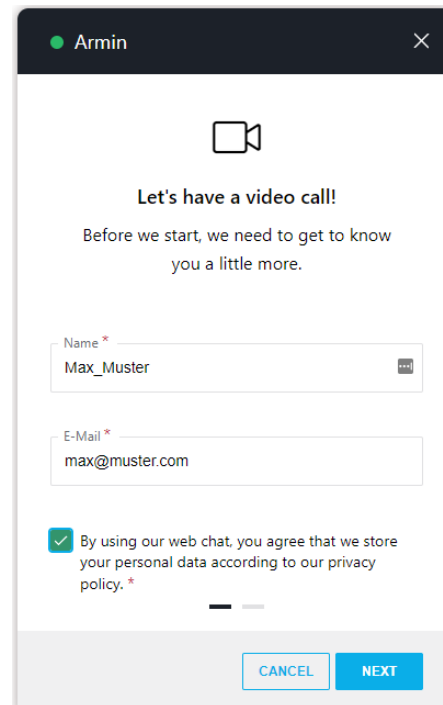# Luware

Interact

Admin 101

MOMENTUM

Important Basics

IMPORTANT NOTE: This App must be licensed separately per user or service and can work with the (separately licensed) Nimbus Contact Center.

Luware Interact is a solution that incorporates instant messaging (chat), audio, and video calls directly into a website. Admins can customize it so that customers interact with your Teams directly – either via service front, or with directly visible single users. From a customer perspective, the Interact UI is very simple to use, and is directly embedded as a code snippet (widget) on a website.

The customer engages with a simple setup process and starts talking directly to any Nimbus user within their MS Teams client, **without any prior plugin or software installation required on Customer side.** By extending your configuration with Interact Domain Templates (CORS), you can define where Interact widgets are allowed to be used and restrict access this way so that no external websites can "redirect" traffic to your services.

Brief Overview

Interact can be licensed for users and for services.

While **Interact for users** enables customers to get in touch directly with a specific agent by handing over the task directly to the agent, **Interact for services** handles incoming tasks in a similar fashion as inbound calls are handled. The customer sees the service's name in the Interact widget in the latter case.

NOTE: This guide is a primer, offering basic instruction and some useful links to the vendor's online KB for additional information or details.

Click HERE to find Training information.

Supported Modalities

Interact currently supports the following modalities, bi-directional and without any further browser installation requirements:

Audio/Video & Screen Sharing

Audio or Audio/Video (+ Screen sharing). Customers interact via an Interact widget on your website where they can configure their headset, webcam, and screen sharing options.
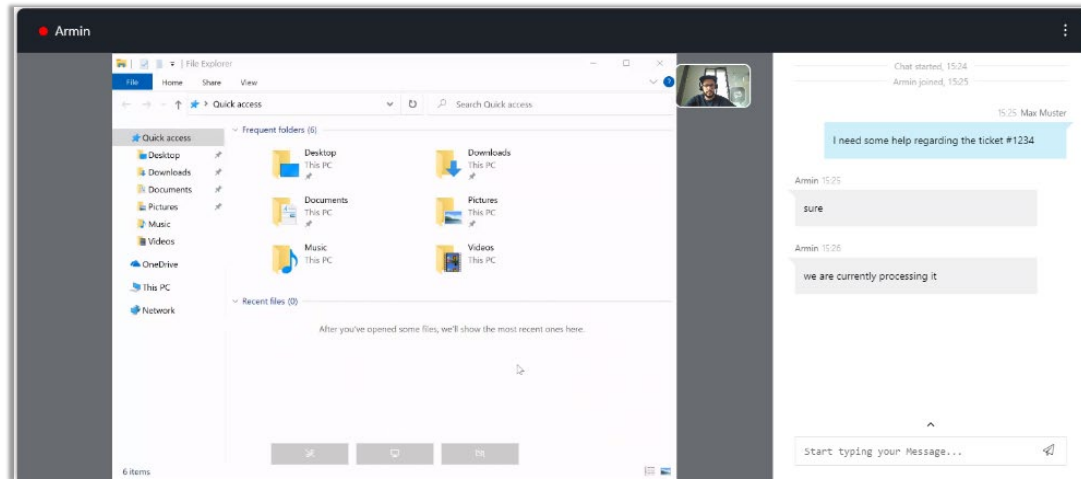
🔍 The Video modality is exclusive to Interact. Refer to Audio/Video for preconditions and requirements. The Use Case - Setting Up Interact is the basic condition for getting A/V calls established.

Instant Messaging

Instant Messaging (Chat) is handled either directly to a user (agent) OR handled according to a service's Instant Message Workflow. In either case, customers interact via an Interact widget on your website where they can provide a name, an email address, and an initial message, and start chatting.

Before You Start: Related Steps

- Nimbus Interact is a separately licensed Nimbus Feature and can be enabled individually for Users and Services. Please get in touch with Customer Success partner as prior setup is required limitations may apply.
- You can enable and configure either modality individually per Interact User Settings and Interact Service Settings, either opting to route incoming modalities via a service queue or directly to the Teams users themselves.
- The Interact configuration is done completely within the Administration portal for the tenant.
  Also refer to Use Case - Setting up Interact for detailed steps.
- Customers from outside will directly interact with Nimbus users and services via website widget. The website whitelist and the embed code are configured via Interact Domain Templates (CORS).

Interact Setup

On this page, we're going through an example **setup for your own Interact web presence**, covering the following steps:

- Necessary tenant [Administration](#) steps.
- [Interact Domain Templates (CORS)](#) to control access.
- [Interact Service Settings](#) to enable Interact for services.
- [Interact User Settings](#) to enable Interact for users.

Preconditions

Audio/Video Instant Messaging (Public Preview).   These steps will cover 2 modality scenarios: AV (Audio/Video Calls) and Instant Messaging (IM/Chat).
You can configure either or both options via the steps below.

> ✅ **The Instant Messaging modality must be enabled on your tenant first in order to be configurable for Interact. Please get in contact with your Luware Customer Success specialist to discuss this.**

The following preconditions apply for using Interact with any modality:

> You require **tenant administrator** rights to to create and update tenant, user, and service settings.
> You need to have a **dedicated ACS (Azure Communication Service) instance** from Azure.
> You need a **dedicated O365-user** (teams license assigned) on behalf of which Teams meetings will be created. This user needs to have a proper [Access Policy](#) assigned.

Azure Communication Service (ACS) Instance Setup

The usage of Interact will cause additional monthly ACS (Azure Communication Services) costs depending on modality (IM/AV) used.
**These costs are determined by Microsoft**. Also see: https://learn.microsoft.com/en-us/azure/communication-services/concepts/pricing

- Before enabling additional modality features for your services, get in touch with your Nimbus provider to discuss terms, usage scenarios, and necessary setup procedures.
- Please note that Nimbus and Interact support does not cover pricing discussions or make recommendations based on the Microsoft Azure infrastructure.

The following steps describe how an ACS instance can be setup as required for Nimbus Interact.

To create a new Azure Communication Service, perform the following steps**:**

1. Head to Azure Portal and login with tenant admin rights.
2. Search for "*Azure Communication Service*" component and click "*Create*".
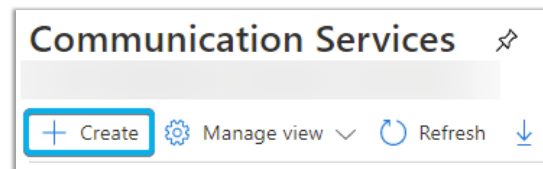
   ☝ Make sure not to use any underline/underscores within the name.
3. Switch to the **Keys** tab and copy the **connection string**

Icon Legend

💡 = A hint to signal **learnings, improvements or useful information** in context.	🔍 = Info points out **essential notes or related page** in context.
📖 = Notifies you about **fallacies and tricky parts** that help avoid problems.	😕 = Asks and answers common **questions and troubleshooting points**.
❌ = Warns you of **actions with irreversible / data-destructive** consequence.	✅ = Instructs you to **perform a certain (prerequired) action** to complete a related step.

Determine Your Modalities

Interact can be configured for multiple modalities:

Modality	Description
Audio/Video	Calls are either handed directly to a user (agent) OR handled according to the service's Audio/Video Workflow. Customers interact via an Interact widget on your website where they can configure their headset, webcam, and screensharing options.
Instant Messaging	Chats are handed either directly to a user (agent) OR handled according to a service's Instant Message Workflow. In either case, customers interact via an Interact widget on your website where they can provide a name, an email address, and an initial message, and start chatting.

💡 You can configure either modality independently per service *and* per user.
  If not marked further, steps are generally applicable regardless of modality.

Defining Your Use Case

You can set up Interact either for a **User** or a **Service**. While Interact for users enables customers to get in touch directly with a specific agent by handing over the task directly to the agent, Interact for services handles incoming tasks in a similar fashion as inbound calls are handled. The customer sees the service's name in the Interact widget in the latter case.

Some setup steps are the same for both use cases, some differ. Differing steps are divided into tabs, explaining how to perform them either for *Interact for users* or *Interact for services*.
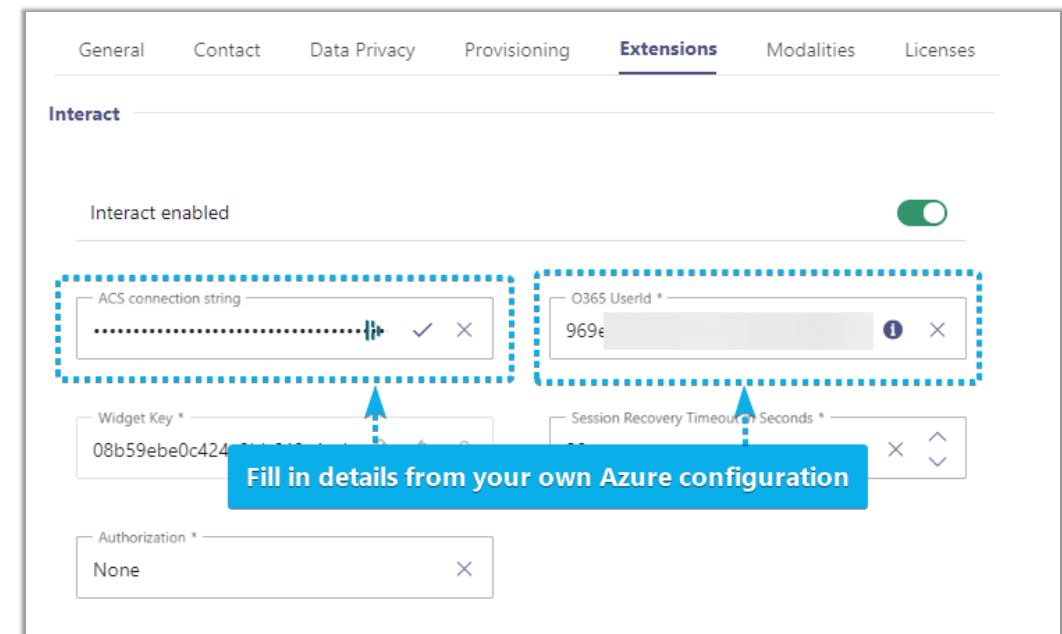
💡**Note** that your service has to have either an Enterprise or a Contact Center license assigned in order to use Interact.

Configuring Your Tenant for Interact

1. Navigate to **Nimbus Admin > Tenant Administration.**
2. In the **Extensions** tab, go to section **Interact.**
3. **Enable Interact** for your Tenant.
4. **Specify the following Interact settings:**

   - *ACS Connection string (from the ACS instance which was created)*
   - *O365 User ID (newly created Azure EntraID User with a proper Teams License)*
   - *Widget Key (autogenerated)*
   - *Session Recovery Timeout in Seconds*
   - *Authorization.*
     🔍 See Extensions Tenant Settings for more details about these settings.
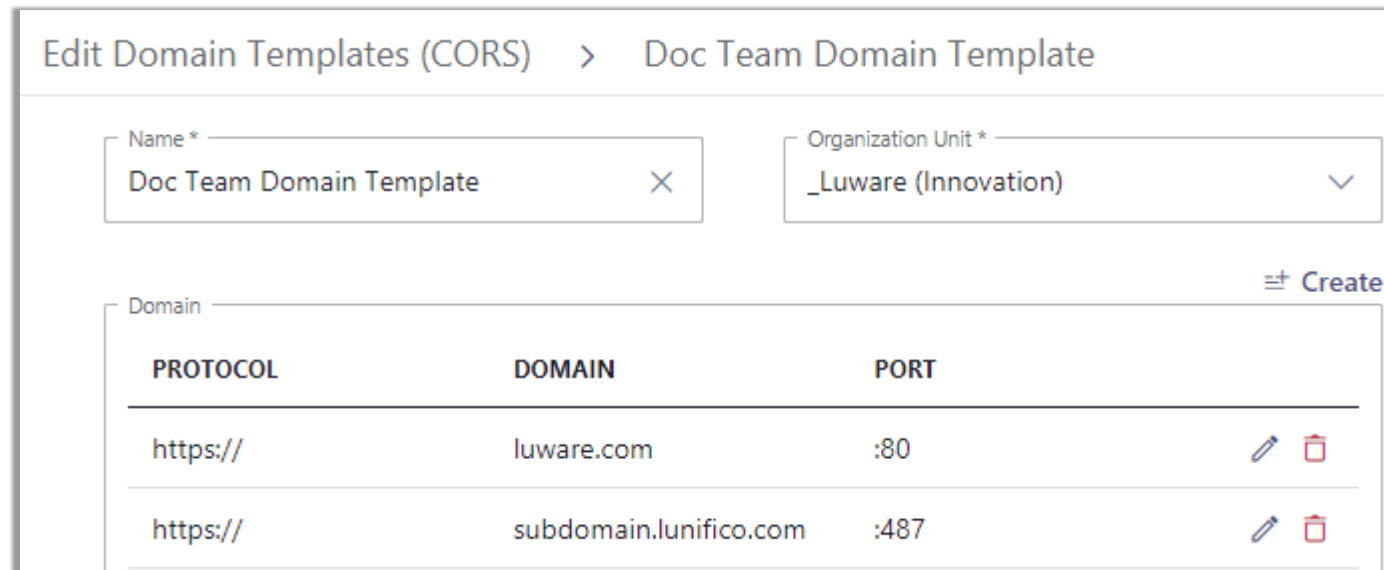
5. **Save** the changes.

After the configuration is completed, your need to run the Nimbus provisioning script in order to get the changes applied.

Configuring a Domain Template

Domain templates define where Interact widgets are allowed to be used, so that no external websites can "redirect" traffic to your services. Templates can be applied to either users or services independently. To define templates, perform the following steps:

Edit Domain Templates (CORS)　　>　　Doc Team Domain Template

Name *

Doc Team Domain Template

Organization Unit *

_Luware (Innovation)

⇅ Create

Domain

PROTOCOL	DOMAIN	PORT		
https://	luware.com	:80	✎	🗑
https://	subdomain.lunifico.com	:487	✎	🗑

1. Navigate to Nimbus **Admin > Configuration > Interact Domain Templates (CORS)**.
2. Click **Create new**.
3. Enter a name and select the relevant Organization Unit.
4. **Specify Domain name(s)** on which you want to allow **Interact** usage (whitelist).
5. Click **Create**.

Restricting Access (CORS)

The previously created domain template needs to be applied to either users or services.

Please Note: CORS templates with the same or a higher Organization Units level as your user/service may be available for selection. Ensure you do not select the wrong template (e.g. provided by a higher OU level administrators) or your embedded widgets may not work.

For Users

1. Navigate to Nimbus **Admin > Users** and select the user.
2. **Enable Interact license** for the user and click *Save.*
   ↳ The Interact tab appears.
3. Go to the **Interact tab** and **activate** Interact.
4. In section **Restriction**, enable *Restrict Access.*
   💡You can skip this and the next step if you don't want to apply domain templates to the user.
5. **Select the previously created CORS-Domain-Template** in the *Domain Template* dropdown list.
6. Click *Save*.

For Services

✅ Your Service has either an Enterprise or a Contact Center license applied.

1. Navigate to Nimbus **Admin > Services.**
2. Select the service you want to enable Interact for.
3. In General Service Settings, assign an Interact license for the service.
4. Click *Save & Apply.*
   ↳ The Interact tab appears.
5. Go to the **Interact tab** and **activate** Interact.
6. In section **Restriction**, enable *Restrict Access.*
   💡You can skip this and the next step if you don't want to apply domain templates to the service.
7. **Select the previously created CORS-Domain-Template** in the *Domain Template* dropdown list.
8. Click *Save & Apply.*

Creating Service and Direct System Messages

💡 This step is **optional** and only necessary if you want to add Service System Messages to your service or Direct System Messages for Users.

System Messages are message templates for messages displayed to the customer and user before, during, and after the session, e.g. a welcome message for the customer, or an informative message for the user on the Adaptive Card.

For Users

1. Go to Nimbus **Admin > Configuration**.
2. Select **Instant Messaging > Direct System Messages.**
3. Click *Create New.*
4. Fill out the tabs as follows:

   General

   1. Give your Direct System Message a name and select the Organization Unit.
   2. Optionally, add a description.
   3. In the User dropdown, select how you want to display the user's name for customer.
      You can either display the user's current display name or define a custom name.

Messages to User

In the tab *Messages to User*, you can define messages that are displayed to the user when an instant message is coming in, handled, or terminated, using Direct Conversation Parameters:


Messages to Customer

In the tab *Messages to Customer*, you can define messages that are displayed to the customer when getting connected to the user or ended by the user:
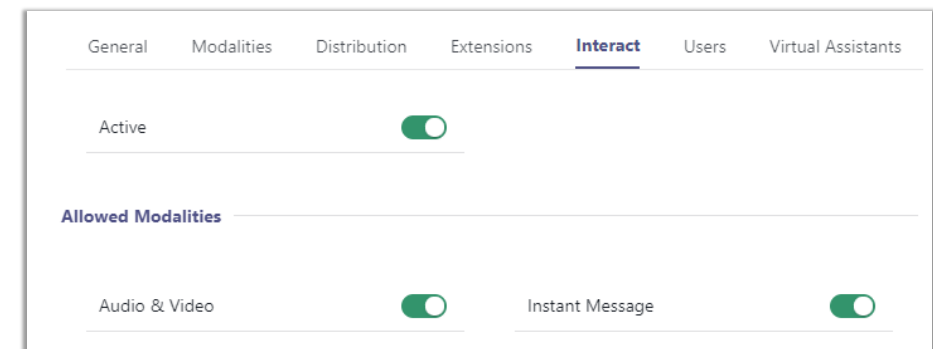
Configuring Interact Service/User Settings

✅ Ensure that the IM modality has been enabled for your tenant as described in the pre-requirements, otherwise you will not see that option in this step.

Allowed Modalities

Audio & Video ⬤ Instant Message ⬤
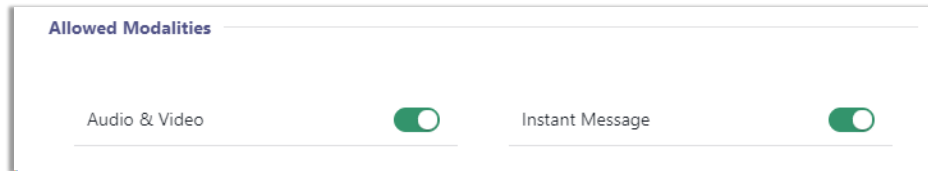
For Users

✅ Interact is enabled for the user in General User Settings **and** activated in tab *Interact*.

1. Navigate to Nimbus **Admin > Users** and select the user.
2. Go to tab *Interact* and enable one or more modalities for Interact. In our example setup, we enable Audio/Video and Instant Messaging.
3. Optionally, in the *Direct System Messages* dropdown, select the (previously created) Direct System Message.
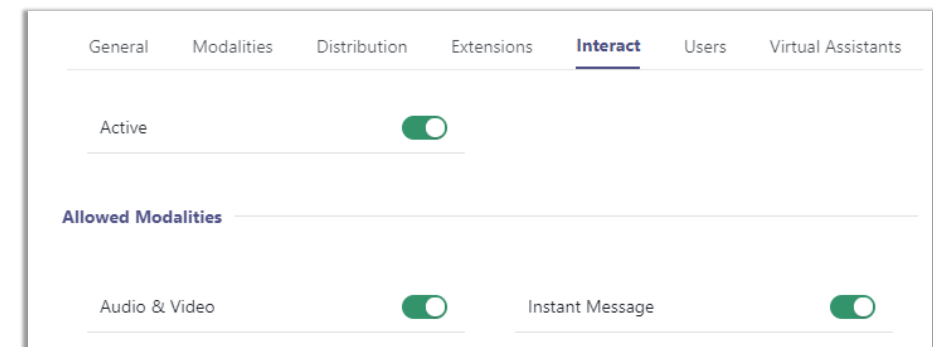
| General | Modalities | Distribution | Extensions | **Interact** | Users | Virtual Assistants |

Active ⬤

Allowed Modalities

Audio & Video ⬤   Instant Message ⬤

For Services

Enterprise Contact Center

✅ Interact is enabled for the service in General Service Settings **and** activated in tab *Interact*.

1. Navigate to Nimbus **Admin > Services** and select your service.
2. Go to tab *Modalities* and enable Instant Messaging.
   ↳ A new section *Instant Messaging* appears. If you don't see it, scroll down to the end of the page.
3. In the *Instant Messaging Workflow* dropdown, select an *Instant Messaging* workflow.
4. Optionally, in the *Service System Message* dropdown, you may select a service system message created previously.
5. Head over to the tab *Interact* and enable one or more modalities for Interact.
6. Enable *Instant Message* and other modalities you want to use in the service. In our example setup, we enable Audio/Video and Instant Messaging.

| General | Modalities | Distribution | Extensions | **Interact** | Users | Virtual Assistants |

Active ⬤

Allowed Modalities

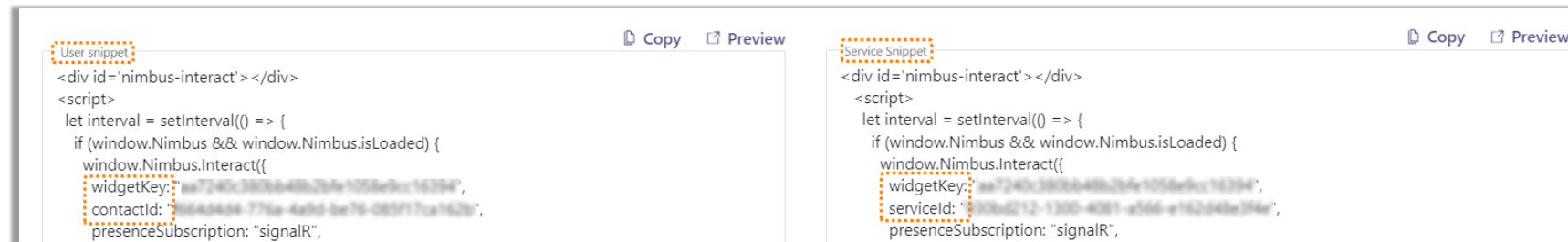Audio & Video ⬤   Instant Message ⬤

Testing Integration Snippets

The final step for setting up Interact is to test and copy the snippets for your user/service to the destination website. If you do not have the expertise, ask your web administrator to embed the widget snippets for you.

1. In the *Interact* tab (either in Interact User Settings for users or Interact User Settings for services), go to section ***Integration*** and click *Preview*.
   ↳ A mockup website with the Interact functionality opens. This is how it will look like for the customer.
2. If you are satisfied with the preview, **copy the HTML code snippet, and insert it into your website.**

💡 **Note** that users and services have individual IDs and widget keys. Make sure not to mix these details when pasting them on your website.

Users and services have individual IDs and widget keys.

Instant Messaging Set Up

Configure and Enable Chat Communications Channel

In this use case, we're going to tackle the following topics:

- Necessary Administration steps to enable Instant Messaging (IM) modality on your tenant.
- User Administration to enable Instant Messaging modality (and other modalities you might need) for users.
- Change related Service Settings to set up Instant Messaging Workflows.

Preconditions

Licensing:

- **Instant Messaging is a user modality feature to be enabled for your tenant**. This is done during initial setup with your Luware Nimbus provider and in tandem with License Management for your users and services.
- **Instant Messaging needs to be enabled for your tenant in Modalities Tenant Settings.**
- **Luware Interact is currently required to engage in service chats from outside**. This is done via *Tenant Administration > Extensions > Interact* section.

User Requirements

- **Service Users** - As a user of the Instant Messaging modality, you need to have an Instant Message service modality license assigned in General User Settings.
- **Direct User Messages** - As a user receiving direct user messages via Interact (without a service being involved), you need to have an Interact license assigned in General User Settings and Instant Message modality enabled in Interact User Settings.
- **Delegated admin user permissions** are required once to run the application. This link can be found under *Modality Service Settings > Instant Messaging > "Grant Permissions".*
- **As a user of the Instant Messaging modality**, you need to **register with the IM chat bot** once in order to receive Adaptive Card messages and chat invitations. This is done via *Nimbus Portal > User Preferences (Portal).*
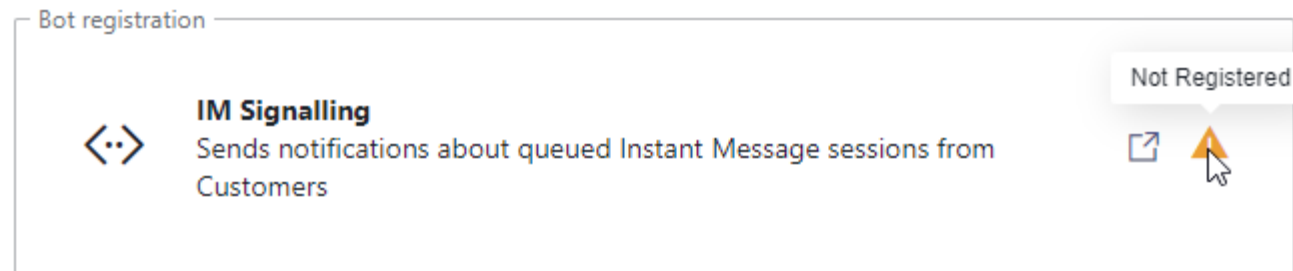
After registration, the bot will invite users via adaptive cards on incoming chat messages. This permission is necessary for bot-spam prevention.

Currently, Instant Messaging only works together with Interact, which can be set up for user and for services. Interact for users works without a service being involved.
If you want to setup IM for Interact for users, you can skip the service-specific steps described in this use case. On the contrary, you can skip the IM for Users steps is setting up IM for services only.

Enabling Instant Messaging on Your Tenant

a. Go to **Modalities Tenant Settings**.
b. In the section *Instant Messaging,* **toggle on** *"Instant messaging enabled"* to get further options.
c. **Invite the external users** for IM on your tenant using the following steps:

   As Tenant Admin, log into your Azure Portal.

   1. Go to Users > New Users and select "Invite external User".

   2. Invite both guest users 1&2 on your tenant. Add each of the previously copied email addresses (e.g. svr_nimbus_guest@onmicrosoft.com) and click Invite.
       ↳ A standard Azure invite mail will be sent out to Luware.

   🔔 **Note that MFA (Multi Factor Authentication) needs to be disabled for these users**.
   Otherwise, this feature will not work as the guest users cannot sign into your tenant**.**

1. Let your Customer Success Specialist know that the guest users have been invited.
2. Please wait while steps are done in the background:
    i.   Luware cloud operations team must accept the guest invitations.
         Please allow for some time for this to happen.
    ii. Once successful, the "*Account is not added as guest*" message should disappear on your side in the Nimbus admin UI.
    iii. If this is not the case, please get in contact with the Luware support.

   Admin: Inform your Customer Success partner about the pending user invite.
   This invitation needs to be accepted by us before usage is possible on your side.

   Upon receiving confirmation from Customer Success, you can use the **Test UPN** field to send messages to any user on your tenant (e.g. a future chat message recipient acting as service user).
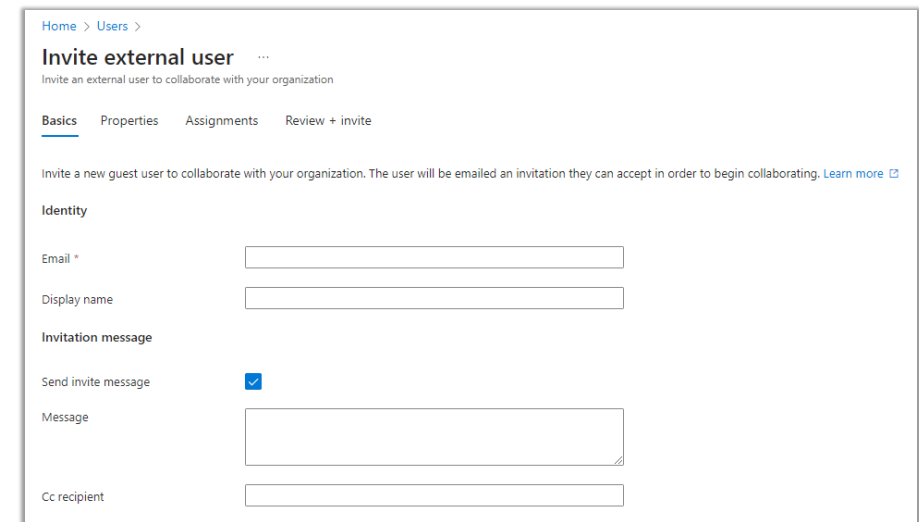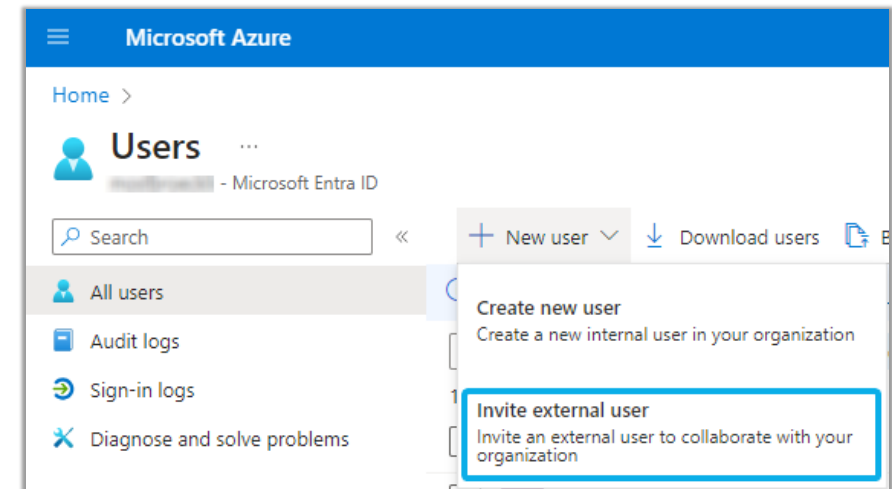
Instant Messaging for Services Set Up

Configure Your Instant Messaging Workflow

🔍 This step is **only necessary if you want Instant Messing for your Services**. For enabling Instant Messages directly to users, refer to Use Case - Setting up Interact.

1. Navigate to Nimbus **Admin > Configuration**.
2. Select **Workflows > Workflows.**
3. Click **Create New.**
4. Select Instant Messaging as Workflow Type.
5. Give your new workflow a name and Organization Unit that fits your new chat handling service.
6. Design your workflow in the editor:
   1. 💡 Note that you have similar Workflow Activities for instant messaging to those for Audio/Video workflows, however, with slightly differences.
   2. We recommend you to start with "*Accept Conversation*" and a "*Message*" activity for your customer.
   3. Follow up with a "*Queue Task*" activity to assign the IM task to the users of your service.
   4. Once the queue limit is reached, don't forget to use "*Cancel Task*", and "*Disconnect*" the user as you would in a call. 💡 A friendly "Sorry" message goes a long way.
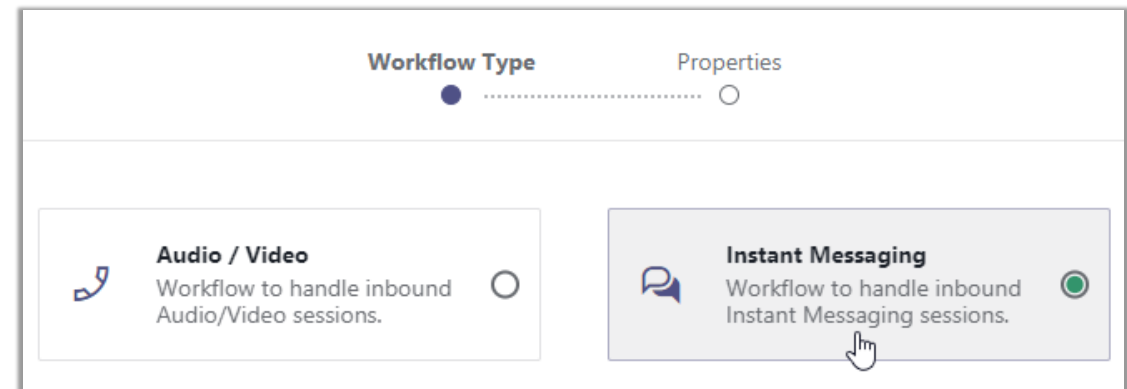
Final Checks and Rollout

Instant Message **only**: Ensure that your users have registered the chat bot. This is done via their User Preferences (Portal) > Permissions Tab.
Further details can be found in Setting up Instant Messaging.

Instant Message Audio/Video: For each of your services, double-check that Modality Service Settings have the respective Workflows applied to handle the modality of your choice.

🔍 Refer to Call Handling and Instant Message Handling for descriptions of the respective interaction.

Customers can now interact with your users and services directly via Interact widget.

Troubleshooting and Known Issues

😒 **Preview or embed code not working? Check the following:**

- Interact is enabled on Tenant Level within the Tenant Administration.
- Interact is enabled for the user.
- The access for the user is not restricted by a Interact Domain Templates (CORS) . Disable *Restrict Access* to test this quickly.
- When "*Authorization*" is enabled for Interact on Tenant level, you require an access token, as described in Use Case - Enabling additional authorization for Interact.

Known Interact Limitations

- Interact has certain JavaScript calling limitations in regard to operating systems and browsers. Refer to the official MSFT documentation.
- Audio/Video Calls initiated from Interact have the following workflow **limitations**:

Workflow Activity	Limitations
Transfer	Can only target services. Not supported targets are: • external • user • parameter
Queue	"Pickup" distribution type is not supported.
Voice Message	Not supported.
Customer Input	Sending DTMF over Interact (Client/SDK) is not supported