Note: Syntelate XA can integrate with other SMS service providers, too. To discuss this, please contact [Support and Training](#)Inisoft Support.

7.3 Technical Details

To send an outbound SMS message, you simply need to add a new record to the INTERACTION_X_NEWMESSAGE table. This is then picked up the Outbound Gateway service and sent to the customer.

You can add new records to the INTERACTION_X_NEWMESSAGE table in a variety of ways. For example:

- » You can add a multiline text box to your agents' desktop that writes to the INTERACTION_X_NEWMESSAGE table.
- » You can add an action to a completion button that writes to the INTERACTION_X_NEWMESSAGE table.
- » You can set up a fulfilment that runs at set intervals and, where certain conditions are met, adds new records to the INTERACTION_X_NEWMESSAGE table.

7.4 More Information

Document	Description
<i>Syntelate XA - Designer</i>	<p>Explains how to design desktops for your agents.</p> <p>To let your agents send SMS messages at the click of a button, add an action button action button to a data entry element.</p> <p>To let your agents type SMS messages, add a multiline text boxmultiline text box.</p> <p>To automatically send an SMS at the end of a call, add an action to a completion button.</p>
<i>Syntelate XA - Message Gateway Configuration</i>	Explains how to configure a message gateway with an SMS service provider for the sending of outbound SMS messages.
<i>Syntelate XA - Fulfilment Server</i>	Explains how to set up fulfilments, which you can use for automated SMS communication.

8. SMS Chat

Syntelate XA's SMS chat functionality lets customers communicate with an agent via an exchange of SMS text messages.

An SMS chat begins when a customer texts a phone number that is monitored by Syntelate XA.

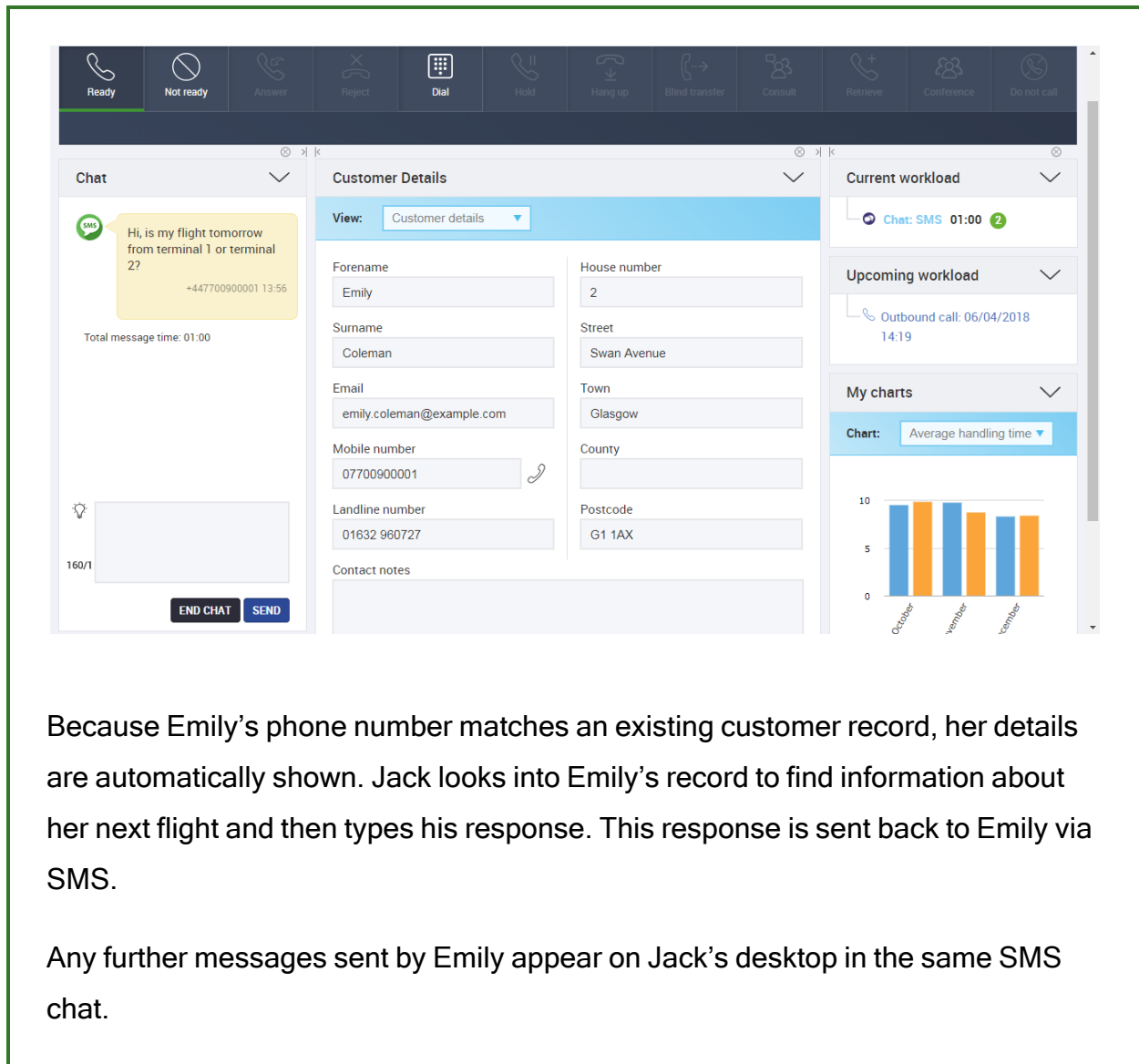
For agents, SMS chats take place in Syntelate XA. Agents' messages are sent as SMS messages from the company's monitored phone number.

EXAMPLE

Customers can contact Inisoft Travel by sending SMS text messages from their cell phone.

Emily has an inquiry, so on her cell phone she sends the following message to Inisoft Travel: *Hi, is my flight tomorrow from terminal 1 or terminal 2?*

For Jack, an agent, the SMS chat opens in Syntelate XA.



The screenshot displays a customer service interface with three main sections:

- Chat:** Shows an incoming SMS message: "Hi, is my flight tomorrow from terminal 1 or terminal 2?" with a phone number +447700900001 and a timestamp of 13:56. Below the message, it indicates "Total message time: 01:00". At the bottom of the chat window are "END CHAT" and "SEND" buttons.
- Customer Details:** A form displaying information for a customer named Emily Coleman. Fields include:
 - Forename: Emily
 - House number: 2
 - Surname: Coleman
 - Street: Swan Avenue
 - Email: emily.coleman@example.com
 - Town: Glasgow
 - Mobile number: 07700900001
 - County: [Empty]
 - Landline number: 01632 960727
 - Postcode: G1 1AX
 - Contact notes: [Empty text area]
- Workload and Charts:**
 - Current workload:** Shows "Chat: SMS 01:00" with a notification icon.
 - Upcoming workload:** Shows "Outbound call: 06/04/2018 14:19".
 - My charts:** A bar chart titled "Average handling time" comparing performance across three months: October, November, and December. The chart shows values of approximately 9.5 for October, 10 for November, and 8.5 for December.

Because Emily's phone number matches an existing customer record, her details are automatically shown. Jack looks into Emily's record to find information about her next flight and then types his response. This response is sent back to Emily via SMS.

Any further messages sent by Emily appear on Jack's desktop in the same SMS chat.

8.1 Features

Some of the key features of SMS chat are described below.

8.1.1 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- » Analyzes the agent's written content,
- » Corrects any spelling, grammatical, and punctuation errors,
- » Rewrites it in a formal style,
- » And presents the agent with suggested replacements.

8.1.1.1 Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the **AIRewrite** setting in the [GENERAL table](#).

8.1.1.2 Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

8.1.1.3 Agent Experience

See Using Rewriter to understand how it works in practice for agents.

8.1.2 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer’s first name: *Hi, Emily. I can help you with that.*

8.1.3 Phone Numbers

You can monitor multiple phone numbers and associate each phone number with a different agent group. You can then direct customers to text a particular phone number for a particular type of query. For example:

Query Type	Phone Number
Personal Travel	07700900050
Business Travel	07700900060

8.1.4 Handle Multiple Chats

Agents can handle multiple chats at a time – you can choose how many. This can even be a mix of SMS, web, and social media chats.

8.2 SMS Chat vs Outbound SMS

Syntelate XA offers two types of SMS functionality.

8.2.1 SMS Chat

Allows back-and-forth chat between an agent and a customer via SMS. Initiated by the customer sending an SMS.

8.2.2 Outbound SMS

Allows outbound communication to the customer, either by automated communication or by the agent manually sending a message.

For more information about outbound SMS, see [Outbound SMS](#) on page 127.

8.3 SMS Costs

Syntelate XA integrates with third-party APIs for SMS chat, which means that you need to open an account with a third-party SMS provider to implement SMS chat. Check with your chosen provider to find out their costs for sending and receiving SMS.

8.4 Settings

Various general settings are relevant to SMS chat. See the GENERAL database table.

In particular, you must set the **PhoneNumberMatching** general setting with the telephone dialing prefixes that Syntelate XA should take into account for phone number matching.

EXAMPLE

Emily's cell phone number is 07700900001. Emily lives in the United Kingdom, where the country calling code is +44.

For the **PhoneNumberMatching** general setting, Inisoft Travel have specified **44,+44**.

This setting ensures that when Emily gets in touch by SMS, Syntelate XA can match her phone number against the number in Emily's contact record. In other words, Syntelate XA would consider +447700900001 and 07700900001 to be a match.

Some advanced configuration options for SMS chat are held in app settings files.

8.5 More Information

Document	Description
<i>Syntelate XA - Handling Chats</i>	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
<i>Syntelate XA - Designer</i>	Explains how to design desktops for your agents. To let your agents handle chats, add a chat control to the desktop.
<i>Syntelate XA - Message Gateway Configuration</i>	Explains how to configure the phone numbers that you monitor and that agents can use to send texts.
<i>Syntelate XA - Smart Text Editor</i>	Explains how to configure smart text for chat.

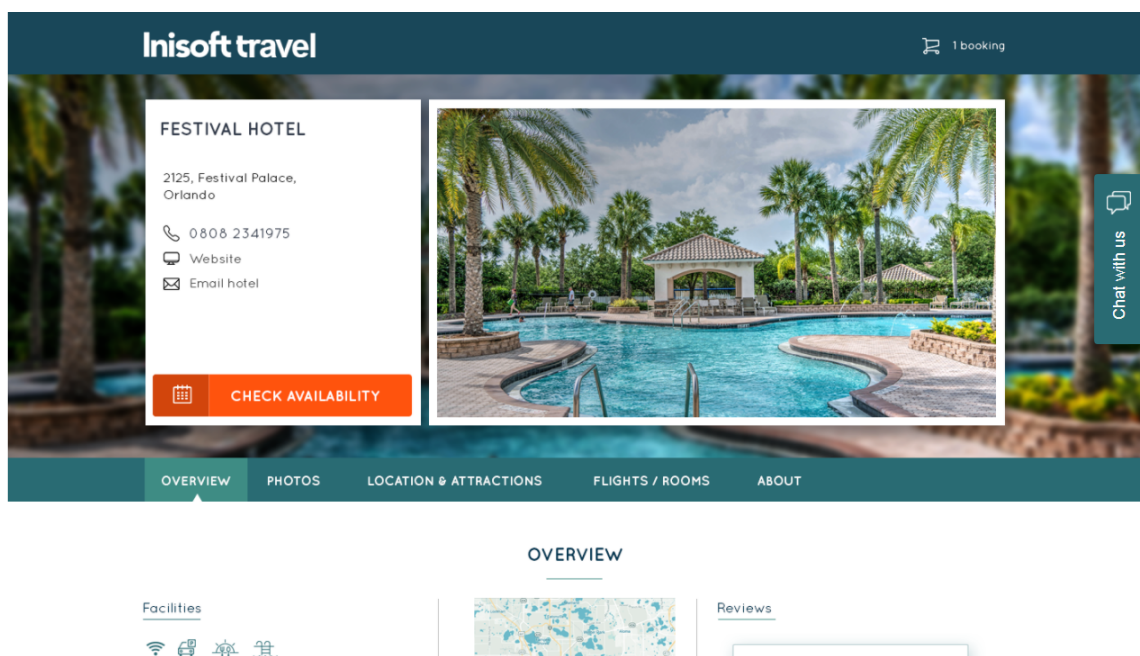
9. Web Chat

Syntelate XA's web chat functionality lets customers communicate with an agent via a web chat widget on your website. A web chat takes the form of an exchange of instant messages.

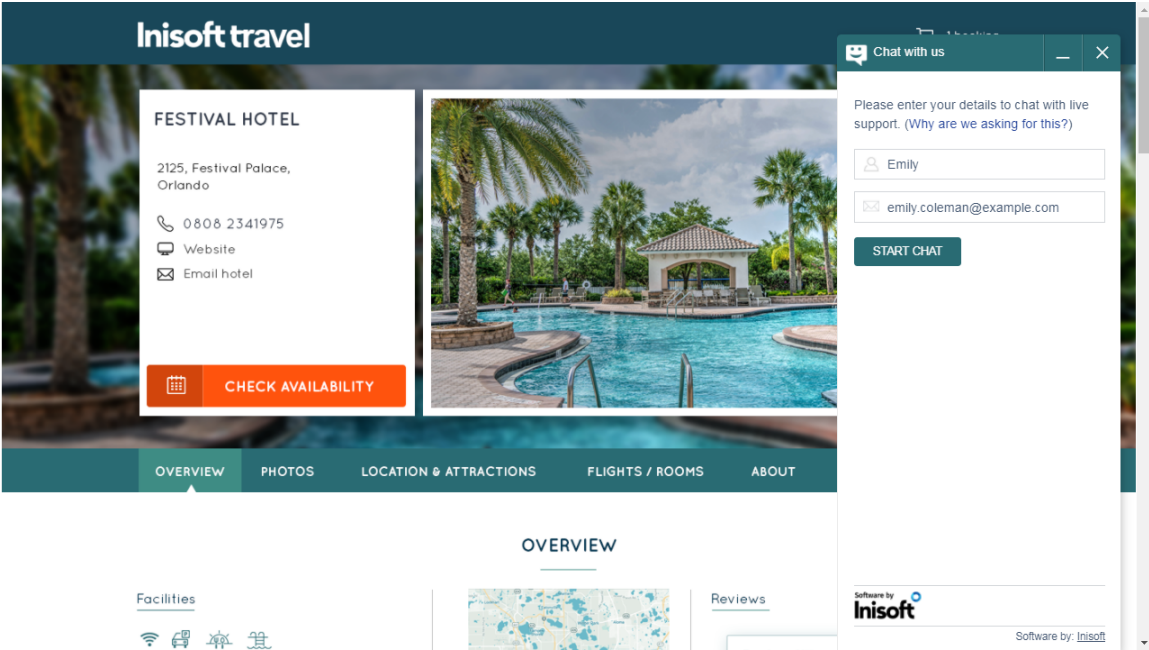
For agents, chats take place in Syntelate XA.

EXAMPLE

Emily is on the Inisoft Travel website.



Emily would like to ask a question about a holiday she has booked, so she clicks **Chat with us**. She is asked to enter some basic personal details.



The screenshot shows a web page for 'Inisoft travel' featuring a hotel listing for 'FESTIVAL HOTEL'. The hotel details include the address '2125, Festival Palace, Orlando', phone number '0808 2341975', and links for 'Website' and 'Email hotel'. A 'CHECK AVAILABILITY' button is prominently displayed. A chat window is overlaid on the right side of the page, titled 'Chat with us'. It prompts the user to enter details for chat support, with the name 'Emily' and email 'emily.coleman@example.com' already entered. A 'START CHAT' button is visible at the bottom of the chat window. The background of the chat window shows a pool area with palm trees.

After entering these details and clicking **START CHAT**, Emily is connected to an agent: Jack.

The screenshot displays the Inisoft travel website interface. On the left, a card for 'FESTIVAL HOTEL' provides contact information: '2125, Festival Palace, Orlando', phone number '0808 2341975', and links for 'Website' and 'Email hotel'. A prominent orange 'CHECK AVAILABILITY' button is at the bottom of the card. To the right is a large image of a swimming pool with palm trees. Below the image is a navigation menu with 'OVERVIEW', 'PHOTOS', 'LOCATION & ATTRACTIONS', 'FLIGHTS / ROOMS', and 'ABOUT'. The 'OVERVIEW' section is active, showing 'Facilities' with icons for Wi-Fi, parking, and other amenities, a map, and a 'Reviews' section.

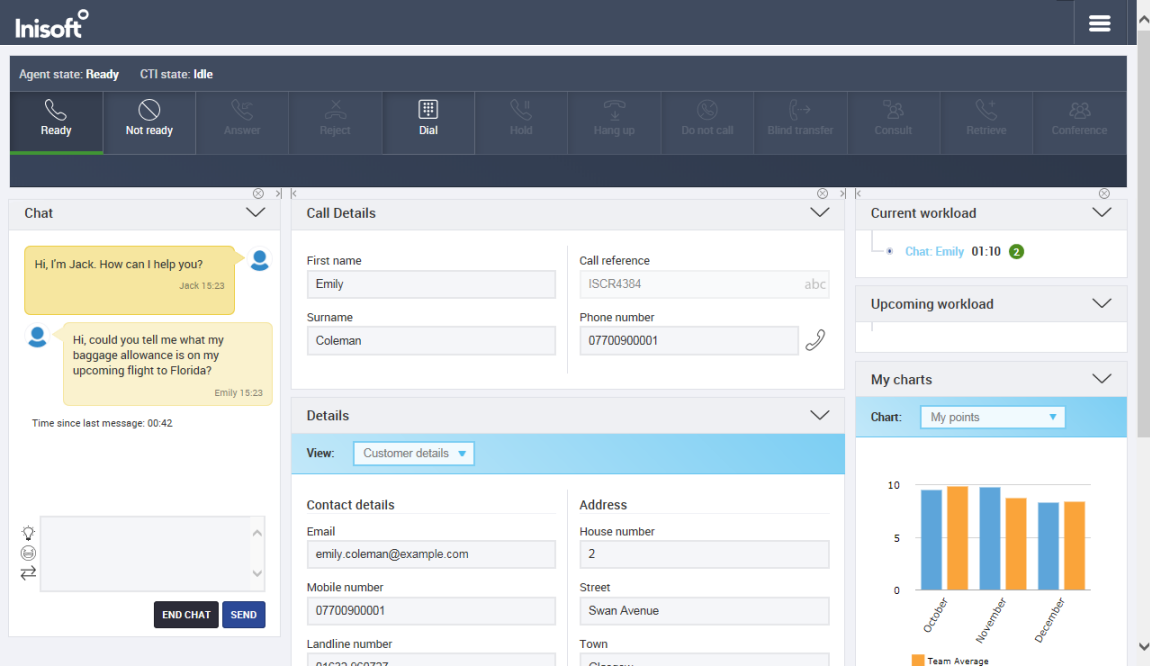
Overlaid on the right side of the website is a chat window titled 'Chat with us'. The chat history shows:

- A yellow system message: 'You will be connected to the first available agent' at 15:23.
- Another yellow system message: 'You are now chatting with Jack' at 15:23.
- A grey message from Jack: 'Hi, I'm Jack. How can I help you?' at 15:23.

 At the bottom of the chat window is a text input field with the placeholder 'Type message here', and buttons for 'END CHAT', 'UPLOAD FILE', and 'SEND'. The chat window footer includes the Inisoft logo and the text 'Software by: Inisoft'.

Emily types her question in the text box and clicks **SEND**.

For Jack, the web chat opens in Syntelate XA.



The screenshot displays the Inisoft web chat interface. At the top, the agent's status is 'Ready' and the CTI state is 'Idle'. Below this is a toolbar with various call control icons. The main interface is divided into three panels:

- Chat:** Shows a conversation with Jack and Emily. Jack's message is 'Hi, I'm Jack. How can I help you?' and Emily's response is 'Hi, could you tell me what my baggage allowance is on my upcoming flight to Florida?'. The time since the last message is 00:42.
- Call Details:** Displays customer information including First name (Emily), Surname (Coleman), Call reference (ISCR4384), and Phone number (07700900001).
- Details:** Shows contact and address information. Contact details include Email (emily.coleman@example.com), Mobile number (07700900001), and Landline number. Address details include House number (2), Street (Swan Avenue), and Town.
- Current workload:** Shows 'Chat: Emily 01:10' with a green indicator.
- My charts:** A bar chart titled 'My points' showing performance for October, November, and December. The legend indicates 'Team Average'.

Because Emily's email address matches an existing customer record, her details are shown.

9.1 Features

Some of the key features of web chat are described below.

9.1.1 Sentiment Analysis

Sentiment Analysis helps agents create a positive experience for customers. When **Sentiment Analysis** is enabled, Syntelate XA displays a sentiment rating for each inbound and outbound chat message. Possible ratings are positive, neutral or negative. The customer does not see the sentiment ratings. Only the agent can see them.

9.1.1.1 Configuration

If you add **Sentiment Analysis** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether Sentiment Analysis is on or off. You can switch **Sentiment Analysis** on and off using the `SentimentAnalysis` setting in the [GENERAL table](#).

9.1.1.2 Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

9.1.1.3 Agent Experience

For more information on the agent experience of **Sentiment Analysis**, see Handling Chats.

9.1.1.4 Sentiment Analysis Reporting

You can add a **Sentiment Analysis** report to your Syntelate XA Dashboard Desktop. With this report, supervisors can monitor the average sentiment ratings of customer interactions by channel. See 'Dashboard Desktop' in the PDF Guide, *Syntelate XA - Supervisor*.

9.1.2 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- » Analyzes the agent's written content,
- » Corrects any spelling, grammatical, and punctuation errors,
- » Rewrites it in a formal style,
- » And presents the agent with suggested replacements.

9.1.2.1 Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the **AIRewrite** setting in the [GENERAL table](#).

9.1.2.2 Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

9.1.2.3 Agent Experience

See Using Rewriter to understand how it works in practice for agents.

9.1.3 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer's first name: *Hi, Emily. I can help you with that.*

9.1.4 Auto-responses

In web chats, an auto-response is a message that a chat can automatically send to the customer when specific events occur. For example, when either the agent or the customer has not sent a message for a while:

- » *I haven't heard from you for a while. Are you still there?*
- » *Sorry for the delay. I'll get back to you soon.*

The content and settings of auto-responses are configured in the **Message Gateway** tile of Syntelate Studio. You can find instructions in the Setting the Chat Messages topic of the Configuration document.

9.1.5 Surveys

Pre-chat surveys are questions that can be sent to customers before they are connected to a chat agent.

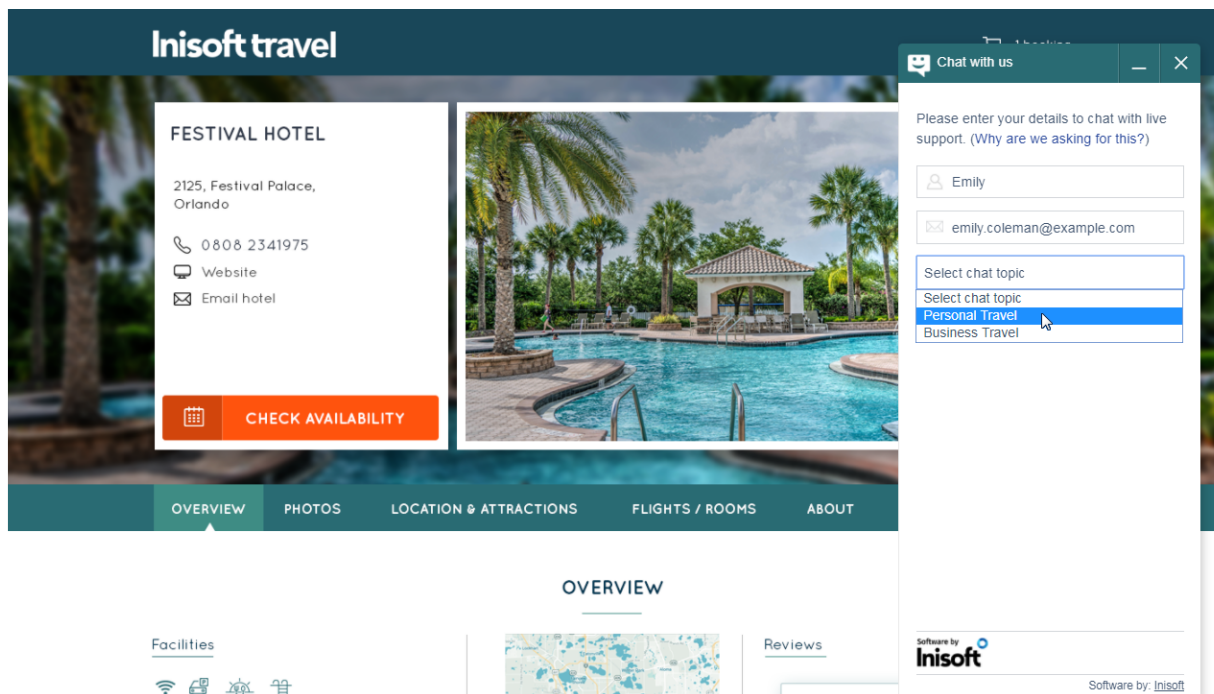
Post-chat surveys tailored to the selected topic can be sent after the chat has ended.

The content of surveys is configured during the requirements gathering stage. If you need to make any changes to your surveys, contact Inisoft Support (+44 (0)800 668 1290, support@inisoft.com).

9.1.6 Topics

You can define different topics, such as *Personal Travel* and *Business Travel*. You can then associate each topic with a different agent group.

You can allow the customer to select the topic when they start a web chat:



Alternatively, you can automatically set the topic based on the web page from which the customer starts the chat. For example, if a customer starts a web chat from www.inisoft.com/business, you could automatically set the topic to Business Travel.

9.1.7 Transfer

Agents can transfer a web chat from one topic to another.

Agents can also transfer the web chat to another agent who deals with the same topic. They might need to do this, say, if the customer has a second question that they can't help with.



Note: See the document *Syntelate XA - Handling Chats*.

9.1.8 Handle Multiple Chats

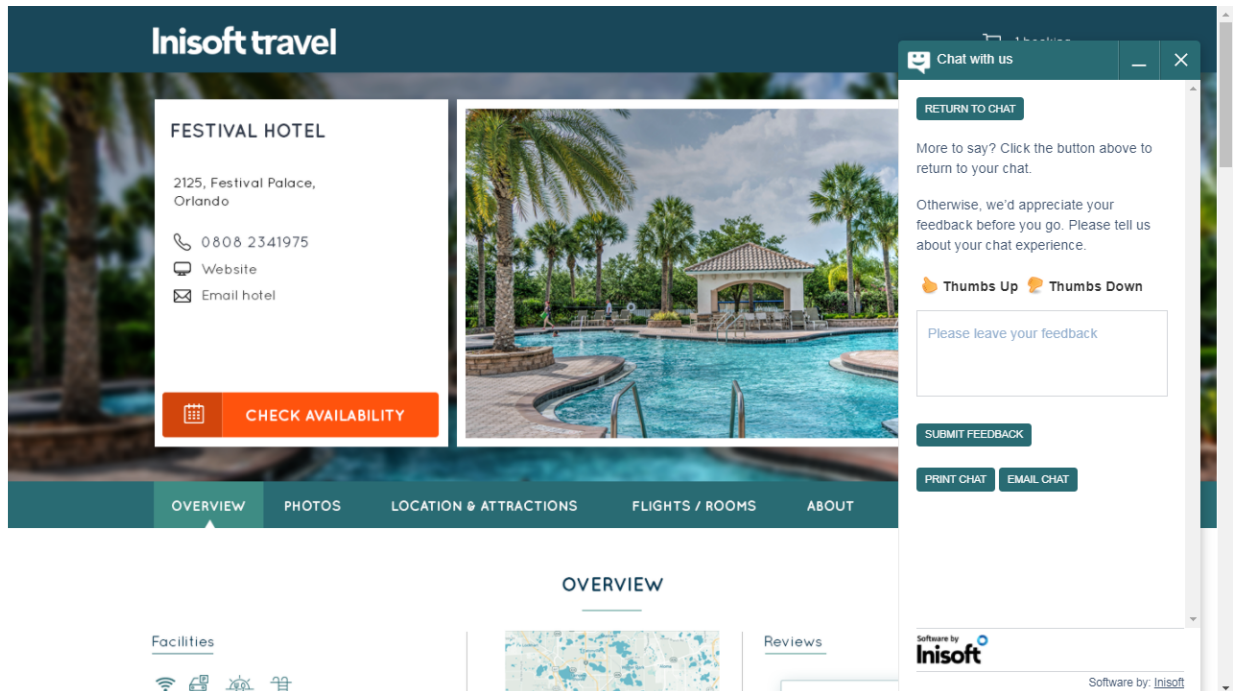
Agents can handle multiple chats at a time – you can choose how many. This can even be a mix of web, SMS, and social media chats.

9.1.9 Attachments

Agents and customers can upload files to be attached to a current chat conversation. For example, they could upload a photograph or a scanned document.

9.1.10 Customer Feedback

At the end of a web chat, customers can leave feedback:



You can choose to use either thumbs up / thumbs down or a 1 to 5 star rating.

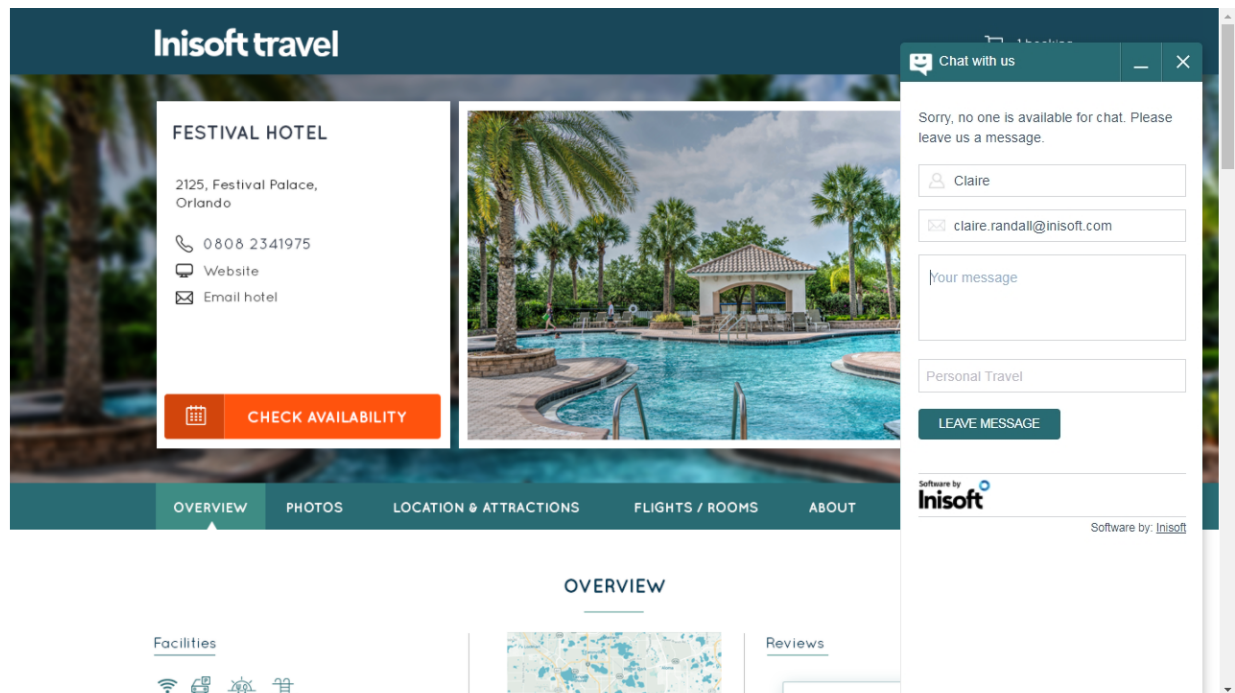
All customer feedback is written to the INTERACTION_X_FEEDBACK database table.

9.1.11 Email Transcript

The customer can choose to be emailed the web chat transcript. The agent can also select for this to happen.

9.1.12 Leave a Message

When no agents are available for web chat, a customer can instead leave a message:



9.1.13 Customizable Widget

You can fully customize the web chat widget, including:

- » Setting the colors and logos that it uses
- » Defining the days and times that it is visible on your website

9.2 Settings

Various general settings are relevant to web chat. See the GENERAL database table.

Some advanced configuration options for web chat are held in app settings files.

9.3 More Information

Document	Description
<i>Syntelate XA - Handling Chats</i>	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
<i>Syntelate XA - Designer</i>	Explains how to design desktops for your agents. To let your agents handle chats, add a chat control to the desktop.
<i>Syntelate XA - Message Gateway Configuration</i>	Explains how to configure web chat topics and leave a message gateways.
<i>Syntelate XA - Smart Text Editor</i>	Explains how to configure smart text for chat.
<i>Syntelate XA - Web Chat Configuration</i>	Explains how to configure the web chat widget for your company's website.

10. WhatsApp

WhatsApp is owned by Meta. To enable a WhatsApp channel in Syntelate XA, we support integrations with Meta's approved third-party solution providers. The third party's API provides the interface between Syntelate XA and the WhatsApp Business API.

Syntelate XA's WhatsApp channel works in the same way as Messenger, SMS chat, and web chat.

This document describes the key features of a WhatsApp channel in Syntelate XA.

10.1 Agent Experience

Agents receive and reply to WhatsApp messages using the **Chat** element on the Syntelate XA Agent Desktop.

Syntelate XA pops customer WhatsApp messages to the agent desktop when a customer sends a message to your business's WhatsApp number.

10.2 Customer Experience

Customers can have WhatsApp conversations with your business wherever they use WhatsApp. This might be a widget on your business's website, on Web WhatsApp in their browser, or on the WhatsApp app installed on their device.

10.3 Features

Some of the key features of WhatsApp chat in Syntelate XA are described below.

10.3.1 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- » Analyzes the agent's written content,
- » Corrects any spelling, grammatical, and punctuation errors,
- » Rewrites it in a formal style,
- » And presents the agent with suggested replacements.

10.3.1.1 Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the **AIRewrite** setting in the [GENERAL table](#).

10.3.1.2 Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

10.3.1.3 Agent Experience

See Using Rewriter to understand how it works in practice for agents.

10.3.2 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer's first name: *Hi, Emily. I can help you with that.*

10.3.3 Transfer

Agents can transfer a WhatsApp chat. Syntelate XA will then pass the chat to another agent.

10.3.4 Handle Multiple Chats

Agents can handle multiple chats at a time – you can choose how many. This can even be omnichannel: WhatsApp, web, SMS, and other social messaging chats.

10.3.5 Attachments and Embedded Media

WhatsApp lets your customers send the following content to your agents:

- » Photos
- » Stickers
- » Animated GIFs

- » Emojis
- » Files



Note: Syntelate XA does not let agents send photos or other types of multimedia.

10.4 Conversations on WhatsApp

When you set up a WhatsApp channel in Syntelate XA, you'll be able to receive user-initiated messages and send replies. Your replies need to be sent within 24 hours of receiving the user-initiated message. These types of conversation are categorized by WhatsApp as service conversations.

Syntelate XA currently does not support business-initiated conversations. These types of conversation are categorized by WhatsApp as authentication, marketing, or utility conversations. Business-initiated conversations require you to use WhatsApp message templates.



Note: If you would like to send business-initiated WhatsApp messages, contact our Syntelate XA Product Support team to discuss your requirements. You can reach Product Support at support@inisoft.com or +44 (0)800 668 1290.

For more information about WhatsApp's conversation categories, refer to the [Meta Developer documentation](#) of the WhatsApp Business Platform.

10.4.1 Expiring Messages

WhatsApp restricts the period within which a business can respond to user-initiated messages. WhatsApp refers to this time period as the [customer service window](#), and it's set at 24 hours. The window is opened when a customer's initial WhatsApp message is sent to your WhatsApp number. If the window closes before an agent in Syntelate XA has replied, then the customer's message will expire. To learn more about the consequences of the customer service window for expired user-initiated messages, see Meta's [Policy Requirements](#) paragraph.

The following features help your operations team manage expired messages in Syntelate XA.

10.4.1.1 Reduce the Window

We recommend that you reduce the customer service window in Syntelate XA to avoid failed deliveries of agent replies. You can reduce the customer service window by setting a message expiry time in Syntelate Studio when you create your WhatsApp message gateway. For guidance, see the topic, 'Message Gateways Configuration' in the document *Syntelate XA - Studio*.

10.4.1.2 Remove Expired Messages

Syntelate XA can be configured to automatically remove expired WhatsApp messages from the Syntelate XA queue. That way, agents are never passed an expired message. Although the message is removed from the queue, it remains in Syntelate XA. To allow you to view and manage expired messages, use the **Expired Messages** pane on the Syntelate XA Configuration Desktop. See the document *Syntelate XA - Supervisor* for guidance.

10.4.1.3 Reply Using Another Channel

Your agents can reply to expired messages using a channel other than WhatsApp, such as SMS, email, or outbound voice. To do this, you would need to create the relevant channel. Contact our Syntelate XA Product Support team to discuss your requirements. You can reach Product Support at support@inisoft.com or +44 (0)800 668 1290.

10.5 Integration

To integrate with WhatsApp in Syntelate XA, you need to use a third-party WhatsApp Business solution provider. The third-party API establishes a connection from the WhatsApp Business API Client to Syntelate XA's API and MS SQL database.

Currently, Syntelate XA supports the following providers:

- » [MessageBird](#)
- » [Sunshine Conversations](#)



Note: If you would prefer to use an alternative third-party provider, get in touch to discuss your requirements.

We can implement the integration for you as part of your Syntelate XA project. However, note that Syntelate XA projects do not include the third-party provider's fees. You'll need to sign up for an account with the provider and pay for that separately.

After you have created the integration, you need to create a social media message gateway in Syntelate XA to complete the setup of your WhatsApp channel. For guidance, see the section, 'Message Gateways Configuration' in the document *Syntelate XA - Studio*.

10.6 More Information

Document	Description
<i>Syntelate XA - Handling Chats</i>	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
<i>Syntelate XA - Designer</i>	Explains how to design desktops for your agents. To let your agents handle chats, add a chat to the desktop.
<i>Syntelate XA - Smart Text Editor</i>	Explains how to configure smart text for chat.

Support and Training

Questions? Contact Inisoft Support (+44 (0)800 668 1290, support@inisoft.com).

Interested in training for your call center? Then why not get in touch? Email us at sales@inisoft.com and ask to speak to our Professional Services team.