# Omnichannel Messaging Guide

Yeastar P-Series Appliance Edition

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# Omnichannel Messaging Overview

Yeastar P-Series PBX System provides an omnichannel messaging feature, enabling business to integrate multiple digital channels into the system. This allows business agents to interact seamlessly with customers across multiple channels, including text messages, social media, and more, on a unified platform. ensuring agent productivity while enhancing the customer experience.

## Highlights

Yeastar omnichannel messaging feature provides the following highlights:

### All-in-one Message Inbox

Agents are able to receive and respond to customers' queries from different messaging channels directly on their Linkus UC Clients, greatly saving their time by eliminating the need of switching between apps or services to check for messages. The messages are stored on the PBX server, providing a central record of all the messaging sessions.

### Customer Contact using Business Number

Agents can contact customers using a business number, while keeping their own personal mobile number private. If necessary, the messaging session can be easily elevated to a call to reach the customer, so that the agent can resolve issues faster via voice call.

### Seamless Collaboration across Agents

Agents can hand off customers' issue to another agent by transferring the conversation, the new agent can quickly review the whole chat history and take over the conversation without hassle.

### Flexible Chat Assignment

Route your business messages from different messaging channels to agents, who can share the workload across teams to reduce customer service response time. Chats can be automatically assigned to the first agent who responds to a session in the queue, or agents can manually take over sessions as needed.

## Roles in omnichannel messaging

Users can access the omnichannel messaging feature and perform different tasks based on their roles and responsibilities, as the following table lists.

| Role | Description |
| --- | --- |
| System Administrator | System administrators that are responsible for configuring and maintaining the omnichannel messaging features, including setting up communication channels, setting routing rules, assigning agents, and managing conversation histories.<br>For more information, see Omnichannel Messaging Administrator Guide. |
| Agent | Agents that are responsible for interacting with customers from various messaging channels, handling inquiries, resolving issues, and providing support and services.<br>For more information, see Omnichannel Messaging Agent Guide. |

# Administrator Guide

## Omnichannel Messaging Administrator Guide

This guide provides detailed instructions for system administrators to set up and manage the PBX omnichannel messaging feature, implementing smooth communication on the PBX system across various channels.

### Audience

This guide is intended for system administrators responsible for configuring and maintaining the omnichannel messaging feature.

### Requirements

Subscribe to **Enterprise Plan** or **Ultimate Plan** to ensure that the **Omnichannel Messaging** feature is available.

### Steps to set up omnichannel messaging

#### 1. Set up message channels

To enable your contact center to handle digital channels interactions, you need to add the communication channels in the PBX system, and configure settings for each channel, such as message sending rate, inbound messaging routing rule, etc., for smooth operation.

Refer to the individual channel setup articles for the requirements and detailed instructions.

| Channel | Instruction |
| --- | --- |
| SMS | To reach customers directly on their mobile phones using SMS, you can set up SMS channels on Yeastar PBX with the following supported SMS service providers:<br><br>• Set up an SMS Channel for Apidaze<br>• Set up an SMS Channel for Bandwidth<br>• Set up an SMS Channel for Flowroute<br>• Set up an SMS Channel for SIPTRUNK<br>• Set up an SMS Channel for Telnyx<br>• Set up an SMS Channel for Twilio<br>• Set up an SMS Channel for VoiceMeUp |

| Channel | Instruction |
| --- | --- |
| | For SMS Service Providers that are not listed above, they can add their SMS service to Yeastar P-Series PBX System using SMS API. After the integration is complete, you can create an SMS channel for the Service Provider on your PBX.<br><br>For more information about the SMS service integration and the SMS channel setup after the integration, see Integrate SMS Service with Yeastar P-Series PBX System using SMS API. |
| Social media | To interact with customers through popular social media platforms, you can set up social media channels on Yeastar PBX with the following supported social media.<br><br>• Set up a Facebook Channel<br>• Set up a Live Chat Channel<br>• Set up a WhatsApp Channel |

### 2. Set up message queue

Define a group of agents to receive the inbound messages. When an agent of the queue picks up a session, he or she is able to respond to the messages in the session, and the session is automatically assigned to the agent.

For more information, see Create a Message Queue and Manage Message Queues.

### 3. Set up message campaign

To send a message to multiple recipients, you can create a message campaign. This allows you to set up and manage bulk messaging tasks, enabling you to deliver a single message to multiple target numbers at once.

For more information, see Create an SMS Campaign and Create a WhatsApp Campaign.

### 4. Manage message history

Get access to the detailed records of customer message interactions from various channels, allowing you to have a complete overview of each conversation journey.

For more information, see Check and Manage External Chat Logs and Download External Chat Logs.

# Message Channel Setup

## Apidaze

## Set up an SMS Channel for Apidaze

This topic describes how to set up a Apidaze SMS channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to SMS messages from customers on their Linkus UC Clients.

### Requirements

The Yeastar PBX should meet the following requirements:

- **Firmware**: Version 37.20.0.124 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: PBX can be remotely accessed via a domain name.

> **Note:**
> - Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.
> - If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

For more information about the domain configuration, see the following topics:

- Configure Network for Remote Access by a Yeastar FQDN
- Configure Network for Remote Access by a Yeastar Domain Name
- Configure Network for Remote Access by a Domain Name

### Supported message types and limits

#### Supported message types

The Apidaze SMS channel supports text messages and multimedia messages (MMS), where the supported MMS file types are determined by Apidaze.

> **Important:**
> When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the SMS service provider is located, otherwise the file transmission would fail.

### Limits

- **File size**: Max. 100 MB
- **File retention period**: 72 hours

## Prerequisites

You have obtained the following information from the Apidaze Service Provider:

- API key
- Secret
- Phone number used for message sending and receiving

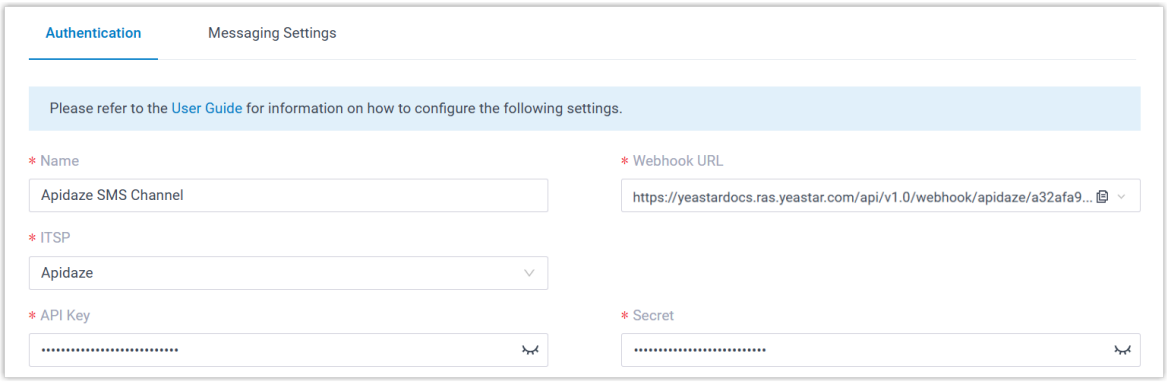
> **Note:**
> If business needs to communicate with US-based customers, make sure that the phone number has been completed with 10DLC registration to avoid disruption in message delivery.

## Procedure

- Step 1. Create and configure an SMS channel on PBX
- Step 2. Configure webhook in Apidaze

## Step 1. Create and configure an SMS channel on PBX

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, enter the authentication information of Apidaze.

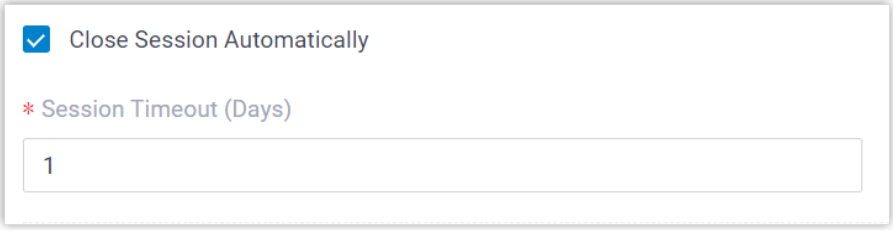



- **Name**: Enter a name to help you identify the channel.
- **ITSP**: Select **Apidaze**.
- **API Key**: Enter the API key obtained from Apidaze.
- **Secret**: Enter the Secret obtained from Apidaze.

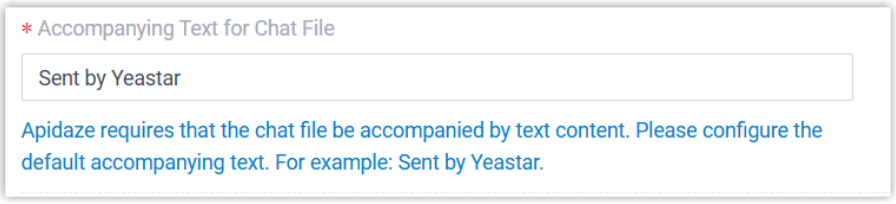
4. In the **Messaging Setting** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

> **Note:**
> - If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.
> - If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

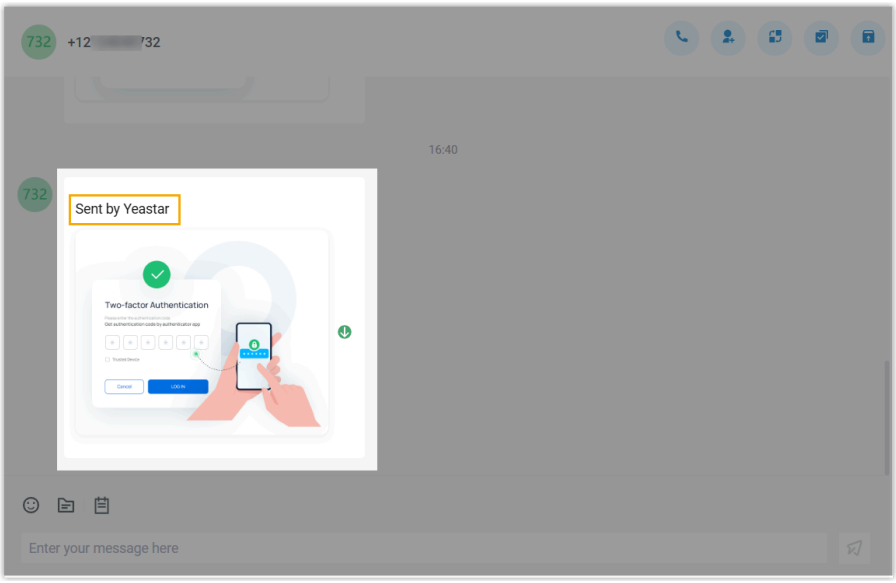
   b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.



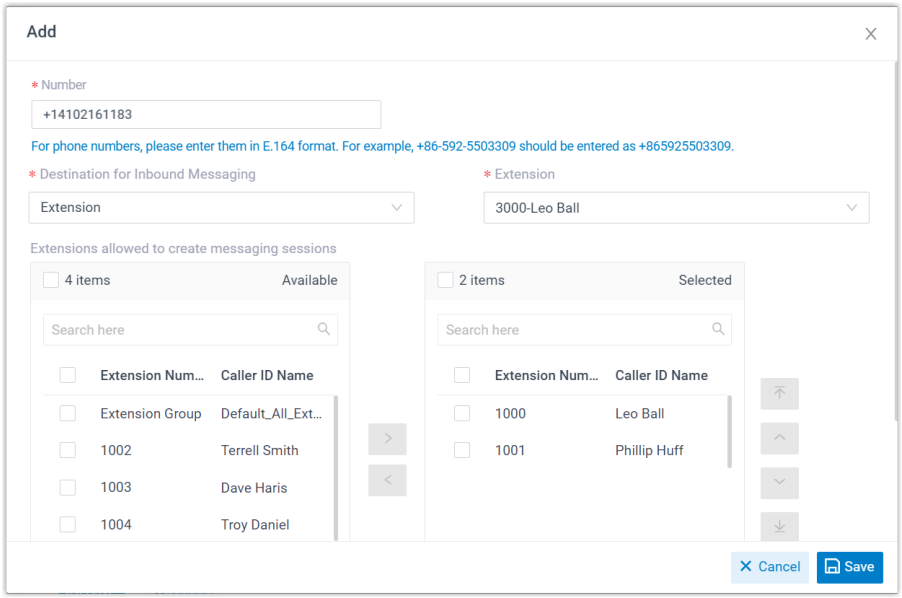

   c. In the **Accompanying Text for Chat File** field, specify the default text that will be sent along with chat files.




The message recipient will see the text displayed alongside the chat files.




d. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

> **Note:**
> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

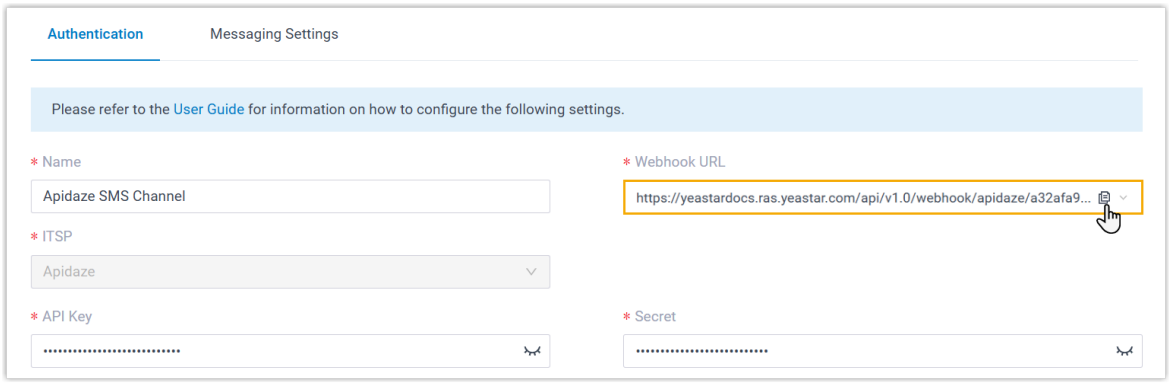
- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

e. Click **Save**.

5. Click **Save**.

## Step 2. Configure webhook in Apidaze

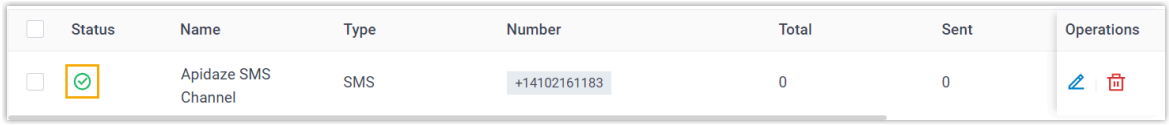
1. On PBX web portal, go to **Messaging > Message Channel**.
2. Click the SMS channel you created.
3. In the **Authentication** tab, select a desired URL from the **Webhook URL** drop-down list, then copy the URL.




4. In Apidaze, configure messaging webhook for the phone number using the PBX's webhook URL to receive inbound messages.

## Result

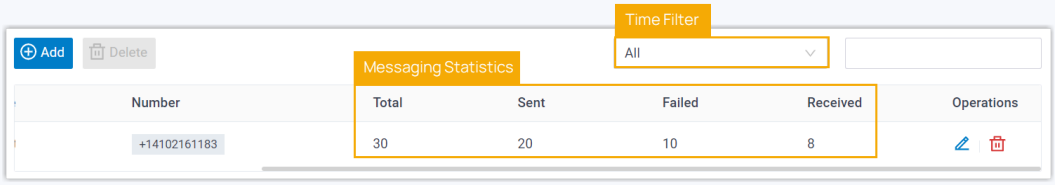
- A messaging channel is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing ✓.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

> **Note:**
> - For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.

- You can filter the statistics by a time period using the time filter.




### What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

**Related information**

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# Bandwidth

## Set up an SMS Channel for Bandwidth

This topic describes how to set up a Bandwidth SMS channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to SMS messages from customers on their Linkus UC Clients.

### Requirements

The Yeastar PBX should meet the following requirements:

- **Firmware**: Version 37.20.0.124 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: PBX can be remotely accessed via a domain name.

**Note:**

- Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

- If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

For more information about the domain configuration, see the following topics:

- Configure Network for Remote Access by a Yeastar FQDN
- Configure Network for Remote Access by a Yeastar Domain Name
- Configure Network for Remote Access by a Domain Name

## Supported message types and limits

### Supported message types

The Bandwidth SMS channel supports text messages and multimedia messages (MMS), where the supported MMS file types are determined by Bandwidth. For more information, see Bandwidth supported MMS file types.

**Important:**
When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the SMS service provider is located, otherwise the file transmission would fail.

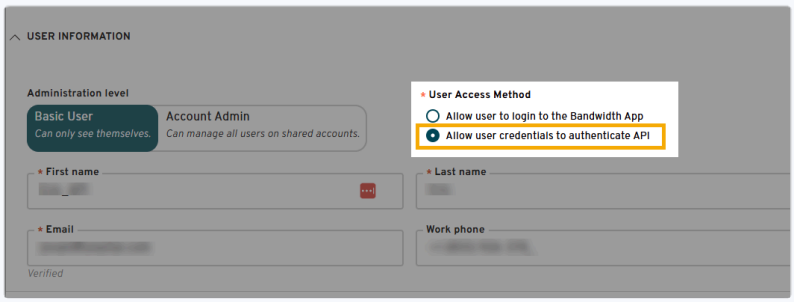
### Limits

- **File size**: Max. 100 MB
- **File retention period**: 72 hours

## Prerequisites

- You have created a sub-account and associated with your location in Bandwidth.

**Note:**
Ensure that the **Allow user credentials to authenticate API** option is enabled for the account.




- You have purchased phone number(s) in Bandwidth.

## Procedure

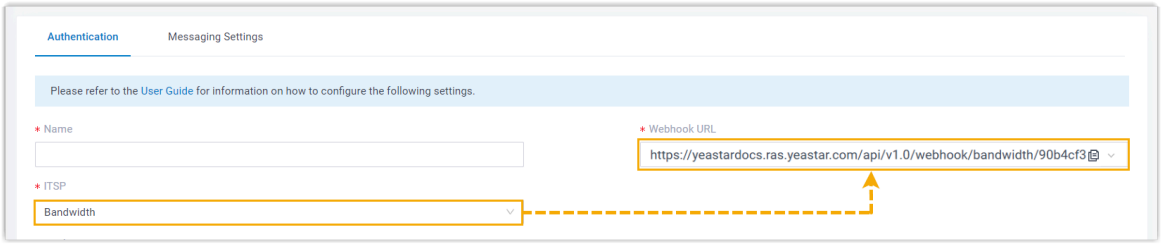
- Step 2. Configure a number for SMS on Bandwidth
- Step 3. Create and configure an SMS channel on PBX
- Step 1. Obtain a Webhook URL on PBX

## Step 1. Obtain a Webhook URL on PBX

Obtain a Webhook URL from PBX web portal first, which is required when you configure a number for SMS on Bandwidth.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **ITSP** drop-down list, select **Bandwidth**, then select and copy the desired **Webhook URL**.

> **Important:**
> The URL will change once you leave the current page, please make sure you use the latest Webhook URL for the configuration on the service provider's customer portal.



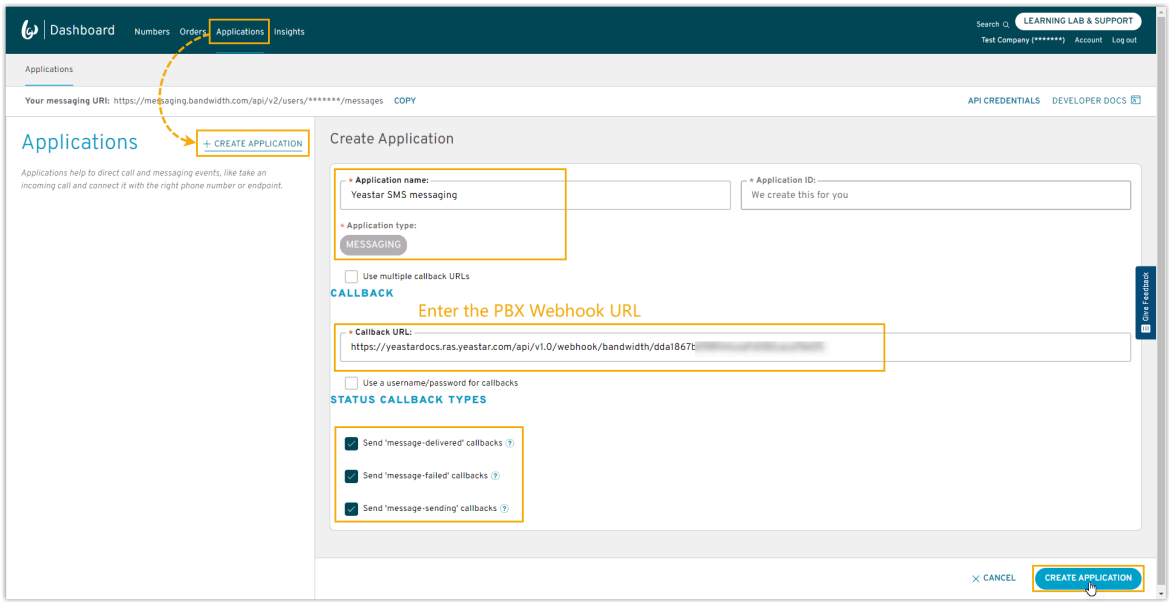

4. Note down the Webhook URL.

## Step 2. Configure a number for SMS on Bandwidth

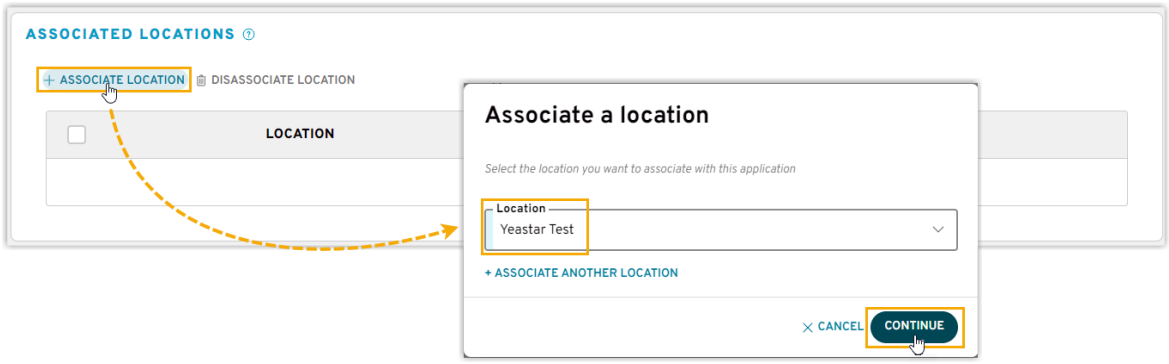
> **Important:**
> According to US legislation (A2P 10DLC SMS), 10DLC (10-digit Long Code) phone numbers that are used for A2P (Application-to-Person) messaging MUST be registered, otherwise SMS messages sent to US numbers from unregistered 10DLC numbers will be blocked.
>
> If your business needs to communicates with US-based customers, you should confirm the registration requirements with the SMS service provider and complete the phone number registration to avoid disruption in message delivery.

Log in to Bandwidth portal, and complete the followings:

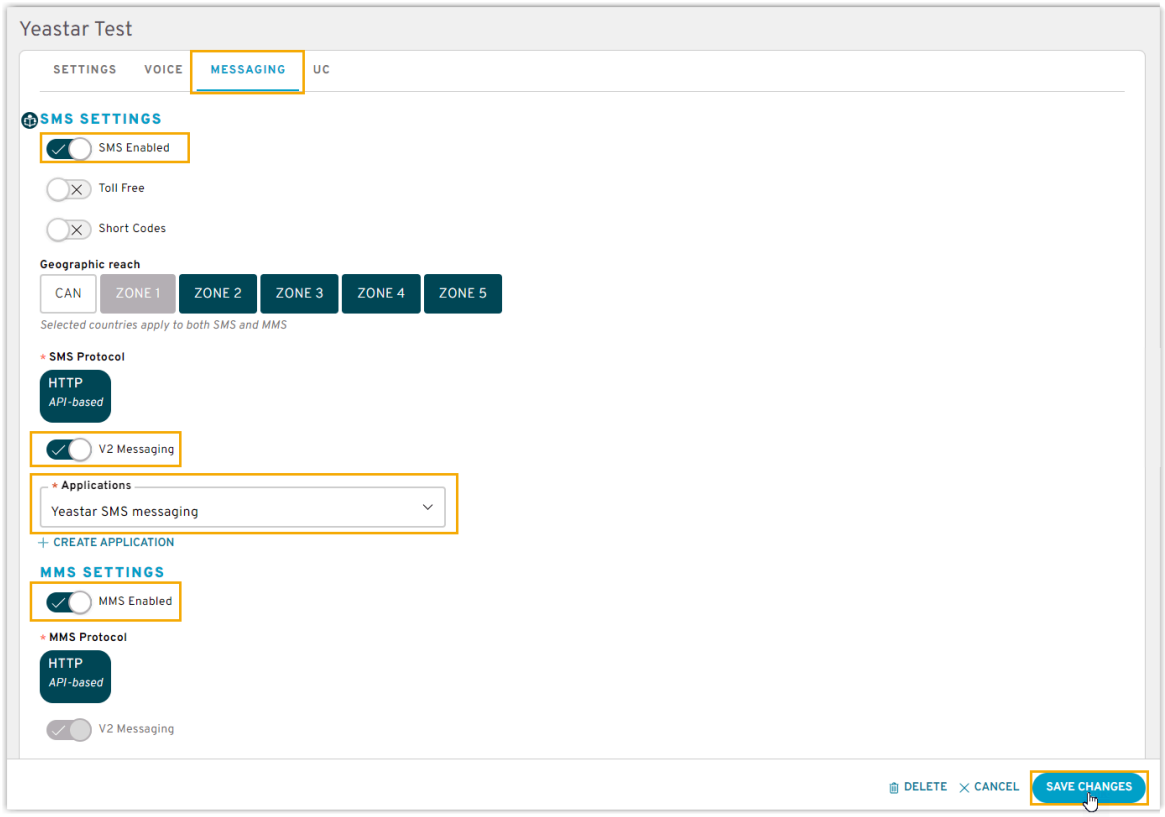
1. Create an application using a sub-account and configure the callback with PBX's Webhook URL.



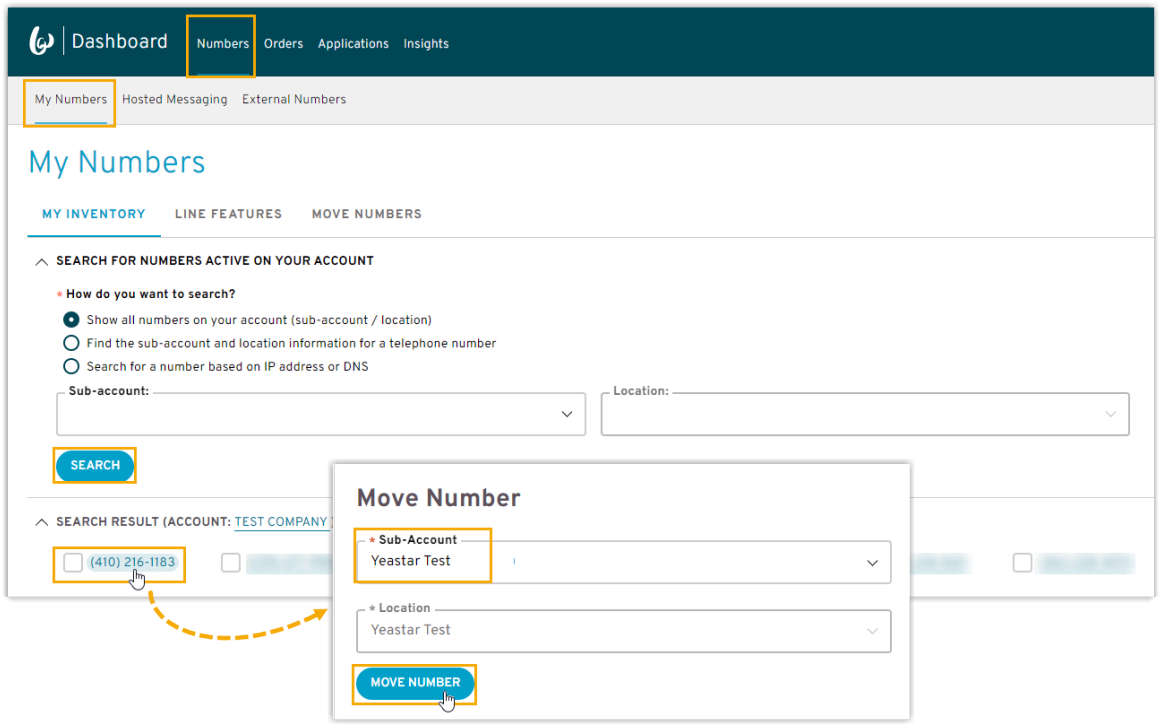

2. On the details page of the new application, associate the application with your location.



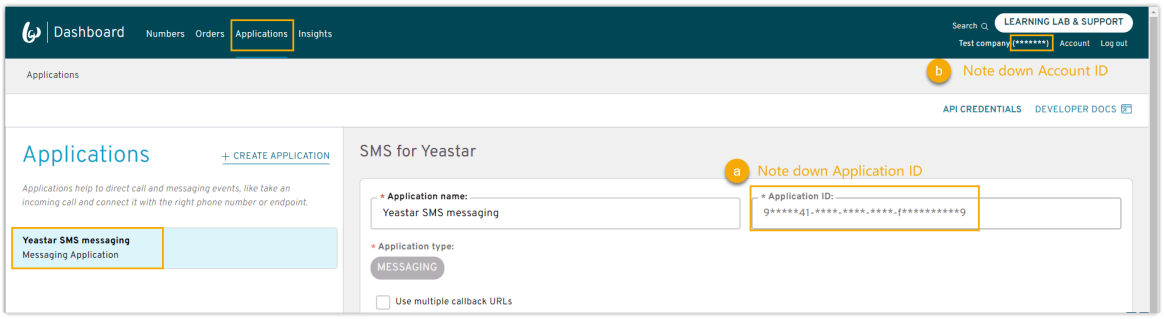

3. Enable HTTP SMS and MMS messaging for your location and the associated application.




4. Search the number that you want to use for SMS and associate it with your sub-account.



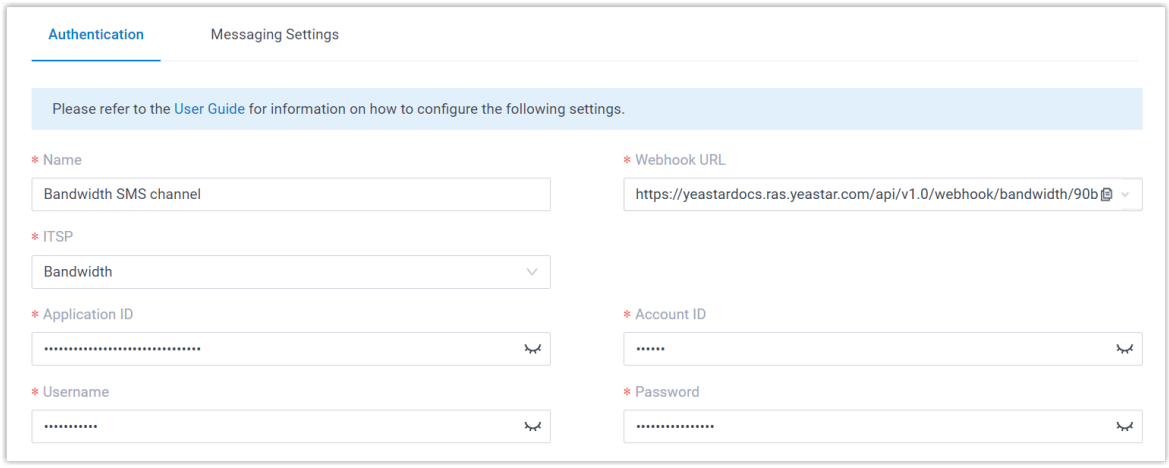

5. Note down the **Application ID** and **Account ID** for the integration with PBX.




## Step 3. Create and configure an SMS channel on PBX

Create an SMS channel on PBX, and configure the channel with the authentication information and number obtained from Bandwidth.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, enter the authentication information of Bandwidth.

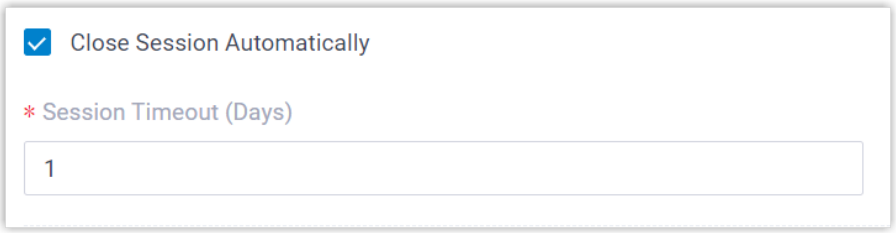



- **Name**: Enter a name to help you identify the channel.
- **ITSP**: Select **Bandwidth**.
- **Application ID**: Paste the Application ID obtained from Bandwidth.
- **Account ID**: Enter the Account ID of your Bandwidth account.
- **Username**: Enter the user name of your Bandwidth account.
- **Password**: Enter the password associated with your Bandwidth account.

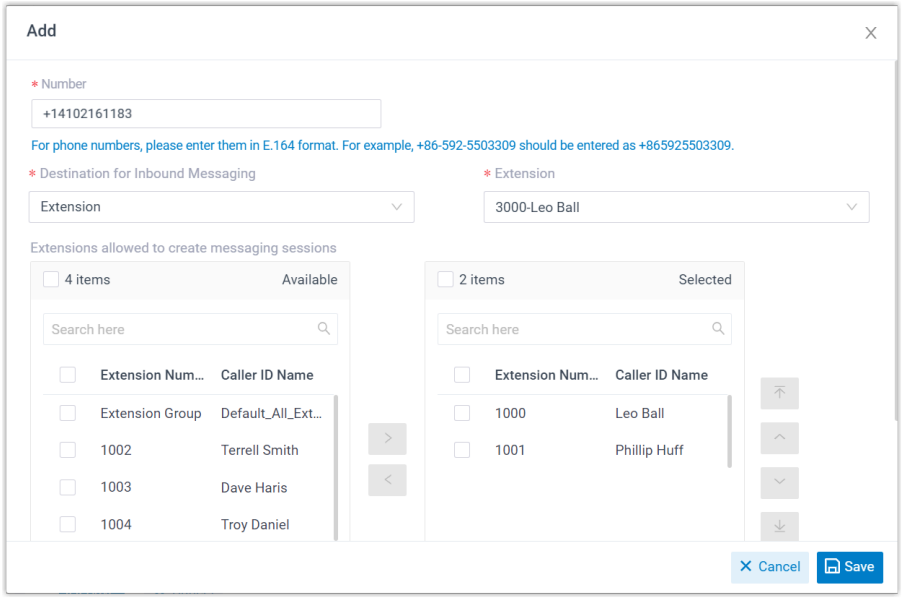
4. In the **Messaging Settings** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

> **Note:**
> - If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.
> - If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

   b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.




c. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

> **Note:**
> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list. |

| Option | Description |
| --- | --- |
| | All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br><br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

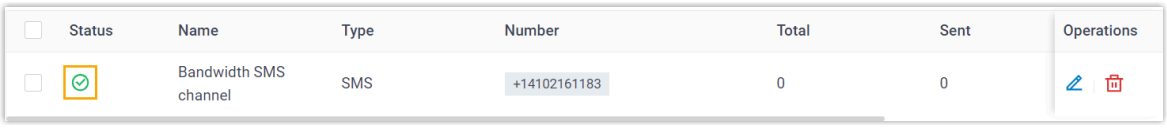
- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

d. Click **Save**.

5. Click **Save**.

## Result

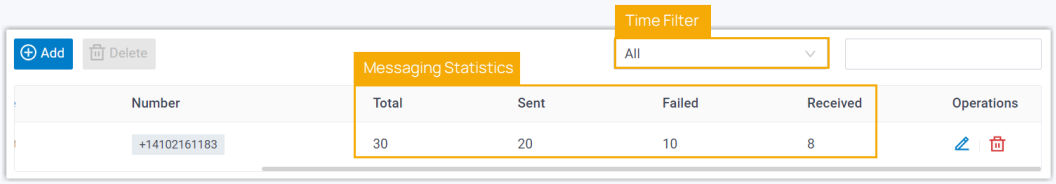
- A messaging channel is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing ✓.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

**Note:**

- For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.
- You can filter the statistics by a time period using the time filter.




### What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

**Related information**

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# Flowroute

## Set up an SMS Channel for Flowroute

This topic describes how to set up a Flowroute SMS channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to SMS messages from customers on their Linkus UC Clients.

## Requirements

| Platform | Requirement |
|---|---|
| Yeastar PBX | • **Firmware**: Version 37.20.0.124 or later<br>• **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)<br>• **Domain Name**: PBX can be remotely accessed via a domain name.<br><br>**Note:**<br>◦ Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br>◦ If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br><br>For more information about the domain configuration, see the following topics:<br>◦ Configure Network for Remote Access by a Yeastar FQDN<br>◦ Configure Network for Remote Access by a Yeastar Domain Name<br>◦ Configure Network for Remote Access by a Domain Name |
| Flowroute | **API Version**: v2.1<br><br>**Note:**<br>You can check or update the API version on Flowroute (Path: **PREFERENCE > API Control > SMS Webhook Version**). |

## Supported message types and limits

### Supported message types

The Flowroute SMS channel supports text messages and multimedia messages (MMS), where the supported MMS file types are determined by Flowroute. For more information, see Flowroute supported MMS file types.

**Important:**
When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the

country where the SMS service provider is located, otherwise the file transmission would fail.

### Limits

- **File size**: Max. 100 MB
- **File retention period**: 72 hours

## Procedure

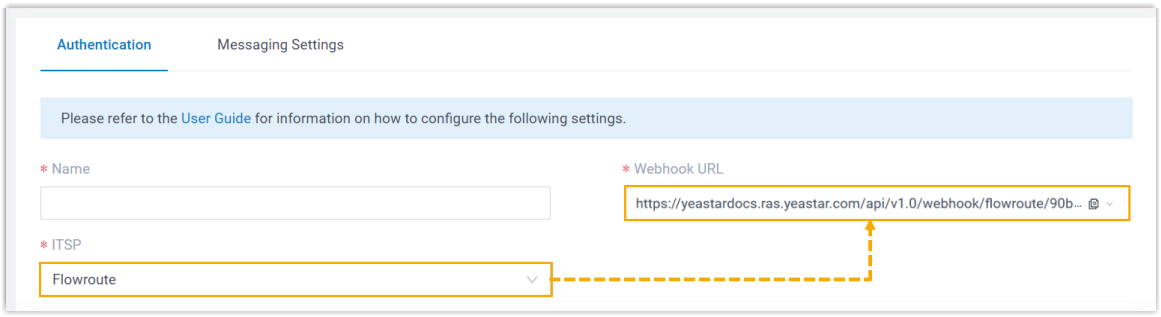

- Step 1. Obtain a Webhook URL on PBX
- Step 2. Configure a number for SMS on Flowroute
- Step 3. Create and configure an SMS channel on PBX


## Step 1. Obtain a Webhook URL on PBX

Obtain a Webhook URL from PBX web portal first, which is required when you configure a number for SMS on Flowroute.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **ITSP** drop-down list, select **Flowroute**, then select and copy the desired **Webhook URL**.

**Important:**
The URL will change once you leave the current page, please make sure you use the latest Webhook URL for the configuration on the service provider's customer portal.



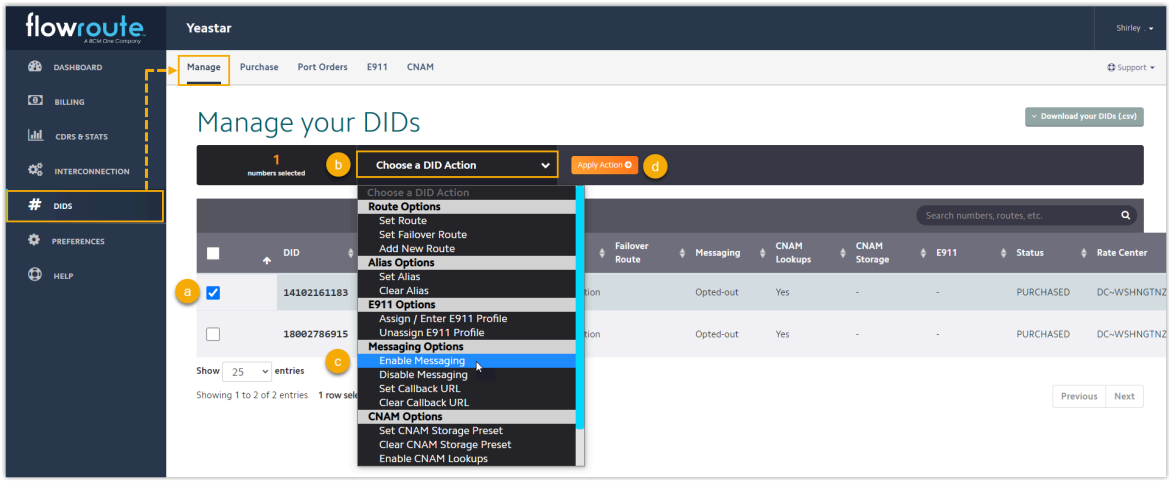

4. Note down the Webhook URL.

## Step 2. Configure a number for SMS on Flowroute

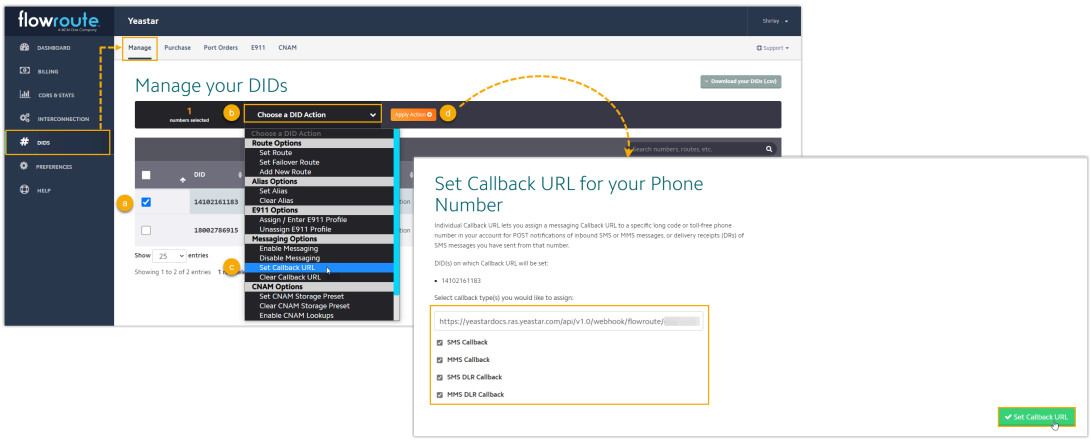
> **Important:**
> According to US legislation (A2P 10DLC SMS), 10DLC (10-digit Long Code) phone numbers that are used for A2P (Application-to-Person) messaging MUST be registered, otherwise SMS messages sent to US numbers from the unregistered 10DLC numbers will be blocked.
>
> If your business communicates with US-based customers, you should confirm the registration requirements with the SMS service provider and complete the phone number registration to avoid disruption in message delivery.

Log in to Flowroute portal, and complete the following settings:

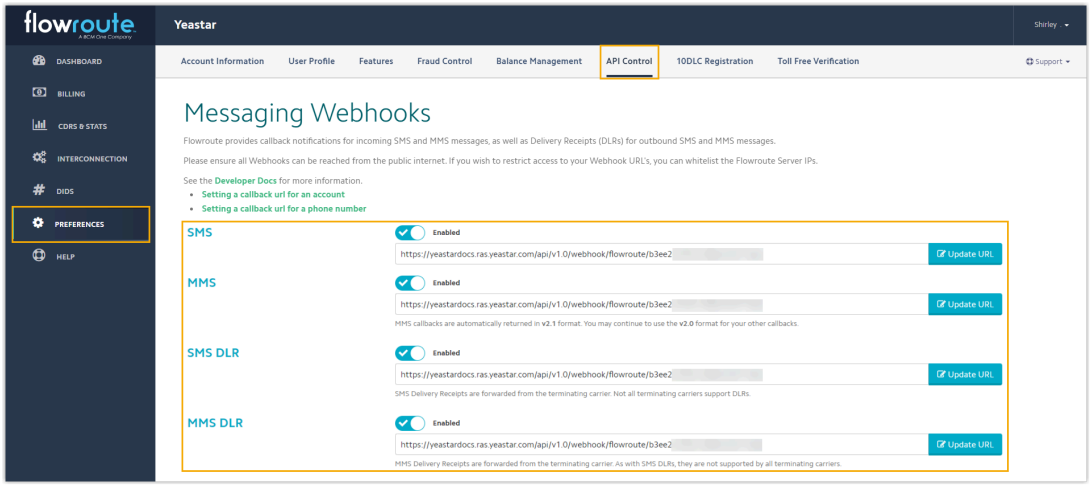
1. Enable the messaging feature for the desired DID number.




2. Configure messaging webhook according to your needs.
   - If you only need to receive callback notification for inbound messages sent from a specific number, configure messaging webhook with PBX's Webhook URL for the number individually.

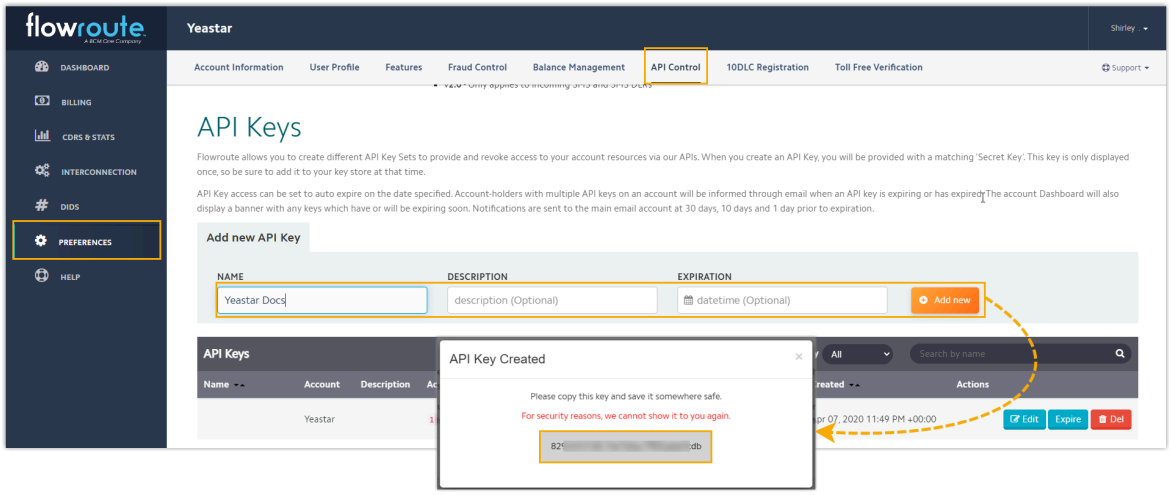



- If you need to receive callback notification for inbound messages sent from all the numbers in your account, configure global messaging webhook with PBX's Webhook URL as shown below.

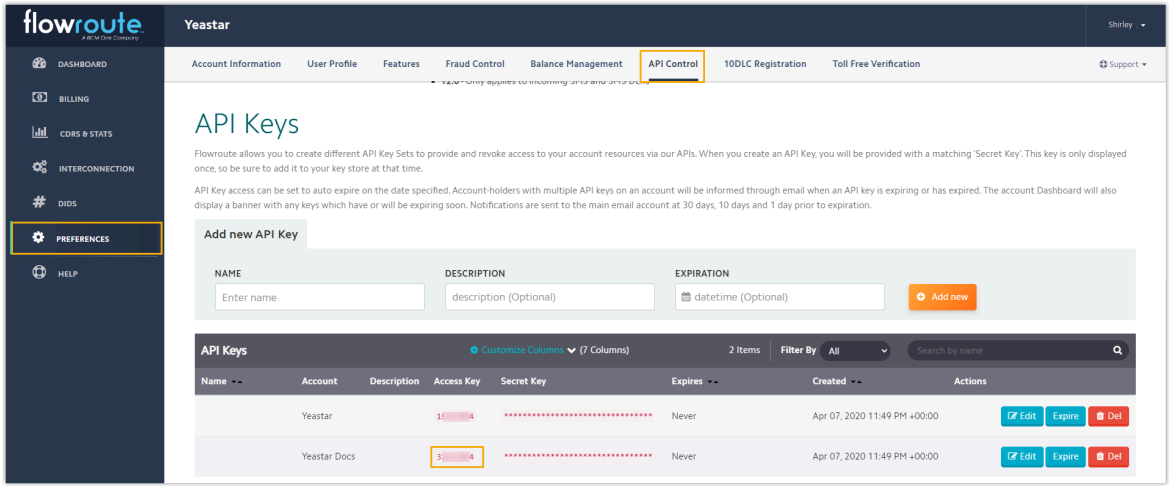



3. Create an API key for the integration with PBX.

> **Important:**
> You MUST note down the generated key in the pop-up window, as it is only displayed ONCE.



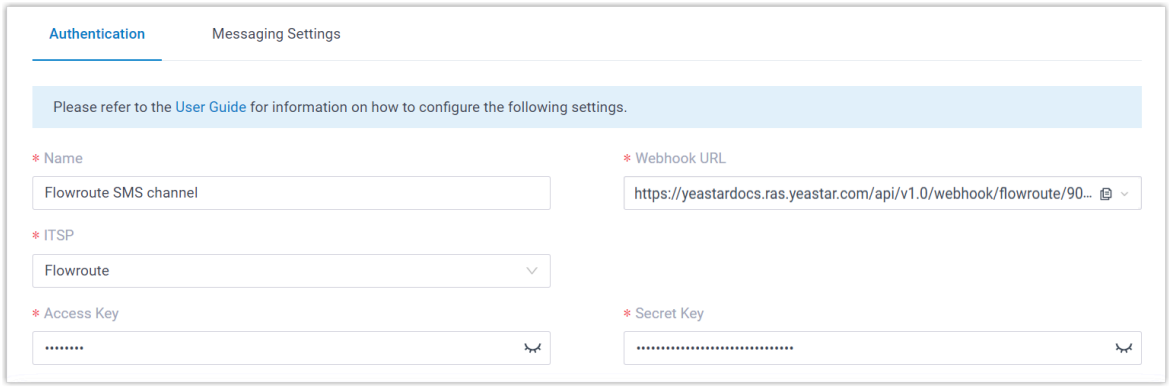

4. Note down the **Access Key** of the API key.




## Step 3. Create and configure an SMS channel on PBX

Create an SMS channel on PBX, and configure the channel with the authentication information and number obtained from Flowroute.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, enter the authentication information of Flowroute.

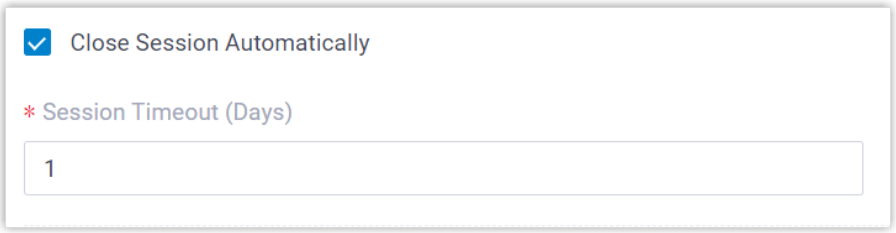



- **Name**: Enter a name to help you identify the channel.
- **ITSP**: Select **Flowroute**.
- **Access Key**: Paste the access key obtained from Flowroute.
- **Secret Key**: Paste the API key obtained from Flowroute.

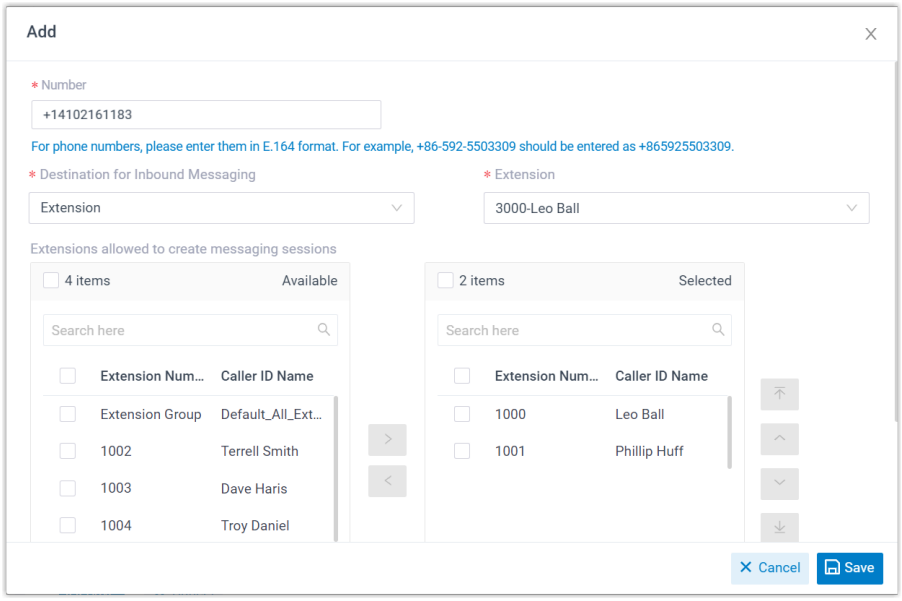
4. In the **Messaging Settings** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

> **Note:**
> - If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.
> - If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

   b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.




   c. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

> **Note:**
> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing. |

| Option | Description |
| --- | --- |
| (Transmitted via API) | **Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

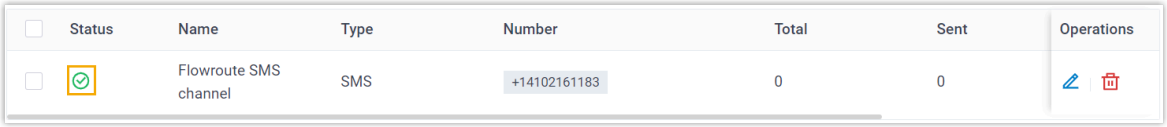
- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

d. Click **Save**.

5. Click **Save**.

## Result

- A messaging channel is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing ✓.

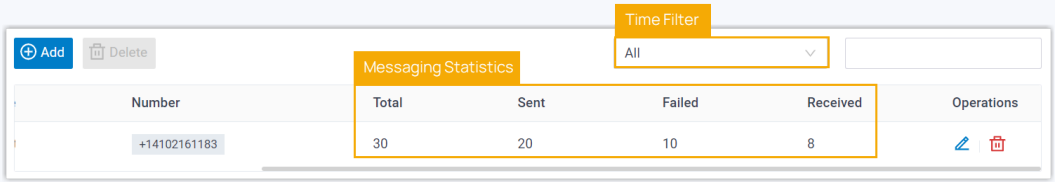



- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

**Note:**

- For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.

◦ You can filter the statistics by a time period using the time filter.




## What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

### Related information

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# SIPTRUNK

# Set up an SMS Channel for SIPTRUNK

This topic describes how to set up a SIPTRUNK SMS channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to SMS messages from customers on their Linkus UC Clients.

## Requirements

| Platform | Requirement |
|---|---|
| Yeastar PBX | • **Firmware**: Version 37.20.0.124 or later<br>• **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)<br>• **Domain Name**: PBX can be remotely accessed via a domain name.<br><br>**Note:**<br>◦ Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br>◦ If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain |

| Platform | Requirement |
| --- | --- |
| | name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br><br>For more information about the domain configuration, see the following topics:<br>◦ Configure Network for Remote Access by a Yeastar FQDN<br>◦ Configure Network for Remote Access by a Yeastar Domain Name<br>◦ Configure Network for Remote Access by a Domain Name |
| SIPTRUNK | • **Telephone number**: The DID number(s) should be SMS/MMS compatible and registered with 10DLC.<br><br>**Important:**<br>According to US legislation (A2P 10DLC SMS), 10DLC (10-digit Long Code) phone numbers that are used for A2P (Application-to-Person) messaging MUST be registered, otherwise SMS messages sent to US numbers from the unregistered 10DLC numbers will be blocked.<br><br>If your business communicates with US-based customers, you should complete the 10DLC registration for your phone numbers to avoid disruption in message delivery.<br><br>**Tip:**<br>Submit a request to your service provider for the required number(s). For more information, see SMS Process & Expectations. |

## Supported message types and limits

### Supported message types

The SIPTRUNK SMS channel supports text messages and multimedia messages (MMS), where the supported MMS file types are determined by SIPTRUNK.

**Important:**
When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the

country where the SMS service provider is located, otherwise the file transmission would fail.

### Limits

- **File size**: Max. 100 MB
- **File retention period**: 72 hours

## Procedure

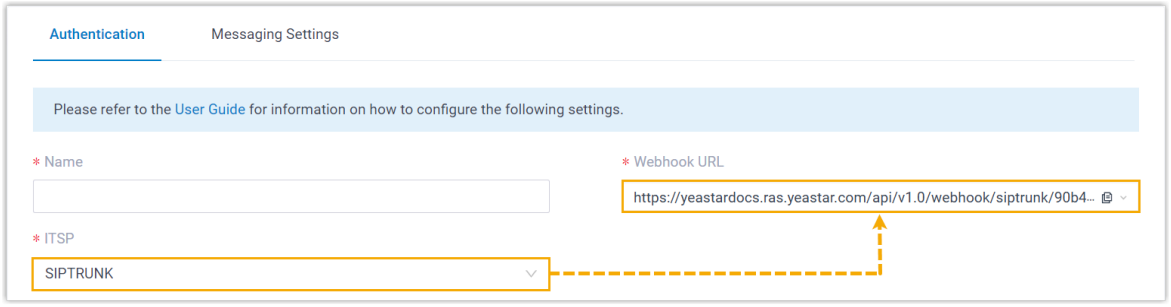

- Step 1. Obtain a Webhook URL on PBX
- Step 2. Configure messaging feature on SIPTRUNK
- Step 3. Create and configure an SMS channel on PBX


## Step 1. Obtain a Webhook URL on PBX

Obtain a Webhook URL from PBX web portal first, which is required when you configure a number for SMS on SIPTRUNK.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **ITSP** drop-down list, select **SIPTRUNK**, then select and copy the desired **Webhook URL**.

**Important:**
The URL will change once you leave the current page, please make sure you use the latest Webhook URL for the configuration on the service provider's customer portal.

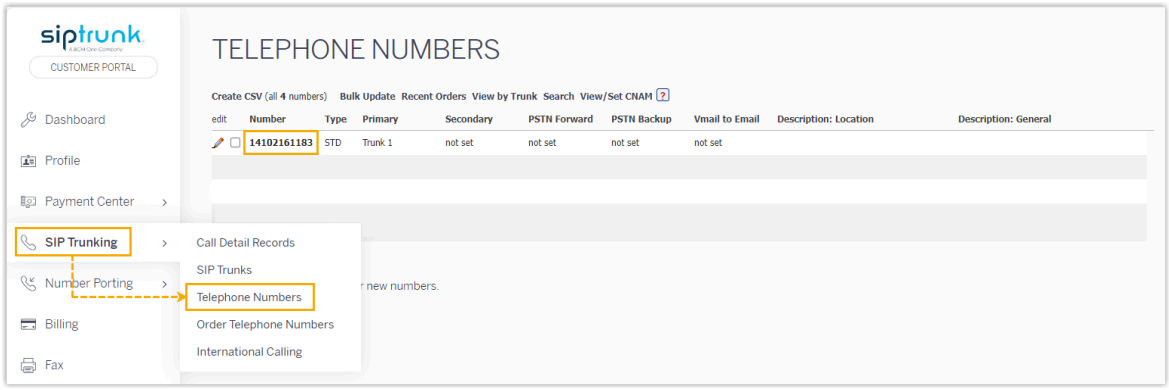



4. Note down the Webhook URL.

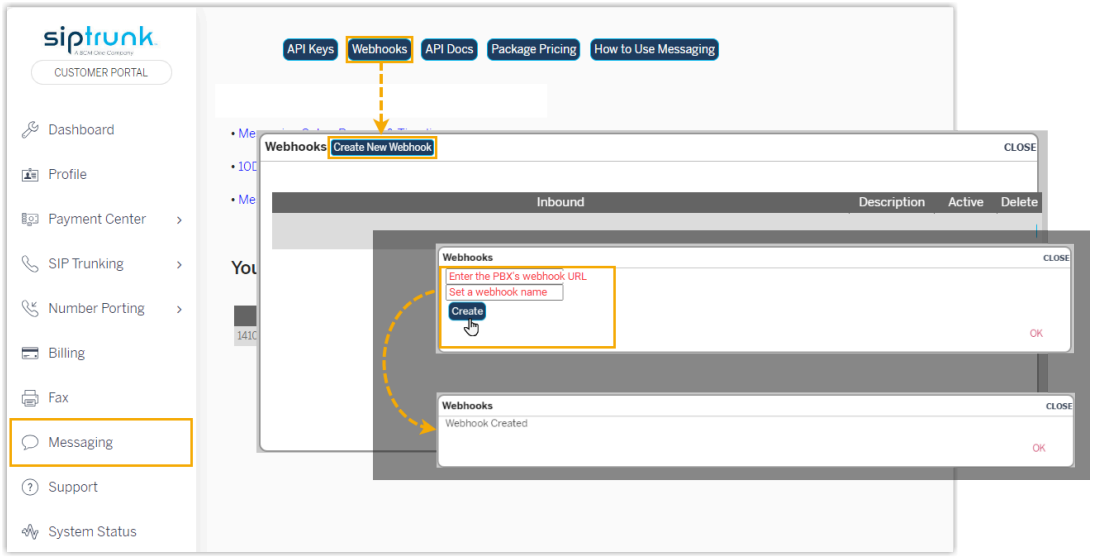
## Step 2. Configure messaging feature on SIPTRUNK

Log in to SIPTRUNK customer portal, and complete the following settings:

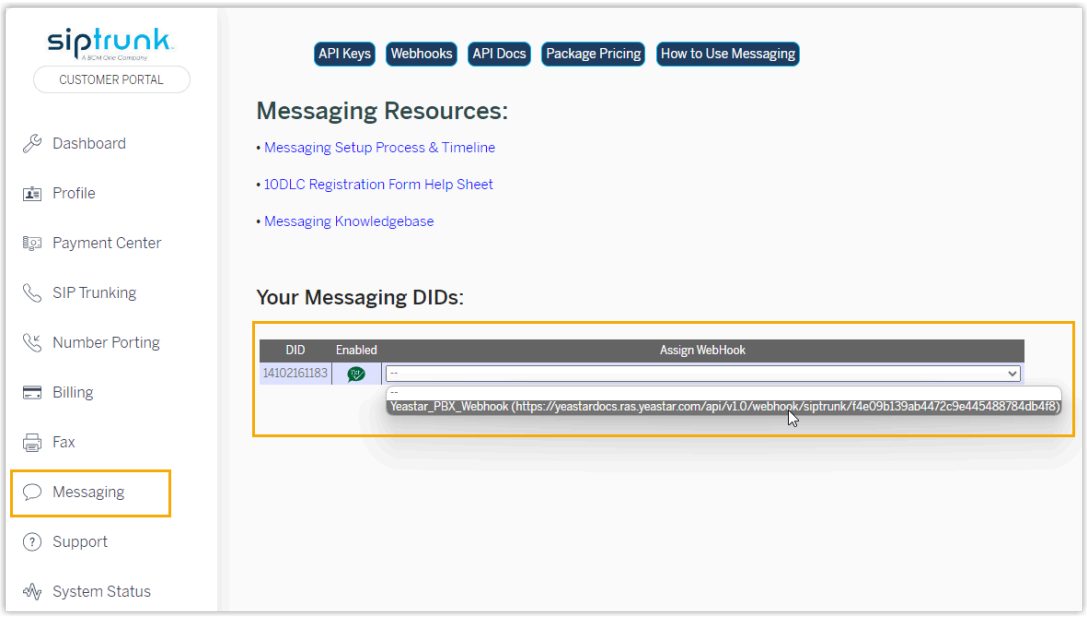
1. Note down the desired DID number to be added to the SMS channel.




2. Configure messaging webhook for the DID number.
   a. Create a Webhook using the PBX's Webhook URL.

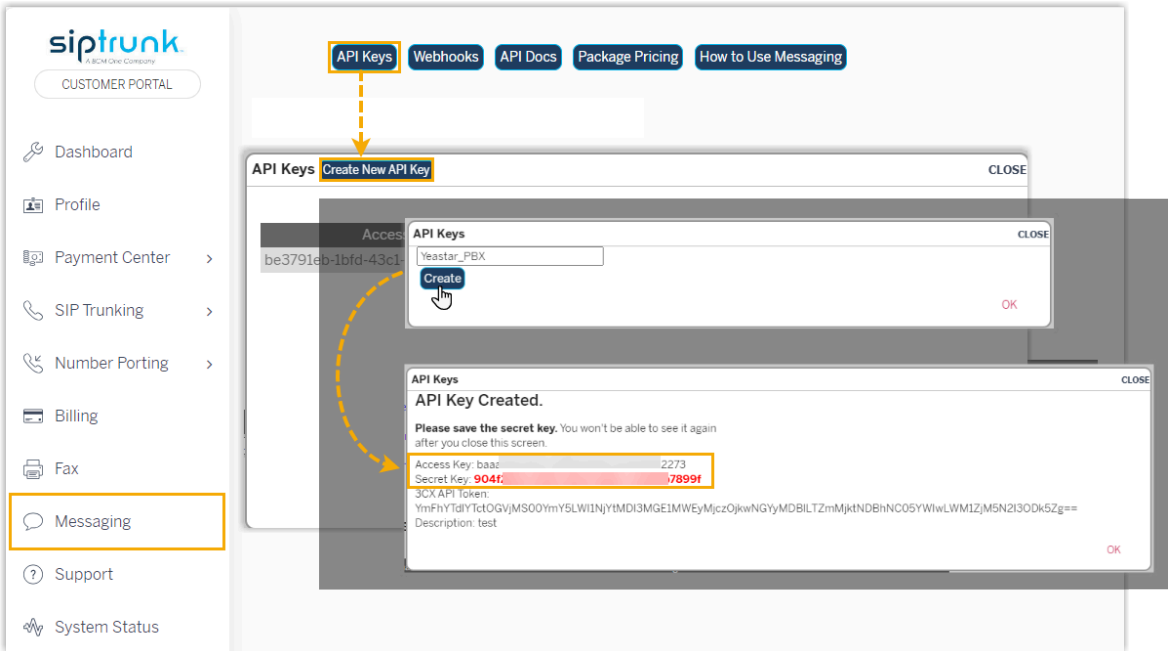



   b. Assign the Webhook to the DID number.




3. Create an API key for the integration with PBX, and note down the **Access Key** and **Secret Key**.

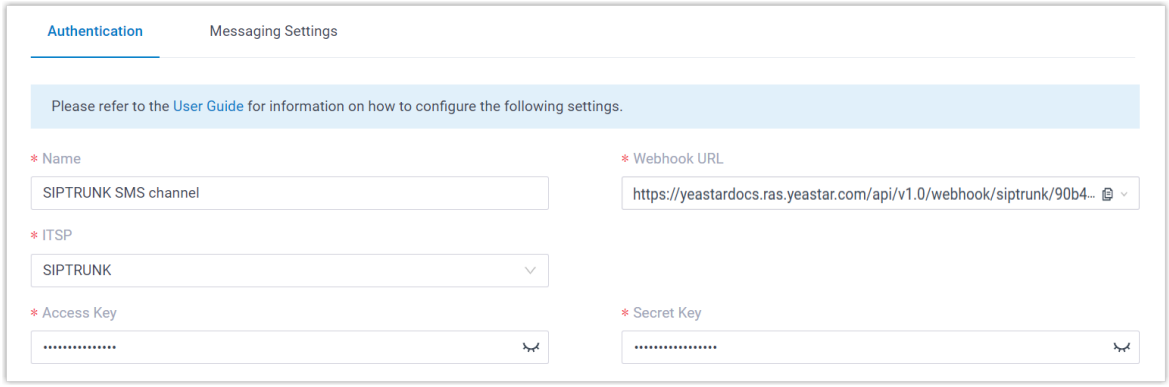
> **Important:**
> Make sure that you have copied and properly saved the **Secret Key** before closing the pop-up window, as it is only displayed ONCE.



## Step 3. Create and configure an SMS channel on PBX

Create an SMS channel on PBX, and configure the channel with the authentication information and number obtained from SIPTRUNK.

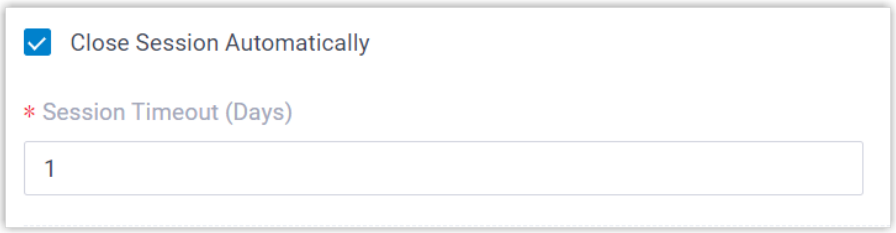
1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, enter the authentication information of SIPTRUNK.



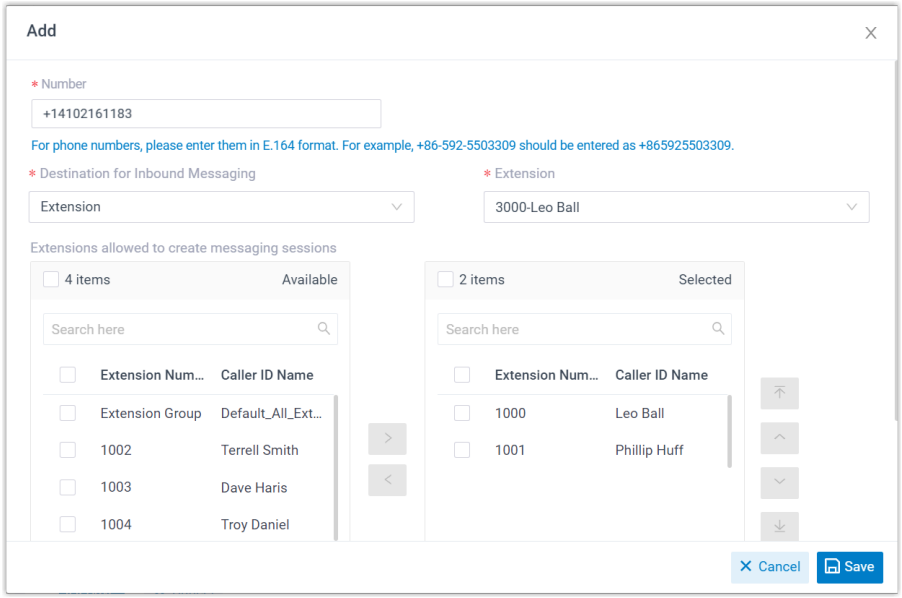

   - **Name**: Enter a name to help you identify the channel.
   - **ITSP**: Select **SIPTRUNK**.
   - **Access Key**: Paste the access key obtained from SIPTRUNK.
   - **Secret Key**: Paste the secret key obtained from SIPTRUNK.
4. In the **Messaging Settings** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

      **Note:**
      - If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.
      - If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

   b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.




c. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

> **Note:**
> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list. |

| Option | Description |
|---|---|
| | All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br><br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

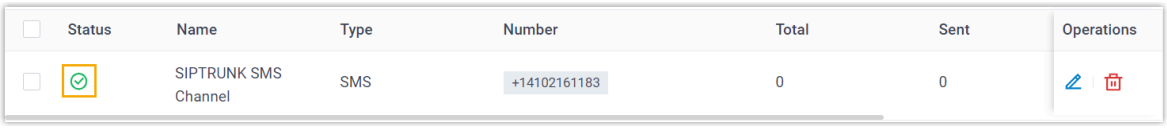
- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

d. Click **Save**.

5. Click **Save**.

## Result

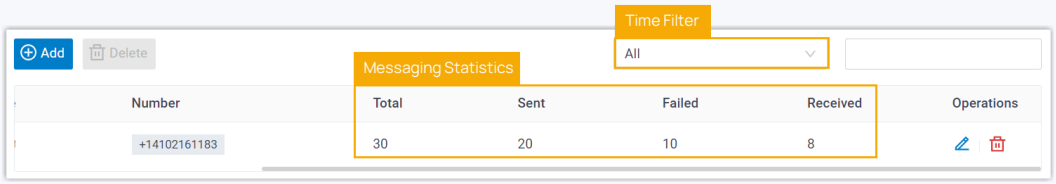
- A messaging channel is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing ✓.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

**Note:**

- For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.
- You can filter the statistics by a time period using the time filter.




### What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

**Related information**

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# Telnyx

## Set up an SMS Channel for Telnyx

This topic describes how to set up a Telnyx SMS channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to SMS messages from customers on their Linkus UC Clients.

### Requirements

The Yeastar PBX should meet the following requirements:

- **Firmware**: Version 37.20.0.124 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: PBX can be remotely accessed via a domain name.

> **Note:**
> - Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.
> - If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

For more information about the domain configuration, see the following topics:
- Configure Network for Remote Access by a Yeastar FQDN
- Configure Network for Remote Access by a Yeastar Domain Name
- Configure Network for Remote Access by a Domain Name

## Supported message types and limits

### Supported message types

The Telnyx SMS channel supports text messages and multimedia messages (MMS), where the supported MMS file types are determined by Telnyx. For more information, see Telnyx supported MMS file types.

> **Important:**
> When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the SMS service provider is located, otherwise the file transmission would fail.

### Limits

- **File size**: Max. 100 MB
- **File retention period**: 72 hours

## Procedure

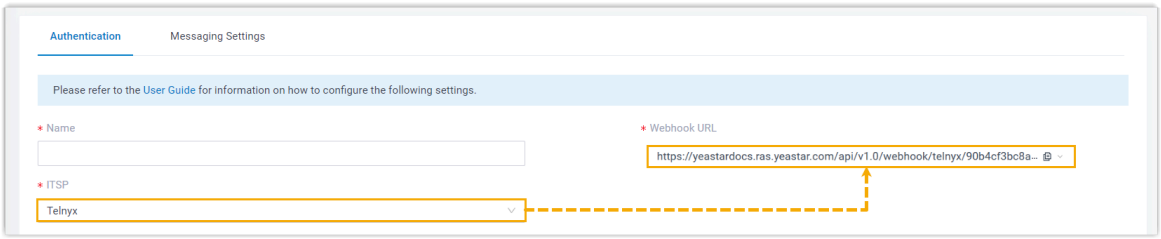

- Step 1. Obtain a Webhook URL on PBX
- Step 2. Configure a number for SMS on Telnyx
- Step 3. Create and configure an SMS channel on PBX


## Step 1. Obtain a Webhook URL on PBX

Obtain a Webhook URL from PBX web portal first, which is required when you configure a number for SMS on Telnyx.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **ITSP** drop-down list, select **Telnyx**, then select and copy the desired **Webhook URL**.

> **Important:**
> The URL will change once you leave the current page, please make sure you use the latest Webhook URL for the configuration on the service provider's customer portal.




4. Note down the Webhook URL.

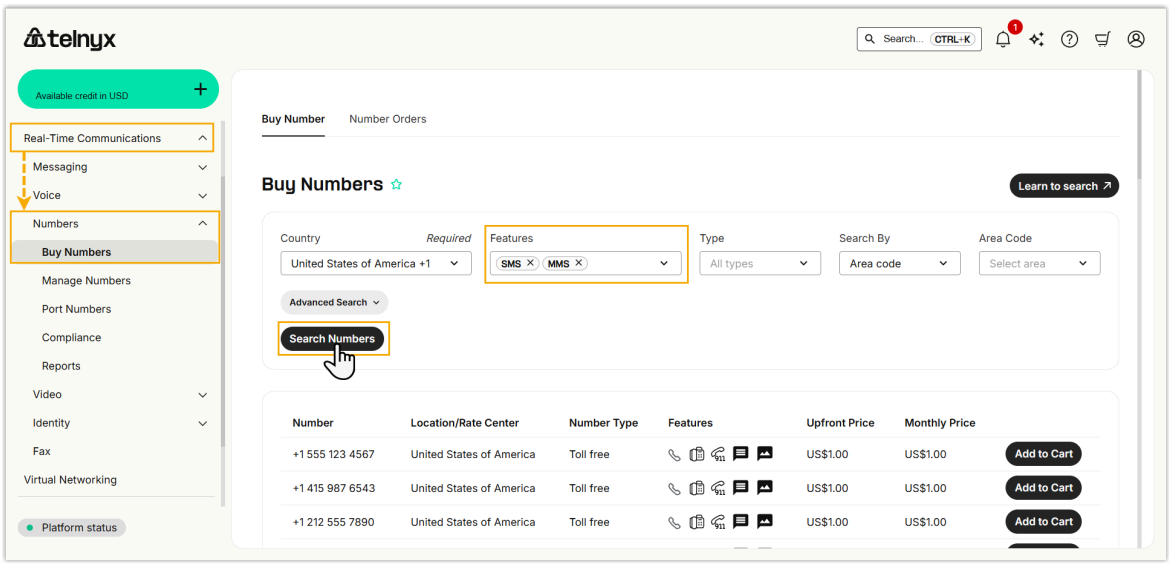
## Step 2. Configure a number for SMS on Telnyx

> **Important:**
> According to US legislation (A2P 10DLC SMS), 10DLC (10-digit Long Code) phone numbers that are used for A2P (Application-to-Person) messaging MUST be registered, otherwise SMS messages sent to US numbers from the unregistered 10DLC numbers will be blocked.

> If your business communicates with US-based customers, you should confirm the registration requirements with the SMS service provider and complete the phone number registration to avoid disruption in message delivery.

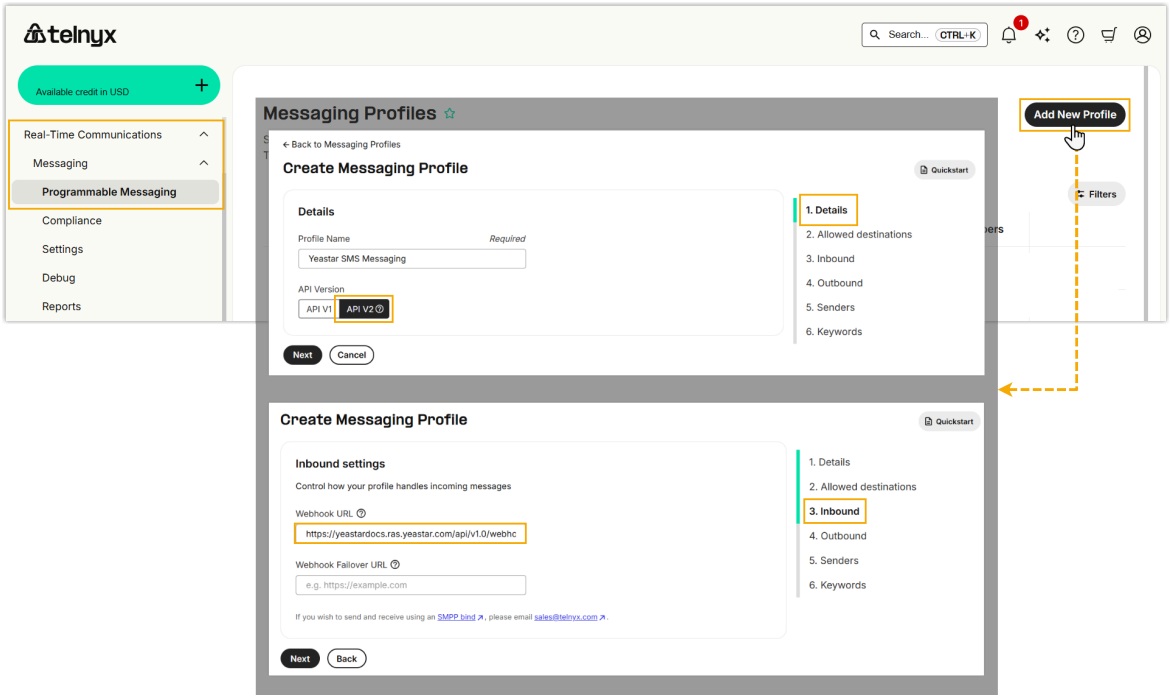
Log in to Telnyx portal, and complete the following settings:

1. Search and purchase a DID number with SMS feature.

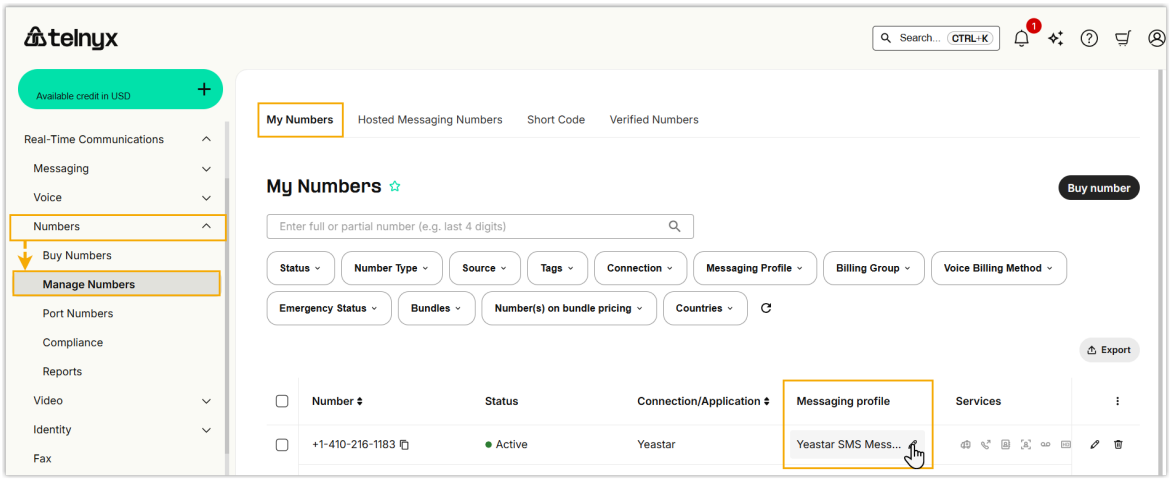



2. Create a message profile and configure messaging webhook with PBX's Webhook URL.

> **Note:**
> For any settings not shown, configure them according to your actual requirements.

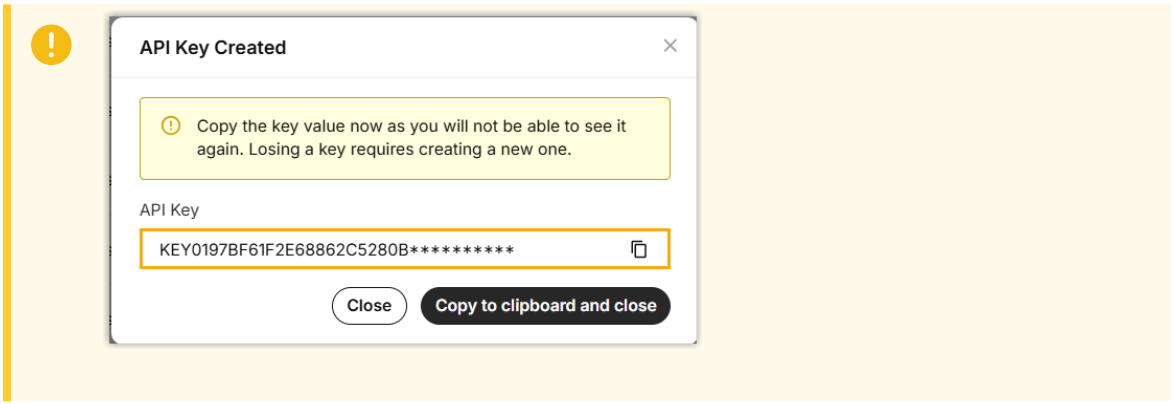


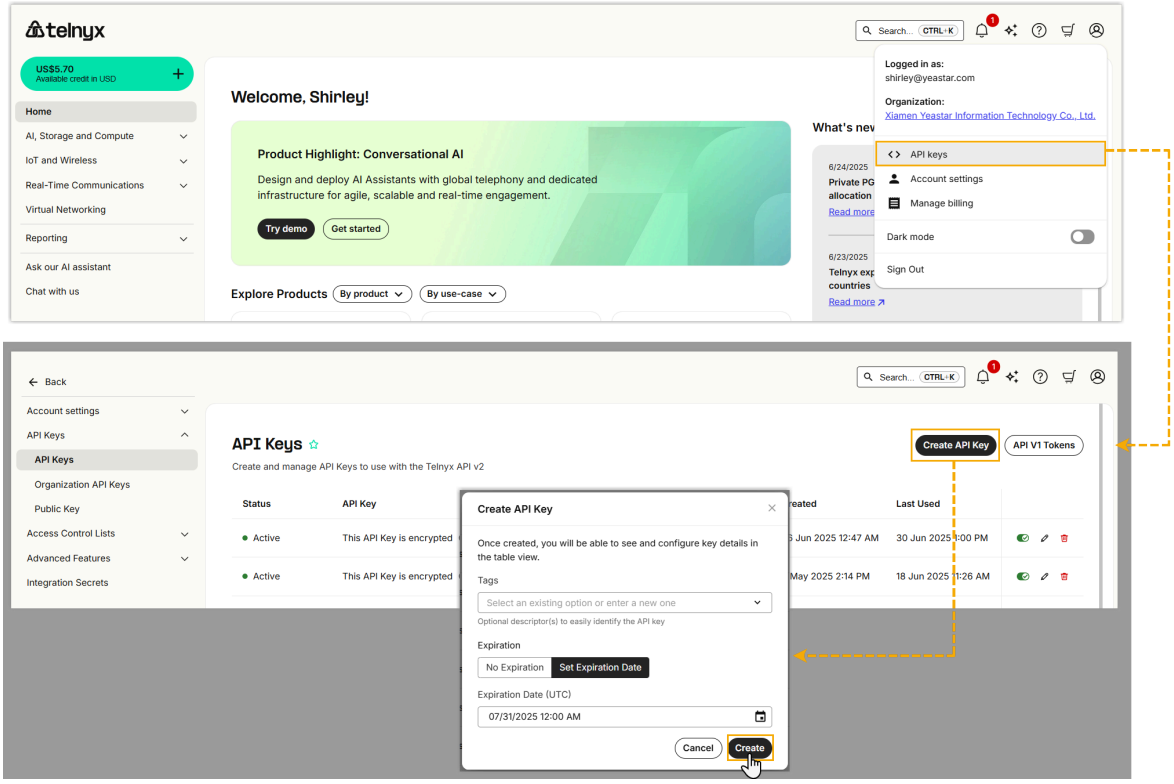

3. Assign the message profile to the purchased DID number.



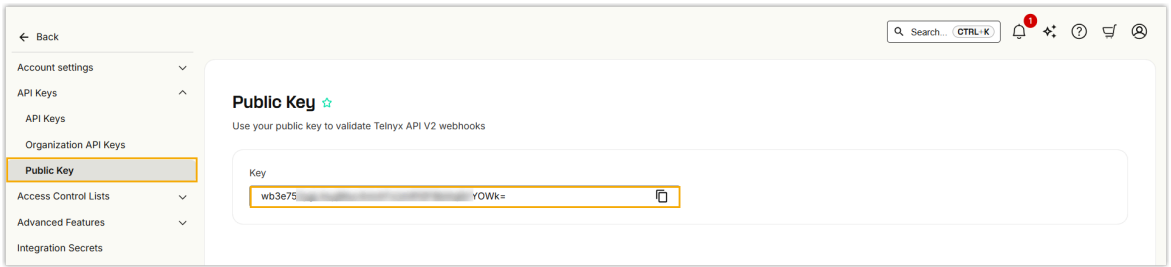

4. Create an API key for the integration with PBX.

> **Important:**
> Properly copy and save the API key after it is created, as it will only be displayed once. You will not be able to view the key again after you close the API key display window.



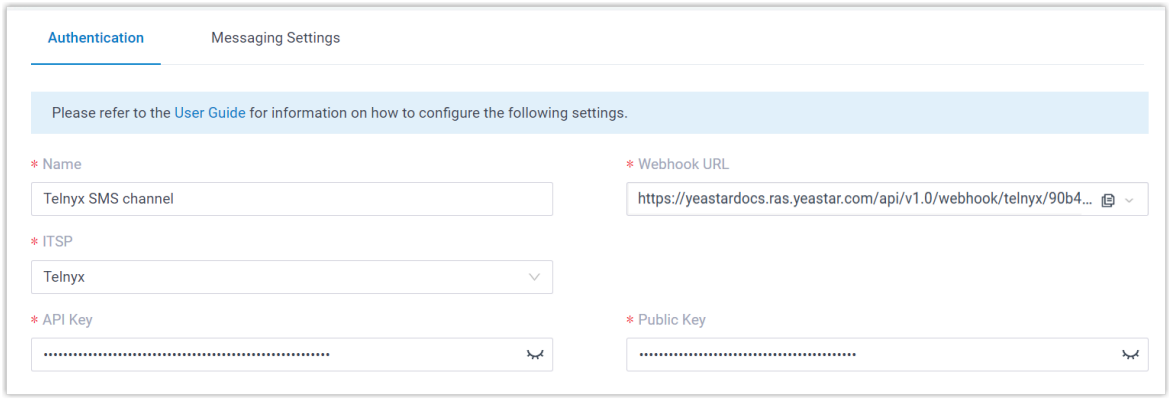




5. Note down the Public key in **Public Key** page.



## Step 3. Create and configure an SMS channel on PBX

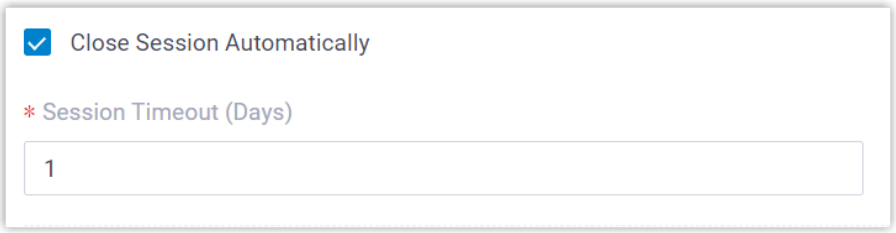
1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, enter the authentication information of Telnyx.



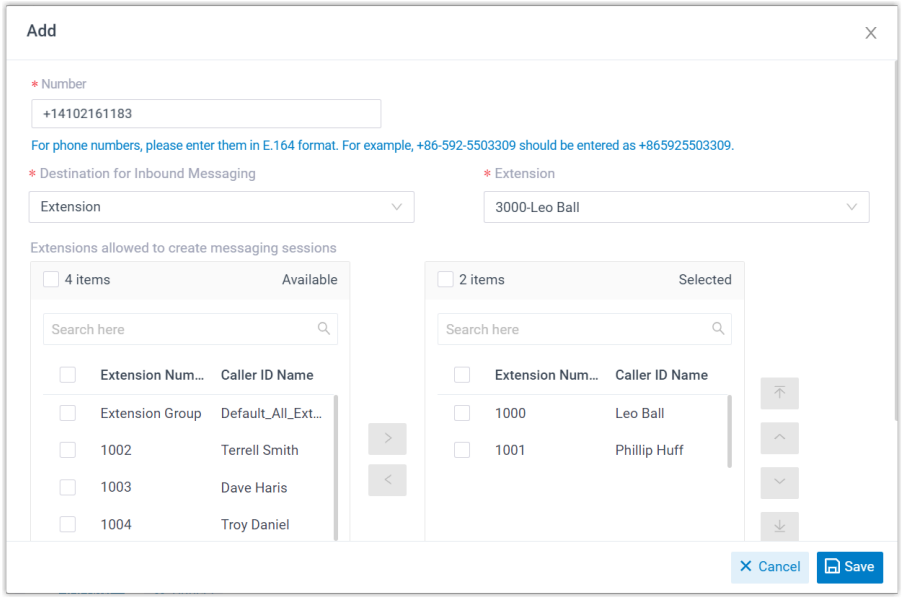

   - **Name**: Enter a name to help you identify the channel.
   - **ITSP**: Select **Telnyx**.
   - **API Key**: Paste the API Key obtained from Telnyx.
   - **Public Key**: Paste the Public Key obtained from Telnyx.
4. In the **Messaging Settings** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

      > **Note:**
      > - If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.
      > - If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

   b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.




c. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

> **Note:**
> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list. |

| Option | Description |
| --- | --- |
| | All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br><br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

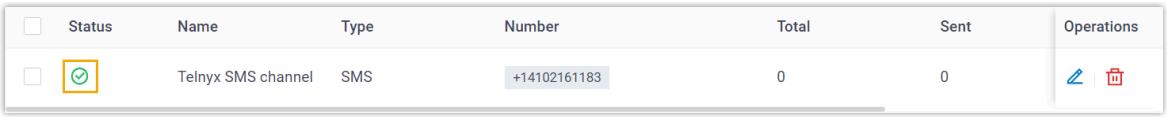
- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

d. Click **Save**.

5. Click **Save**.

## Result

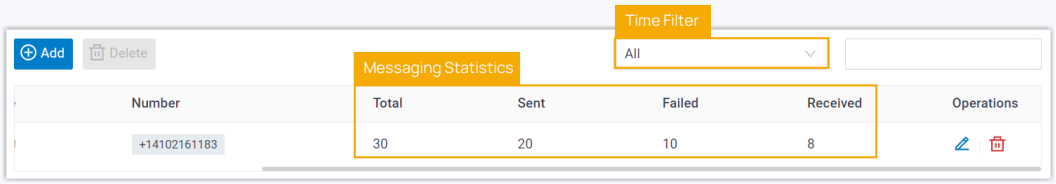
- A messaging channel is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing ✓.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

**Note:**

- For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.
- You can filter the statistics by a time period using the time filter.




### What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

**Related information**

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

## Twilio

## Set up an SMS Channel for Twilio

This topic describes how to set up a Twilio SMS channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to SMS messages from customers on their Linkus UC Clients.

### Requirements

The Yeastar PBX should meet the following requirements:

- **Firmware**: Version 37.20.0.124 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: PBX can be remotely accessed via a domain name.

> **Note:**
> - Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.
> - If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

For more information about the domain configuration, see the following topics:
- Configure Network for Remote Access by a Yeastar FQDN
- Configure Network for Remote Access by a Yeastar Domain Name
- Configure Network for Remote Access by a Domain Name

## Supported message types and limits

### Supported message types

The Twilio SMS channel supports text messages and multimedia messages (MMS), where the supported MMS file types are determined by Twilio. For more information, see Twilio supported MMS file types.

> **Important:**
> When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the SMS service provider is located, otherwise the file transmission would fail.

### Limits

- **File size**: Max. 100 MB
- **File retention period**: 72 hours

## Procedure

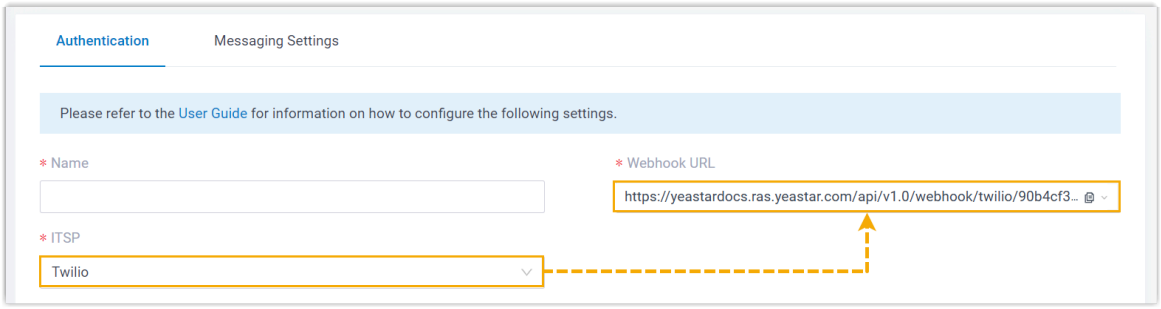

- Step 1. Obtain a Webhook URL on PBX
- Step 2. Configure a number for SMS on Twilio
- Step 3. Create and configure an SMS channel on PBX


## Step 1. Obtain a Webhook URL on PBX

Obtain a Webhook URL from PBX web portal first, which is required when you configure a number for SMS on Twilio.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **ITSP** drop-down list, select **Twilio**, then select and copy the desired **Webhook URL**.

> **Important:**
> The URL will change once you leave the current page, please make sure you use the latest Webhook URL for the configuration on the service provider's customer portal.




4. Note down the Webhook URL.

## Step 2. Configure a number for SMS on Twilio

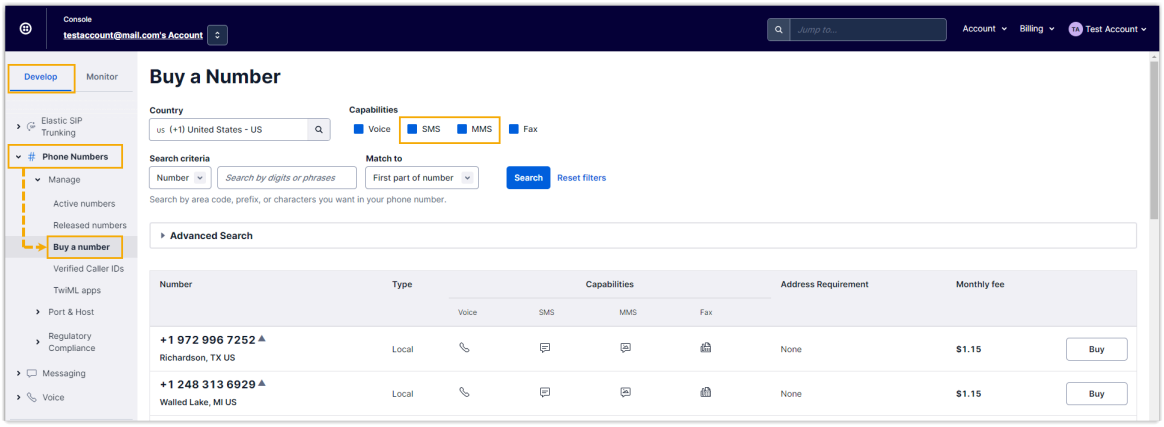
> **Important:**
> According to US legislation (A2P 10DLC SMS), 10DLC (10-digit Long Code) phone numbers that are used for A2P (Application-to-Person) messaging MUST be registered, otherwise SMS messages sent to US numbers from the unregistered 10DLC numbers will be blocked.

> If your business communicates with US-based customers, you should confirm the registration requirements with the SMS service provider and complete the phone number registration to avoid disruption in message delivery.

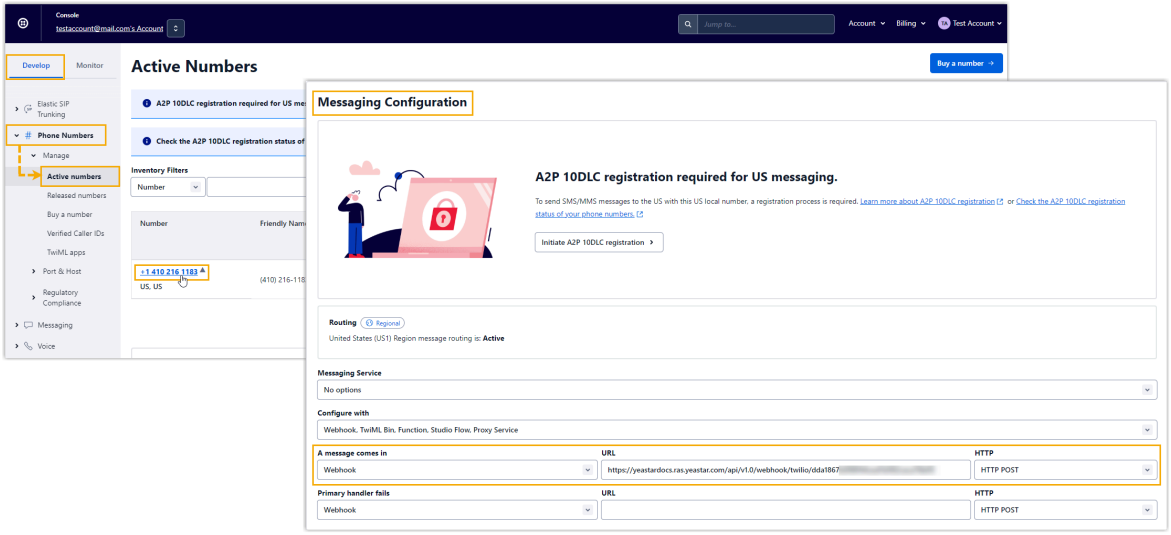
Log in to Twilio portal, and complete the followings:

1. Search and purchase a number with SMS feature.

> **Tip:**
> You can check the SMS service pricing here.

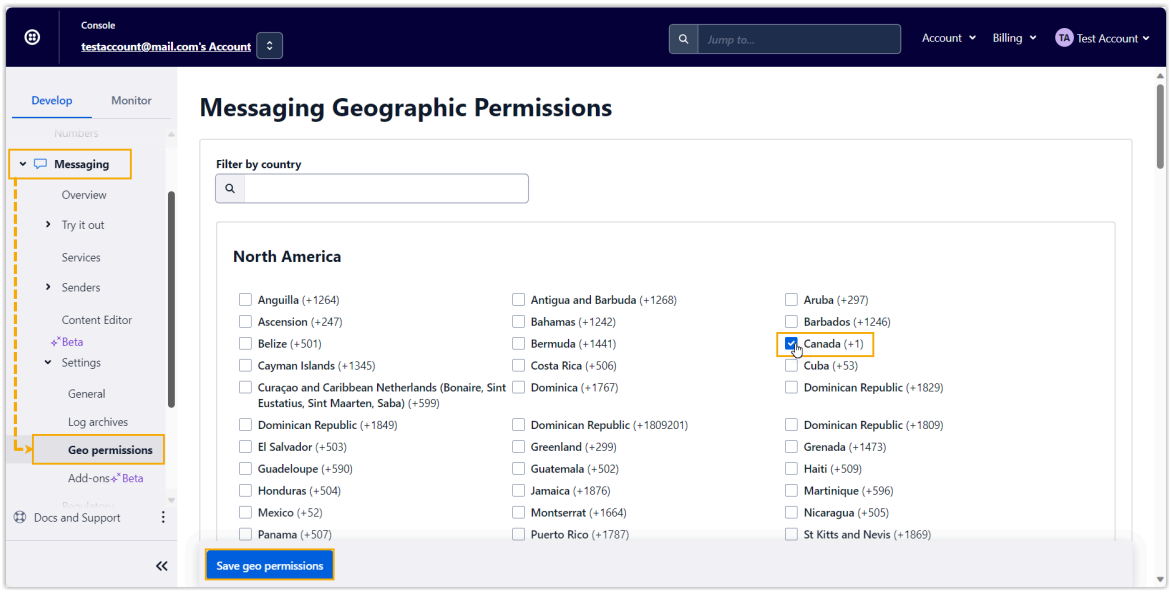



2. Edit the purchased number to configure the messaging webhook with PBX's Webhook URL.



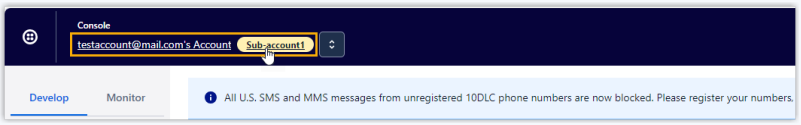
3. Enable the geographic permission for the desired region(s) where you want to send SMS messages, so that messages can be successfully sent to the phone numbers within the region(s).

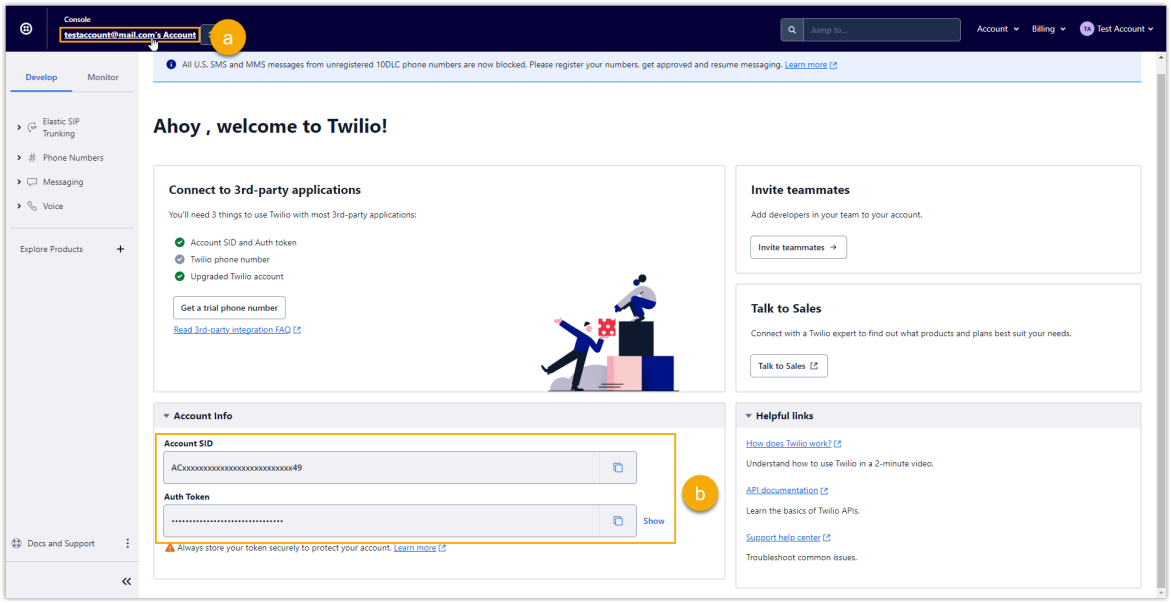
> **Note:**
> This setting should be completed in the parent account.




4. Go to your account's dashboard, note down the **Account SID** and **Auth Token**, as you will need to use it on PBX later.

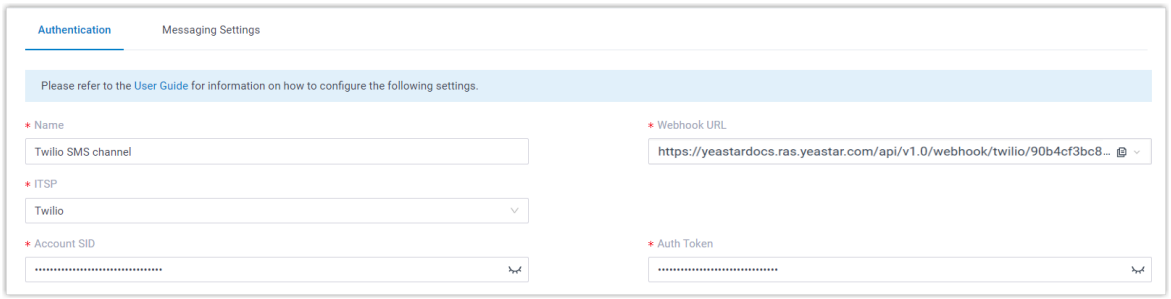
> **Note:**
> The account MUST be the one used for purchasing the number. That is, if the number is purchased using a sub-account, you need to access the sub-account's dashboard to obtain the information.






## Step 3. Create and configure an SMS channel on PBX

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, enter the authentication information of Twilio.

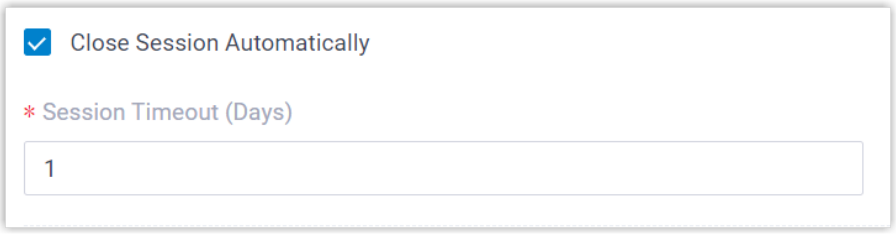



   - **Name**: Enter a name to help you identify the channel.
   - **ITSP**: Select **Twilio**.
   - **Account SID**: Paste the Account SID obtained from Twilio.
   - **Auth Token**: Paste the Auth Token obtained from Twilio.
4. In the **Messaging Settings** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

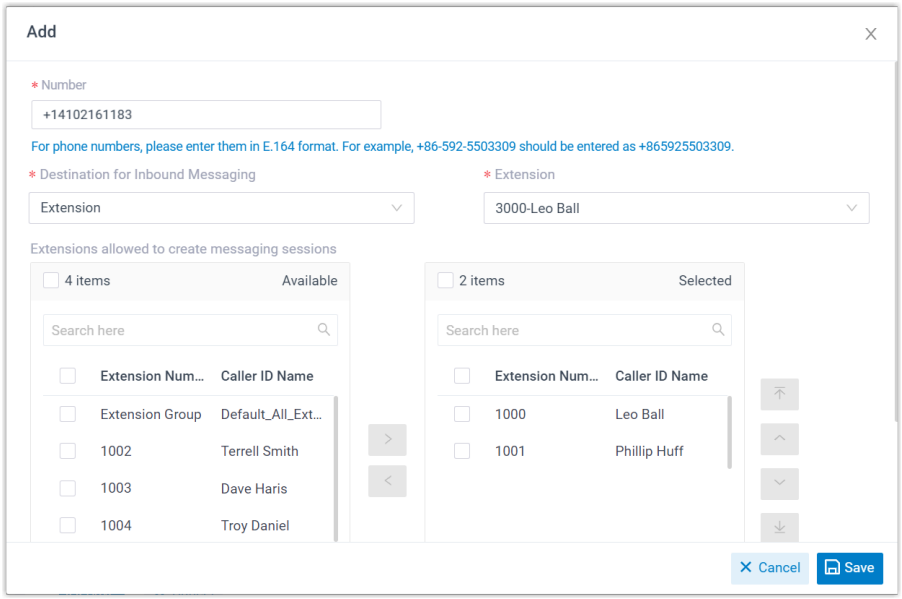
> **Note:**

- If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.
- If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.




c. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

**Note:**

> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

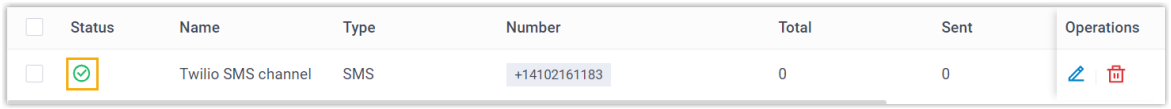
- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

d. Click **Save**.

5. Click **Save**.

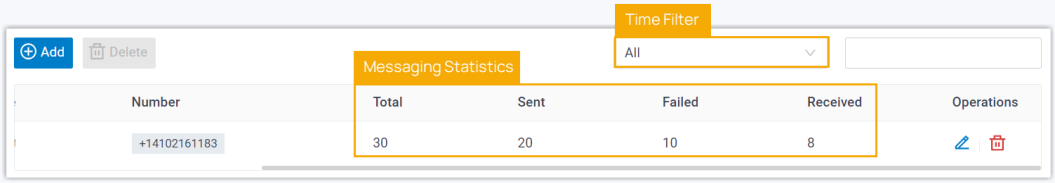
## Result

- A messaging channel for Twilio is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing .




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

> **Note:**
>
> - For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.
> - You can filter the statistics by a time period using the time filter.




## What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

### Related information

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# VoiceMeUp

## Set up an SMS Channel for VoiceMeUp

This topic describes how to set up a VoiceMeUp SMS channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to SMS messages from customers on their Linkus UC Clients.

### Requirements

The Yeastar PBX should meet the following requirements:

- **Firmware**: Version 37.20.0.124 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: PBX can be remotely accessed via a domain name.

> **Note:**
> - Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.
> - If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

For more information about the domain configuration, see the following topics:
- Configure Network for Remote Access by a Yeastar FQDN
- Configure Network for Remote Access by a Yeastar Domain Name
- Configure Network for Remote Access by a Domain Name

### Supported message types and limits

#### Supported message types

The VoiceMeUp SMS channel supports text messages and multimedia messages (MMS), where the supported MMS file types are determined by VoiceMeUp.

> **Important:**

> When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the SMS service provider is located, otherwise the file transmission would fail.

### Limits

- **File size**: Max. 100 MB
- **File retention period**: 72 hours

## Procedure

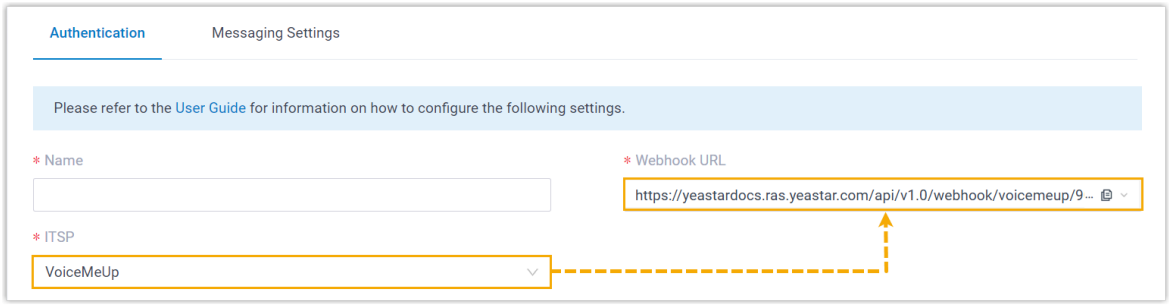
- Step 1. Obtain a Webhook URL on PBX
- Step 2. Configure messaging feature on VoiceMeUp
- Step 3. Create and configure an SMS channel on PBX

## Step 1. Obtain a Webhook URL on PBX

Obtain a Webhook URL from PBX web portal first, which is required when you configure a number for SMS on VoiceMeUp.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **ITSP** drop-down list, select **VoiceMeUp**, then select and copy the desired **Webhook URL**.

> **Important:**
> The URL will change once you leave the current page, please make sure you use the latest Webhook URL for the configuration on the service provider's customer portal.



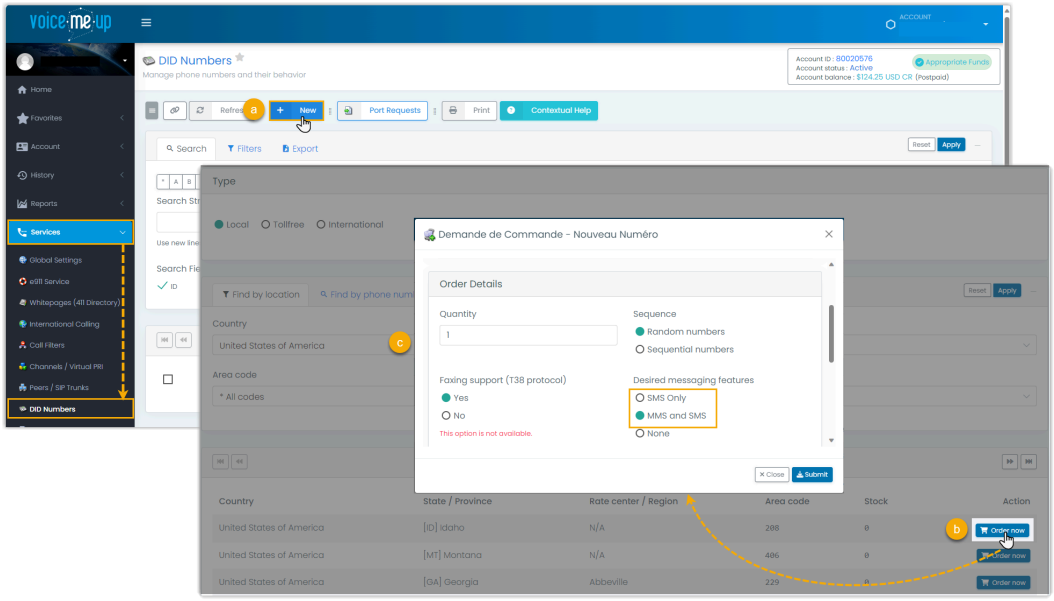

4. Note down the Webhook URL.

## Step 2. Configure messaging feature on VoiceMeUp

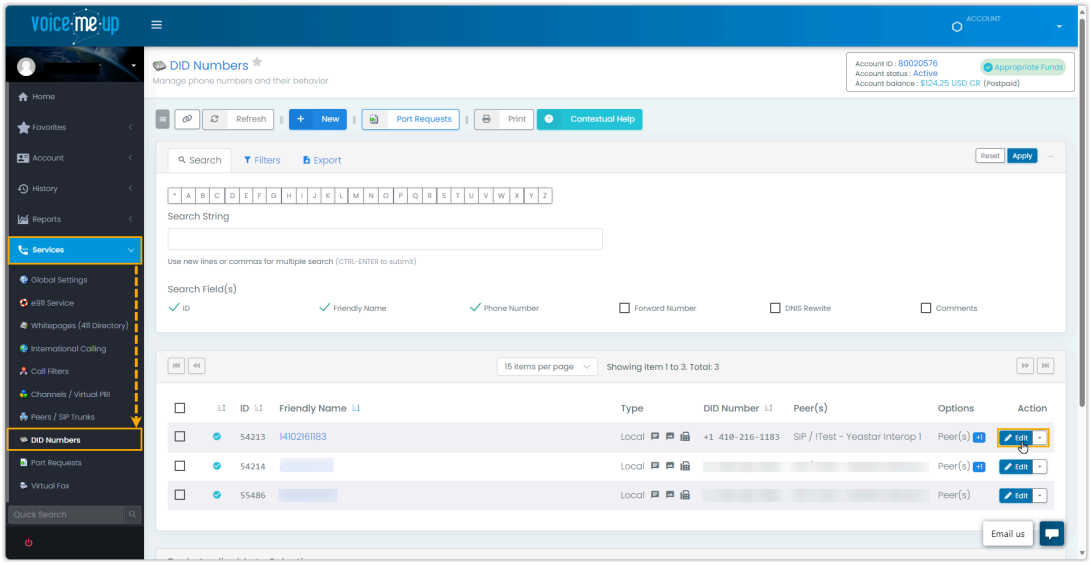
Log in to VoiceMeUp customer portal, and complete the following settings:

1. Purchase a DID number with SMS feature.

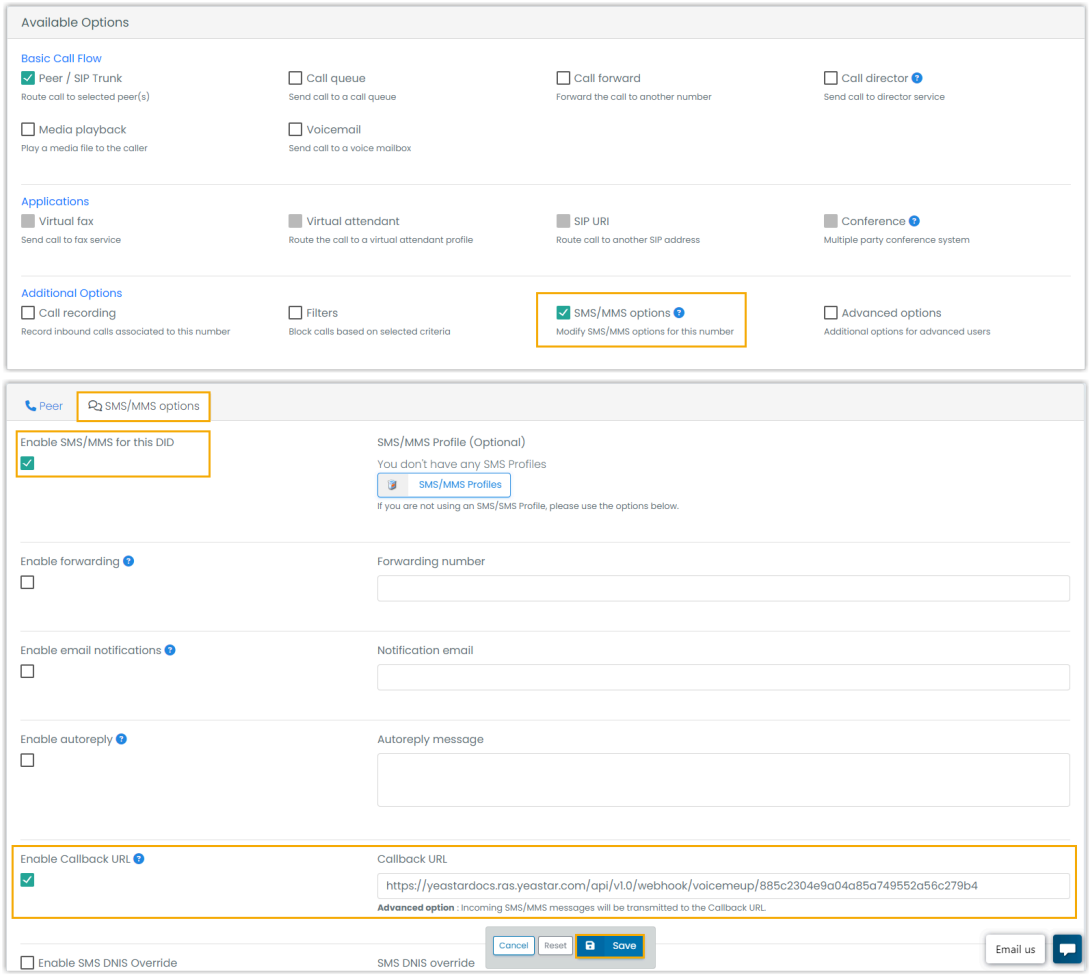
> **Important:**
> According to US legislation (A2P 10DLC SMS), 10DLC (10-digit Long Code) phone numbers that are used for A2P (Application-to-Person) messaging MUST be registered, otherwise SMS messages sent to US numbers from the unregistered 10DLC numbers will be blocked.
>
> If your business communicates with US-based customers, you should contact the SMS service provider to complete 10DLC registration for your DID number to avoid disruption in message delivery.



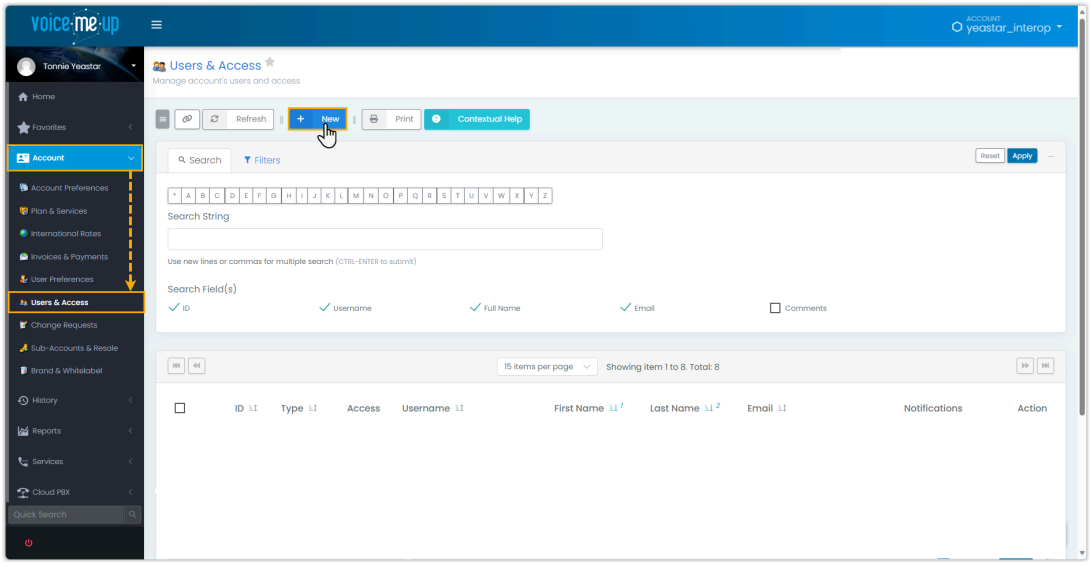

2. Configure messaging webhook for the DID number.
    a. Go to the edition page of the desired DID number.




    b. Enable SMS/MMS for the DID number, and configure the Callback URL using the PBX's Webhook URL.

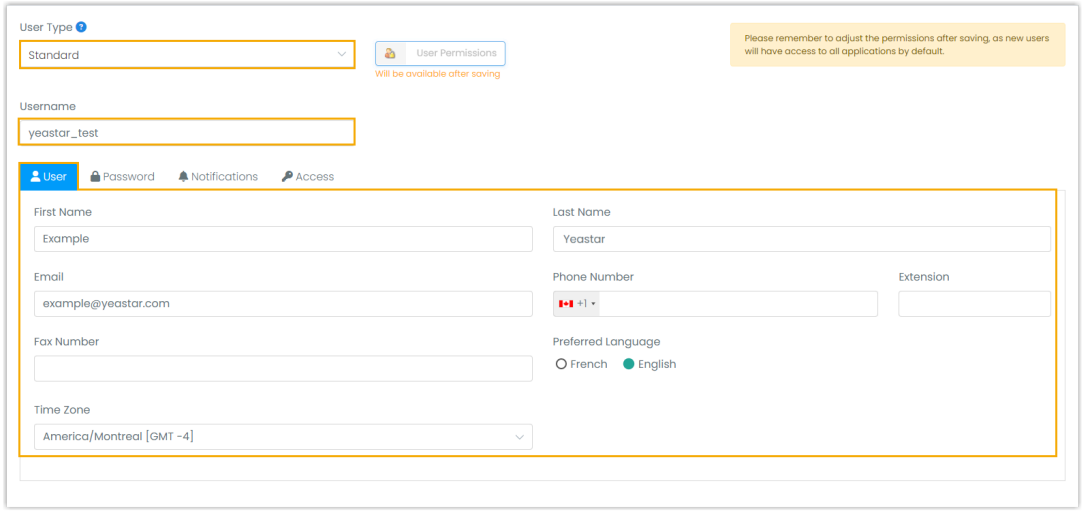


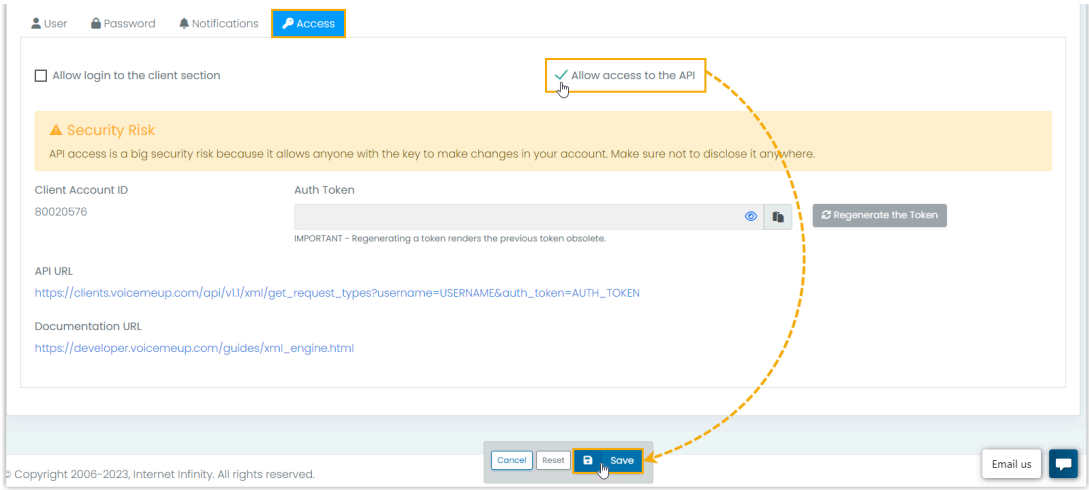

3. Configure a user account used for the integration with PBX.
    a. Create a user account.



b. Configure the account information, and enable API access for the account.

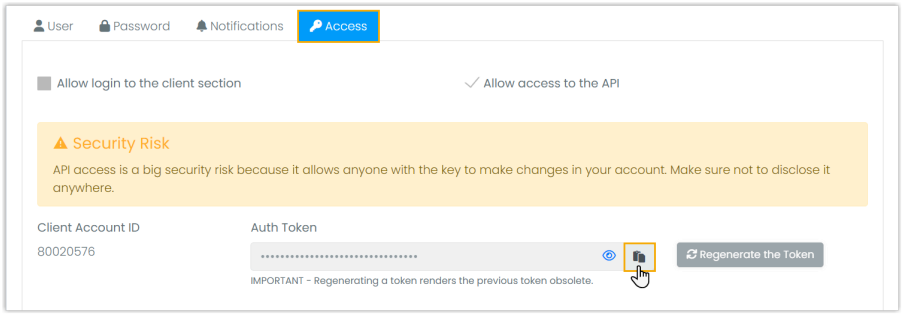
> **Note:**
> Note down the username you set, as you will need it later on PBX.




An account is created successfully; You are redirected the user account list.

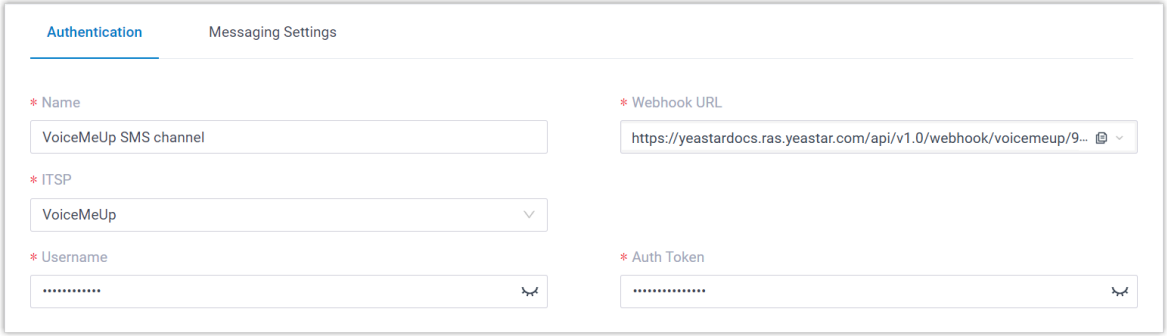
c. Go to the account's details page, and obtain the **Auth Token** for the integration.




## Step 3. Create and configure an SMS channel on PBX

Create an SMS channel on PBX, and configure the channel with the authentication information and number obtained from VoiceMeUp.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, enter the authentication information of VoiceMeUp.

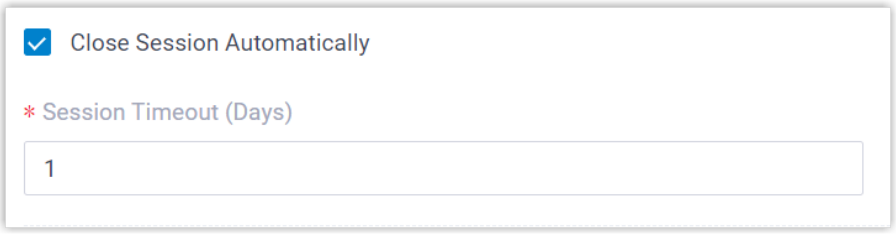



   - **Name**: Enter a name to help you identify the channel.
   - **ITSP**: Select **VoiceMeUp**.
   - **Username**: Paste the username of the VoiceMeUp account.
   - **Auth Token**: Paste the auth token of the VoiceMeUp account.
4. In the **Messaging Settings** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

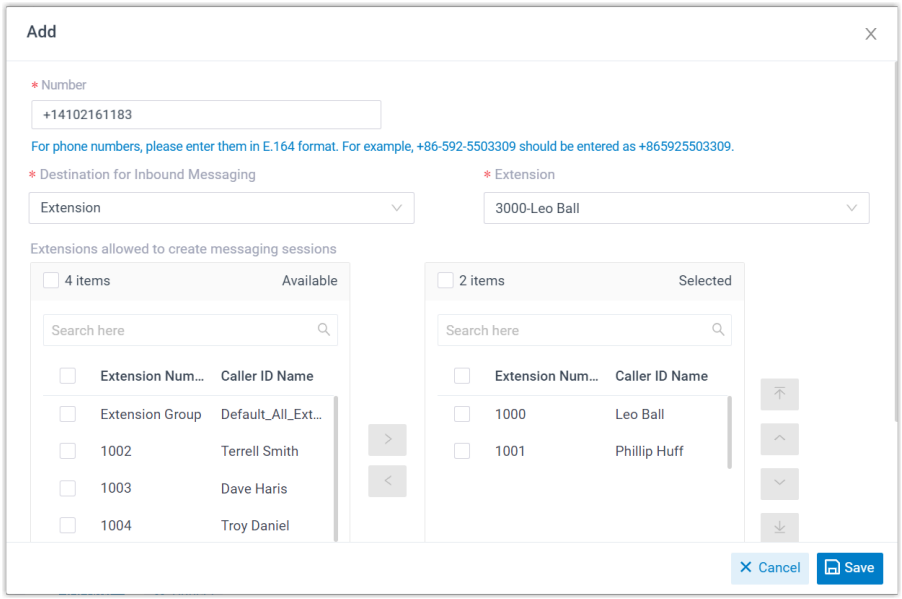
> **Note:**
> - If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.

> • If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.




c. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

> **Note:**
> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

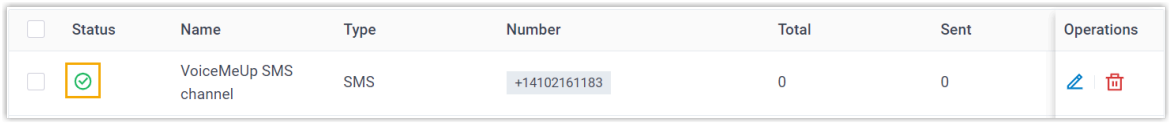
- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

d. Click **Save**.

5. Click **Save**.

## Result

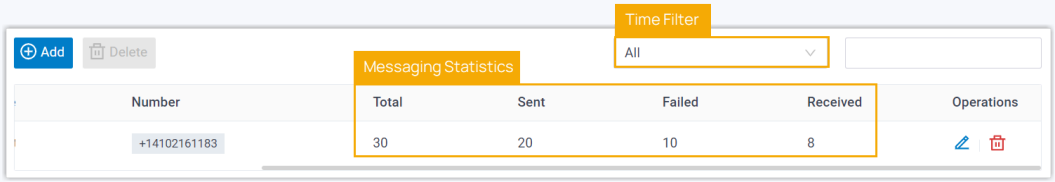
- A messaging channel is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing ✓.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

**Note:**

- For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.
- You can filter the statistics by a time period using the time filter.




## What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

### Related information

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# Custom SMS Channel

## Integrate SMS Service with Yeastar P-Series PBX System using SMS API

Yeastar P-Series PBX System allows Service Providers to integrate their SMS service with the PBX system using SMS API. This topic describes how Service Provider can achieve the interaction of SMS service with Yeastar PBX using API, and introduces how PBX administrators can set up an SMS channel for the Service Provider on PBX system.

### Requirements

To implement the SMS service integration with Yeastar P-Series PBX System, Yeastar PBX and Service Provider must meet the following requirements.

| Platform | Requirement |
| --- | --- |
| Yeastar PBX | • **Firmware**: Version 37.20.0.124 or later<br>• **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)<br>• **Domain Name**: PBX can be remotely accessed via a domain name.<br><br>**Note:**<br>◦ Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br>◦ If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br><br>For more information about the domain configuration, see the following topics:<br>◦ Configure Network for Remote Access by a Yeastar FQDN<br>◦ Configure Network for Remote Access by a Yeastar Domain Name<br>◦ Configure Network for Remote Access by a Domain Name |
| Service Provider | • **API**: Service Provider should provide the following API interfaces.<br>◦ HTTPS REST API for sending messages. |

| Platform | Requirement |
| --- | --- |
| | ◦ (Optional) If the service provider requires PBX to verify its identity, an HTTPS REST API for verifying authentication should also be provided.<br>• **Customer Portal Feature**: Service Provider should offer the following features on its customer portal.<br>◦ Provide an **API key** to authenticate API requests sent from PBX system.<br>◦ (Optional) If the Service Provider requires signature verification for webhook requests sent to the PBX, a **Secret** should also be provided for the PBX to verify the authenticity of the webhook requests.<br>◦ Support for configuring **Webhook** through the customer portal.<br>• **Number Format**: Phone numbers should follow the E.164 format. |

## Authenticate requests

As the SMS service integration is implemented via API interactions between Service Provider and PBX, the Service Provider should provide an **API key** and a **Secret** for the request authentication of APIs and webhooks in the integration.

- **API key**

  The API key is used to authenticate the API requests sent from PBX to Service Provider.

  The PBX will pass the API key in the header of each API request under an `Authorization` field, as shown below:

  ```
  Authorization: Bearer {api_key}
  ```

  Upon receiving an API request, Service Provider verifies the API key extracted from the request header. If the API key is valid, the Service Provider should execute the corresponding actions as specified in the request. Otherwise, the API request fails.
  For more information about the API request, see the followings:
  ◦ (Optional) Verify SMS channel connectivity
  ◦ Send messages through Service Provider
- **Secret**
  The Secret is used to authenticate the webhook requests sent from Service Provider to PBX.

  **Note:**

> Whether the Secret is required depends on whether the Service Provider uses it for signature verification in webhook request.

When sending a message to PBX via webhook, the Service Provider needs to utilize the **Secret** along with the SHA256 algorithm to generate a signature based on the webhook request body, and pass the signature in the header of each webhook request under an `X-Signature-256` field, as shown below:

> **Important:**
> The signature included in the request header must be in all lowercase letters.

```
X-Signature-256: sha256={signature}
```

Upon receiving a webhook request, PBX calculates a signature using the **Secret** along with SHA256 algorithm based on the received webhook request body, then compares the result with the signature extracted from the request header. If the signatures match, it indicates that the webhook request is valid and PBX will deliver the message retrieved from the request body to the message recipient. Otherwise, the webhook request will be rejected.

For more information about the webhook request, see Receive messages from Service Provider.

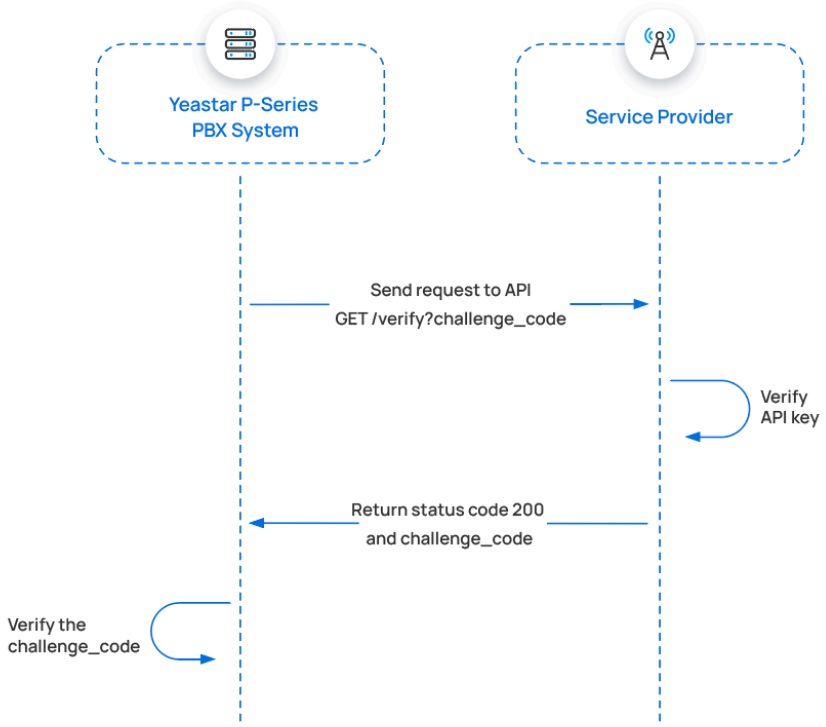
## (Optional) Verify SMS channel connectivity

> **Note:**
> Whether to perform this operation depends on the Service Provider's requirement for identity verification. If not required, it can be skipped.

Once an SMS channel has been established on PBX web portal, the system will periodically send API requests to Service Provider using the **API address for verifying authentication** and **API key** to verify the connectivity of the channel.

### Interaction flow

The process of channel connectivity verification is shown below:




1. PBX initiates an API request, containing a randomly generated challenge code.
2. Upon receiving the API request, Service Provider validates the API key.
3. If the API key is valid, Service Provider should return a status code `200`, and include the challenge code in the response body.
4. Upon receiving the response, PBX checks if the returned challenge code matches the one it sent.

   If the challenge code matches, it indicates that the channel connection is successful.

## API request sent by PBX

Below is the structure and explanation of the API request sent by PBX for channel connectivity verification.

### Request method

GET

### Request URL

```
{api_address_for_verifying_authentication}
```

For example:

```
https://service-provider.example.com/verify
```

### Headers

| Parameter | Type | Description |
|---|---|---|
| Authorization | String | Pass the API key in the header.<br>**Format**: Bearer *{api_key}* |

### Query parameter

| Parameter | Type | Description |
|---|---|---|
| challenge | String | Challenge code. A random string that is generated by PBX. |

### Request example

```
GET /
verify?challenge=mAWpGnyeTZgguOPYlWitGPlRJYIhoLMy
 HTTP/1.1
Host: service-provider.example.com
Authorization: Bearer {api_key}
```

## API response returned by Service Provider

Service Provider should return the API response in JSON format.

### Success response

If the request is successful, Service Provider should return the following information in the response:

- HTTP status code `200`
- The challenge code that was sent by PBX in the request

For example:

```
HTTP/1.1 200 OK
Body: mAWpGnyeTZgguOPYlWitGPlRJYIhoLMy
```

If the challenge code in the response body matches the one sent by PBX, it indicates that the channel has successfully connected.

In this case, the channel status on PBX web portal is displayed as (Connected).

### Error response

If the request fails, Service Provider should return the error information in the response according to the following format.

| Parameter | Type | Description |
|---|---|---|
| code | String | Error code. |
| title | String | Error type (Customizable). |
| detail | String | Detailed information of the error (Customizable). |

The following example shows a response of a failed channel connectivity verification.

```
HTTP/1.1 401 Unauthorized
{
    "errors": [
        {
            "code": "10004",
            "title": "Authentication failed",
            "detail": "No key found matching the ID
 with the provided secret."
        }
    ]
}
```

### Exceptions and troubleshooting

If channel connectivity verification fails, the channel on PBX web portal will display an abnormal status. Service Provider can troubleshoot the cause of the anomaly by checking the error code and response body.

- **Error code**

  The table below lists the error codes defined in the PBX.

| Error Code | Error Message | Description |
|---|---|---|
| 10001 | channel.ErrInvalidPhoneNumber | Invalid phone number. |
| 10002 | channel.ErrInvalidParam | Invalid parameter in the request. |
| 10003 | channel.ErrUnsupportMedia | Resource type not supported (MMS). |
| 10004 | channel.ErrAuthFail | Authentication failed. |
| 10005 | channel.ErrAuthFail | No permission. |
| 10006 | channel.ErrTooManyRequest | Too many requests. |
| 10007 | channel.ErrServiceUnavailable | Service unavailable on recipient's platform. |
| 10008 | channel.ErrExceedsSizeLimit | File size exceeds the limit. |

- **Exceptions**

  The table below lists the possible abnormal channel statuses and their trigger conditions.

| Channel Status | Trigger Condition |
|---|---|
| Unauthorized | ◦ Authentication failed, Service Provider returns HTTP status code `401`/`403`/`404`.<br>◦ The returned challenge code does not match the one sent by the PBX. |
| Services of the recipient platform are unavailable | Service Provider returns HTTP status code `500`. |
| Unknown | Service Provider returns HTTP status code except for `401`/`403`/`404`/`500`, and returns error information in the response body according to the format defined by the PBX. |
| Request Failed | ◦ Service Provider does not return an HTTP status code, possibly due to TCP connection issues or non-existent domain. |

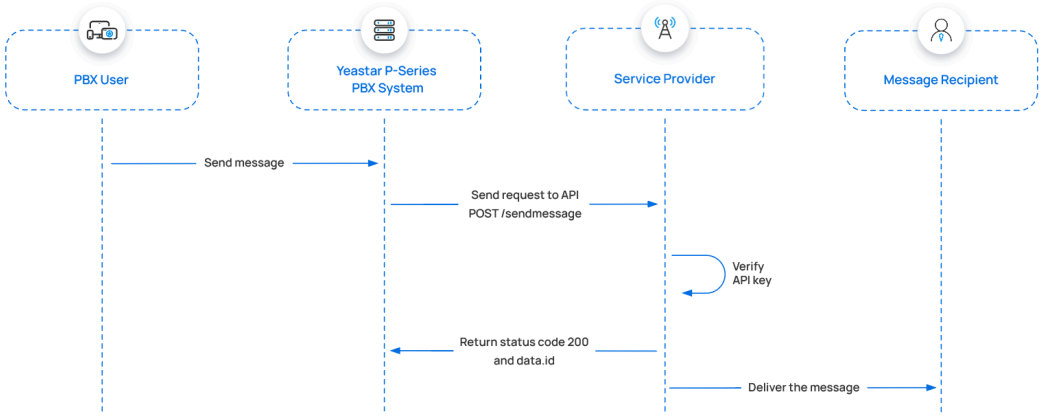
| Channel Status | Trigger Condition |
| --- | --- |
| | ◦ Service Provider returns HTTP status code except for `401`/`403`/`404`/`500`, and does not return a response body or the returned response body is not in JSON format. |

## Send messages through Service Provider

When a PBX user sends a message, PBX will send an API request to the Service Provider using the **API interface for sending messages** and **API key**, so as to deliver the message to external message recipient through Service Provider.

### Interaction flow

The process of sending a message through Service Provider is shown below:




1. A PBX user sends a message.
2. PBX initiates an API request to send a message through the Service Provider.
3. Upon receiving the API request, the Service Provider validates the API key.
4. If the API key is valid, the Service Provider should return a status code `200` and a `data.id` to pass the unique ID of the message.
5. Service Provider delivers the message to the message recipient.

### API request sent by PBX

Below is the structure and explanation of the API request sent by PBX for sending a message through Service Provider.

### Request method

POST

### Request URL

```
{api_address_for_sending_message}
```

For example:

```
https://service-provider.example.com/sendmessage
```

### Headers

| Parameter | Type | Description |
|---|---|---|
| Content-Type | String | Define the content type of the request payload.<br>**Valid value**: application/json |
| Authorization | String | Pass the API key in the header.<br>**Format**: Bearer *{api_key}* |

### Request body

PBX will pass the outbound message in the request body.

| Parameter | Type | Description |
|---|---|---|
| from | String | Phone number of the message sender.<br>**Note:**<br>This parameter should be in E.164 format. For example, `+8618012121222`. |
| to | String | Phone number of the message recipient.<br>**Note:**<br>This parameter should be in E.164 format. For example, `+8618012121222`. |
| text | String | The textual content of the message. |
| media_urls | Array<String> | The URL(s) pointing to the media content of the message. |

### Request example

Here are examples of sending SMS/MMS messages to a phone number through Service Provider.

- Send an SMS message

```
POST /sendmessage HTTP/1.1
Host: service-provider.example.com
Content-Type: application/json
Authorization: Bearer {api_key}

{
    "from": "+8618012121222",
    "text": "Hello, World!",
    "to": "+8618012121223"
}
```

- Send an MMS message

```
POST /sendmessage HTTP/1.1
Host: service-provider.example.com
Content-Type: application/json
Authorization: Bearer {api_key}

{
    "from":"+8618012121222",
    "to":"+8618012121223",

 "media_urls":["yeastardocs.ras.yeastar.com/
api/chat/70dee7e2f95041ca890f222ace06c2dc"]
}
```

## API response returned by Service Provider

Service Provider should return the API response in JSON format.

### Success response

If the request is successful, Service Provider should return the following information in the response:

- HTTP status code `200`
- A parameter `data.id` to pass the unique ID of the message

For example:

```
HTTP/1.1 200 OK
{
    "data": {
        "id":"b301ed3f-1490-491f-995f-6e64e69674d4",
  // Message ID (Required, and MUST be different every
 time)

        }
}
```

### Error response

If the API request fails, Service Provider should return the error information in the response according to the following format.

| Parameter | Type | Description |
|---|---|---|
| code | String | Error code. |
| title | String | Error type (Customizable). |
| detail | String | Detailed information of the error (Customizable). |

The following example shows a response of a failed message sending request.

```
HTTP/1.1 400 Bad Request
{
    "errors": [
        {
            "code": "10001",
            "title": "Invalid 'to' address",
            "detail": "The 'to' address should be a
 single valid number."
        }
    ]
}
```

### Exceptions and troubleshooting

If message delivery fails, an error prompt will be displayed on the PBX user's Linkus client. Service Provider can troubleshoot the cause of the anomaly by checking the error code and response body.

- **Error code**

  The table below lists the error codes defined in the PBX.

| Error Code | Error Message | Description |
|---|---|---|
| 10001 | channel.ErrInvalidPhoneNumber | Invalid phone number. |
| 10002 | channel.ErrInvalidParam | Invalid parameter in the request. |
| 10003 | channel.ErrUnsupportMedia | Resource type not supported (MMS). |
| 10004 | channel.ErrAuthFail | Authentication failed. |
| 10005 | channel.ErrAuthFail | No permission. |
| 10006 | channel.ErrTooManyRequest | Too many requests. |
| 10007 | channel.ErrServiceUnavailable | Service unavailable on recipient's platform. |
| 10008 | channel.ErrExceedsSizeLimit | File size exceeds the limit. |

- **Exceptions**

  The table below lists the possible error prompts and their trigger conditions.

| Error Prompt | Trigger Condition |
|---|---|
| Failed to send | ◦ Service Provider does not return a `data.id`.<br>◦ Service Provider returns HTTP status code `404`, prompting service not found.<br>◦ Message delivery fails, and Service Provider returns error information according to the format defined by the PBX, which will be displayed in the error prompt.<br>◦ Message delivery fails, and Service Provider does not return error information or the returned response body is not in JSON format. |
| Authentication Failed | ◦ Service Provider returns HTTP status code `401`. |

| Error Prompt | Trigger Condition |
| --- | --- |
| | ◦ Service Provider returns error code `10004` or `10005`. |
| Recipient Platform Service Unavailable | ◦ Service Provider returns HTTP status code `403`.<br>◦ Service Provider returns error code `10007`. |
| Invalid Phone Number | Service Provider returns error code `10001`. |
| Invalid Parameter | Service Provider returns error code `10002`. |
| This type of message is not supported due to the restriction of the recipient platform. | Service Provider returns error code `10003`. |
| Too frequent operations. Please try again later. | Service Provider returns error code `10006`. |
| The file size exceeds the limit of the recipient's platform. | Service Provider returns error code `10008`. |

## Receive messages from Service Provider

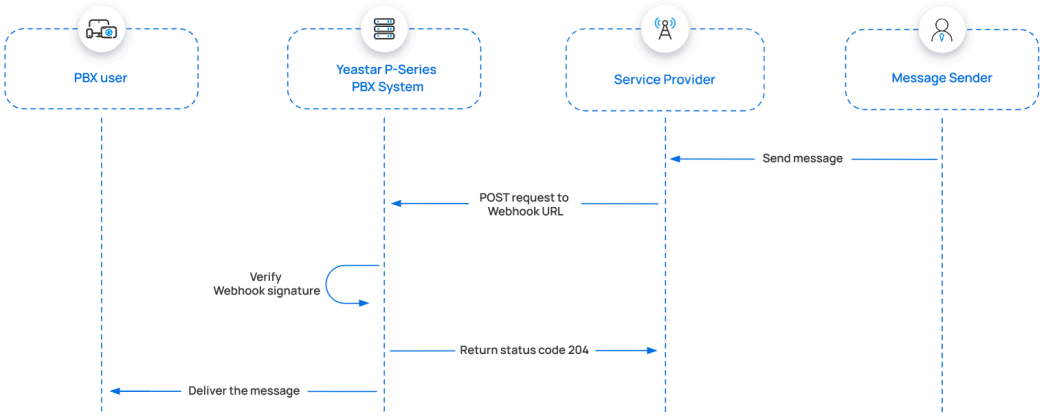
PBX can receive messages from external message sender via a phone number provided by the Service Provider. When an external message sender sends a message to the phone number, Service Provider can send a request to PBX's webhook URL, so as to deliver this message to PBX.

### Interaction flow

The process of receiving a message from Service Provider is shown below:

**Note:**

> Whether to perform signature verification depends on the Service Provider's requirement for signature verification. If not required, the signature-related operations can be skipped.




1. An external message sender sends a message.
2. The Service Provider should initiate a request to the PBX's webhook URL, with the inbound message attached in the request body and a SHA256 signature included in the request header.
3. Upon receiving the webhook request, PBX verifies the signature by using the secret provided by Service Provider to calculate a SHA256 signature based on the received webhook request body, then compares the result with the signature extracted from the request header.

   If the signatures match, it indicates that the webhook request is valid, and PBX will return a status code `204` to the Service Provider.
4. PBX delivers the message to the PBX user.

## Webhook request sent by Service Provider

Below is the structure and explanation of the webhook request that Service Provider should send for message delivery.

### Request method

POST

### Request URL

```
{webhook_url_provided_by_pbx}
```

For example:

```
https://yeastardocs.ras.yeastar.com/
api/v1.0/webhook/general/429ced149ff9437695be795aff3
8407b
```

### Headers

| Parameter | Type | Description |
|---|---|---|
| Content-Type | String | Define the content type of the request payload.<br>**Valid value**: application/json |
| X-Signature-256 | String | Pass the signature for webhook authentication, where *{signature}* is the lowercase result generated by encrypting the body content with the **Secret** using the SHA256 algorithm.<br>**Format**: sha256=*{signature}* |

### Request body

The Service Provider should pass the inbound messages in the request body.

> **Note:**
> Here only lists the mandatory parameters. Service Provider may extend this message with other data if needed.

| Parameter | Required | Type | Description |
|---|---|---|---|
| data.event_type | Yes | String | Event type.<br>**Valid value**: `message.received`. |
| data.payload.id | Yes | String | Message ID.<br>**Note:**<br>• The maximum character length is 255. |

| Parameter | Required | Type | Description |
|---|---|---|---|
| | | | • The ID MUST be different every time. |
| data.payload.from.phone_number | Yes | String | Phone number of the message sender.<br><br>**Note:**<br>This parameter should be in E.164 format. For example, `+8618012121222`. |
| data.payload.to.phone_number | Yes | String | Phone number of the message recipient.<br><br>**Note:**<br>This parameter should be in E.164 format. For example, `+8618012121222`. |
| data.payload.text | Yes | String | Textual content of the message.<br><br>**Important:**<br>Either `data.payload.text` or `data.payload.media` must be provided. |
| data.payload.media | Yes | Array <media> | The information and URL pointing to the media content of the message.<br><br>**Important:**<br>Either `data.payload.text` or `data.payload.media` must be provided. |
| data.payload.received_at | Yes | String | The time when the message was received (ISO 8601 format).<br><br>**Format**:<br>`YYYY-MM-DDTHH:MM:SS.mmm+/-HH:MM`.<br><br>**Example**:<br>2019-12-09T20:16:07.588+08:00. |

| Parameter | Required | Type | Description |
|---|---|---|---|
| data.payload.record_type | Yes | String | Record type.<br>**Valid value**: `message`. |

### media

| Parameter | Required | Type | Description |
|---|---|---|---|
| content_type | No | String | The type of the media file.<br>**Tip:** Refer to the Media Types for the corresponding value. |
| sha256 | No | String | The SHA256 value of the media file. |
| size | No | Integer | File size. |
| url | Yes | String | The URL that points to the media file. |

## Request example

The following example shows a webhook request for Service Provider to send a message to the PBX.

```
POST /
api/v1.0/webhook/general/429ced149ff9437695be795aff3
8407b HTTP/1.1
Host: yeastardocs.ras.yeastar.com
Content-Type: application/json
X-Signature-256: sha256={signature}

{
    "data": {
        "event_type": "message.received",
        "id":
 "b301ed3f-1490-491f-995f-6e64e69674d4",
   //Event ID (Required, and MUST be different every
 time)
```

```
        "occurred_at":
 "2019-12-09T20:16:07.588+00:00",
        "payload": {
            "completed_at": null,
            "direction": "inbound",
            "encoding": "GSM-7",
            "errors": [],
            "from": {
              //Sender information
                "carrier": "T-Mobile USA",
                "line_type": "long_code",
                "phone_number": "+8618012121222",
                "status": "webhook_delivered"
            },
            "id":
 "84cca175-9755-4859-b67f-4730d7f58aa3",
  //Message ID
            "media": [{
              //Media content of the message
                    "content_type": null,
                    "sha256": null,
                    "url":
 "https://pbs.twimg.com/profile_images/1142168442042
118144/AW3F4fFD_400x400.png"
                }],
            "messaging_profile_id":
 "740572b6-099c-44a1-89b9-6c92163bc68d",
            "organization_id":
 "47a530f8-4362-4526-829b-bcee17fd9f7a",
            "parts": 1,
            "received_at":
 "2019-12-09T20:16:07.503+00:00",        //The time
 when the message is received
            "record_type": "message",
               //Record type
            "sent_at": null,
            "tags": [],
            "text": "Hello from PBX!",
               //Textual content of the message
            "to": [
               //Recipient information
                {
                    "carrier": "PBX",
                    "line_type": "Wireless",
```

```
                    "phone_number":
 "+8618012121223",
                    "status": "webhook_delivered"
                }
            ],
            "type": "SMS/MMS",
            "valid_until": null,
            "webhook_failover_url": null,
            "webhook_url":
 "http://webhook.site/04bbd2e3-09b5-4c9e-95de-a1debe
b9e675"
        },
        "record_type": "event"
    },
    "meta": {
        "attempt": 1,
        "delivered_to":
 "http://webhook.site/04bbd2e3-09b5-4c9e-95de-a1debe
b9e675"
    }
}
```


### Webhook response returned by PBX

The PBX system will return an HTTP status code in the response.

| Status Code | Description |
|---|---|
| 204 | Success. |
| 400 | Bad request, returned when the signature is incorrect. |

## Set up an SMS channel for Service Provider

After Service Provider implements the SMS service integration with Yeastar PBX, PBX administrator can set up an SMS channel on PBX web portal for the Service Provider.

### Limitations

| Item | Limitation |
|---|---|
| Supported message types | The supported message types are determined by the Service Provider.<br><br>**Important:**<br>When sending multimedia messages (such as images), the SMS service provider downloads the files from a link provided by the PBX. Therefore, if |

| Item | Limitation |
| --- | --- |
| | you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the SMS service provider is located, otherwise the file transmission would fail. |
| File size | Max. 100 MB |
| File retention period | 72 hours |

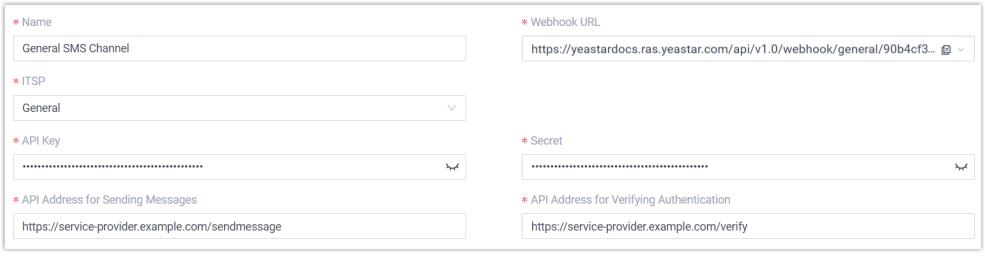
## Prerequisites

- Obtain the following information from the Service Provider:
  - API address for sending messages
  - **(Optional)** API address for verifying authentication
  - Message sending rate limit
- Obtain the following information from the Service Provider's customer portal:
  - API key
  - **(Optional)** Secret
  - Phone number used for message sending and receiving

> **Note:**
> If business needs to communicate with US-based customers, make sure that the phone number has been completed with 10DLC registration to avoid disruption in message delivery.

## Procedure

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **SMS**.
3. In the **Authentication** tab, complete the following settings.

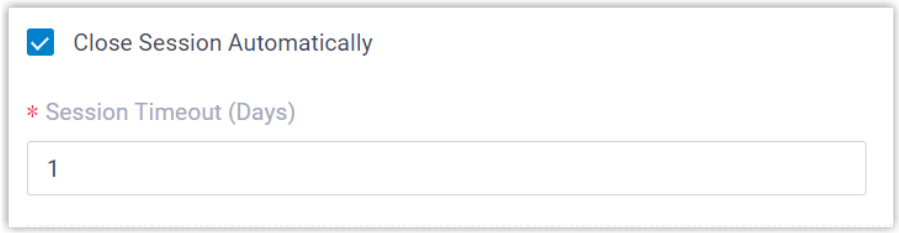


- **Name**: Enter a name to help you identify the channel.
- **ITSP**: Select **General**.
- **API Key**: Enter the API key obtained from the Service Provider's customer portal.
- **Secret**: Optional. If Service Provider provides a Secret for verification, enter it in this field.
- **API Address for Sending Messages**: Enter the corresponding API address provided by the Service Provider. For example, `https://service-provider.example.com/sendmessage`.
- **API Address for Verifying Authentication**: Optional. If Service Provider provides an API address for identity authentication, enter it in this field. For example, `https://service-provider.example-.com/verify`.
- **Webhook URL**: Select a desired URL from the drop-down list, then copy the URL, and configure messaging webhook for the phone number using the URL in the Service Provider's customer portal.

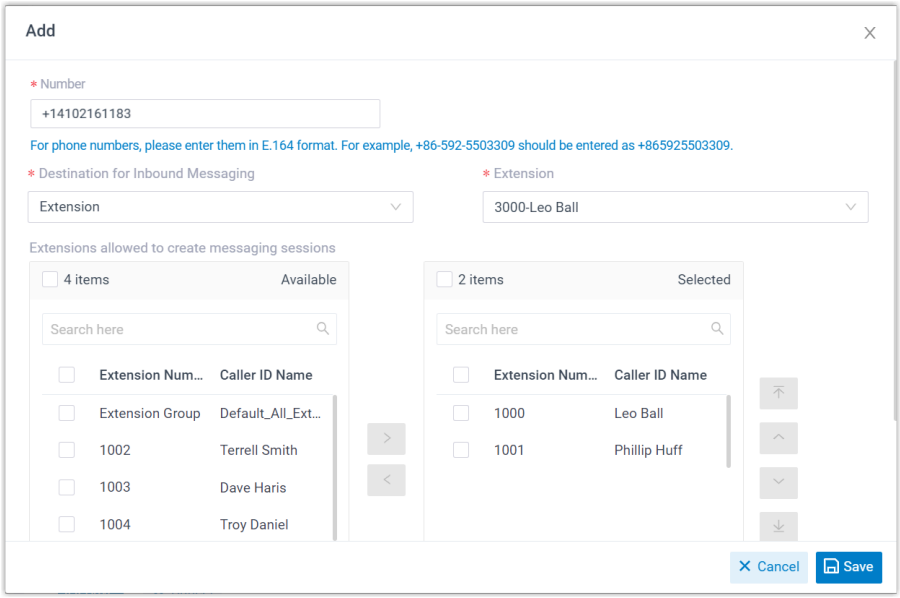
4. In the **Messaging Settings** tab, configure the channel.
   a. In the **Message Sending Rate** field, specify the number of messages that PBX can send per second.

      > **Note:**
      > - If the number of messages to send exceeds the set value, PBX will arrange the messages in queue and send them at the sending rate.
      > - If the sending rate set in PBX exceeds the limit set by the SMS service provider, it may result in message delivery failures. Contact your SMS service provider to confirm the sending rate limit of your account and increase the limit as needed.

   b. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.




c. In the **Number** section, click **Add** to add a message routing rule.




- **Number**: Enter the purchased number or specify an Alphanumeric Sender ID.

> **Note:**
> The phone number should be in E.164 format (`[+][country code][phone number]`). For example, `+14102161183`.

- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |

| Option | Description |
|---|---|
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

- **Extensions allowed to create messaging sessions**: Select the extensions that are allowed to initiate a messaging session with customers.

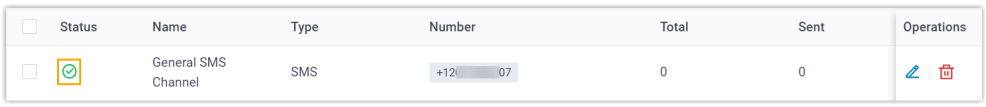
d. Click **Save**.

5. Click **Save**.

## Result

- A messaging channel for the Service Provider is created successfully.

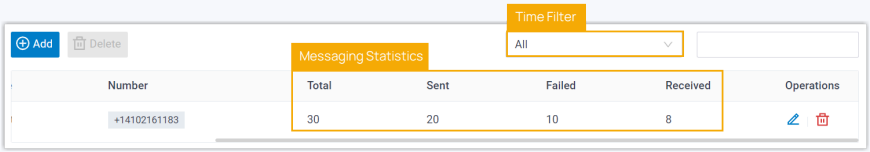
  The channel is displayed in the Messaging list with **Status** showing ✓.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column indicates the total number of sent messages, including both successfully sent messages and failed ones.

**Note:**

- For sent messages, PBX only tracks the number of the messages sent from agents' Linkus UC Clients. If you want to calculate the actual cost of sent messages, consult with the SMS service provider for the precise number of messages transmitted, as long text messages (longer than 160 characters) are automatically split into segments and then re-assembled when they are received, increasing the number of sent messages.
- You can filter the statistics by a time period using the time filter.




### What to do next

Send text messages to the phone number added in the channel, and see if the specified PBX user can receive messages on his or her Linkus UC Client.

### Related information

Check and Manage External Chat Logs

User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client

User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# Facebook

## Facebook Messenger Integration Guide

By integrating Facebook and Yeastar P-Series PBX System, agents in your business can receive and reply to Facebook Page messages directly on Linkus UC Clients, without having to log in to Facebook Messenger.

### Requirements

| Platform | Requirement |
|---|---|
| Yeastar PBX | • **Firmware**: Version 37.20.0.124 or later<br><br>• **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)<br>• **Domain Name**: PBX can be remotely accessed via a domain name.<br><br>**Note:**<br>◦ Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br>◦ If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br><br>For more information about the domain configuration, see the following topics:<br>◦ Configure Network for Remote Access by a Yeastar FQDN<br>◦ Configure Network for Remote Access by a Yeastar Domain Name<br>◦ Configure Network for Remote Access by a Domain Name |
| Facebook | • **Product**: Messenger Platform<br><br>• **Account**:<br>◦ A Meta Developer account<br><br>**Note:**<br>You only need one Meta Developer account to create multiple Meta apps for the Facebook channel integration. There is no limit to the number of Facebook channels on PBX.<br><br>◦ A Business Manager account (Business Portfolio)<br><br>**Note:** |

| Platform | Requirement |
| --- | --- |
| | After you set up a Business Manager account, verify your business. |

### Limitations

Learn about the limitations of Facebook messaging channel.

| Item | Description |
| --- | --- |
| Message type | Supports text messages and multimedia messages, where the multimedia message types are determined by Facebook. For more information, see Facebook supported media types.<br><br>**Important:**<br>When sending multimedia messages (such as images), Facebook downloads the file from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the Facebook server is located, otherwise the file transmission would fail. |
| Messaging mechanism | Supports to receive and reply to **Inbound** messages, but agents can NOT initiate a messaging session with a Facebook user. |
| Message sending rate | Supports to send up to **40** messages per second. |
| File size | Supports to send a file with a maximum size of **25 MB**. |
| File retention period | Files can be retained for **72 hours**. |

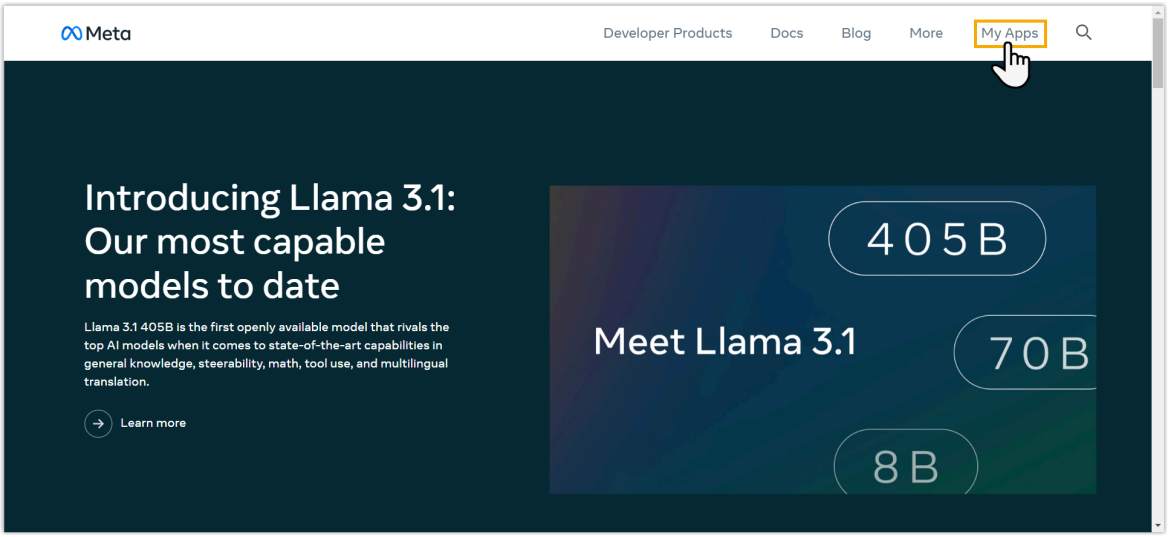
## Set up a Facebook Channel

This topic describes how to set up a Facebook channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to your Facebook Page messages.

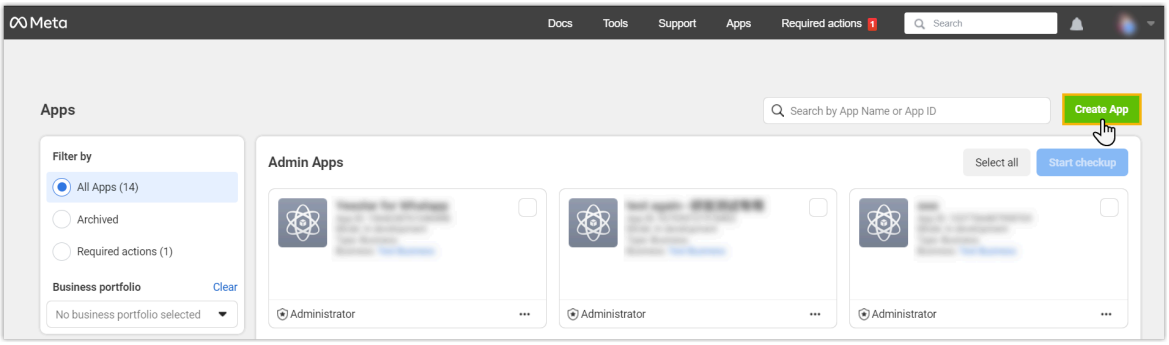
### Step 1. Create a Meta app

On 'Meta for Developers' portal, create a Meta app for the integration.

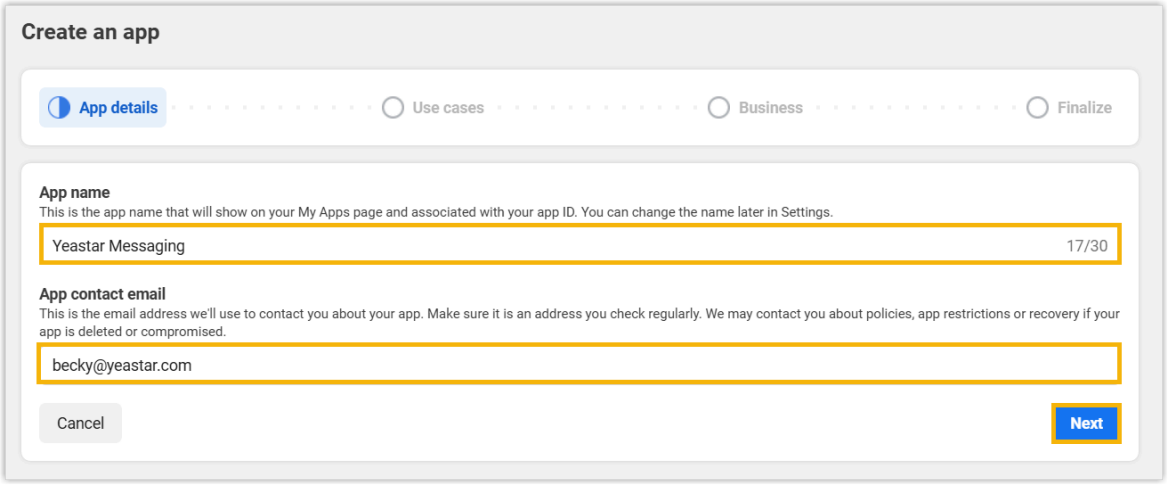
1. Log in to 'Meta for Developers' portal, then go to **My Apps** from the top menu.



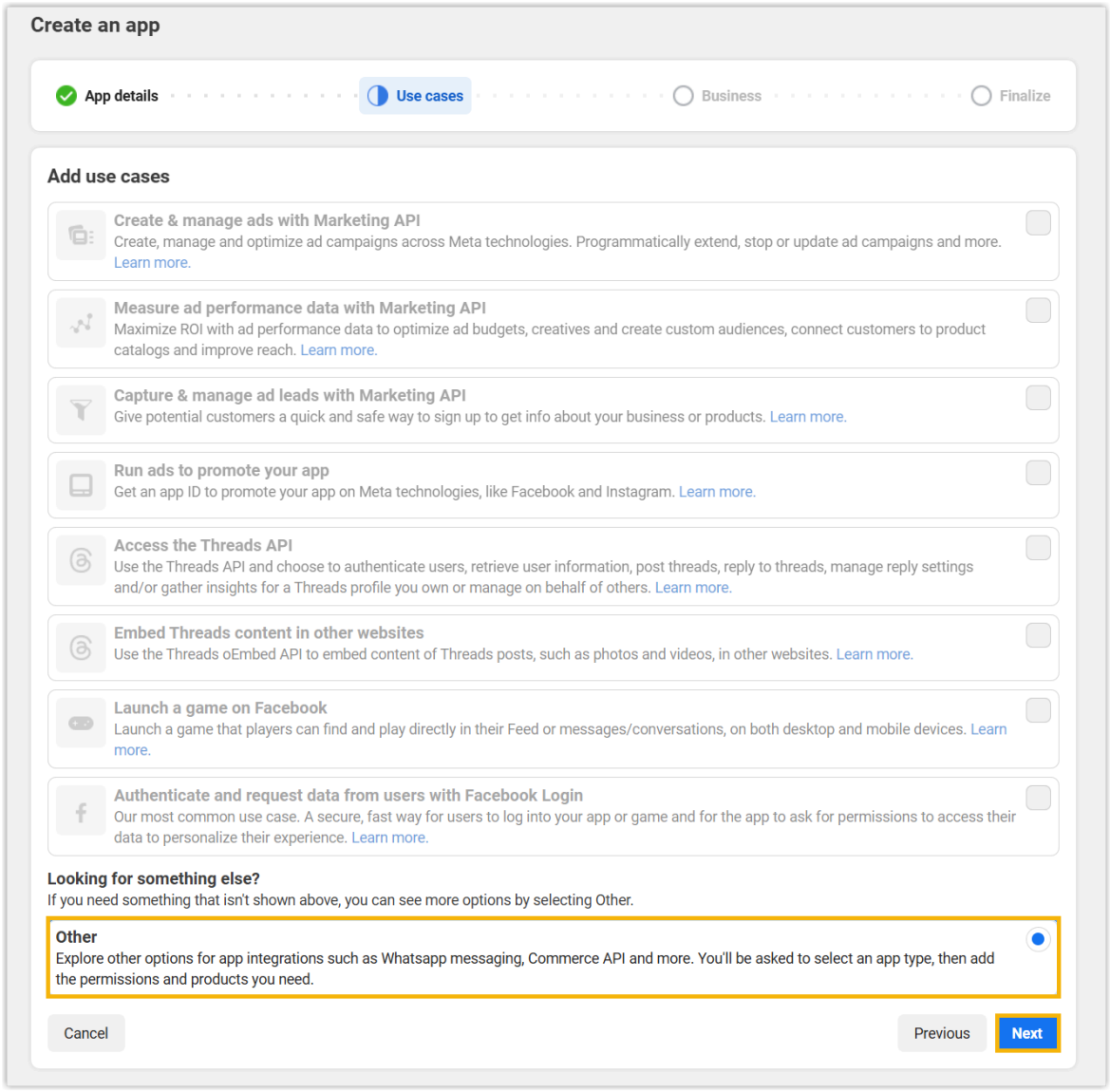

2. At the top-right corner, click **Create App**.



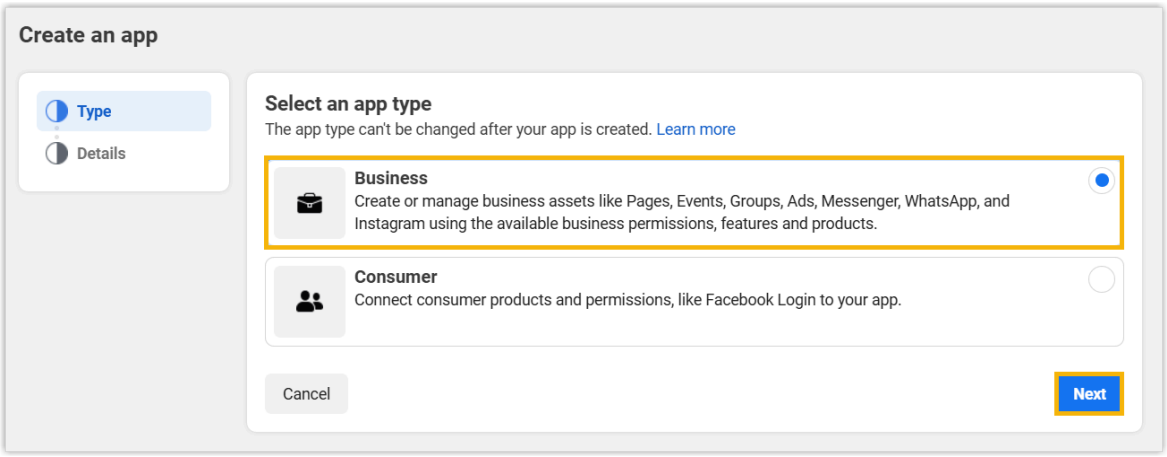

3. For **App details**, configure app name and contact email, then click **Next**.



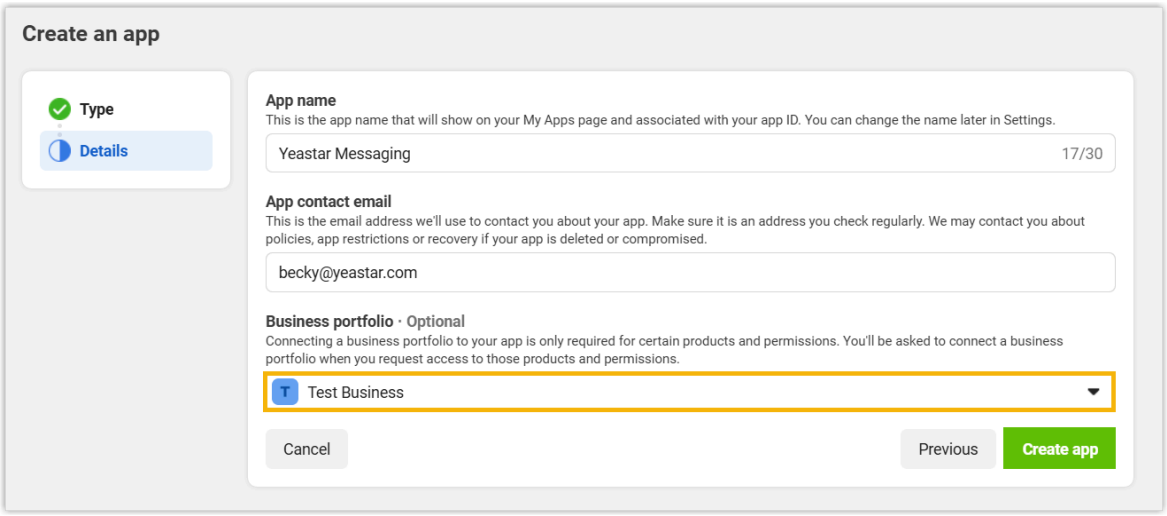

4. For **Use cases**, select **Other**, then click **Next**.




5. For **App type**, select **Business**, then click **Next**.




6. For **App details**, select your Meta business portfolio.



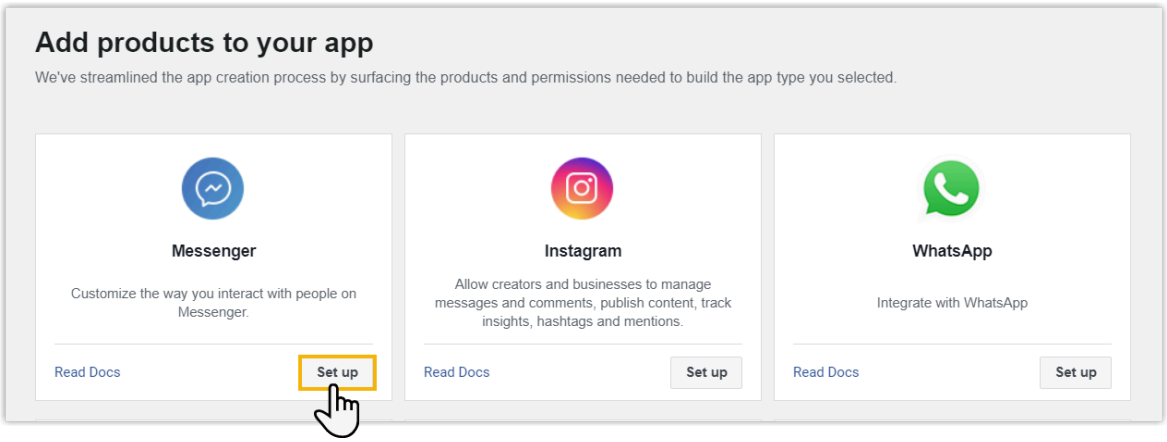

7. Click **Create app**.

   The Meta app is created; You are redirected to the **App Dashboard** page.

## Step 2. Set up the Meta app

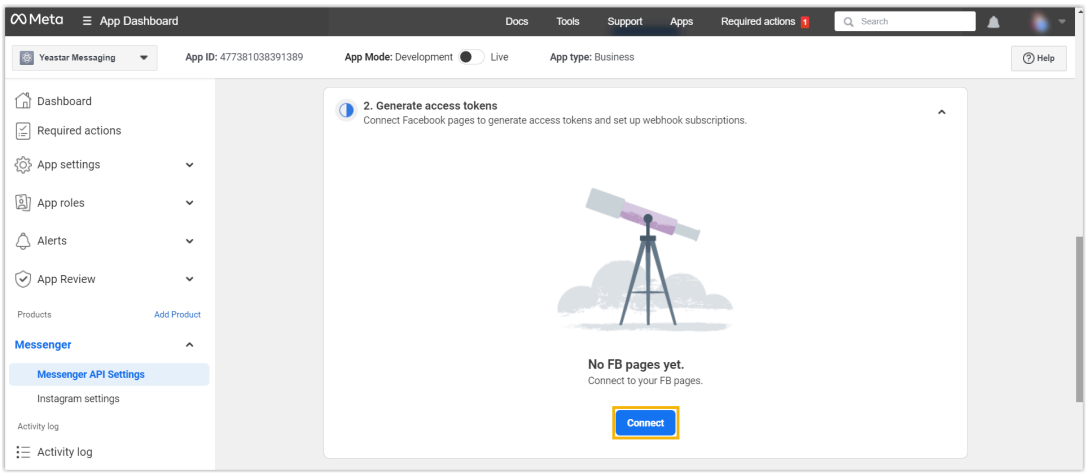
On 'Meta for Developers' portal, add Messenger Platform to your Meta app and set up the app to gather the required credentials for the integration.

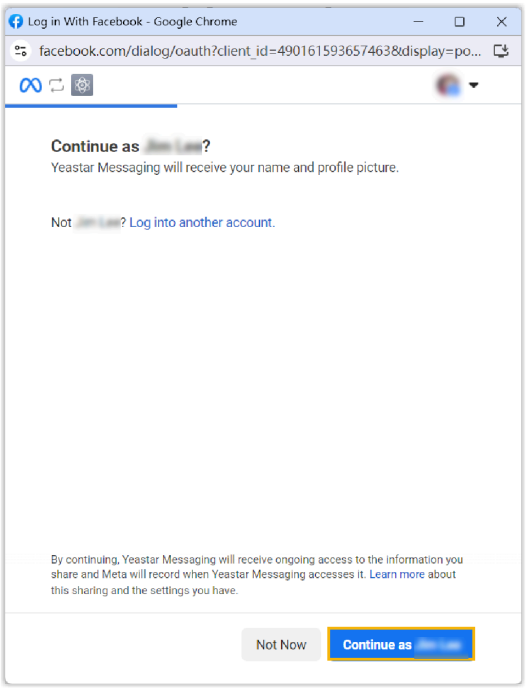
1. On the **Add products to your app** page, click **Set up** on **Messenger**.

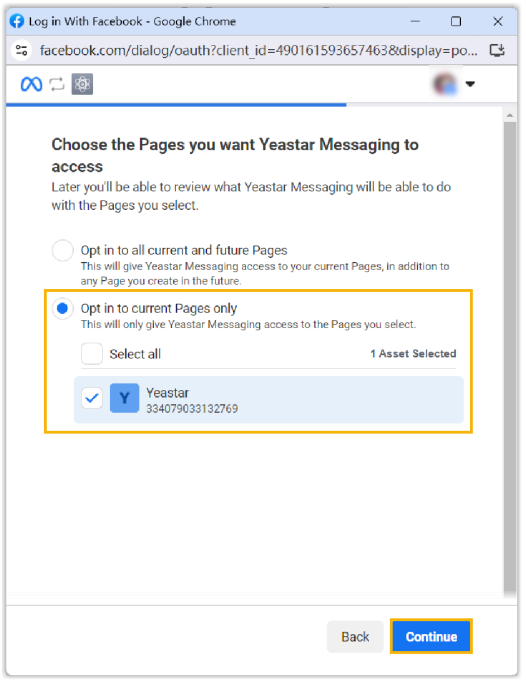


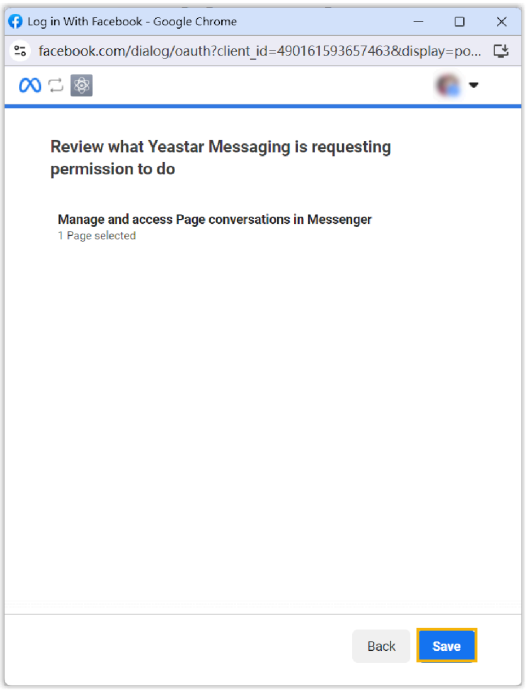

You are redirected to the Messenger API configuration page.

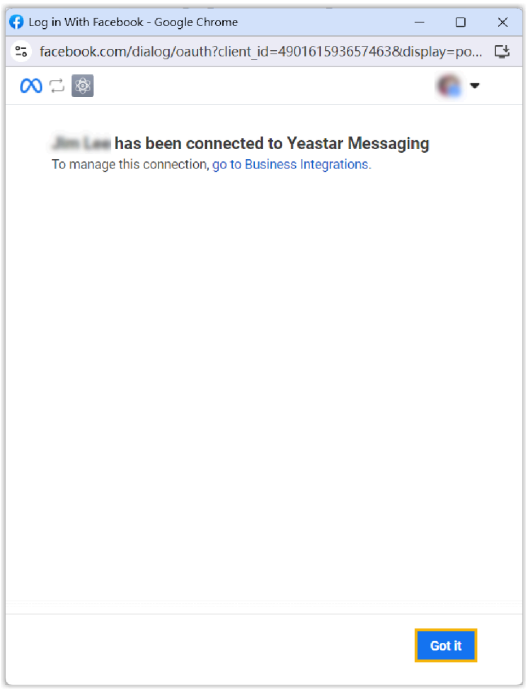
2. Connect the Meta app to your Facebook Page to generate an access token, and gather credentials of the Facebook Page.
    a. Scroll down to the **2. Generate access tokens** section, click **Connect** to add your Facebook Page.


Meta
App Dashboard
Docs
Tools
Support
Apps
Required actions
Search
Yeastar Messaging
App ID: 477381038391389
App Mode: Development
Live
App type: Business
Help
Dashboard
Required actions
App settings
App roles
Alerts
App Review
Products
Add Product
Messenger
Messenger API Settings
Instagram settings
Activity log
Activity log
2. Generate access tokens
Connect Facebook pages to generate access tokens and set up webhook subscriptions.
No FB pages yet.
Connect to your FB pages.
Connect

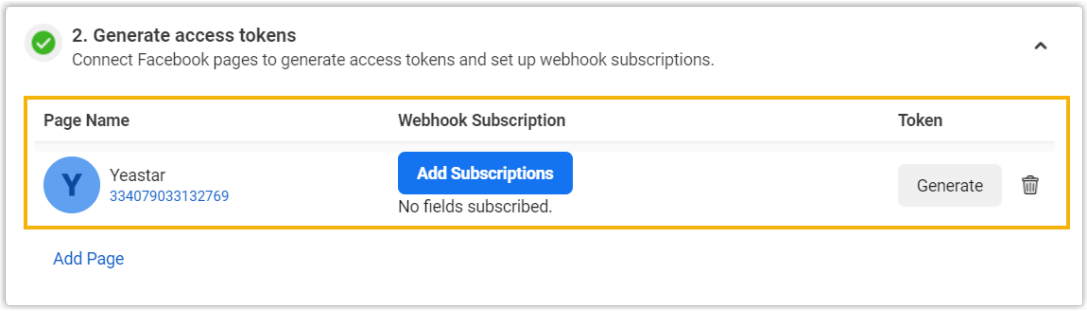

Log in With Facebook - Google Chrome
facebook.com/dialog/oauth?client_id=490161593657463&display=po...
Continue as ?
Yeastar Messaging will receive your name and profile picture.
Not ? Log into another account.
By continuing, Yeastar Messaging will receive ongoing access to the information you share and Meta will record when Yeastar Messaging accesses it. Learn more about this sharing and the settings you have.
Not Now
Continue as


Log in With Facebook - Google Chrome
facebook.com/dialog/oauth?client_id=490161593657463&display=po...
Choose the Pages you want Yeastar Messaging to access
Later you'll be able to review what Yeastar Messaging will be able to do with the Pages you select.
Opt in to all current and future Pages
This will give Yeastar Messaging access to your current Pages, in addition to any Page you create in the future.
Opt in to current Pages only
This will only give Yeastar Messaging access to the Pages you select.
Select all
1 Asset Selected
Yeastar
334079033132769
Back
Continue


Log in With Facebook - Google Chrome
facebook.com/dialog/oauth?client_id=490161593657463&display=po...
Review what Yeastar Messaging is requesting permission to do
Manage and access Page conversations in Messenger
1 Page selected
Back
Save

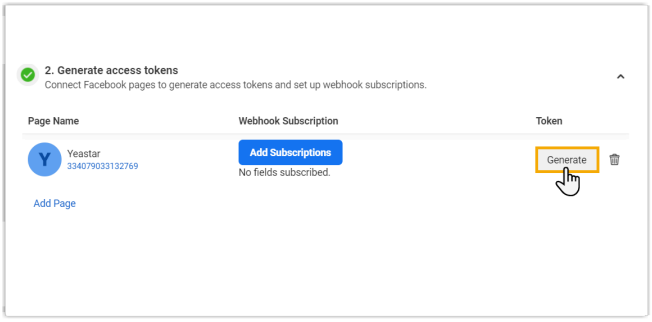

Log in With Facebook - Google Chrome
facebook.com/dialog/oauth?client_id=490161593657463&display=po...
has been connected to Yeastar Messaging
To manage this connection, go to Business Integrations.
Got it

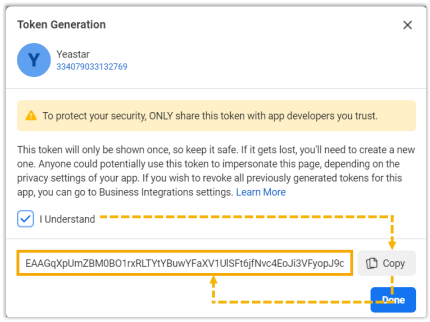
Refresh the webpage and you will see that the Facebook Page is added.



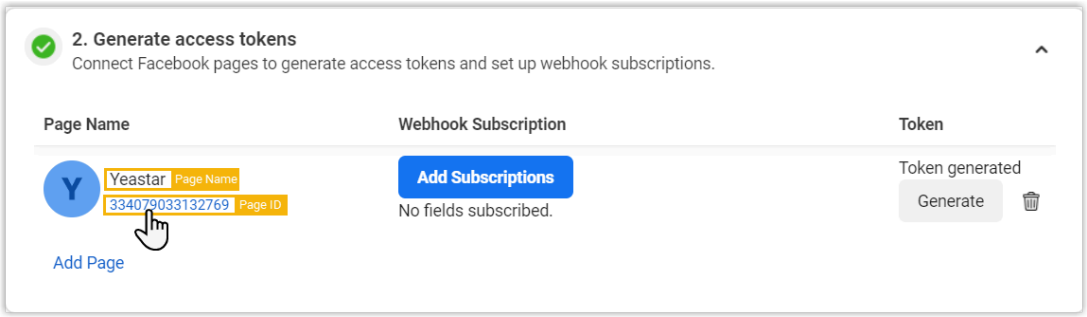

b. Generate an access token to authenticate the Meta app and allow it to perform actions on behalf of the Facebook Page.

> **Note:**
> Copy and note down the access token, as you will need to add it on the PBX later.

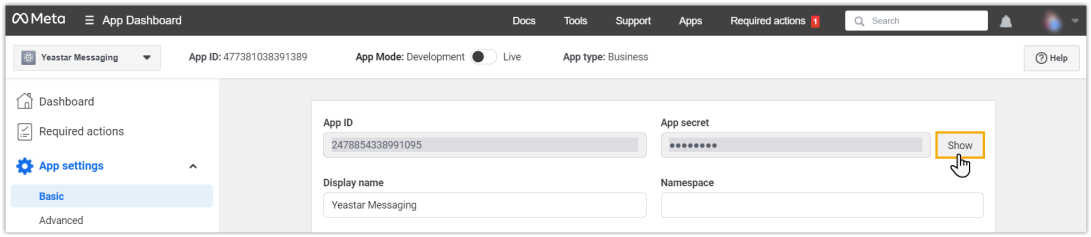


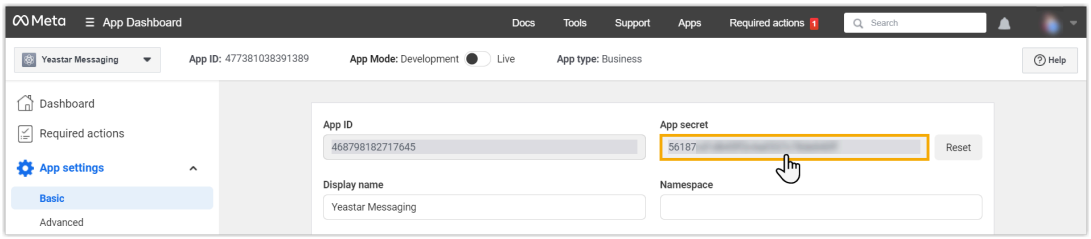

c. Copy and note down the name and ID of your Facebook Page, as you will need to add them on the PBX later.




3. Obtain secret key for the Meta app.
   a. On the left navigation bar, click **App settings > Basic**.
   b. On the right of the **App secret** field, click **Show** to show the secret key.



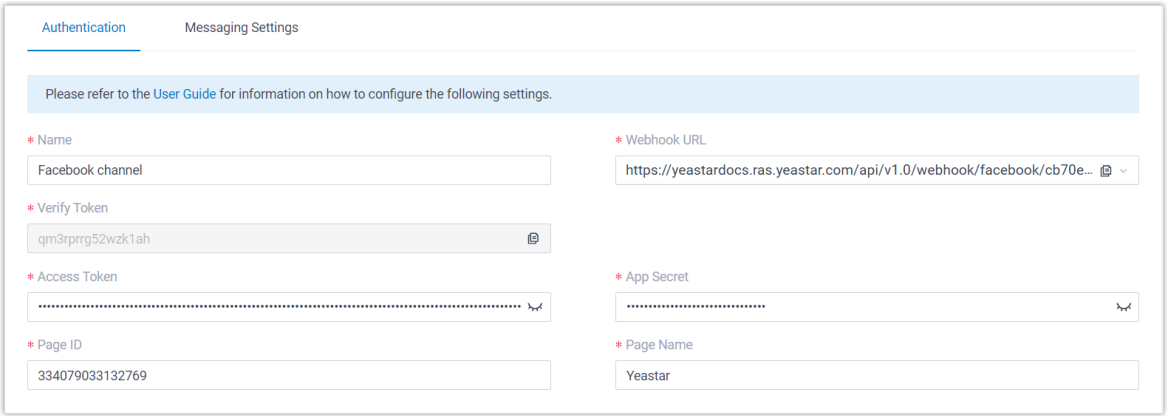

c. Copy and note down the secret key, as you will need to add it on the PBX later.




## Step 3. Create a Facebook channel

On PBX web portal, create and configure a Facebook channel.

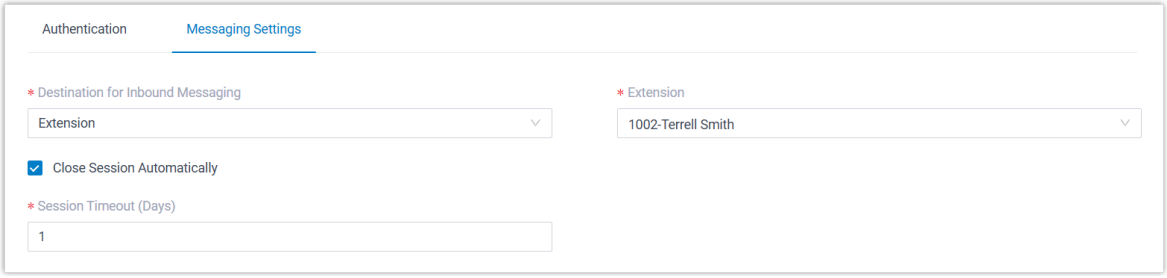
1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **Facebook Messenger**.
3. In the **Authentication** tab, enter the authentication information of Facebook.




- **Name**: Enter a name to help you identify the channel.
- **Webhook URL**: Select and note down the Webhook URL, as you will need it later on 'Meta for Developers' portal.
- **Verify Token**: Note down the verify token, as you will need it later on 'Meta for Developers' portal.
- **Access Token**: Paste the Access Token obtained from 'Meta for Developers' portal.

- **App Secret**: Paste the App Secret obtained from 'Meta for Developers' portal.
- **Page ID**: Paste the Page ID obtained from 'Meta for Developers' portal.
- **Page Name**: Paste the Page Name obtained from 'Meta for Developers' portal.

4. In the **Messaging Settings** tab, configure the channel.




- **Destination for Inbound Messaging**: Specify the destination of inbound messages from Facebook Page.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the Facebook Page. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

- **Close Session Automatically**: Optional. If you want the system to automatically close the sessions that have been inactive for a specific period of time, select

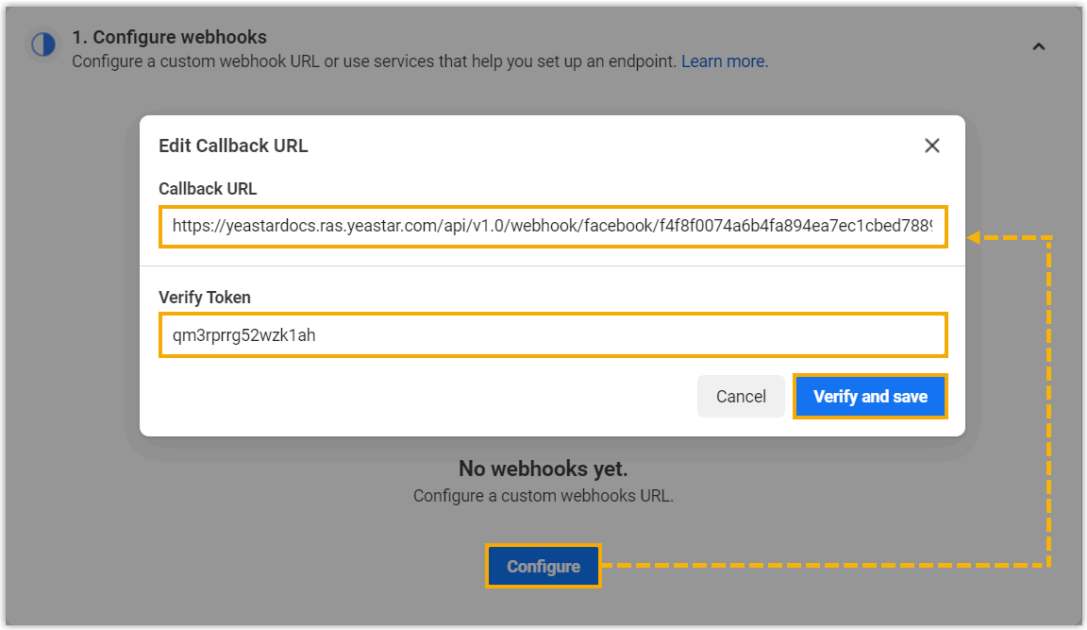
the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.

5. Click **Save**.

## Step 4. Set up Meta webhook

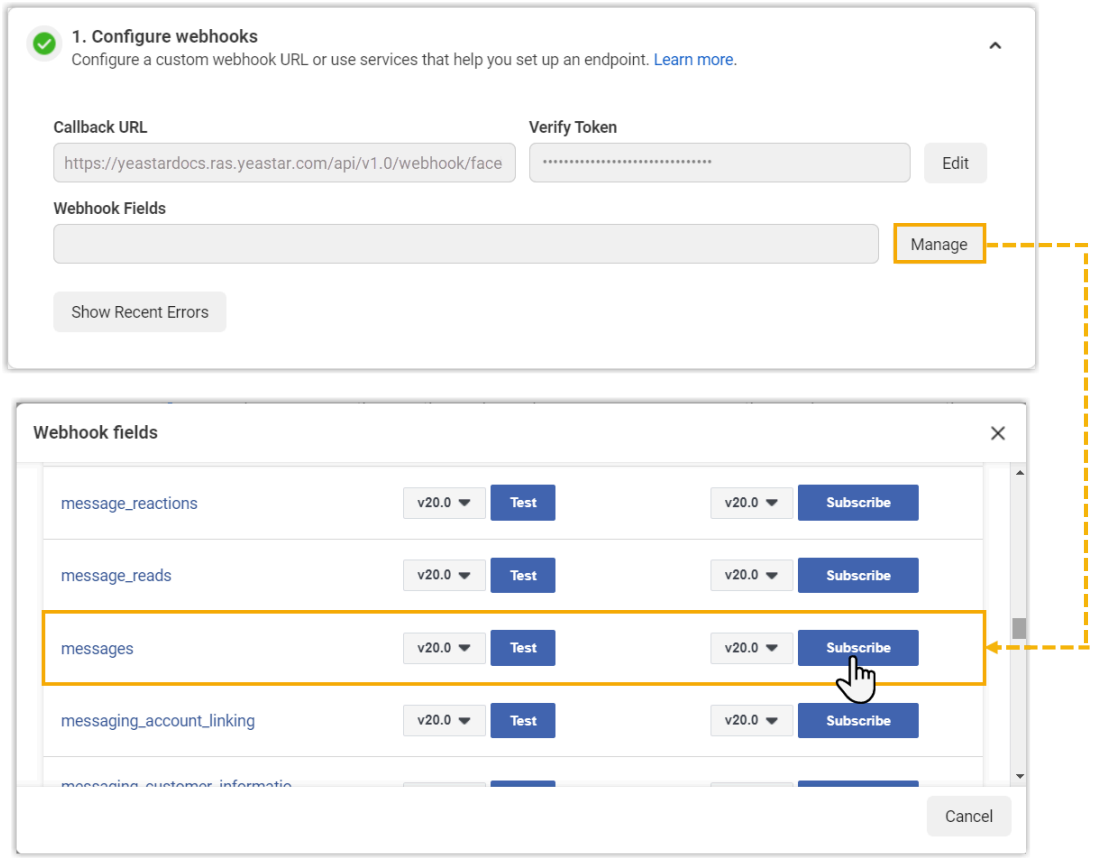
On 'Meta for Developers' portal, configure webhook for your Meta app and subscribe to the messages event, so that PBX can get notified upon receiving Facebook Page messages.

1. On 'Meta for Developers' portal, go to the Messenger API configuration page of your Meta app.
2. In the **1. Configure webhooks** section, configure a webhook and subscribe to **messages** field for your app.
   a. Click **Configure** to add and configure a webhook.

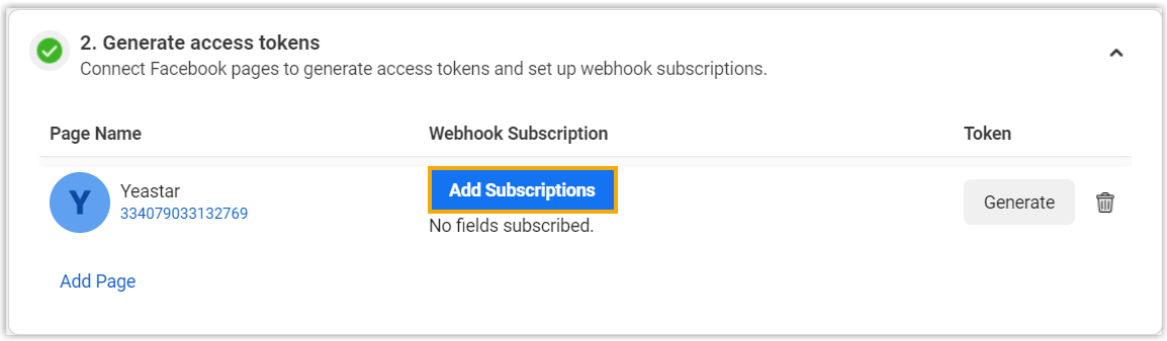


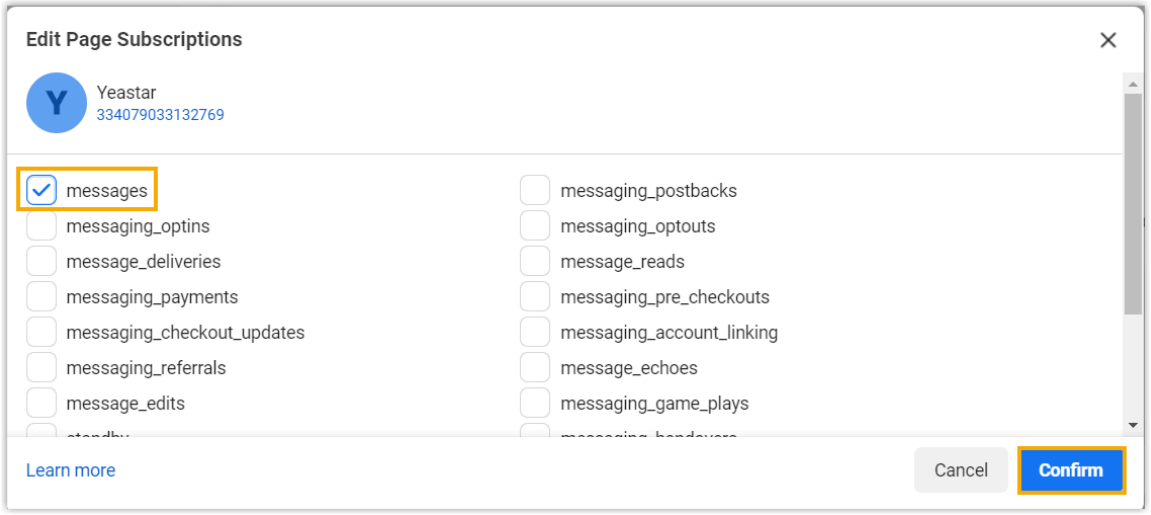

   - **Callback URL**: Paste the Webhook URL obtained from PBX.
   - **Verify Token**: Paste the verify token obtained from PBX.

   b. Click **Manage** to subscribe to **messages** field.



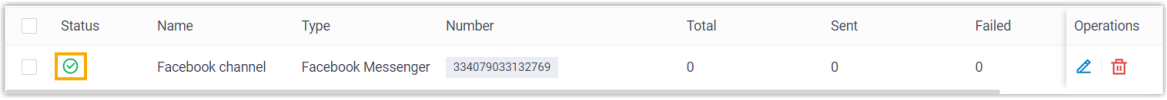

3. In the **2. Generate access tokens** section, click **Add Subscriptions** to subscribe to **messages** field for your Facebook Page.



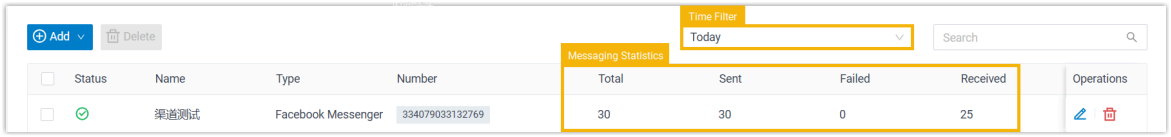

## Result

- On PBX web portal, the **Status** of the Facebook channel shows , which indicates that you have successfully created a Facebook channel.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column displays the total amount of the sent messages, including both successfully sent messages and failed ones.

> **Tip:**
> You can filter the statistics by a time period using the time filter.




### What to do next

Submit App for Review.

## (Optional) Add a Tester for Meta App

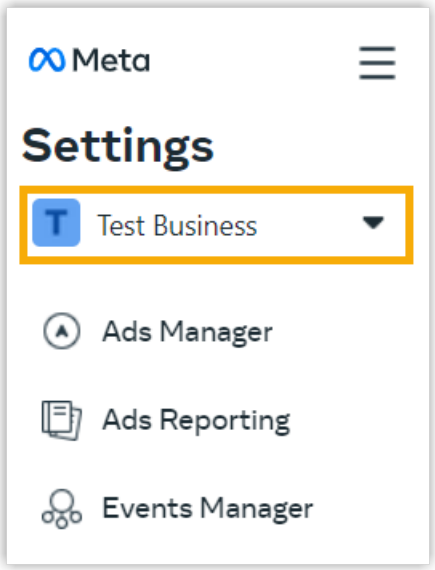
After a Meta app is created, only your Meta Developer account has permission to interact with the app. To keep your account safe, you can add a user as a Tester to aid with the testing process.

### Requirements

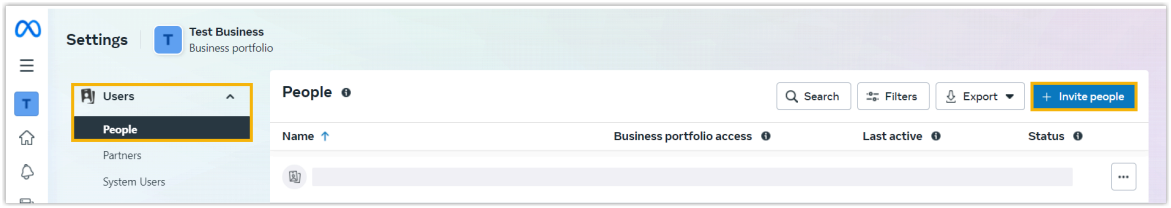
The user who you want to add as a Tester must have a Meta developer account.

### Step 1. Add a user to business portfolio

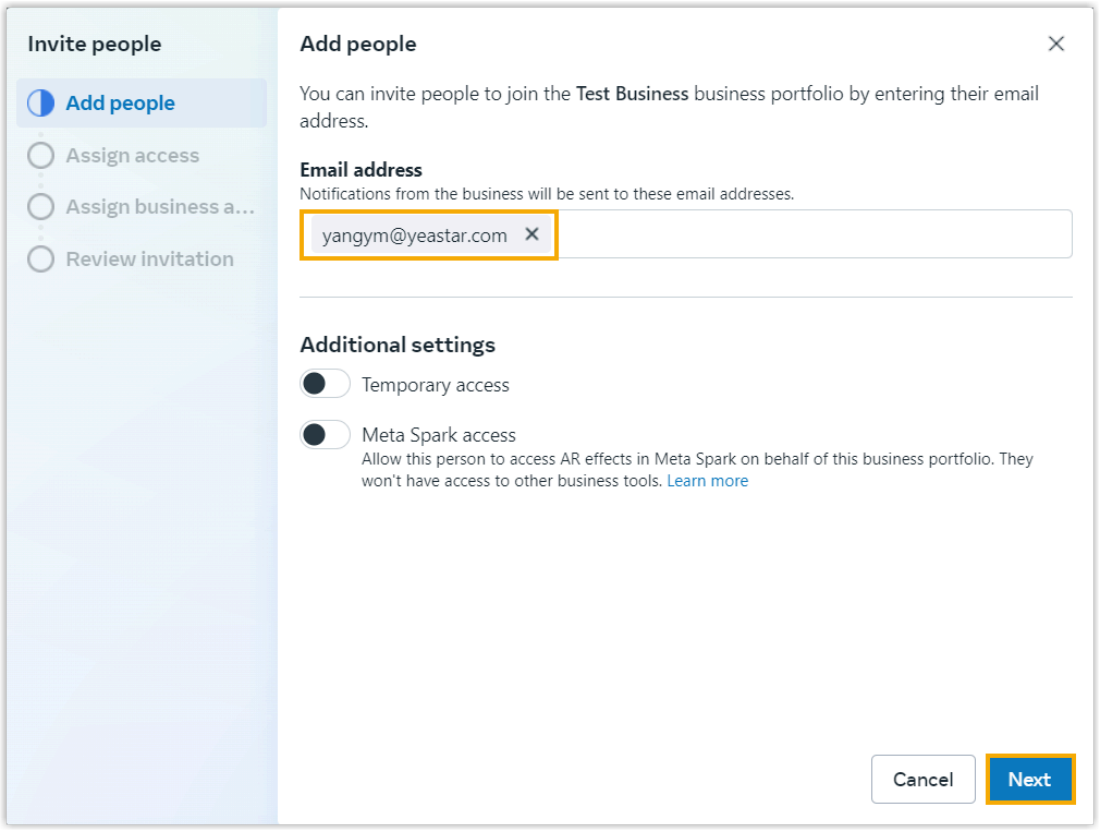
1. Go to Business settings in Meta Business Manager, then select the business portfolio that is connected with your Meta app.



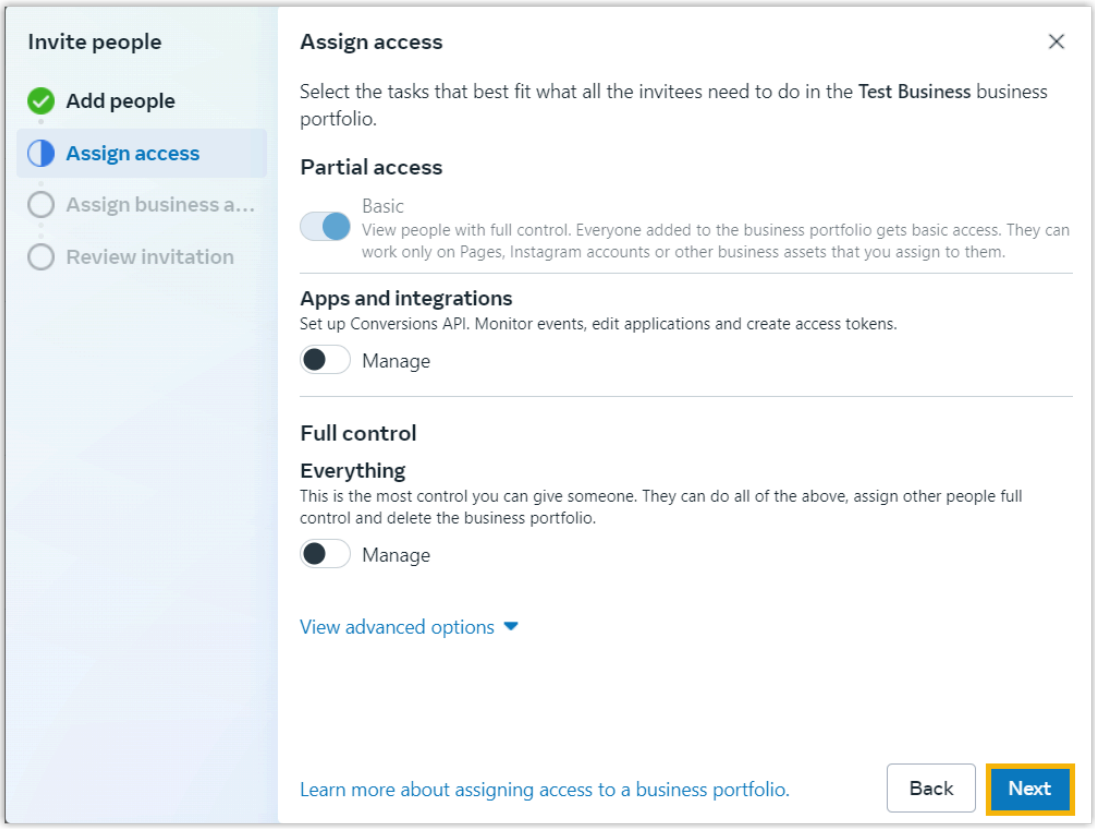

2. Go to **Users > People**, then click **Invite people**.



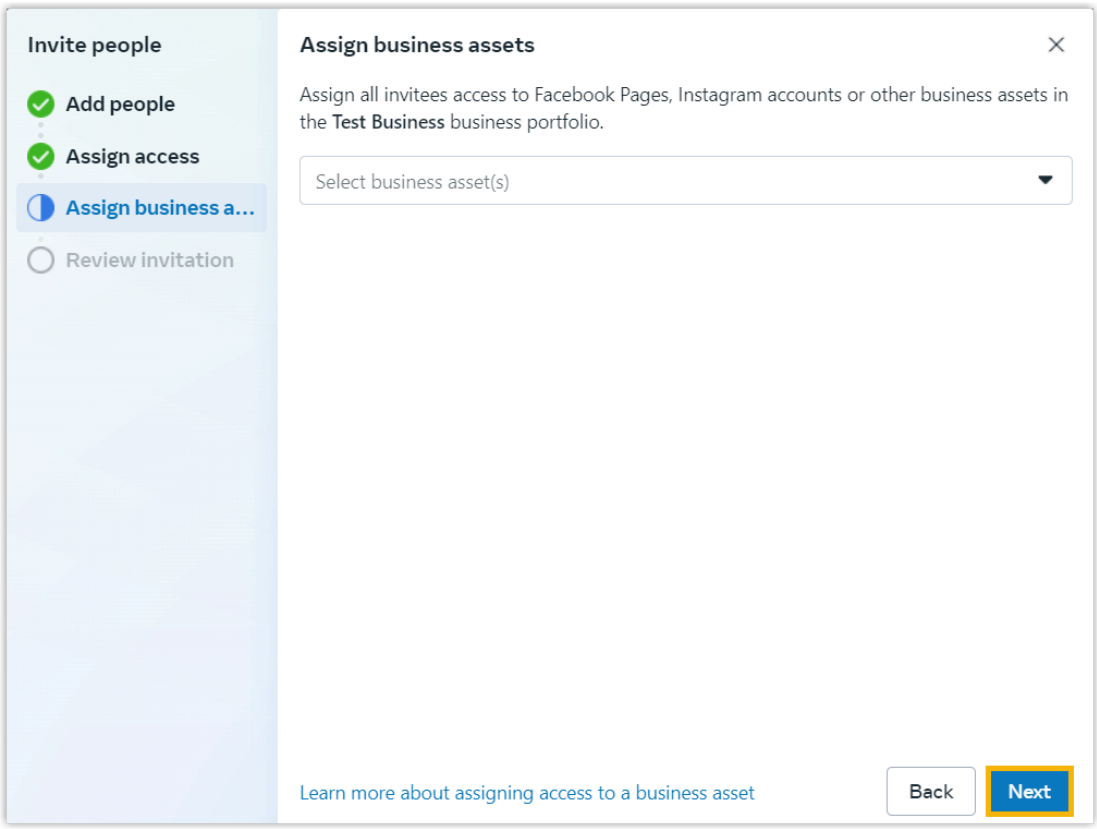

3. In the **Email address** field, enter the email address of the user who you want to add, then click **Next**.



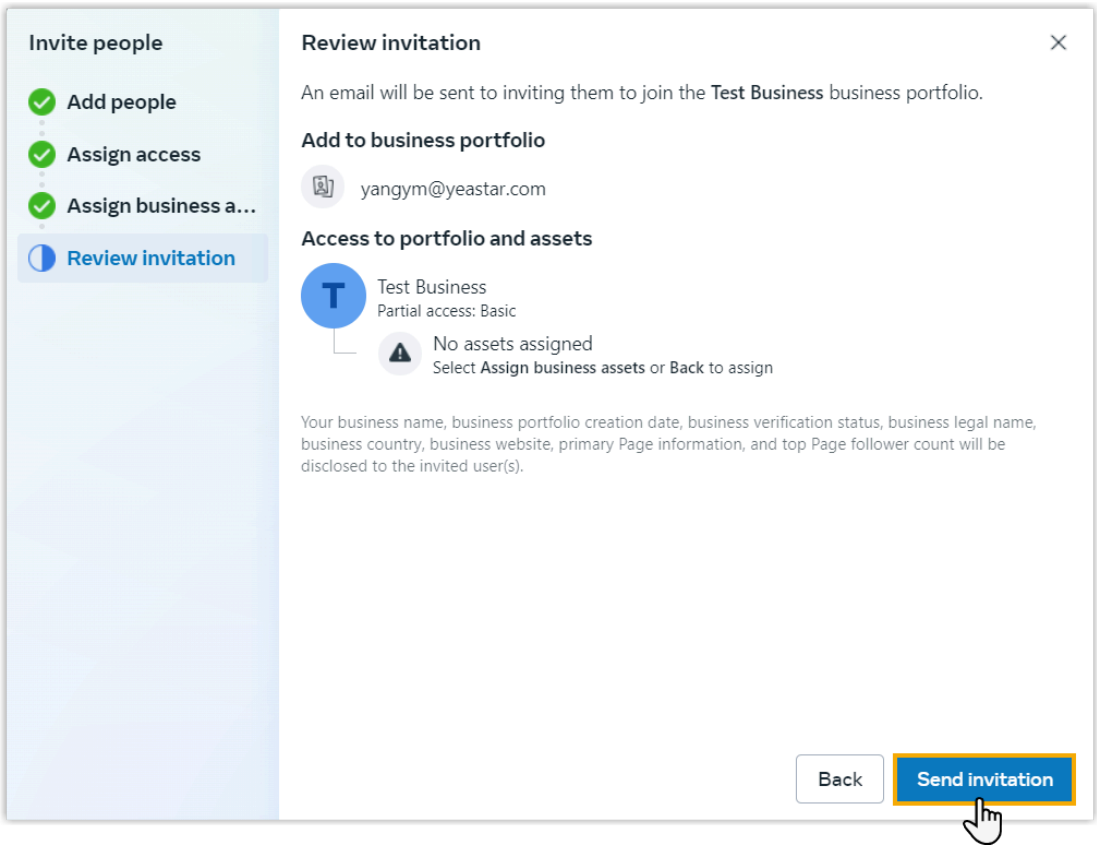

4. Set the type of access that you want to assign as needed, then click **Next**.



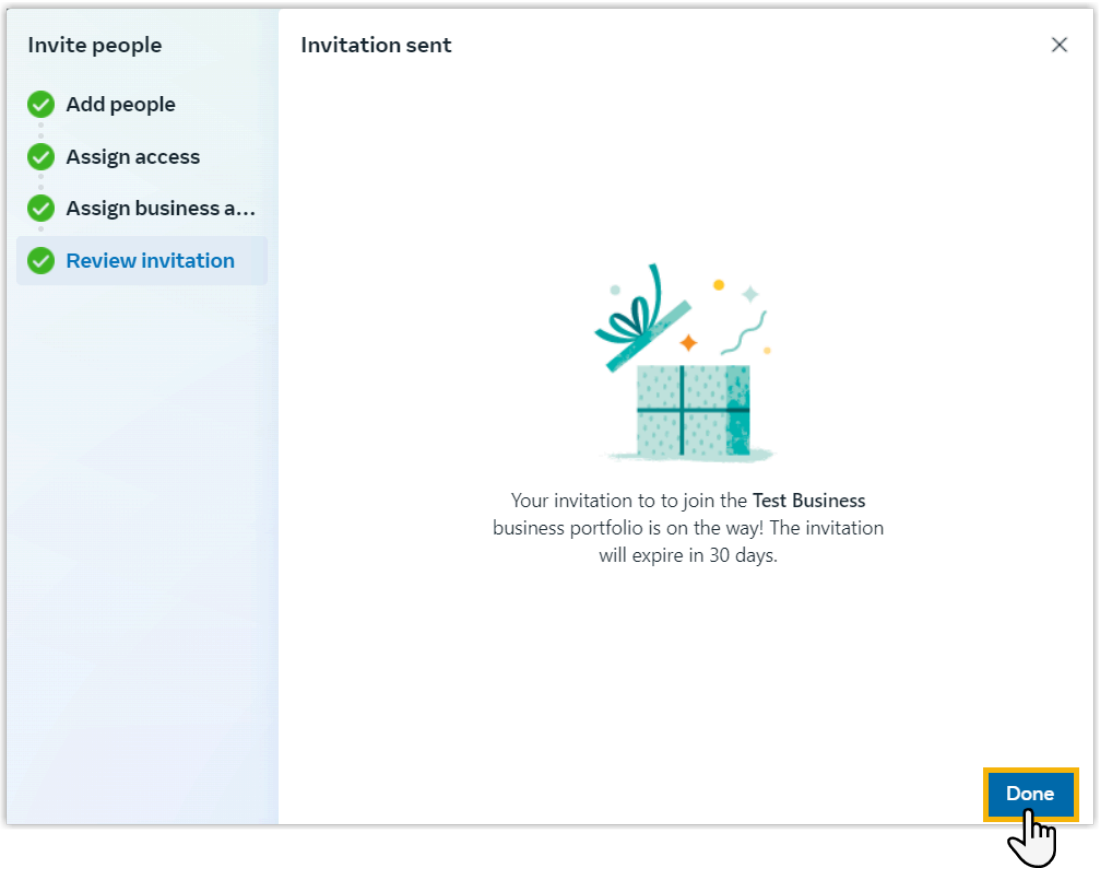

5. Leave business asset(s) blank, then click **Next**.




6. Click **Send invitation**.



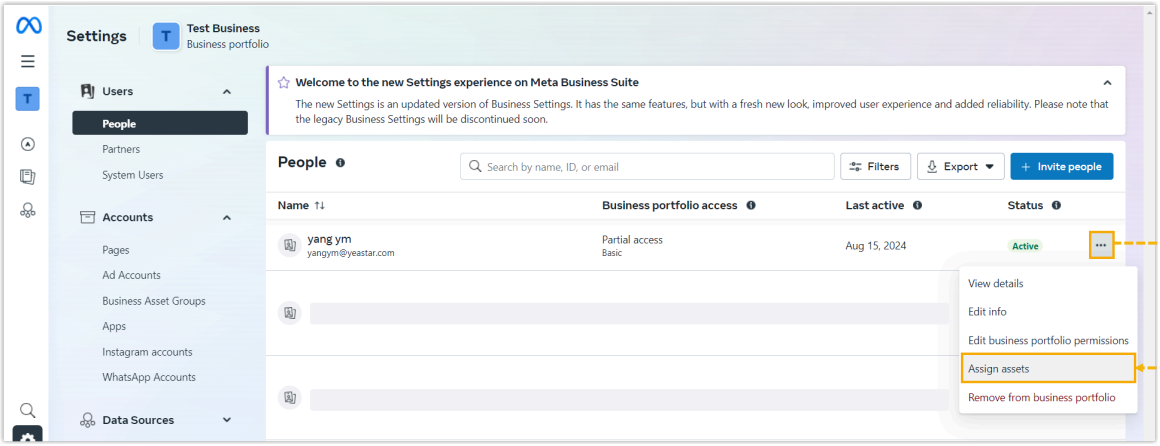

7. Click **Done** to close the window.



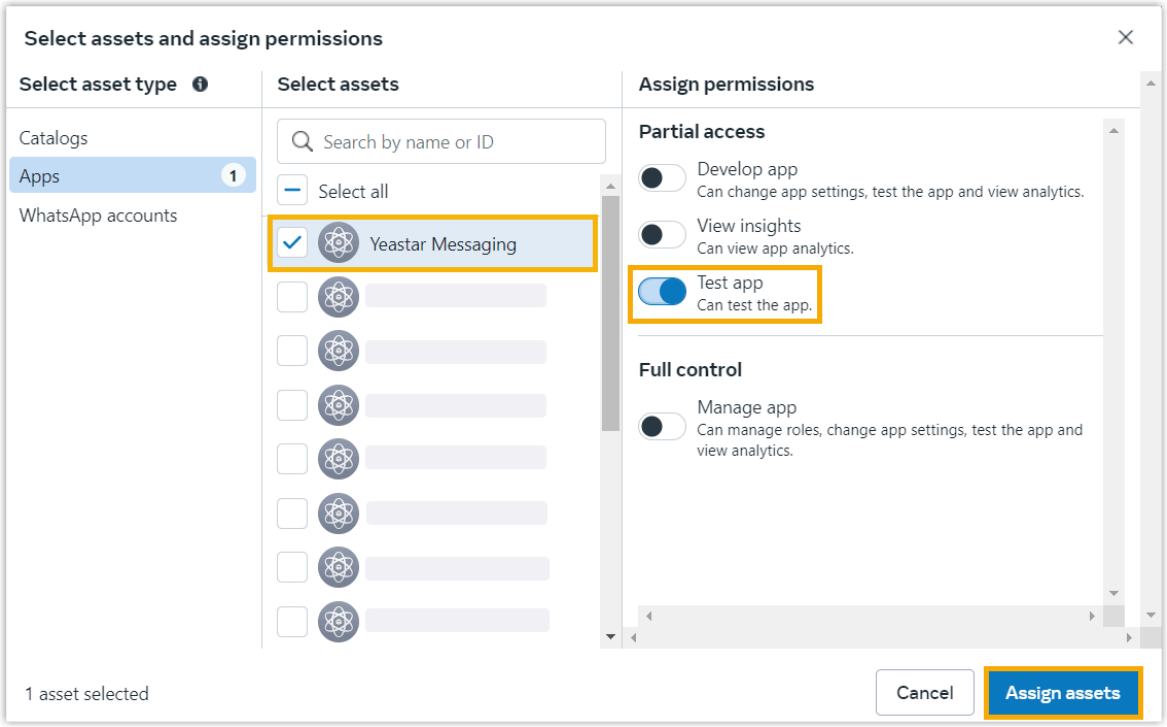

Meta will send an activation email to the user; The user needs to accept the invitation to join your business portfolio.

## Step 2. Assign the Meta app to the user

1. On the right of the desired user, click ⋯, then select **Assign assets**.



2. Assign the Meta app and test access to the user, then click **Assign assets**.




3. Click **Done** to close the window.

### Result

The user is added as a Tester and can interact with your Meta app.

### What to do next

Submit App for Review.

## Submit App for Review

After you set up a Facebook channel, you need to test message delivery between Facebook Page and Yeastar P-Series PBX System, then submit your app for review.

### Before you submit

Test message delivery between Facebook Page and Yeastar P-Series PBX System.

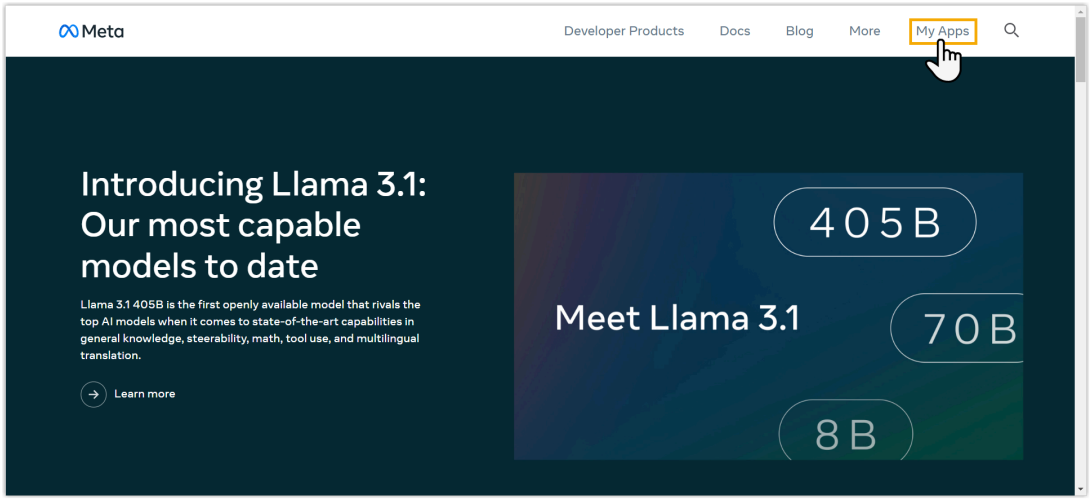
1. (Optional) Add a user as a Tester.

   By default, only your Meta Developer account has permission to interact with the app. You can directly use your Meta Developer account to test message delivery, but we recommend that you add a Tester account with limited access to aid with the testing process. This helps avoid exposing your Meta Developer account, as Meta requires a Facebook account to test your app.
2. Test message delivery and record two screencasts.
   - A screencast that demonstrates how you send a message to your Facebook Page and how the message is received and replied on Yeastar P-Series PBX System within 24 hours.
   - A screencast that demonstrates how your app uses a human agent tag to respond to customer messages outside the 24-hour window.

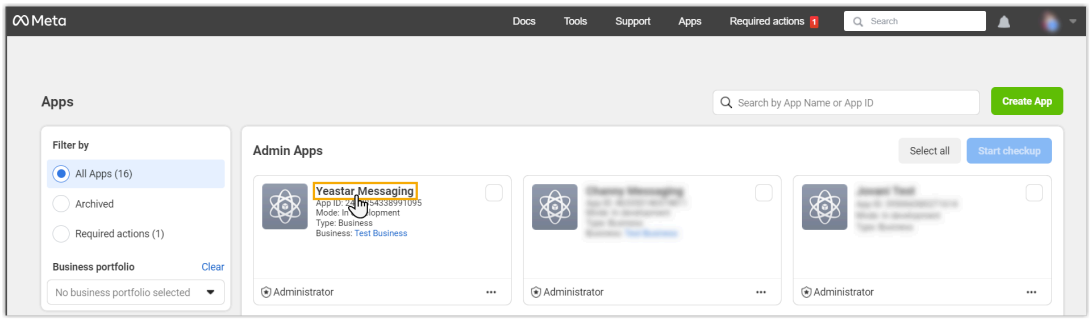
> **Tip:**
> App Review - Best Practices may help improve the quality of your submission and reduce the chances of it being rejected.

### Step 1. Complete app settings

1. Go to the Basic settings page of your Meta app.
   a. Log in to 'Meta for Developers' portal, then go to **My Apps** from the top menu.

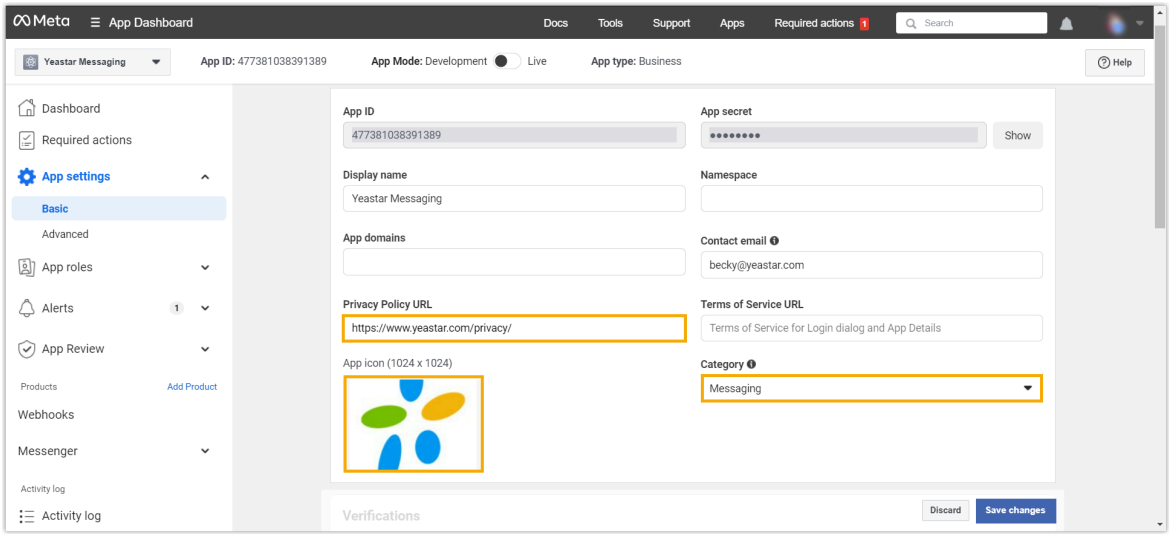



b. On the App list, click your Meta app.




c. On the left navigation bar, go to **App settings > Basic**.

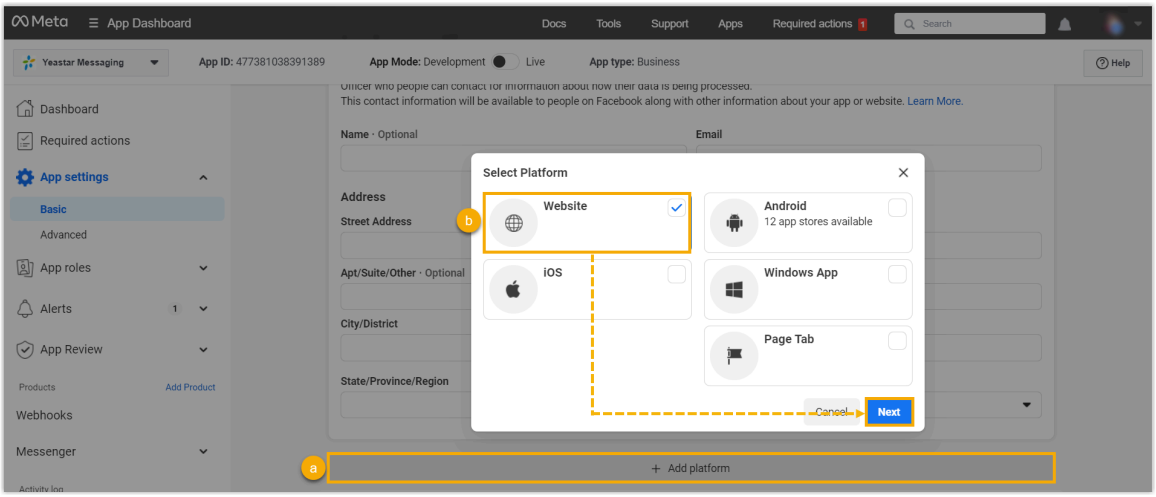
2. At the top of the page, complete the following settings.

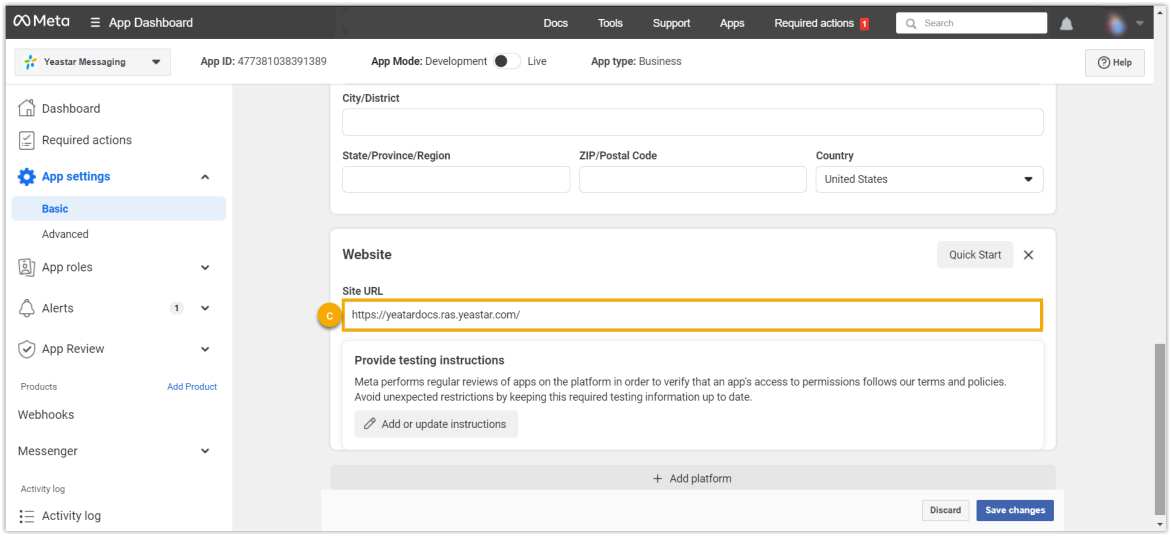



- **Privacy Policy URL**: Enter your organization's privacy policy URL.
- **App icon**: Upload your organization's icon.

- **Category**: Select **Messaging**.

3. Scroll down to the bottom of the page, add a website platform to share the PBX URL with Meta.



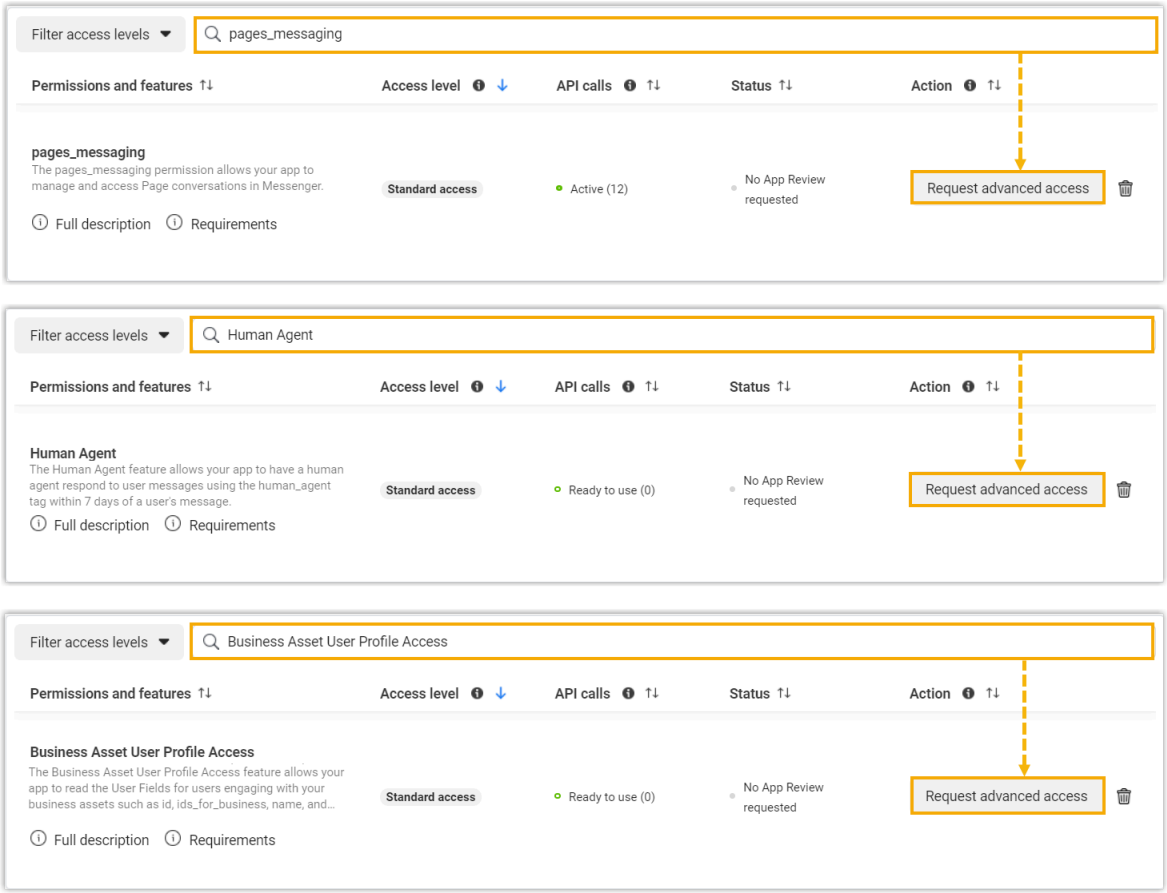

   a. Click **Add platform**.
   b. Select the checkbox of **Website**, then click **Next**.
   c. In the **Site URL** field, enter the FQDNof your PBX system.

4. Click **Save changes**.

## Step 2. Select permissions and features

1. On the left navigation bar, go to **App Review > Permissions and Features**.

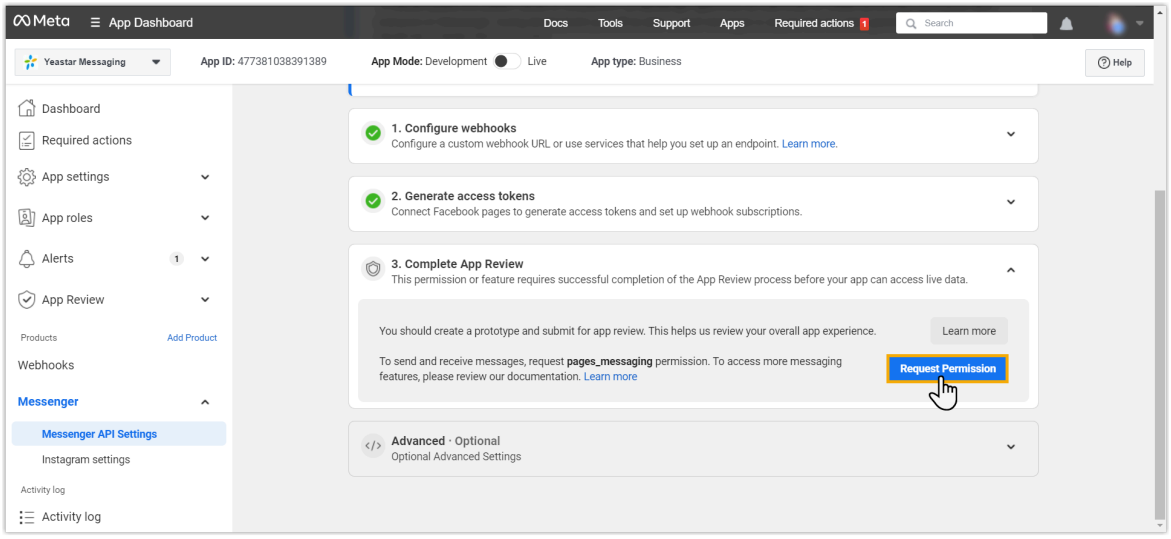
2. Search for the required permissions (**pages_messaging**, **Human Agent**, and **Business Asset User Profile Access**) and click the corresponding **Request advanced access** button to add them to your submission.



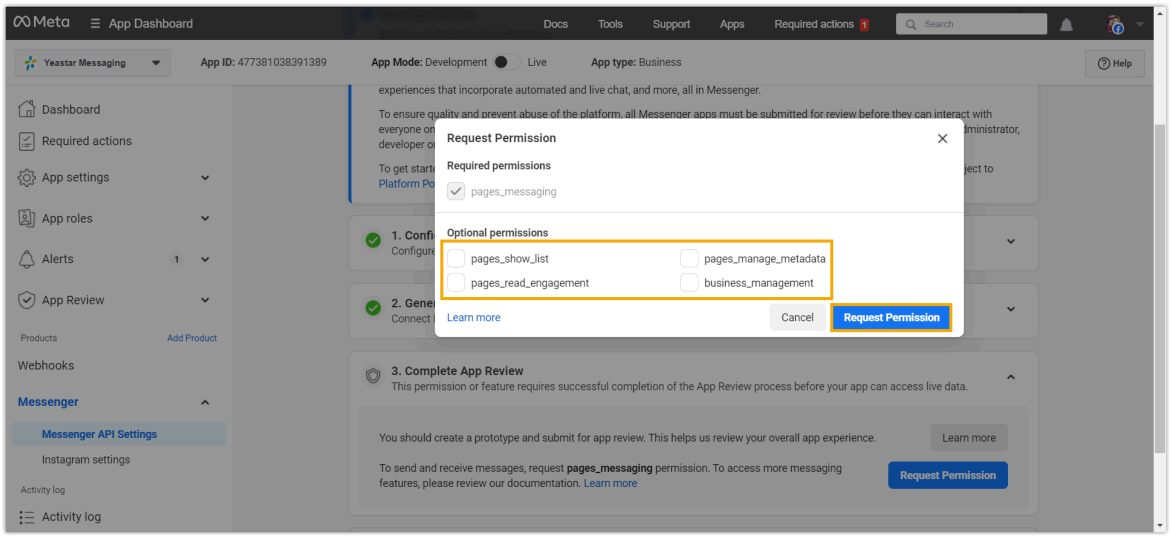

3. Click **Continue request**.

## Step 3. Remove unnecessary permissions

1. On the left navigation bar, go to **Messenger > Messenger API Settings**.
2. In the **3. Complete App Review** section, click **Request Permission**.



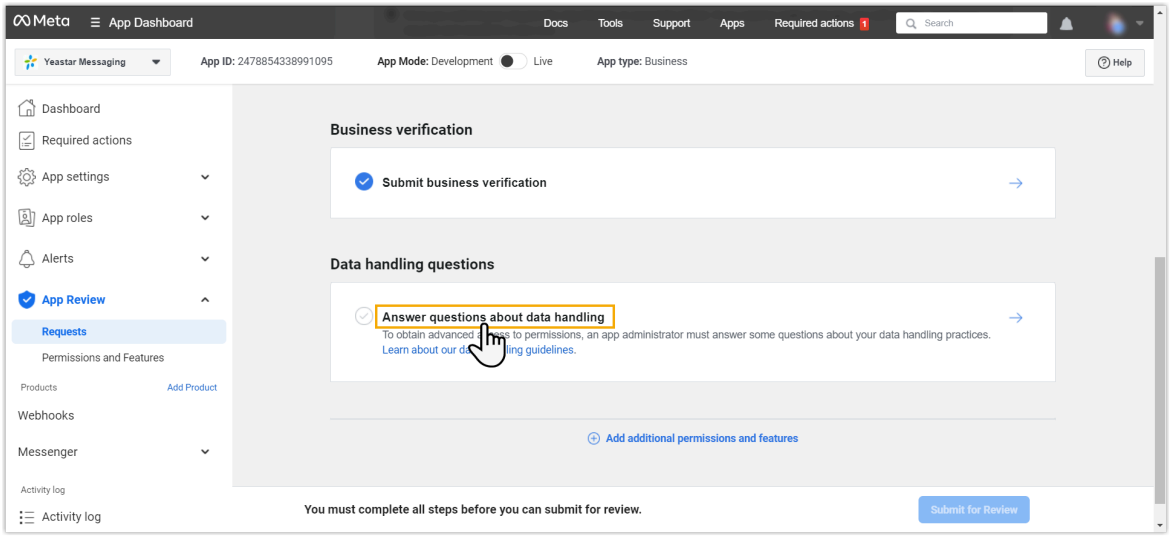

3. Unselect the checkboxes of the following permissions, then click **Request Permission**.



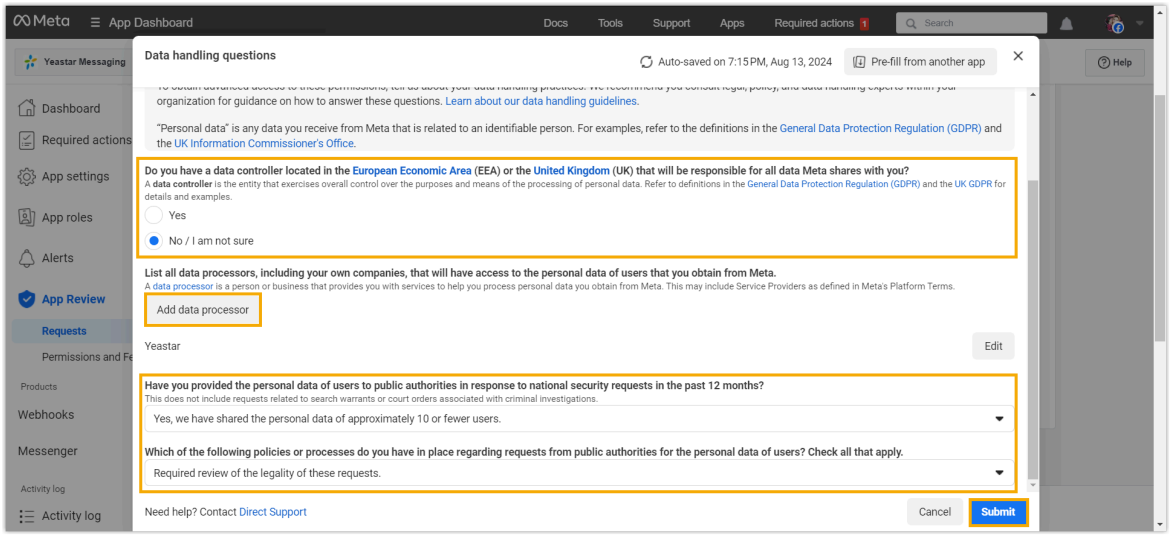

You will be redirected to **App Review > Requests**.

## Step 4. Answer data handling questions

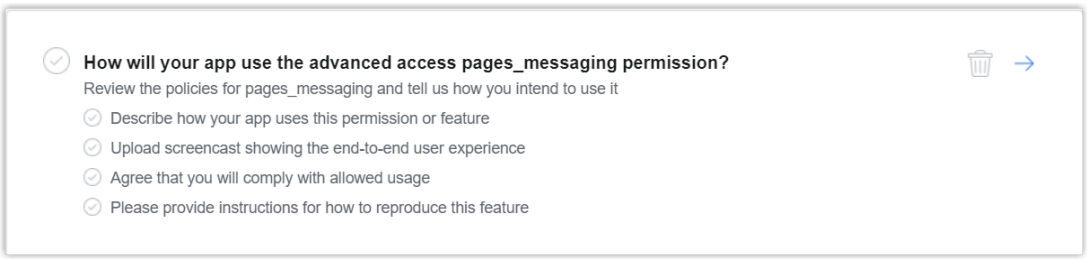
1. On the left navigation bar, go to **App Review > Requests**.
2. Scroll down to the **Data handling questions** section, then click **Answer questions about data handling**.




3. Fill in the following information based on your situation, then click **Submit**.

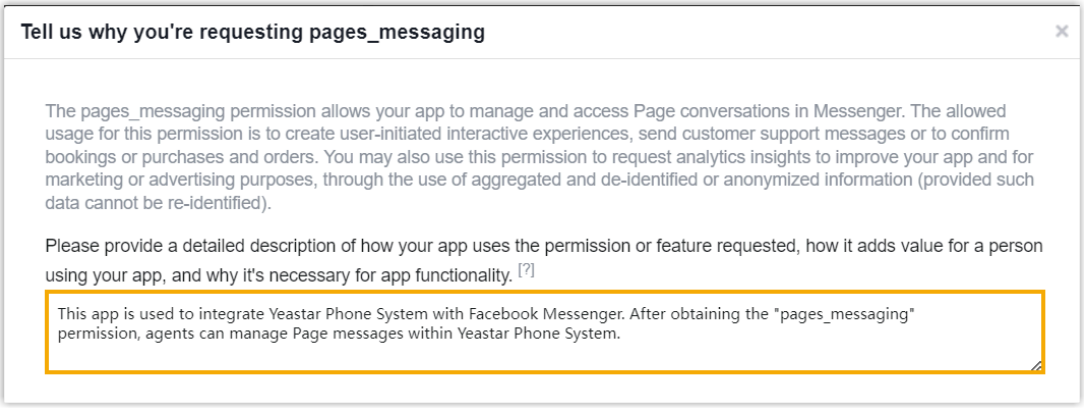



4. Complete the following tasks to demonstrate why the **pages_messaging** permission with advanced access is needed and how the app uses it.
    a. Click **How will your app use the advanced access pages_messaging permission?**.




    b. Copy and paste the following text in the detailed description box.

```
This app is used to integrate Yeastar Phone System with Facebook
 Messenger. After obtaining the "pages_messaging" permission,
 agents can manage Page messages within Yeastar Phone System.
```



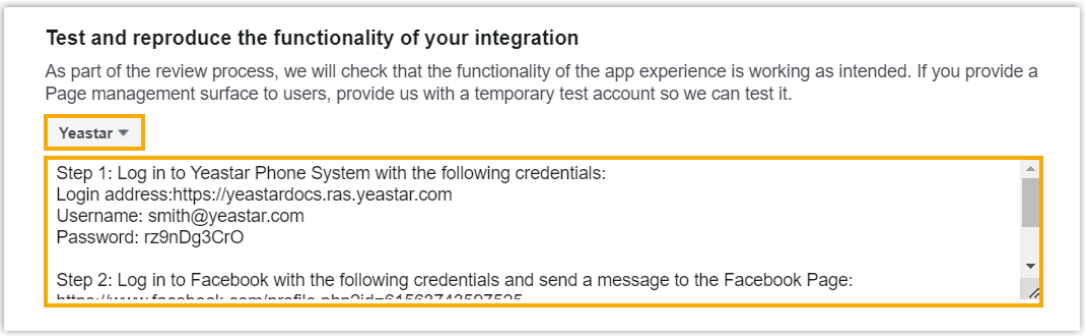

c. In the **Test and reproduce the functionality of your integration** section, select your Facebook Page, copy and edit the following text based on your situation, then paste in the text field.

```
Step 1: Log in to Yeastar Phone System with the following
 credentials:
Login address:{pbx_fqdn}
Username: {extension_number_or_email_address}
Password: {password}

Step 2: Log in to Facebook with the following credentials and
 send a message to the Facebook Page:{url_for_facebook_page}
Email or phone: {email_address_or_phone_number}
Password: {password}

Step 3: Receive and reply to the message on Yeastar Phone System.
```

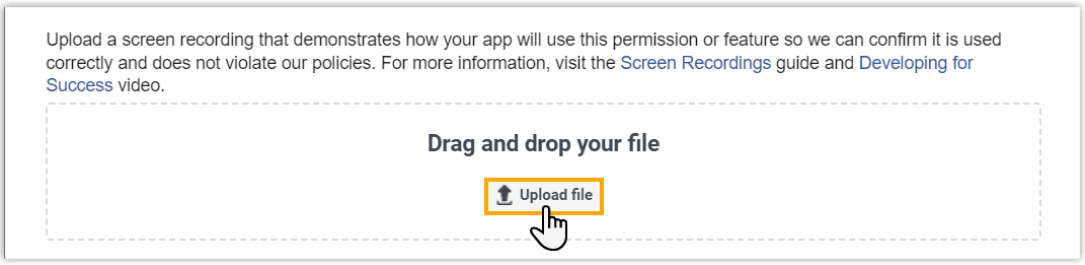
In this example, we paste the following text:

```
Step 1: Log in to Yeastar Phone System with the following
 credentials:
Login address:https://yeastardocs.ras.yeastar.com
Username: smith@yeastar.com
Password: rz9nDg3CrO

Step 2: Log in to Facebook with the following
 credentials and send a message to the Facebook Page:
 https://www.facebook.com/profile.php?id=61563743597525
Email or phone: yangym@yeastar.com
Password: YpeS345joi
```

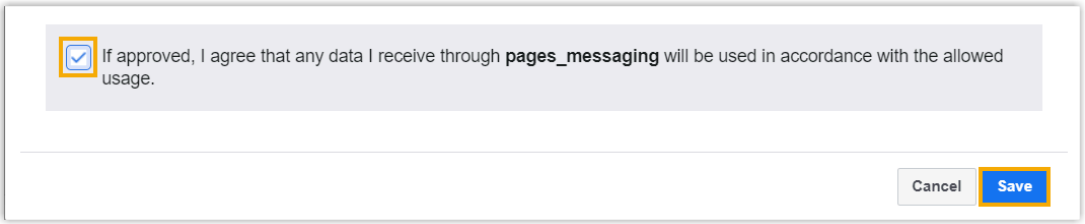
```
Step 3: Receive and reply to the message on Yeastar Phone System.
```



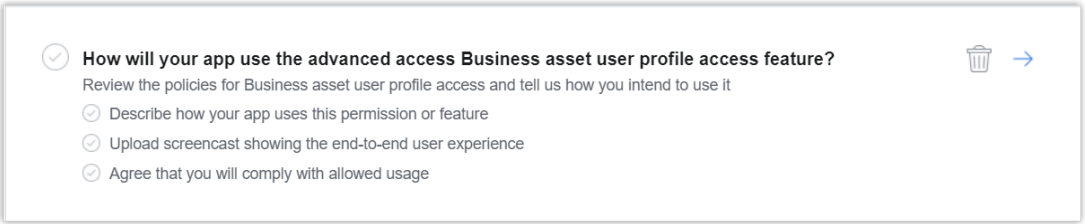

d. Click **Upload file** to upload the screencast that demonstrates how you send a message to your Facebook Page and how the message is received and replied on Yeastar Phone System.




e. Select the checkbox to agree that you will comply with the allowed usage, then click **Save**.

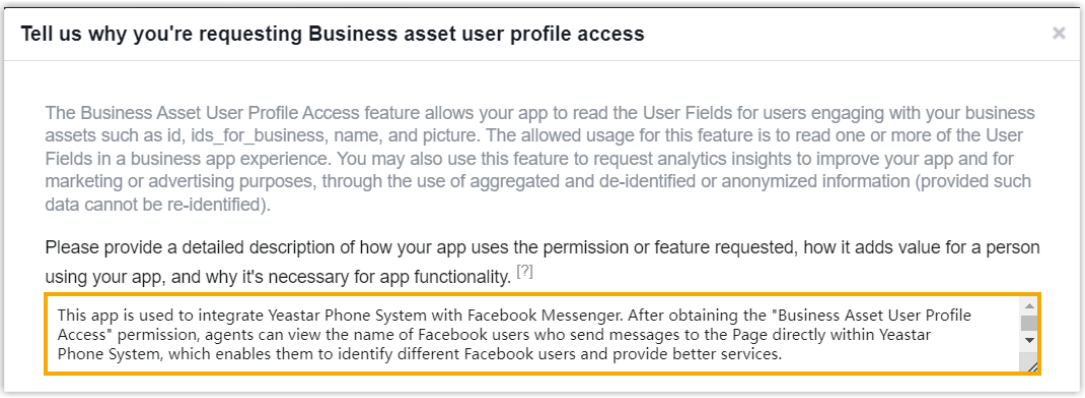



5. Complete the following tasks to demonstrate why the **Business Asset User Profile Access** permission with advanced access is needed and how the app uses it.
   a. Click **How will your app use the advanced access Business asset user profile access feature?**.

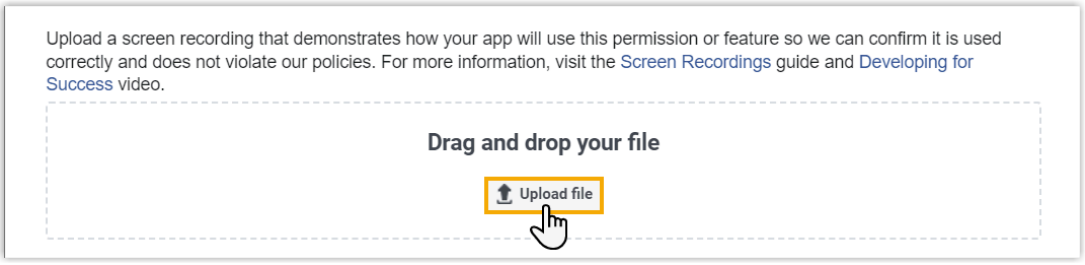


b. Copy and paste the following text in the detailed description box.

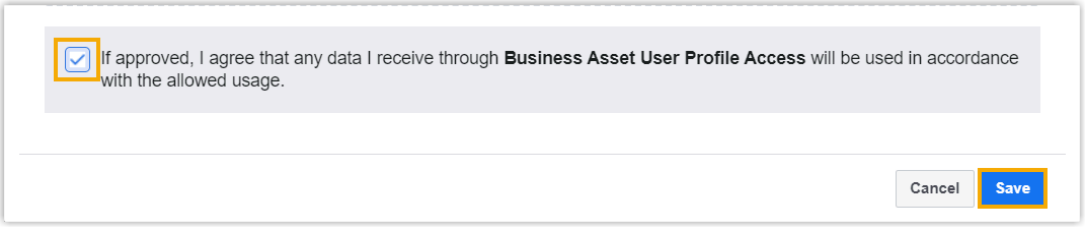
```
This app is used to integrate Yeastar Phone System with Facebook
 Messenger. After obtaining the "Business Asset User Profile
 Access" permission, agents can view the name of Facebook users
 who send messages to the Page directly within Yeastar Phone
 System, which enables them to identify different Facebook users
 and provide better services.
```



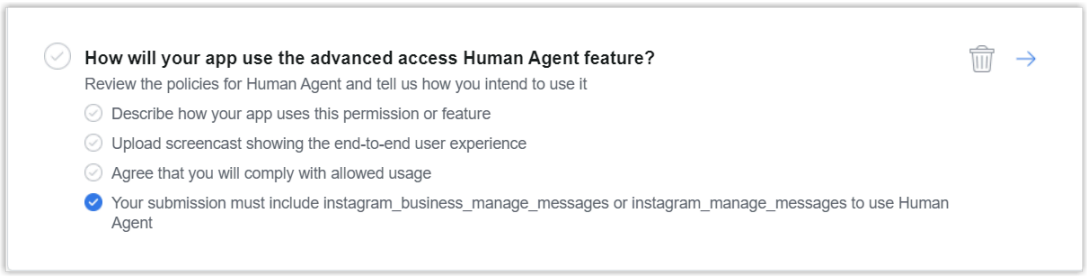

c. Click **Upload file** to upload the screencast that you have uploaded for **pages_-messaging**.




d. Select the checkbox to agree that you will comply with the allowed usage, then click **Save**.

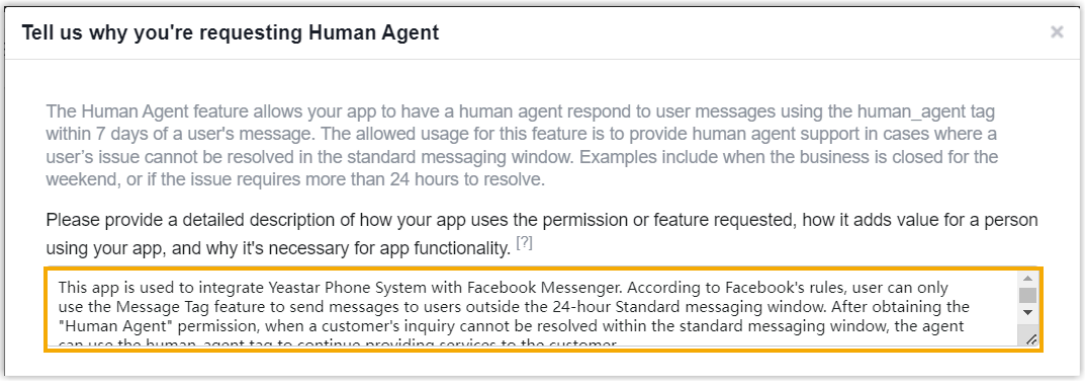



6. Complete the following tasks to demonstrate why the **Human Agent** permission with advanced access is needed and how the app uses it.
   a. Click **How will your app use the advanced access Human Agent feature?**.

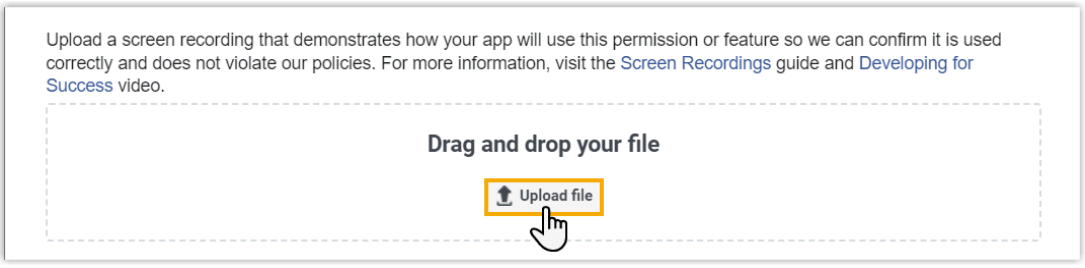



b. Copy and paste the following text in the detailed description box.

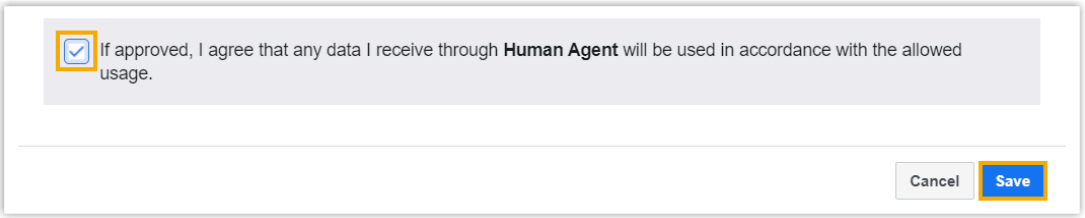
```
This app is used to integrate Yeastar Phone System with Facebook
 Messenger. According to Facebook's rules, user can only use
 the Message Tag feature to send messages to users outside the
 24-hour Standard messaging window.
After obtaining the "Human Agent" permission, when a customer's
 inquiry cannot be resolved within the standard messaging window,
 the agent can use the human_agent tag to continue providing
 services to the customer.
```




c. Click **Upload file** to upload the screencast that demonstrates how your app uses a human agent tag to respond to customer messages.




d. Select the checkbox to agree that you will comply with the allowed usage, then click **Save**.



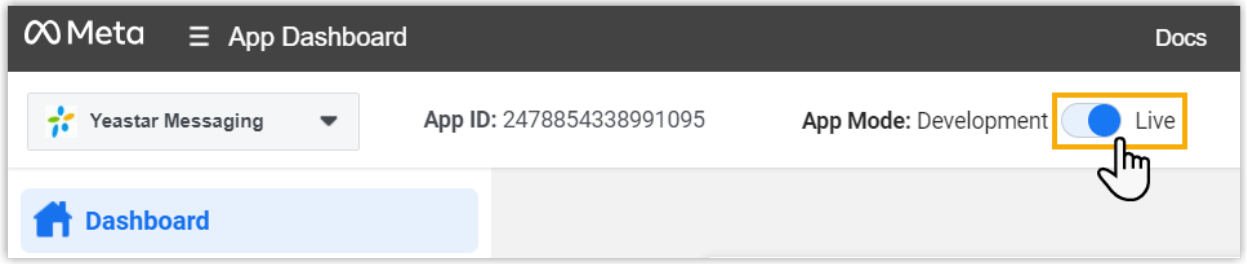

7. At the bottom of the page, click **Submit for Review** and enter password to confirm your operation.

### Result

Your submission is queued and you will receive the review result in a few days.

### What to do next

After you pass App Review, you need to switch your app to Live mode on 'Meta for Developers' portal, as shown below.




# Live Chat

## Live Chat Integration Guide

By adding Yeastar Live Chat to a website, your website visitors can call or chat with your agents in just one click, while agents in your business can centrally handle all customer conversations on Linkus UC Clients.

### Highlights

#### Easy website integration

Embed a live chat widget on any website effortlessly, no coding skills required.

#### Free online consultation (chat & call)

Website visitors can initiate a chat or a call with agents in your business at no cost.

### Secure resource control

Specify website domain and limit the number of concurrent calls to ensure that the live widget only works on the trusted website and prevent resource abuse.

## Requirements

Make sure Yeastar P-Series PBX System meets the following requirements:

| Item | Requirement |
|---|---|
| Firmware | Version 37.20.0.124 or later |
| Plan | Enterprise Plan (EP) or Ultimate Plan (UP) |
| Domain Name | PBX can be remotely accessed via a domain name.<br><br>**Note:**<br>• Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br>• If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br><br>For more information about the configuration, see the following topics:<br>• Configure Network for Remote Access by a Yeastar FQDN<br>• Configure Network for Remote Access by a Yeastar Domain Name<br>• Configure Network for Remote Access by a Domain Name |

## Limitations

Learn about the limitations of Live Chat widget.

| Item | Description |
|---|---|
| Message type | Supports text messages, emojis, and images.<br><br>**Note:** |

| Item | Description |
| --- | --- |
| | **For Image**: The file format should be `.png`, `.jpg`, or `.jpeg` and the maximum file size is 10 MB. |
| Messaging mechanism | Supports to receive and reply to **Inbound** messages, but agents can NOT initiate a chat or a call with website visitors through the live chat widget. |
| File retention period | Files can be retained for **72 hours**. |
| Chat session | Supports **20** active sessions. |

# Set up a Live Chat Channel

To add Yeastar Live Chat to your website, you need to create and configure a live chat channel on Yeastar P-Series PBX System first.

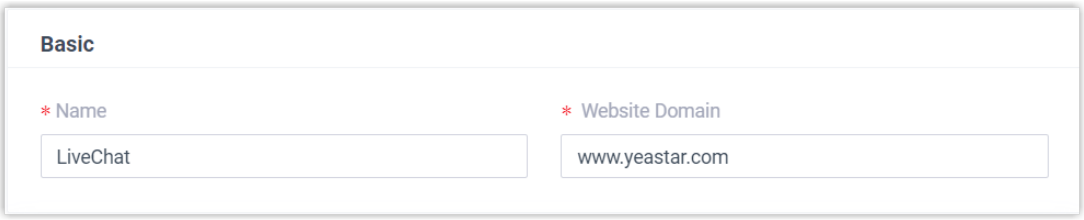
## Before you begin

If you want to allow website visitors to call your agents directly, we recommend that you create a WebRTC trunk and set up a corresponding inbound route in advance, as they are required in the follow-up process.

For more information, see Set up WebRTC Click-to-Call.

## Procedure

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **Live Chat**.
3. In the **General** tab, configure general settings for the channel.
    a. In the **Basic** section, enter the following basic information.

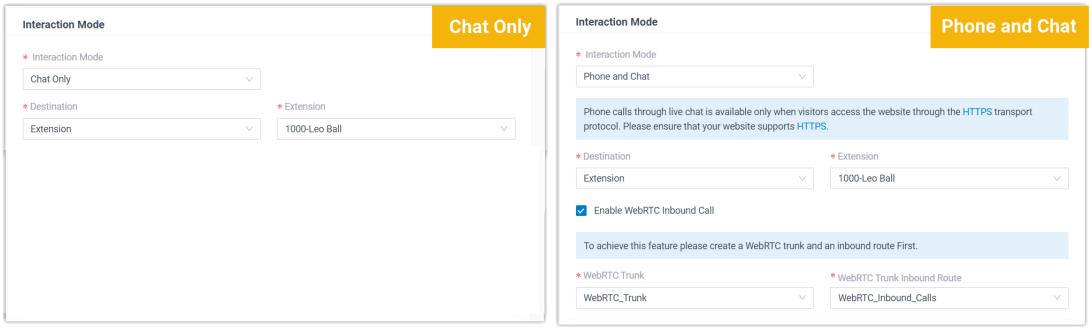



- **Name**: Enter a name to help you identify the channel.
- **Website Domain**: Enter the domain name of the website to which you want to add the live chat widget.

**Note:**

> For security reasons, the live chat widget will only load on the website domain.

b. In the **Interaction Mode** section, set how website visitors can interact with your agent(s) and where to route the visitors.




- **Interaction Mode**: Specify the interaction mode supported on the live chat widget.

| Option | Description |
|---|---|
| Chat Only | If selected, website visitors can communicate with your agent(s) via chat message. |
| Phone and Chat | If selected, website visitors can communicate with your agent(s) via chat message or phone call.<br><br>**Note:**<br>Phone calls through live chat is available only when visitors access the website through HTTPS transport protocol. Therefore, make sure that your website supports HTTPS. |

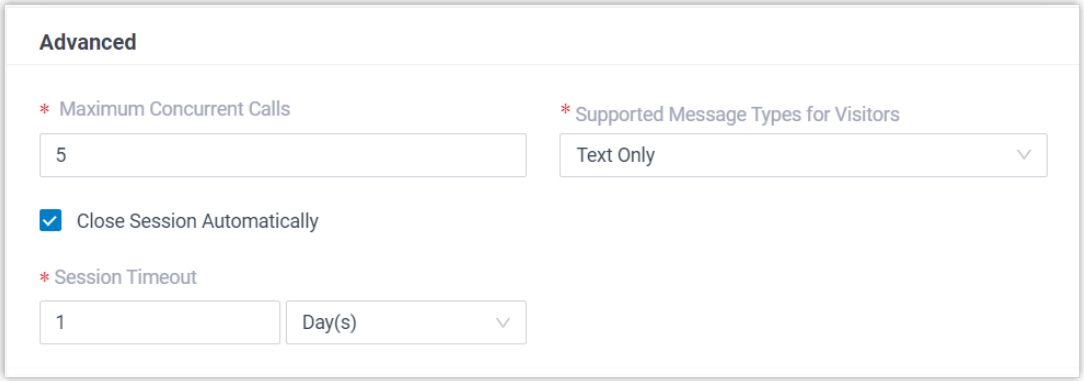
- **Destination**: Specify the destination of inbound messages from live chat.

| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br><br>Only the extension user can receive inbound messages from live chat. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br><br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be |

| Option | Description |
| --- | --- |
| | able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br><br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

- **Enable WebRTC Inbound Call**: If you allow phone calls through live chat, enable this option and select a WebRTC trunk and its corresponding inbound route.

c. In the **Advanced** section, complete the following settings.




- **Maximum Concurrent Calls**: Set the maximum number of concurrent calls supported on live chat.

  When the limit is reached, no more calls can be made through live chat.

**Note:**

> ◦ Phone calls made through live chat, whether by agents or website visitors, occupy the concurrent calls.
> ◦ The default number is **5**, you can set up to **10** concurrent calls.

- **Supported Message Types for Visitors**: Specify the message type that website visitors can send.

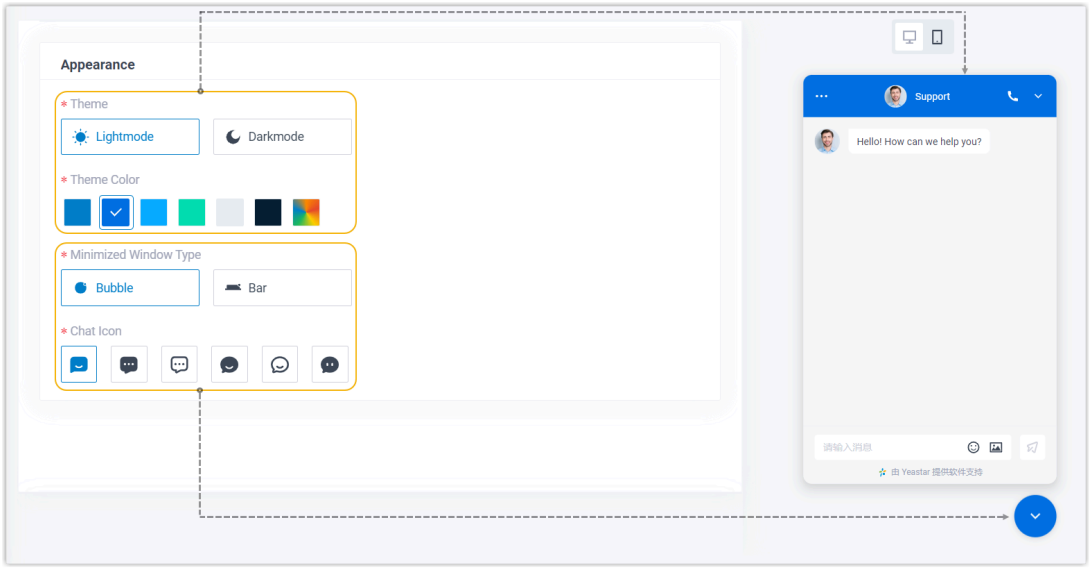
| Option | Description |
|---|---|
| Text Only | Website visitors can send text and emojis. |
| Text and Image | Website visitors can send text, emojis, and images.<br>**Note:**<br>The maximum size for a single image uploaded in the chat widget is 10 MB. |

- **Close Session Automatically**: If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the time-out in the **Session Timeout** field.

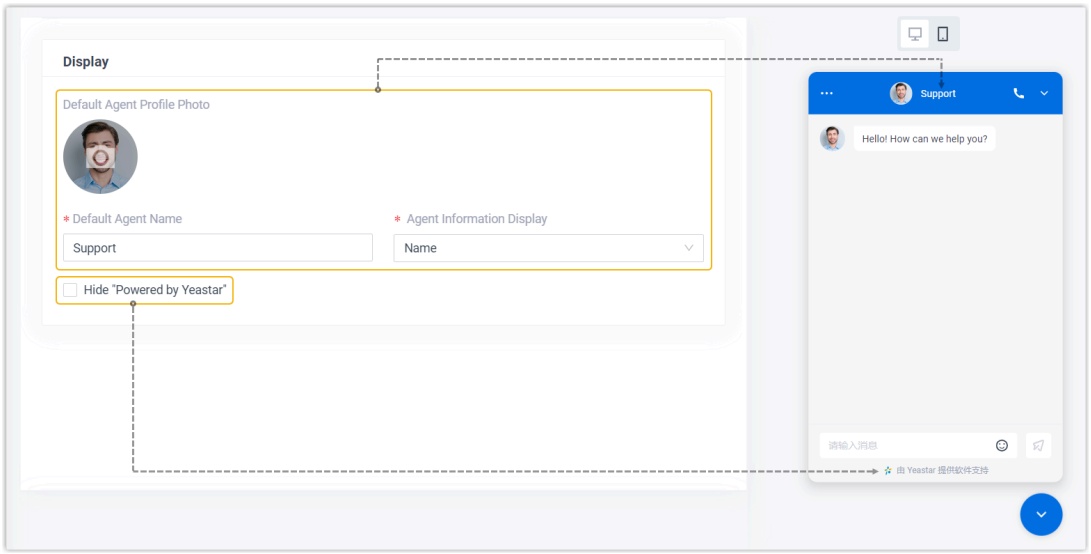
4. In the **Display & Appearance** tab, customize how the live chat widget on your website will look and what information it will offer.

> **Note:**
> When customizing your chat widget, you can preview the changes you made on the right panel.

a. In the **Appearance** section, customize the appearance of your chat widget.




b. In the **Display** section, customize the information that will be displayed when website visitors initiate a chat or a call.



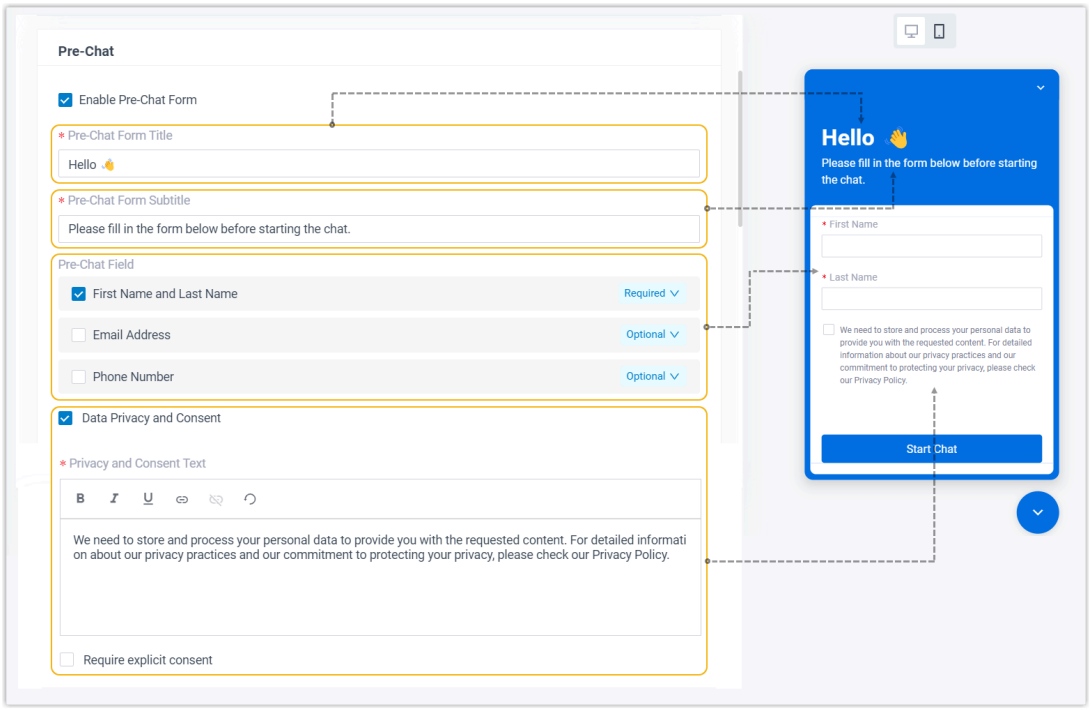

> **Note:**
> For **Agent Information Display**: If you choose **Name** or **Name and Profile Photo**, the real name and profile photo of the agent who deals with the chat message or phone call will be displayed when visitors initiate a chat or a call. Otherwise, the default agent name and agent profile photo will be displayed.

5. In the **Message** section, configure language preference and message settings for the chat widget.

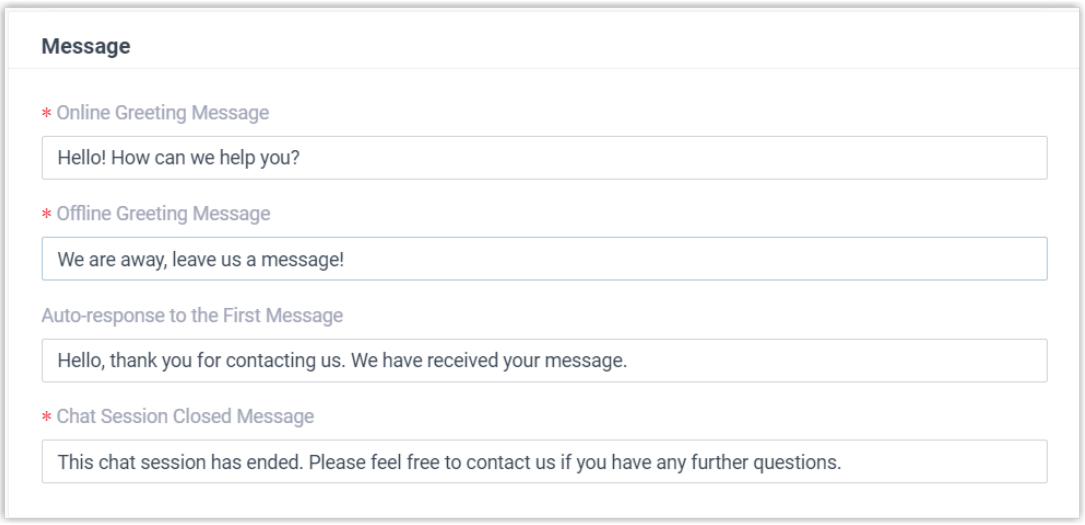
a. In the **Language** section, select an option from the drop-down list.

   This determines the display language of the chat widget.

b. If you want to use a pre-chat form to gather visitor information before a chat starts, complete the following settings in the **Pre-Chat** section.




c. **Optional:** In the **Message** section, edit the following auto-reply text messages as needed, which will be sent to website visitors based on specific scenarios.




**Note:**

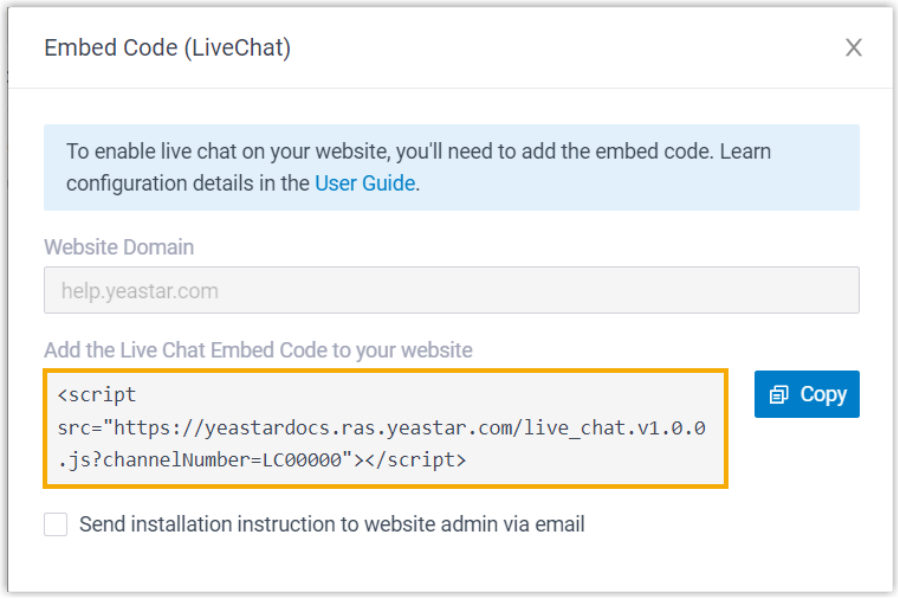
> The Online and Offline Greeting Messages are triggered based on office hours. Make sure that office hours in the PBX are properly configured. For more information, see Overview of Business Hours and Holidays.

- **Online Greeting Message**: Automatically send the text message to website visitors when they open the chat interface in the following situations:
  - PBX is within Business Hours, and the live chat destination is a message queue.
  - PBX is within Business Hours, and the live chat destination is an extension that is logged in to Linkus UC Clients with presence status set to Available.
- **Offline Greeting Message**: Automatically send the text message to website visitors when they open the chat interface in the following situations:
  - PBX is within Outside Business Hours or Holidays.
  - PBX is within Business Hours, and the live chat destination is an extension that logs out of Linkus UC Clients or that is logged in but has presence status set to Away / Business Trip / Do Not Disturb / Lunch Break / Off Work.
- **Auto-response to the First Message**: Automatically reply the text message to website visitors when they send their first message in the chat.
- **Chat Session Closed Message**: Automatically send the text message to website visitors when the chat session ends, either manually closed by agent / website visitor or automatically closed when session timeout is reached.

6. Click **Save**.

## Result

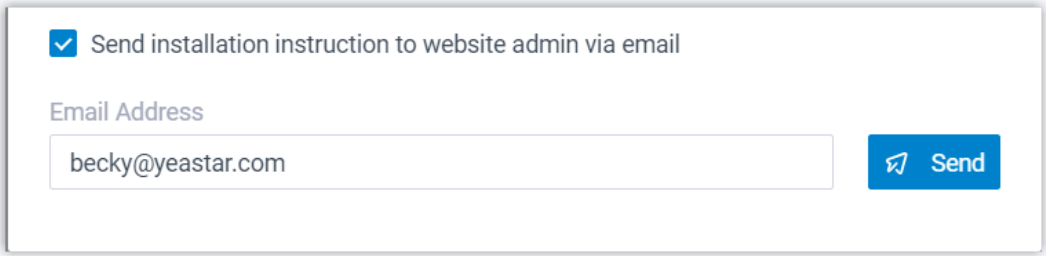
A code snippet for live chat is generated and displayed in the pop-up window.




## What to do next

1. Click **Copy** to copy the code snippet.

   **Note:**
   You can also email the code snippet as well as the website domain to a specific user (e.g. website admin) to help with the process. The system will send an email with installation instructions using the default template (Path: **System > Email > Email Templates > Request to Add Live Chat to Website**) to the specified email address.

2. Enable live chat on your website using the code snippet.

# Enable Yeastar Live Chat on Your Website

After you obtain the code snippet for Yeastar Live Chat, you can paste the code snippet before the closing `</body>` tag in the HTML code for your desired website. When done, a live chat widget appears at the bottom-right corner of the website, enabling website visitors to have a real-time conversation with your agents.

## Procedure

To enable Yeastar Live Chat on your website, paste the code snippet before the closing `</body>` tag in the HTML code for your desired website. After you successfully add the code snippet to your website, a live chat widget is added to the bottom-right corner of your website.

**Note:**

- Currently, the live chat widget is fixed to the bottom-right corner of a website and its position can not be changed.
- The live chat widget has been proven to work when visitors access your website using **Google Chrome**, **Microsoft Edge**, or **Firefox**. For other web browsers, it may not work as expected.

## Example

We take the following Content Management System (CMS) platforms as examples to show you how to enable Yeastar Live Chat on a website.

- Enable Yeastar Live Chat on WordPress Website
- Enable Yeastar Live Chat on Joomla Website
- Enable Yeastar Live Chat on Drupal Website
- Enable Yeastar Live Chat on Wix Website
- Enable Yeastar Live Chat on Squarespace Website

# Enable Yeastar Live Chat on WordPress Website

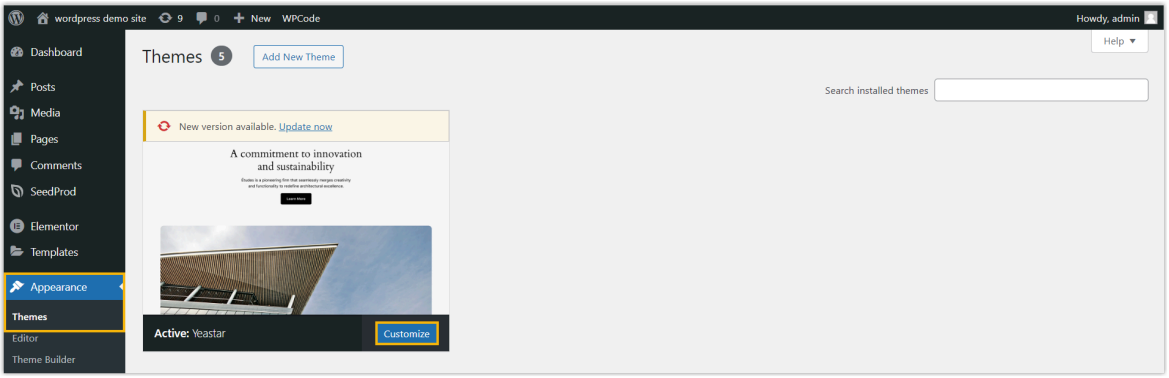
After you obtain the code snippet for Yeastar Live Chat, you can paste the code into the footer of your WordPress website. When done, a live chat widget appears at the bottom-right corner of the website, enabling website visitors to have a real-time conversation with your agents.

## Prerequisites

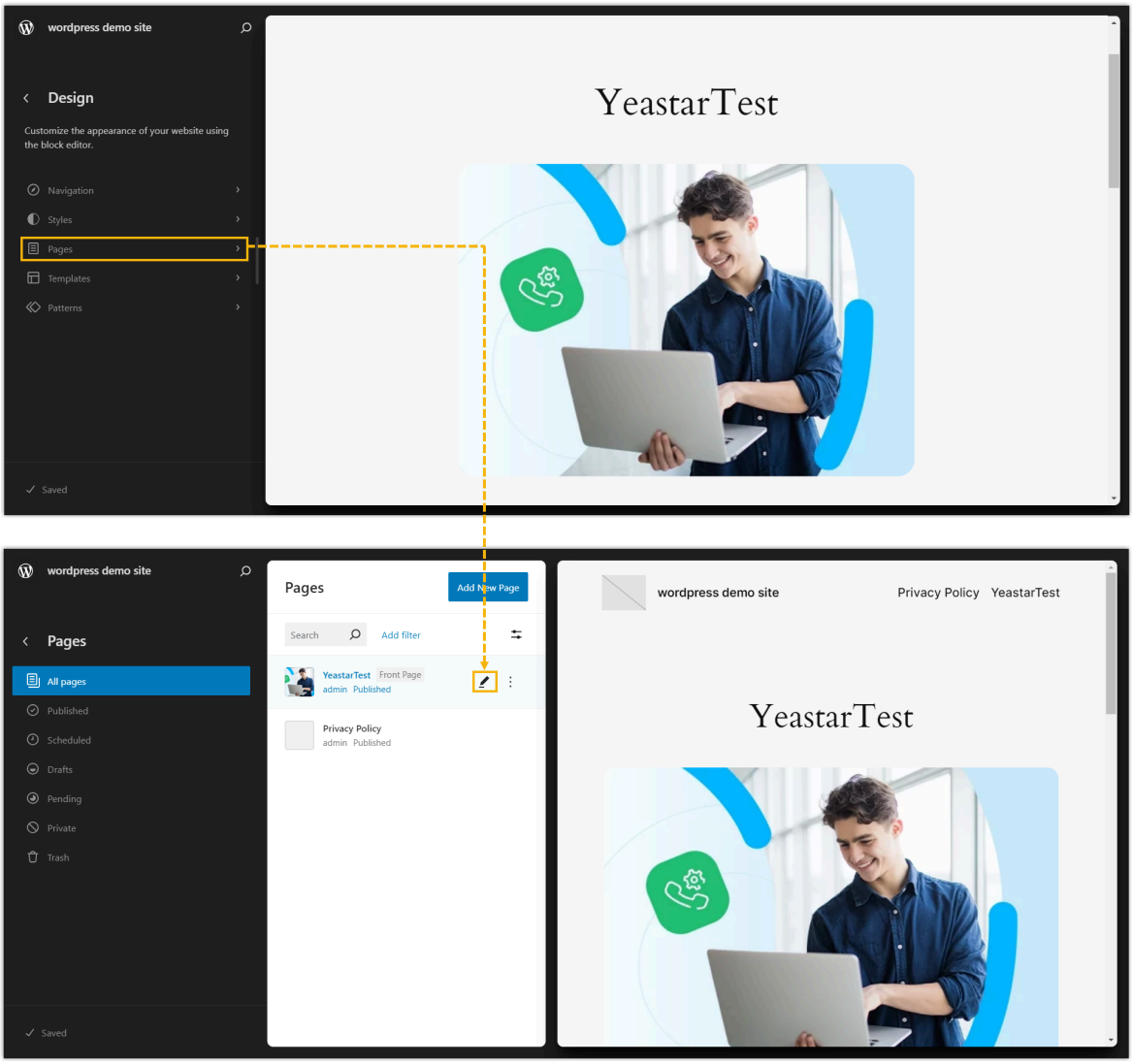
You have obtained the code snippet for Yeastar Live Chat.

## Enable Yeastar Live Chat on WordPress website using theme editor

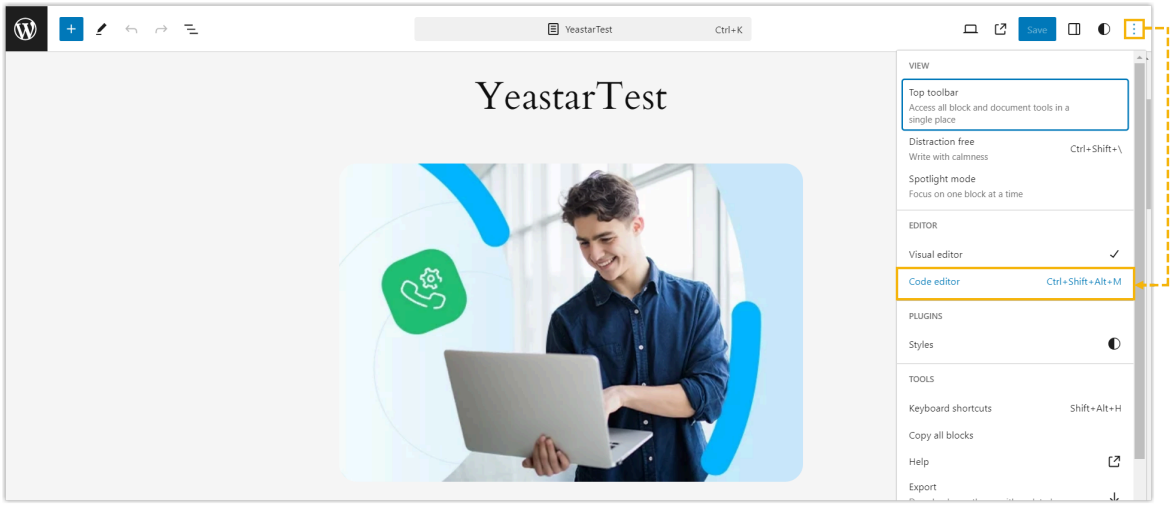
1. Log in to your WordPress admin panel.
2. On the left navigation bar, go to **Appearance > Themes**, then click **Customize** on the desired theme.



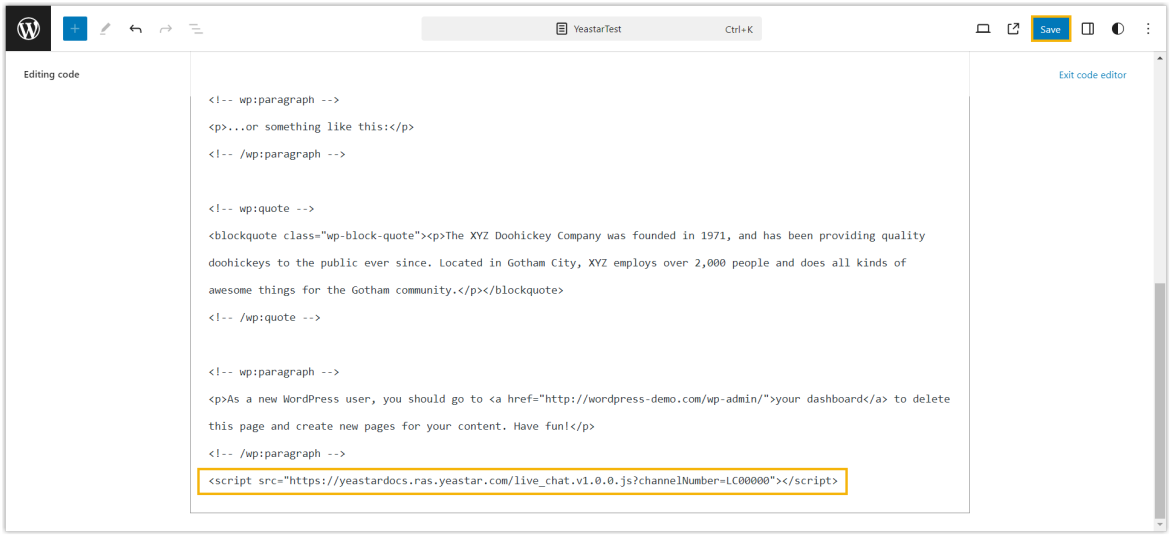

3. On the left navigation bar, click **Pages**, then edit your desired page.



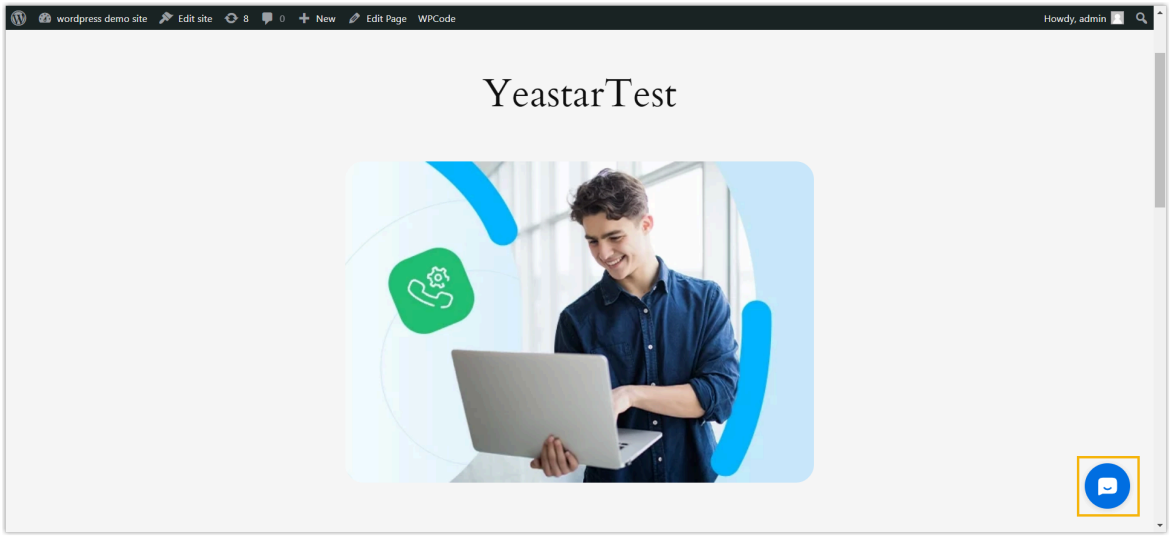

4. At the top-right corner, click ⋮, then click **Code editor**.




5. Scroll down to the bottom, paste the code snippet, then click **Save**.

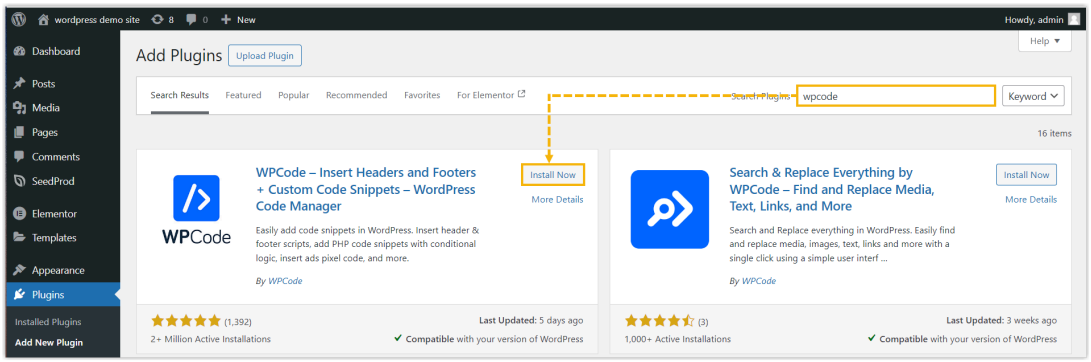



Access the page, then you will find the Live Chat widget is added to your website.

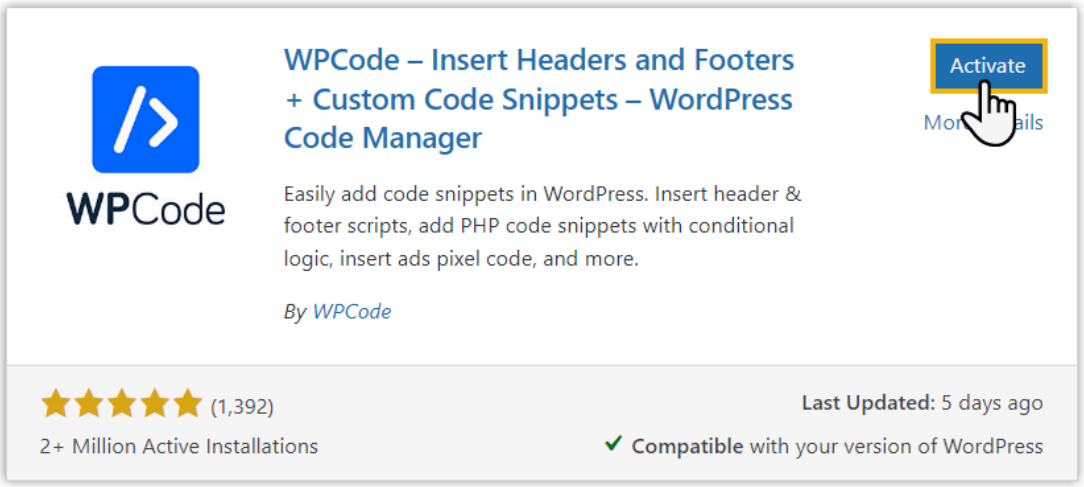



## Enable Yeastar Live Chat on WordPress website using WPCode plugin

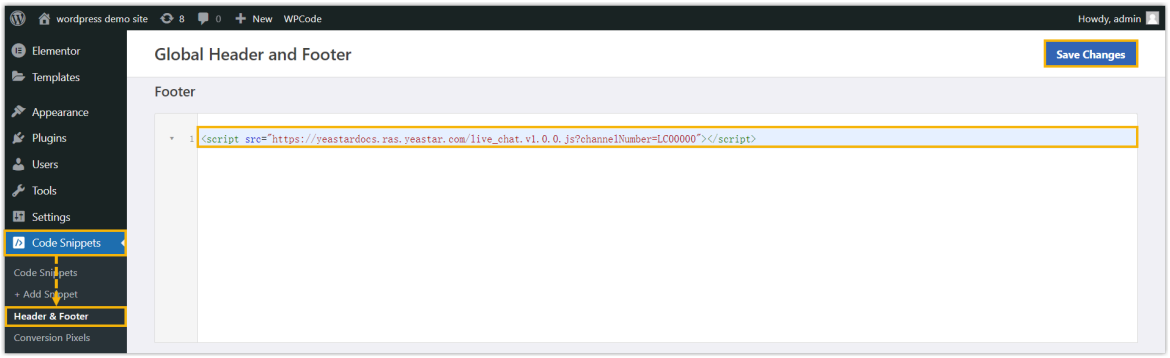
1. Log in to your WordPress admin panel.
2. On the left navigation bar, go to **Plugins > Add New Plugin**.
3. Add and activate WPCode plugin.
    a. At the top-right corner, search for WPCode plugin, then click **Install Now** to install the plugin.




    b. Click **Activate** to activate the plugin.

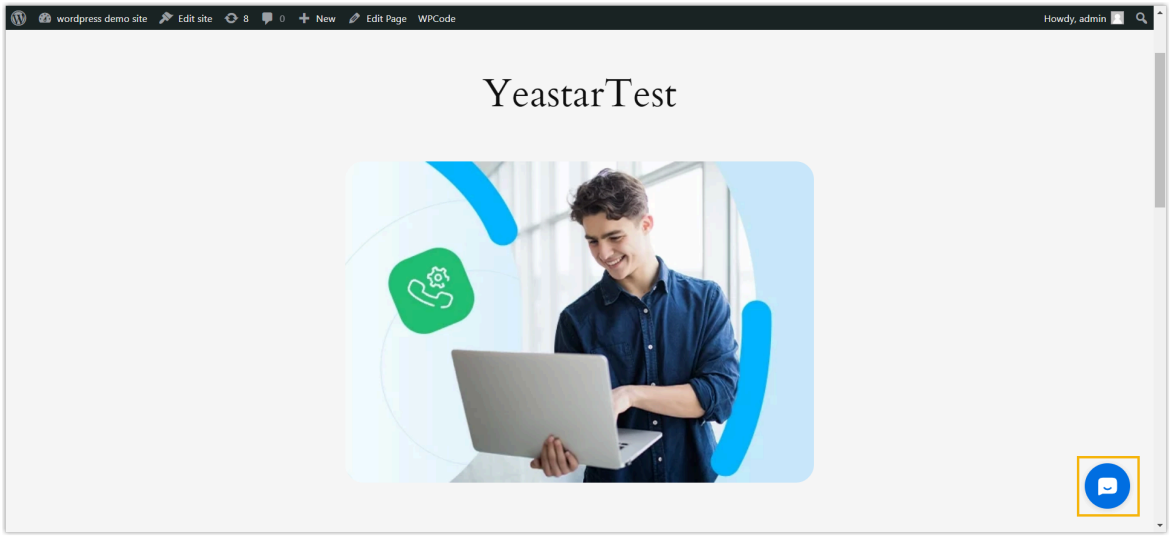



4. Add the code snippet to the footer.




   a. On the left navigation bar, go to **Code Snippets > Header & Footer**.
   b. In the **Footer section**, paste the code snippet.
   c. At the top-right corner, click **Save Changes**.

Access the page, then you will find the Live Chat widget is added to your website.




# Enable Yeastar Live Chat on Joomla Website

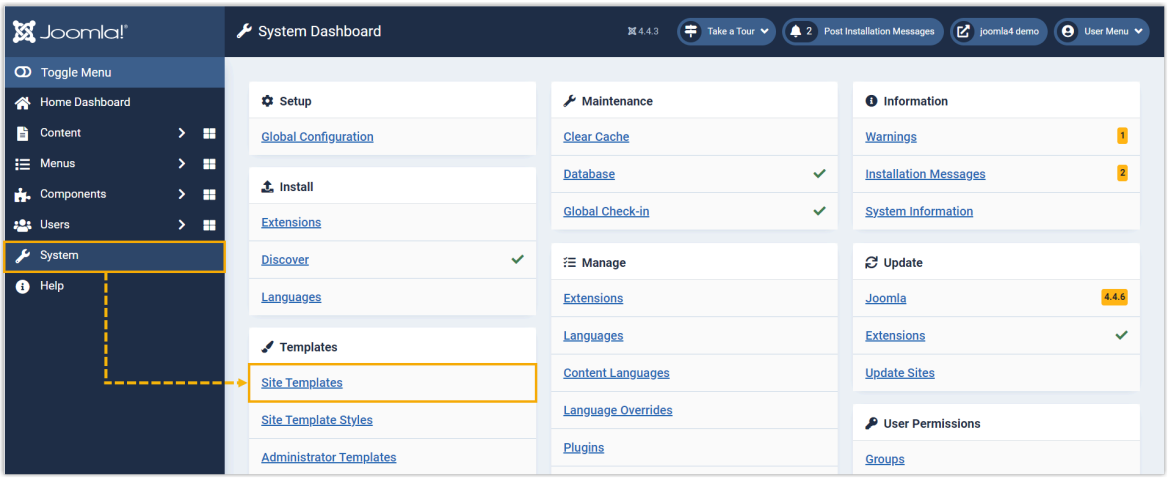
After you obtain the code snippet for Yeastar Live Chat, you can paste the code to your Jommla website's source code before the `/body` tag. When done, a live chat widget appears at the bottom-right corner of the website, enabling website visitors to have a real-time conversation with your agents.

## Prerequisites

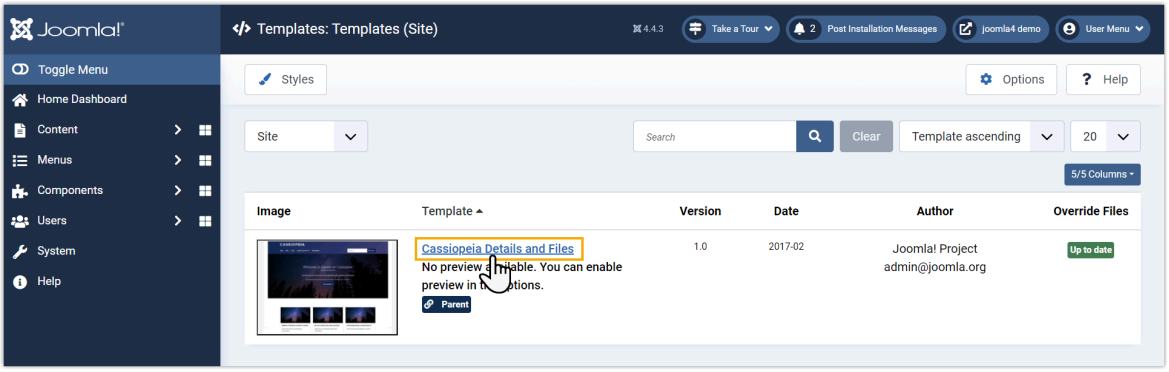
You have obtained the code snippet for Yeastar Live Chat.

## Procedure

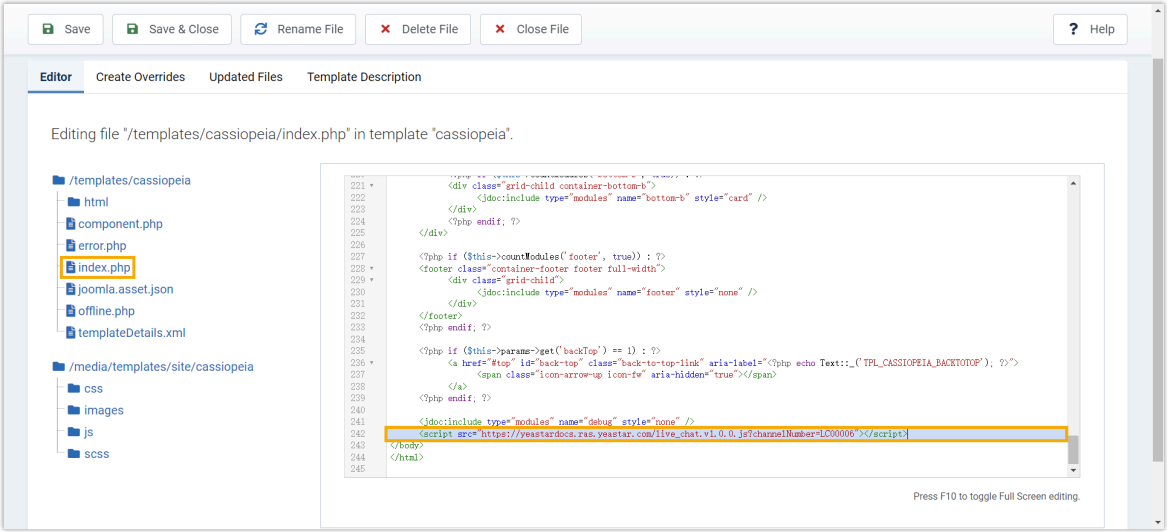
1. Log in to your Joomla's administrator panel.
2. On the left navigation bar, click **System**, then click **Site Templates**.




3. Click the template to which you want to add the code.



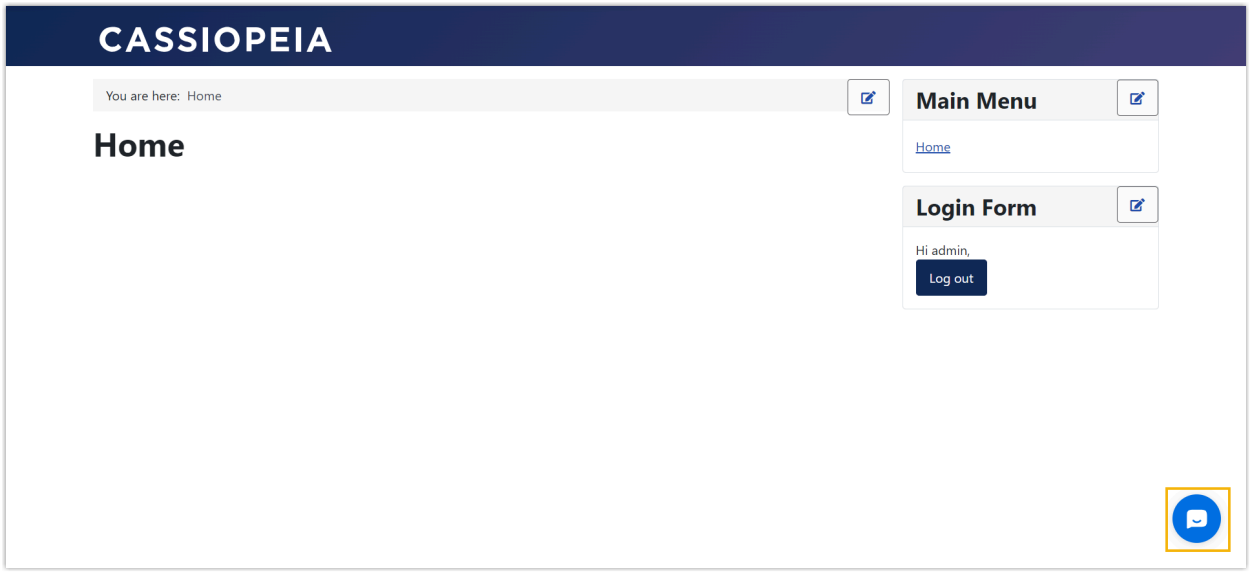

4. Click **index.php**, then paste the code snippet before `/body` tag.




5. At the top-left corner, click **Save**.

### Result

Access your Joomla website, you will find the live chat widget is added to the bottom-right corner of your website.

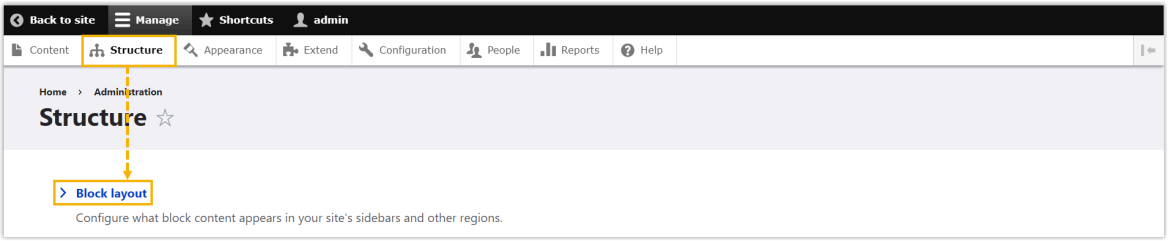



## Enable Yeastar Live Chat on Drupal Website

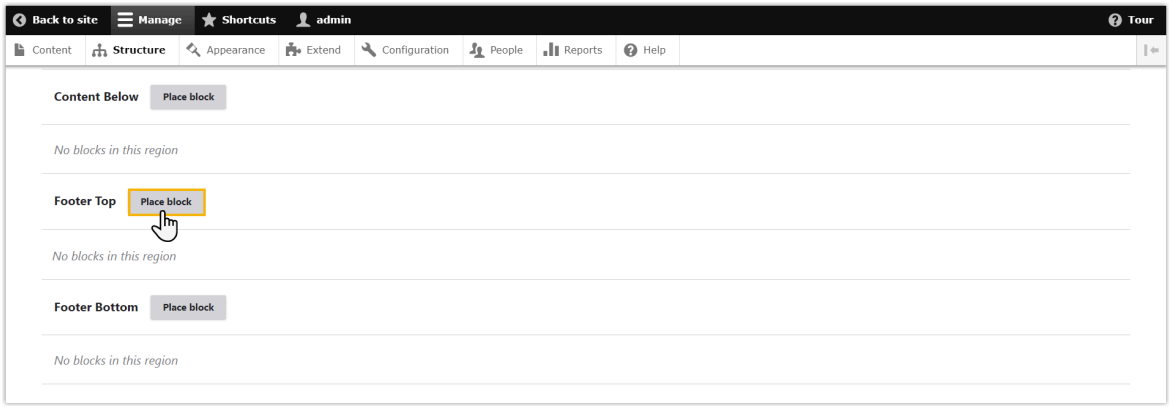
After you obtain the code snippet for Yeastar Live Chat, you can add the code to your Drupal website. When done, a live chat widget appears at the bottom-right corner of the website, enabling website visitors to have a real-time conversation with your agents.

### Procedure

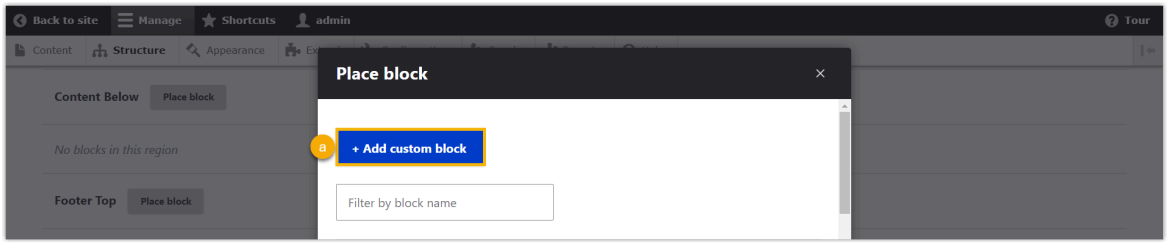
1. Log in to your Drupal admin panel.
2. On the top navigation bar, go to **Structure > Block layout**.

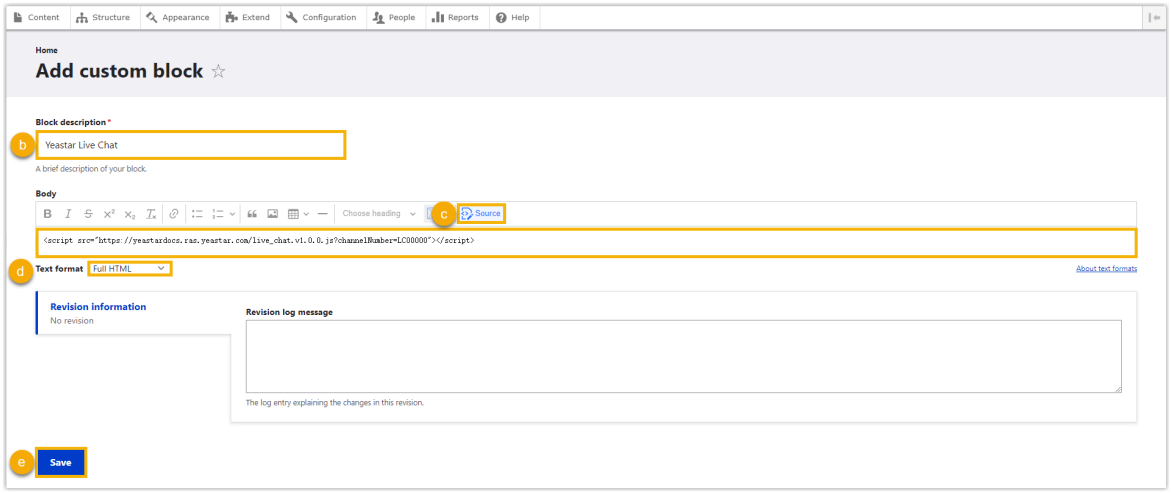



3. Scroll down to the bottom, click **Place block** beside **Footer Top**.

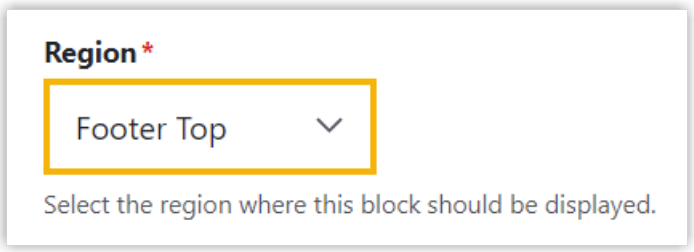



4. Add a custom block.



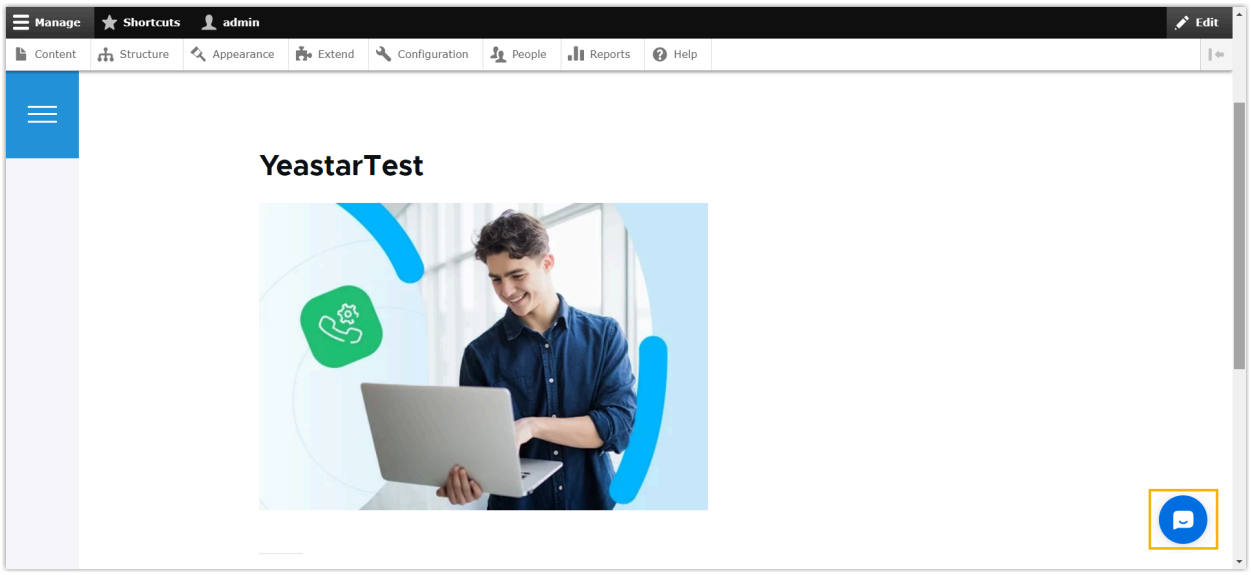

   a. Click **Add custom block**.
   b. In the **Block description** field, enter a short description of the block.
   c. In the **Body** field, click **Source**, then paste the code snippet.
   d. In the **Text format** drop-down list, select **Full HTML**.
   e. Click **Save**.
5. Scroll down to the bottom, then select **Footer Top** from the **Region** drop-down list.




6. Click **Save block**.

### Result

Access your Drupal website, you will find the live chat widget is added to the bottom-right corner of your website.




## Enable Yeastar Live Chat on Wix Website

After you obtain the code snippet for Yeastar Live Chat, you can paste the code to your Wix website's source code before the `/body` tag. When done, a live chat widget appears at the bottom-right corner of the website, enabling website visitors to have a real-time conversation with your agents.

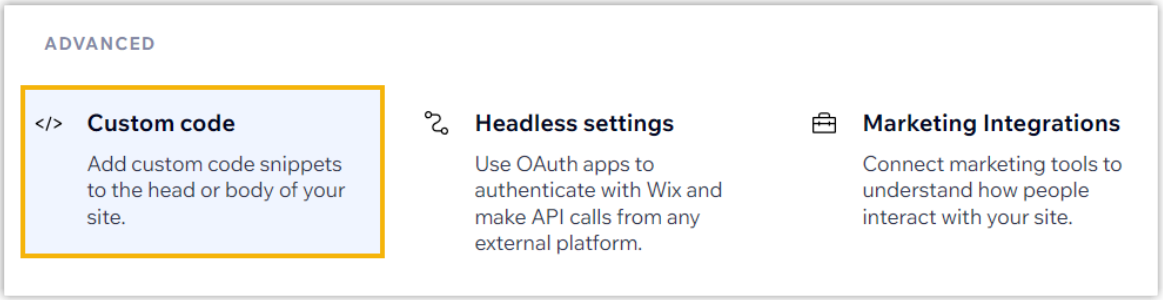
**Note:**
You can also add the chat widget using Wix Editor. For more information, see Wix Editor: Embedding a Site or a Widget.

### Prerequisites

You have obtained the code snippet for Yeastar Live Chat.

### Procedure

1. Log in to your Wix account, then go to **Settings**.
2. On Settings page, scroll down to the **ADVANCED** section, then click **Custom code**.




3. At the top-right corner, click **Add Custom Code**.
4. In the pop-up window, complete the following settings, then click **Apply**.
   - **Paste the code snippet here**: Paste the code snippet for the live chat widget.
   - **Name**: Enter a name to help you identify the code.
   - **Add Code to Pages**: Set the page(s) to which you want to add the code snippet.
   - **Place Code in**: Select **Body - end**.

### Result

Access your Wix website, you will find the live chat widget is added to the bottom-right corner of your website.

## Enable Yeastar Live Chat on Squarespace Website

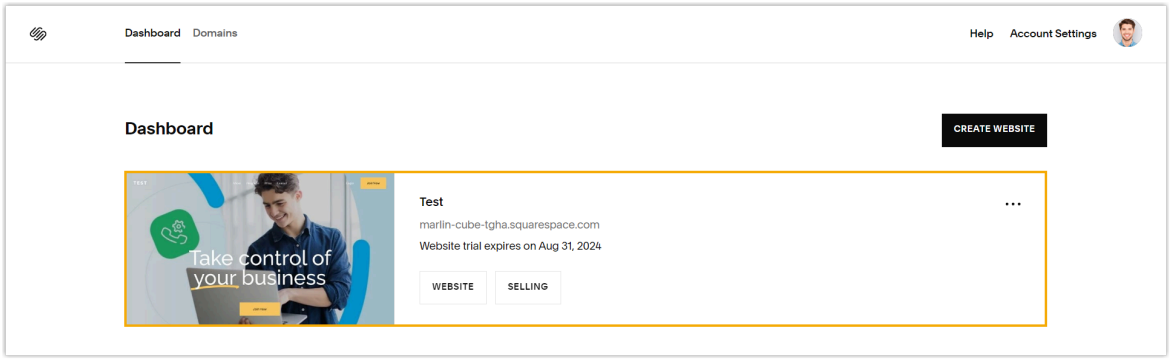
After you obtain the code snippet for Yeastar Live Chat, you can paste the code into the footer of your Squarespace website. When done, a live chat widget appears at the bottom-right corner of the website, enabling website visitors to have a real-time conversation with your agents.

### Prerequisites

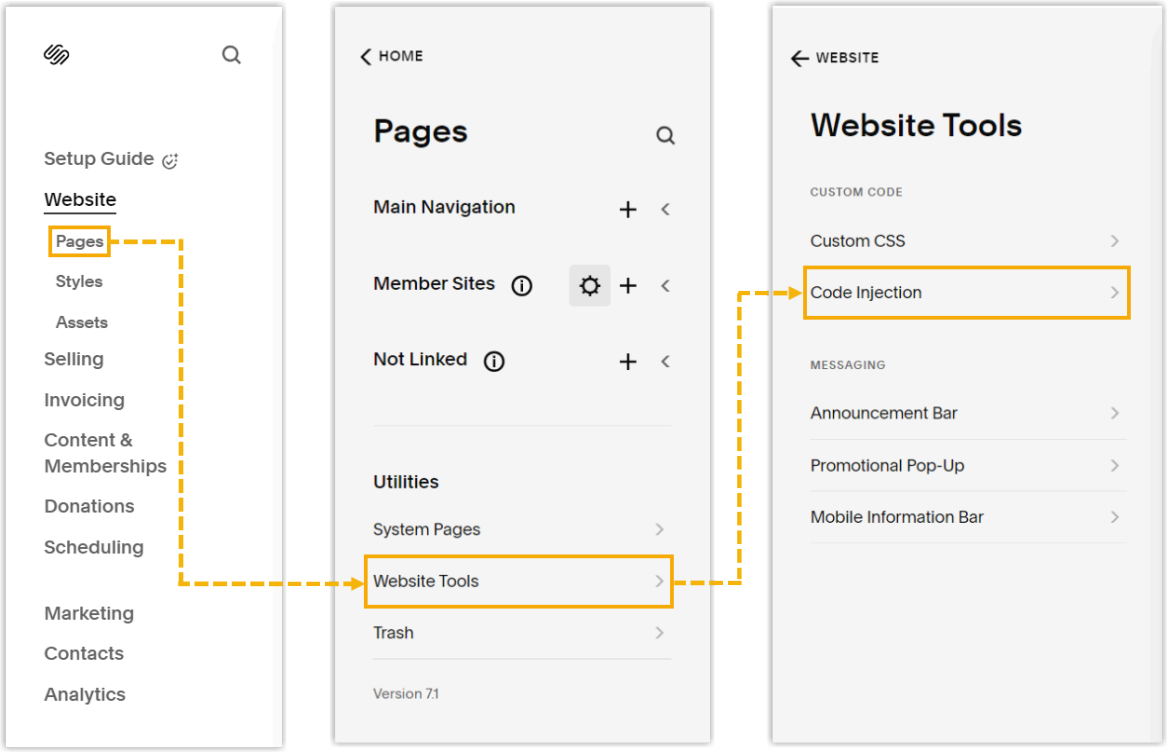
You have obtained the code snippet for Yeastar Live Chat.

## Procedure

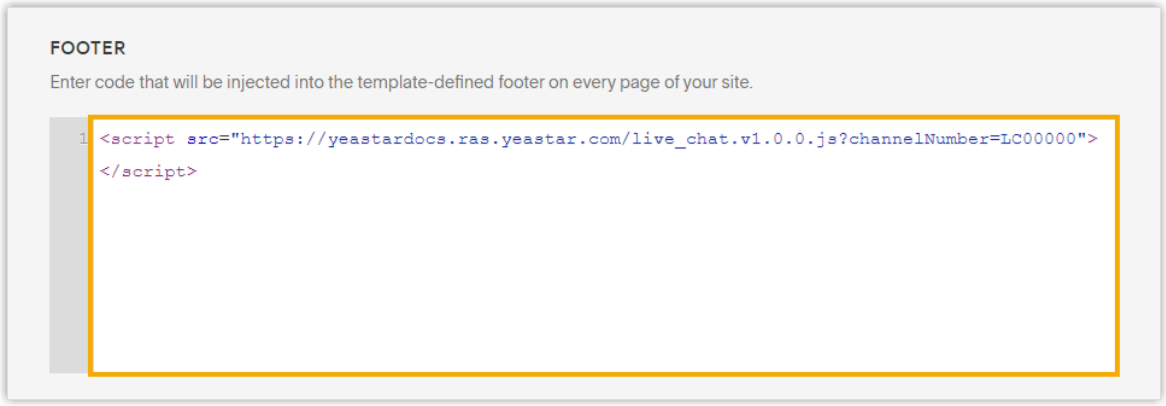
1. Log in to your Squarespace account.
2. On the Dashboard, click the website to which you want to add the live chat widget.




3. On the left navigation bar, go to **Pages > Website Tools > Code Injection**.



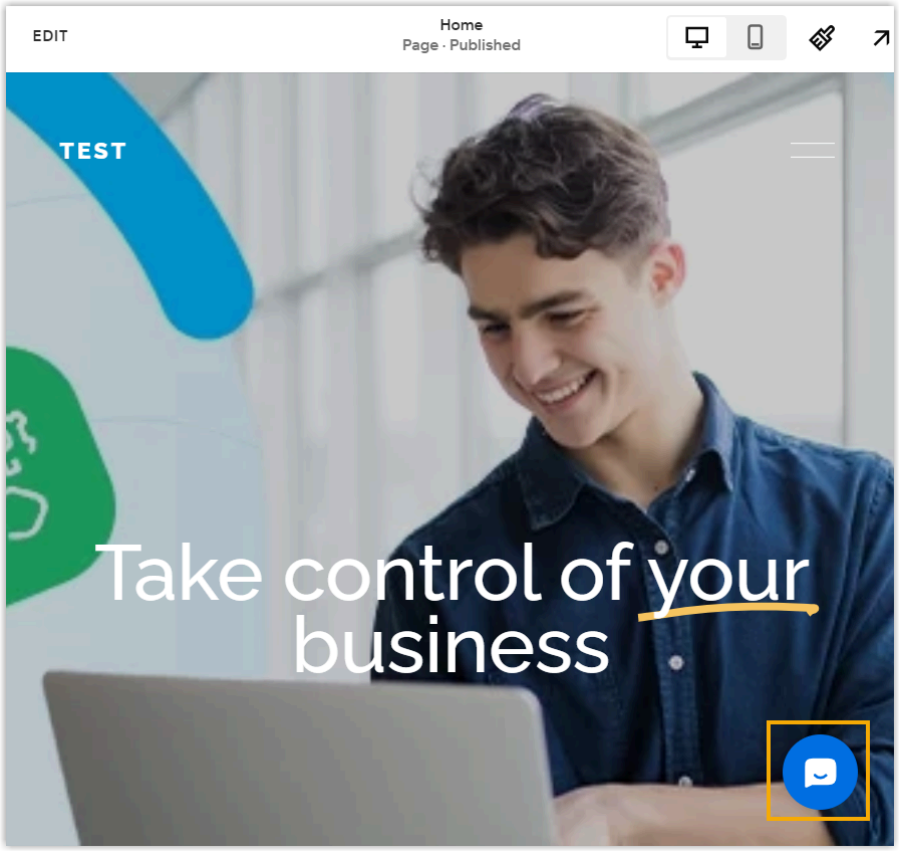

4. In the **Footer** section, paste the code snippet.




5. At the top-left corner, click **Save**.

## Result

The live chat widget is added to the bottom-right corner of your website.



# WhatsApp

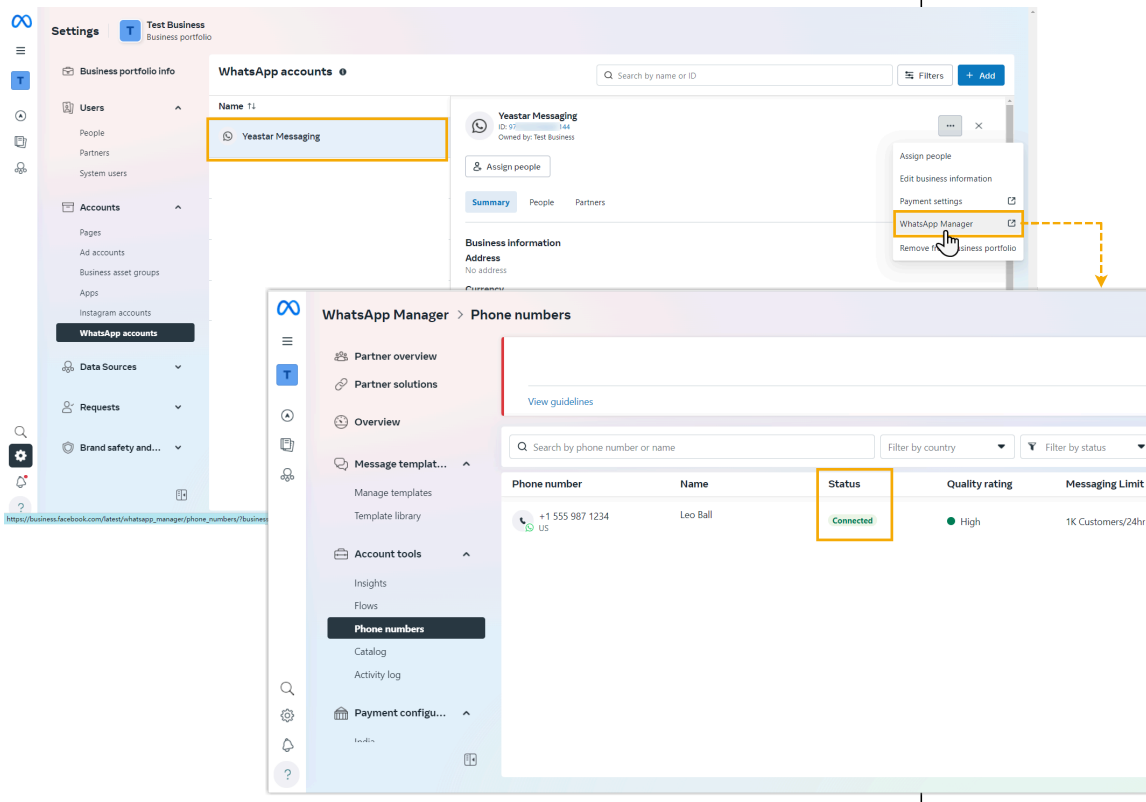
## Set up a WhatsApp Channel

This topic describes how to set up a WhatsApp channel on Yeastar P-Series PBX System, so that agents in your business can receive and reply to WhatsApp messages from customers on their Linkus UC Clients.

### Requirements

Make sure the following resources are ready.

| Platform | Requirement |
| --- | --- |
| Yeastar PBX | • **Firmware**: Version 37.20.0.124 or later<br>• **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)<br>• **Domain Name**: PBX can be remotely accessed via a domain name.<br><br>**Note:**<br>◦ Due to the limitation of the third-party platform, the domain name must NOT contain underscore character(s), otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br>◦ If you use a self-managed domain name, make sure you have installed a valid domain certificate for the domain name, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.<br><br>For more information about the domain configuration, see the following topics:<br>◦ Configure Network for Remote Access by a Yeastar FQDN<br>◦ Configure Network for Remote Access by a Yeastar Domain Name<br>◦ Configure Network for Remote Access by a Domain Name |
| WhatsApp | • **Product**: WhatsApp Business Platform<br><br>• **Account**:<br>◦ A Meta Developer account<br><br>**Note:**<br>You only need ONE Meta Developer account to create MULTIPLE Meta apps for the WhatsApp channel integration. There is no limit to the number of WhatsApp channels on PBX.<br>◦ A Business Manager account (Business Portfolio)<br><br>**Note:** |

| Platform | Requirement |
| --- | --- |
| | After you set up a Business Manager account, verify your business.<br>• **Phone number**: Ensure that your phone number is valid and available for messaging.<br>**Note:**<br>You can check the status of your phone number on 'Meta Business Suite' portal (Path: **Account > WhatsApp accounts > WhatsApp Manager > Account tools > Phone numbers**).<br>  <br>**Troubleshooting:**<br>What should I do if my WhatsApp phone number status is "Pending"? |

## Limitations

Learn about the limitations of WhatsApp messaging channel.

| Item | Description |
|---|---|
| Message type | Supports text messages and multimedia messages, where the multimedia message types are determined by WhatsApp. For more information, see WhatsApp supported media types.<br><br>**Important:**<br>When sending multimedia messages (such as images), WhatsApp downloads the file from a link provided by the PBX. Therefore, if you have set Allowed Country/Region IP Access Protection rule, make sure that you have allowed the IP access from the country where the WhatsApp server is located, otherwise the file transmission would fail. |
| Messaging mechanism | You can receive and reply to customers' inbound messages, or proactively initiate a messaging session using a WhatsApp message template. |
| Message sending rate | Supports to send up to **80** messages per second. |
| File size | Supports to send a file with a maximum size of **100 MB**. |
| File retention period | Files can be retained for **72 hours**. |

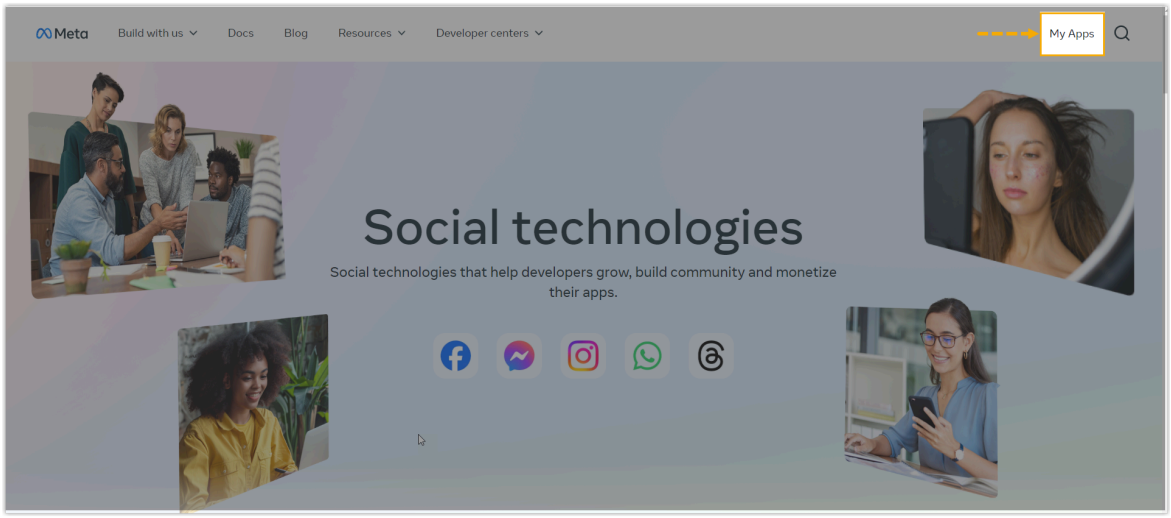
## Procedure

- Step 1. Create a Meta app on 'Meta for Developers' portal
- Step 2. Obtain essential credentials on 'Meta Business Suite' portal
- Step 3. Create and configure a WhatsApp channel on PBX
- Step 4. Configure webhook in the Meta app

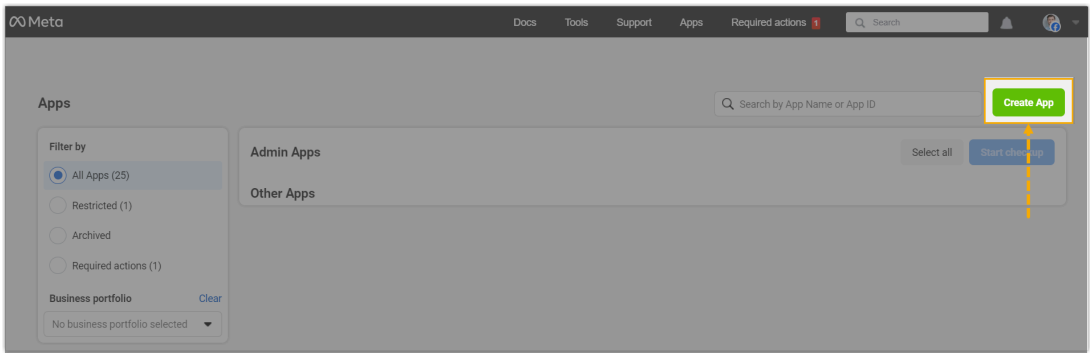
## Step 1. Create a Meta app on 'Meta for Developers' portal

On 'Meta for Developers' portal, create a Meta app on the Meta for Developers portal, add phone number to the app, and obtain a **phone number ID** as well as the **app secret**, which is required later when configuring the WhatsApp channel on the PBX.

1. Log in to 'Meta for Developers' portal with your Meta Developer account, then go to **My Apps** from the top menu.

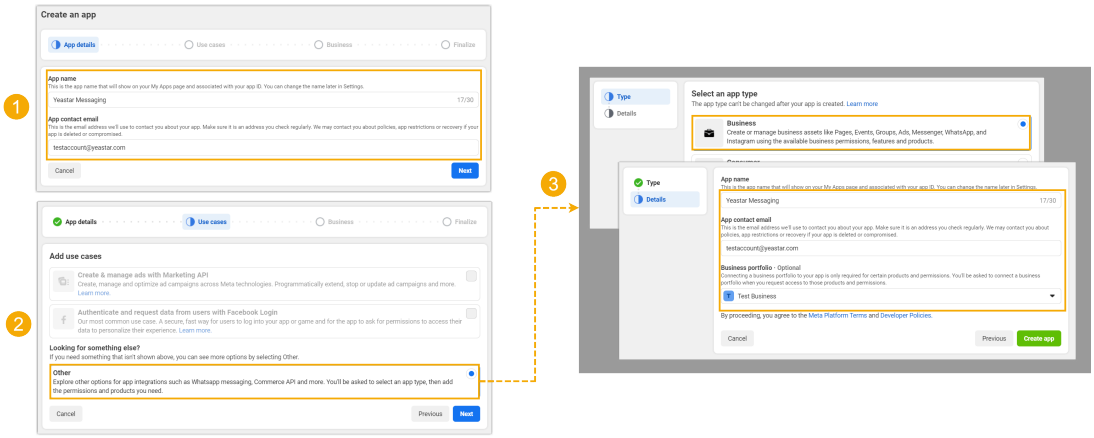



2. Create an app of the **Business** type.
    a. Click **Create App**.

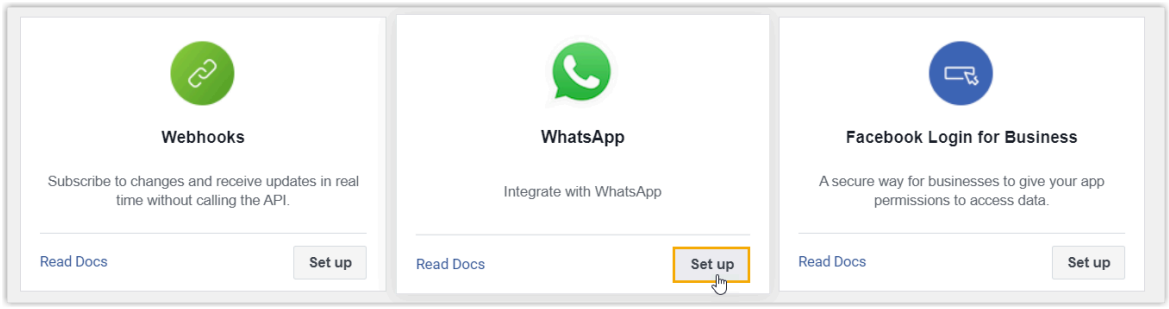



    b. Complete the app settings.

> **Note:**
> In the **Business Portfolio** field, select your Business Account to connect the app with your business, as apps that need advanced access for permissions must be connected to a verified business entity.

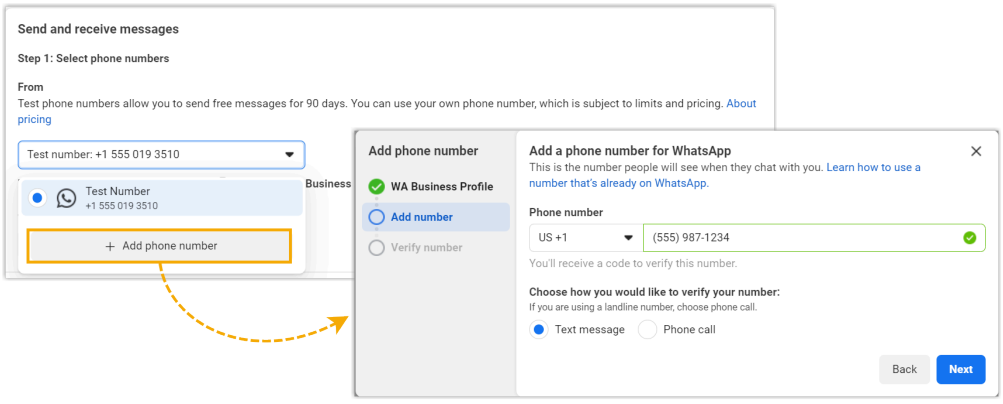



3. In the **Add products to your app** page, scroll down to find **WhatsApp** and click **Set up**.

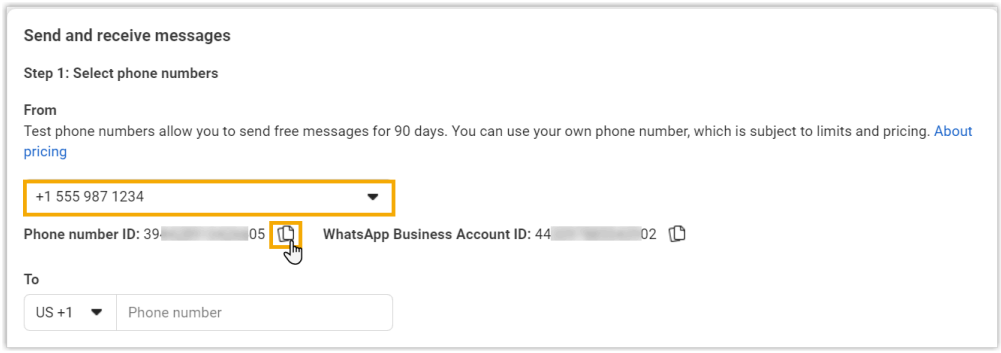



You are redirected to the **Quickstart** page of the WhatsApp product.

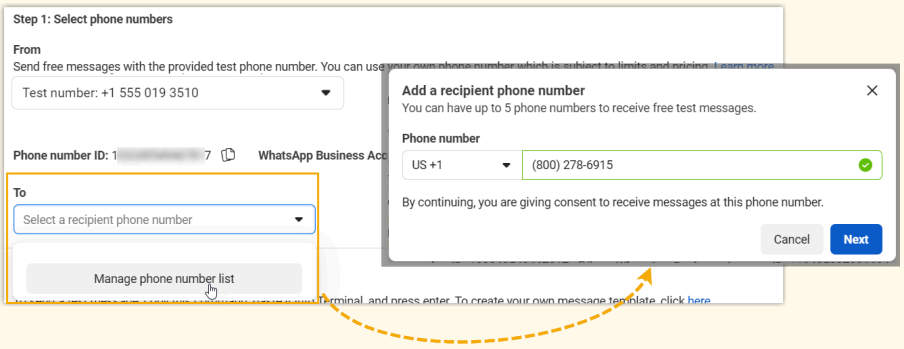
4. On the left navigation bar, go to **WhatsApp > API Setup > Send and receive messages**, and complete the followings:
    a. In the **From** drop-down list, click **Add phone number** to add your WhatsApp phone number for messaging.




    b. Select the added phone number from the list, then note down the corresponding **Phone number ID** as you will need to add them on the PBX later.




**Important:**
If you are using the test number provided by WhatsApp for demo or testing purposes, you need to specify the recipients' phone number in the **To** drop-down list, otherwise message sending may FAIL.



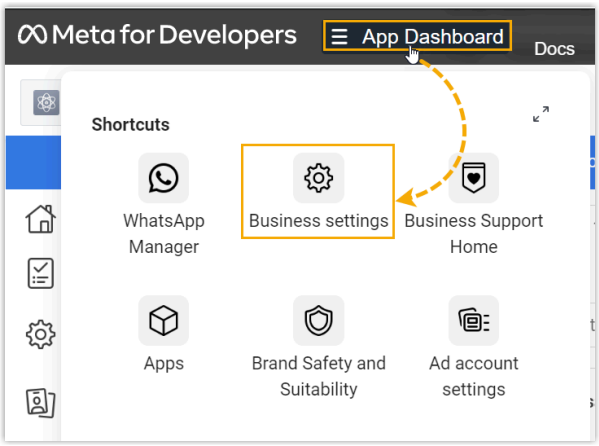

5. On the left navigation bar, go to **App settings > Basic**, note down the **App secret** of the app, as you will need it later on PBX.


## Step 2. Obtain essential credentials on 'Meta Business Suite' portal

On 'Meta Business Suite' portal, create a system user and grant permissions to the user, then generate an **access token** for the user to grant access the Meta App you created in the previous step, which is required when configuring WhatsApp channel on the PBX. Additionally, obtain the WhatsApp Business Account ID, which is needed to retrieve message templates associated with the account.

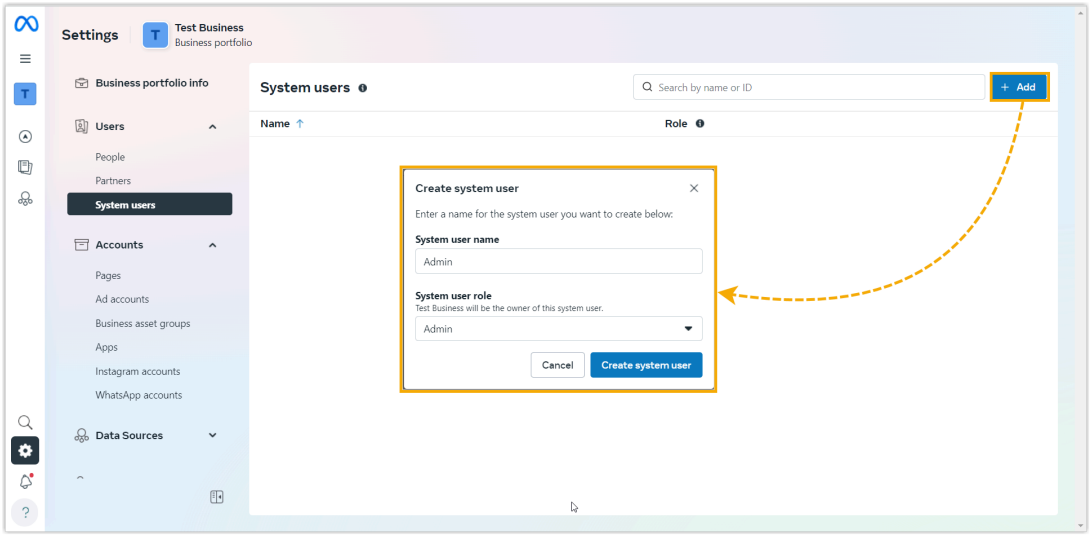
**Important:**
It is recommended to use the access token from **Meta Business Suite** instead of the one from **Meta for Developer** portal, as the latter is a temporary token that may cause missed messages once it expires.

1. At the top-left corner of the 'Meta for Developers' portal, go to **App Dashboard > Business settings**.

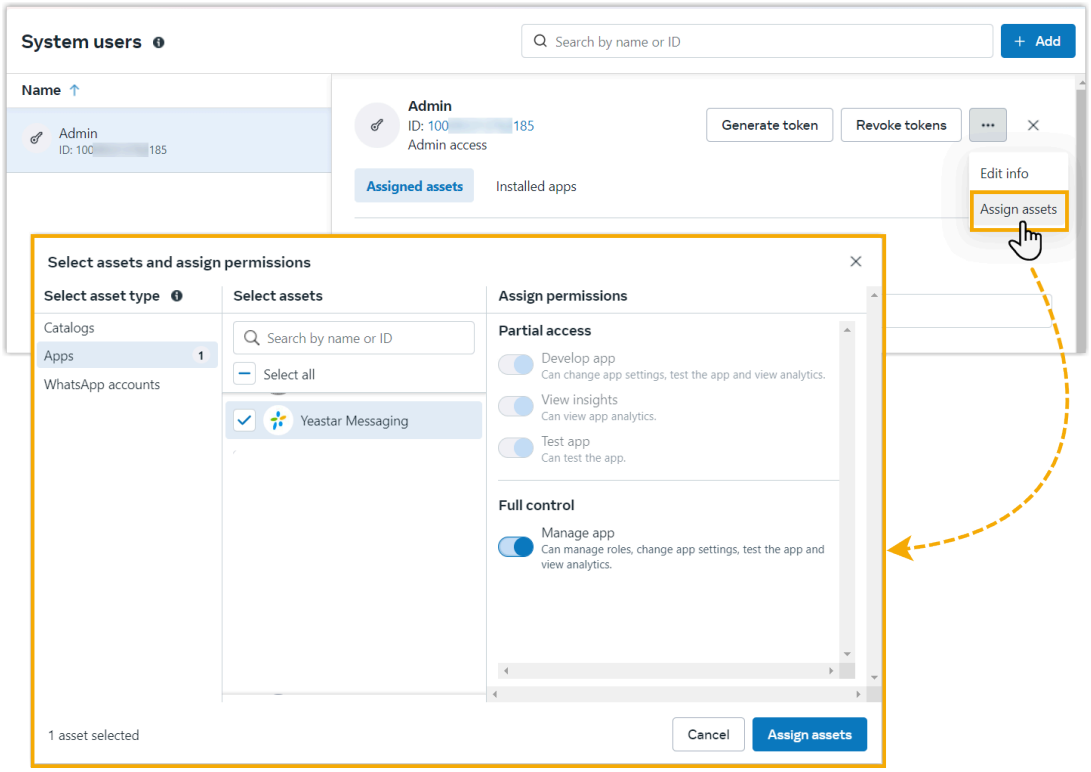



You are redirected to the **Business settings** page of 'Meta Business Suite' portal.

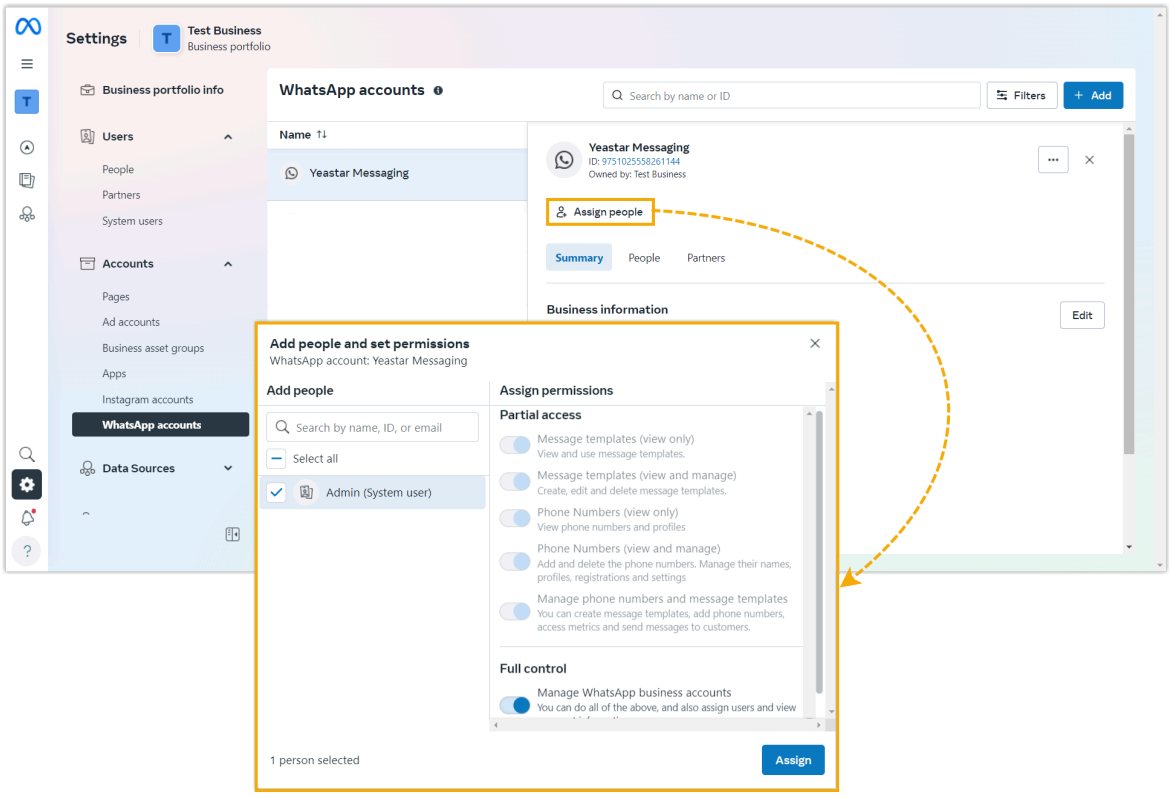
2. Go to **Users > System users**, create a system user and grant app permission to the user.
   a. Click **Add** to create a system user with **Admin** role.




   b. Select the created user, click **Add assets** and grant the full control permission of the app to the created user.

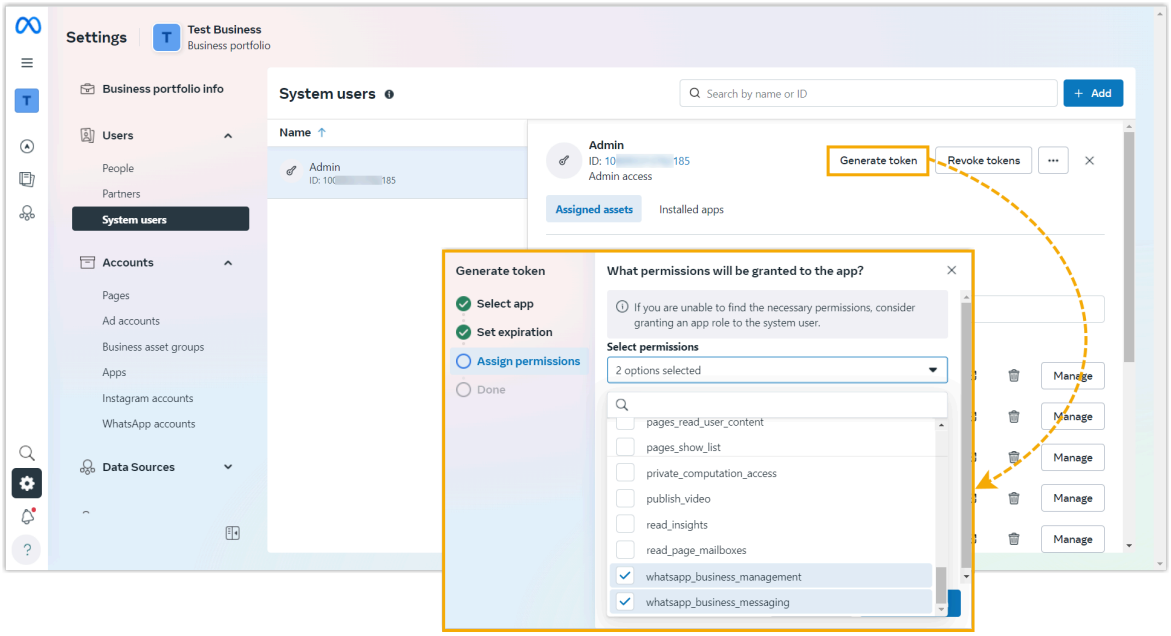



3. Go to **Accounts > WhatsApp Accounts**, add the created user to your WhatsApp Business account and grant the user full control permission.



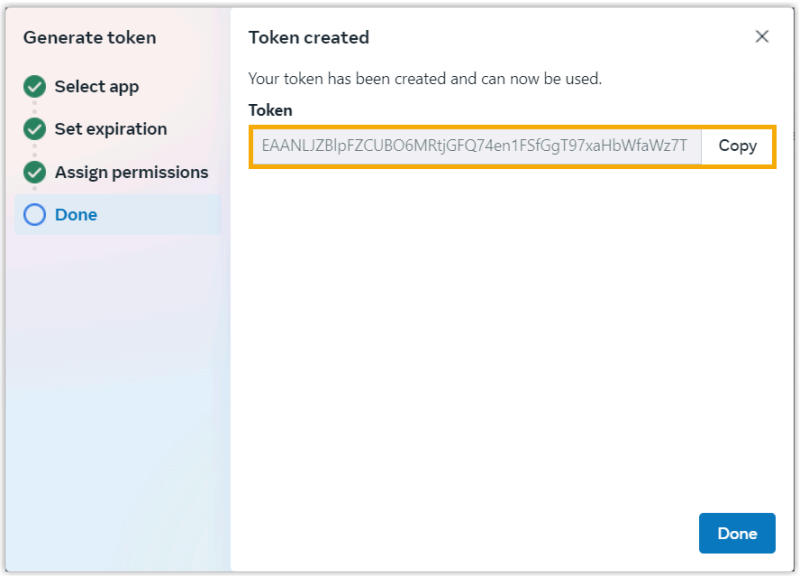
4. Go back to **Users > System users**, generate an access token with the `whatsapp_business_messaging` and `whatsapp_business_management` permissions enabled.

> **Note:**
> By default, the token expires after 60 days. You can set it to **Never** if you don't want the token to expire.

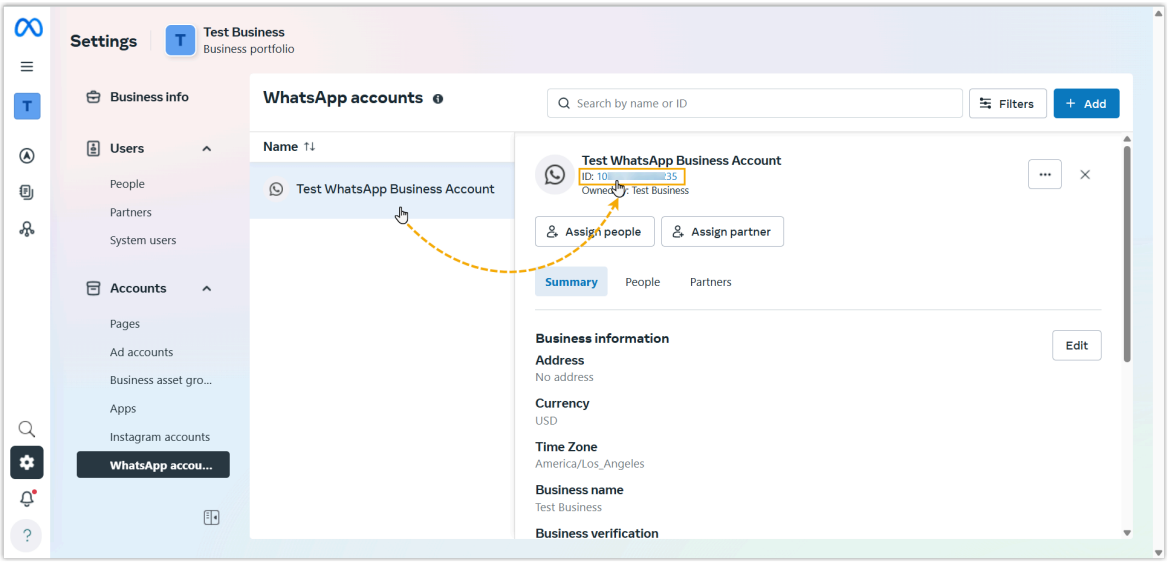



The pop-up window shows the generated access token.

> **Important:**
> Make sure that you have copied and properly saved the access token before closing the pop-up window, as it is only displayed ONCE.



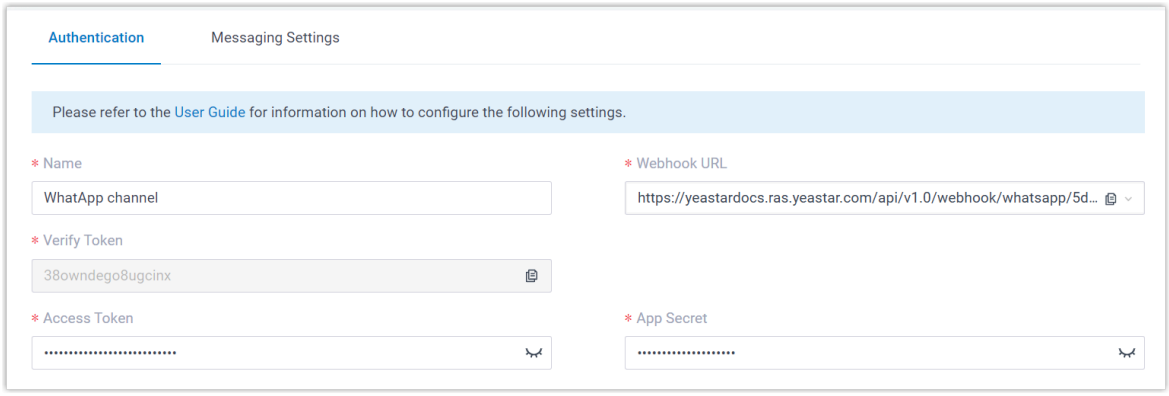

5. Go to **Accounts > WhatsApp accounts**, click your WhatsApp Business Account, then copy the account ID.




## Step 3. Create and configure a WhatsApp channel on PBX

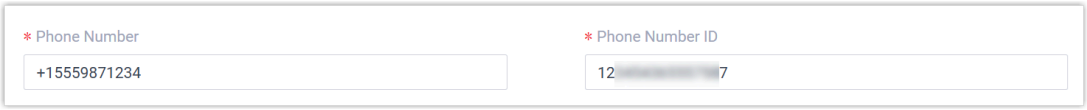
On the PBX, create a WhatsApp channel and configure it using the information obtained in the previous steps. This ensures that the PBX can connect to the WhatsApp for messaging.

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click **Add**, and select **WhatsApp**.
3. In the **Authentication** tab, enter the authentication information of WhatsApp.



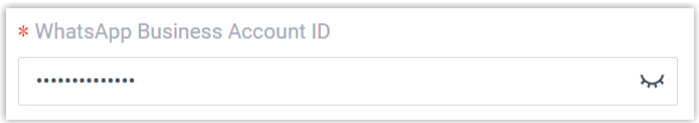

- **Name**: Enter a name to help you identify the channel.
- **Webhook URL**: Select and note down the Webhook URL, as you will need it later on WhatsApp.
- **Verify Token**: Note down the verify token, as you will need it later on WhatsApp.
- **Access Token**: Paste the Access Token obtained from 'Meta Business Suite' portal.
- **App Secret**: Paste the App Secret obtained from 'Meta for Developers' portal.

4. In the **Messaging Settings** tab, configure the channel.
   a. Enter WhatsApp phone number information.



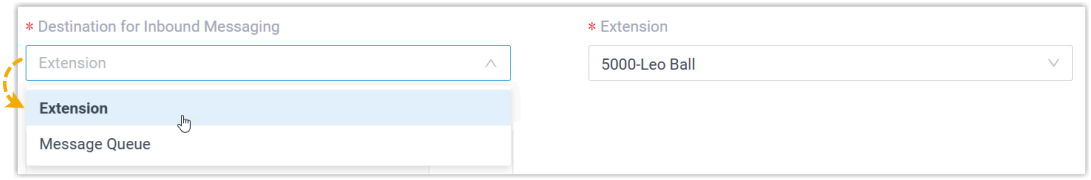

   - **Phone Number**: Enter the WhatsApp phone number in E.164 format (`[+][country code][phone number]`). For example, `+15559871234`.
   - **Phone Number ID**: Paste the phone number ID.

   b. In the **WhatsApp Business Account ID** field, paste the account ID obtained from 'Meta Business Suite' portal.



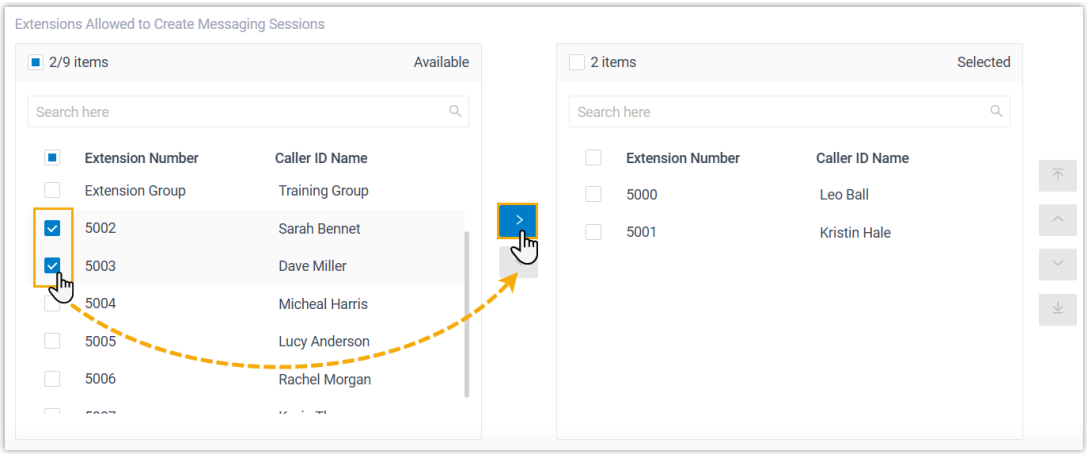

   PBX will automatically synchronize the message templates associated with the WhatsApp account to the channel.

   c. In the **Destination for Inbound Messaging** drop-down list, specify the destination of inbound messages from the number.

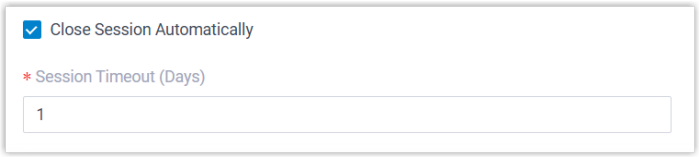



| Option | Description |
|---|---|
| Extension | If selected, choose an extension from the **Extension** drop-down list.<br>Only the extension user can receive inbound messages from the number. |
| Message Queue | If selected, choose a queue from the **Message Queue** drop-down list.<br>All the agents in the selected message queue can receive inbound message(s) of new sessions in the queue. However, only the user who picks up a session will be able to receive and respond to the follow-up inbound messages in the session. |
| Third-Party Message Analytics Platform (Transmitted via API) | If selected, inbound messages will be automatically forwarded to a third-party message analytics platform via API for advanced processing.<br>**Note:**<br>To enable automatic forwarding of inbound messages to a third-party message analytics platform, ensure that your PBX server has been integrated with the third-party message analytics platform via API. Once this option is selected, the PBX system will automatically transmit inbound messages to the designated platform. You can get notified by monitoring the API event (30031) New Message Notification. Additionally, the PBX provides a comprehensive Message API suite for advanced message interaction with the integrated third-party message analytics platforms. |

d. In the **Extensions Allowed to Create Messaging Sessions** section, select the extensions that are allowed to initiate a messaging session with customers.




e. **Optional:** If you want the system to automatically close the sessions that have been inactive for a specific period of time, select the checkbox of **Close Session Automatically**, then set the timeout in the **Session Timeout (Days)** field.

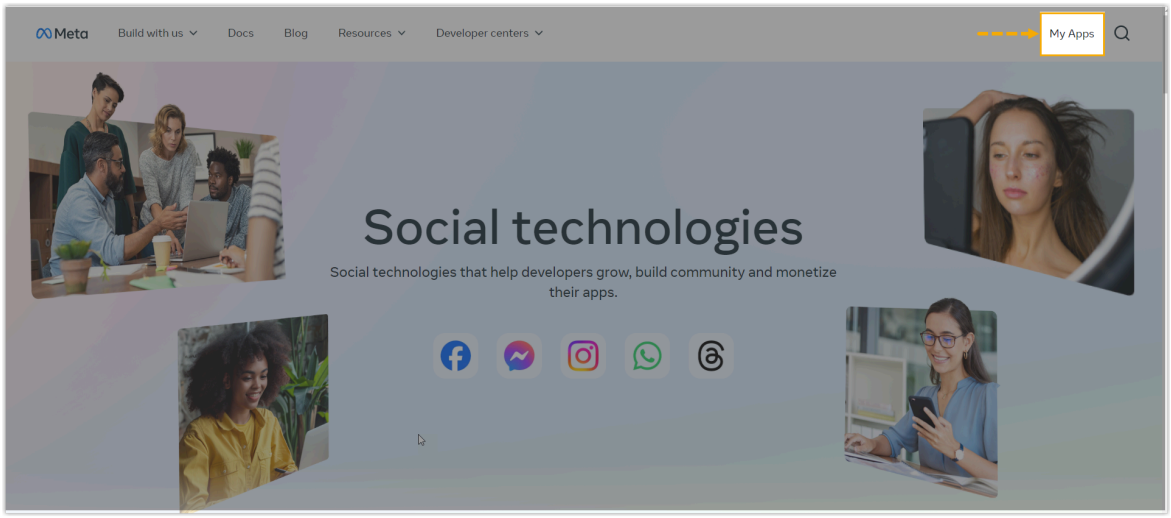



5. Click **Save**.

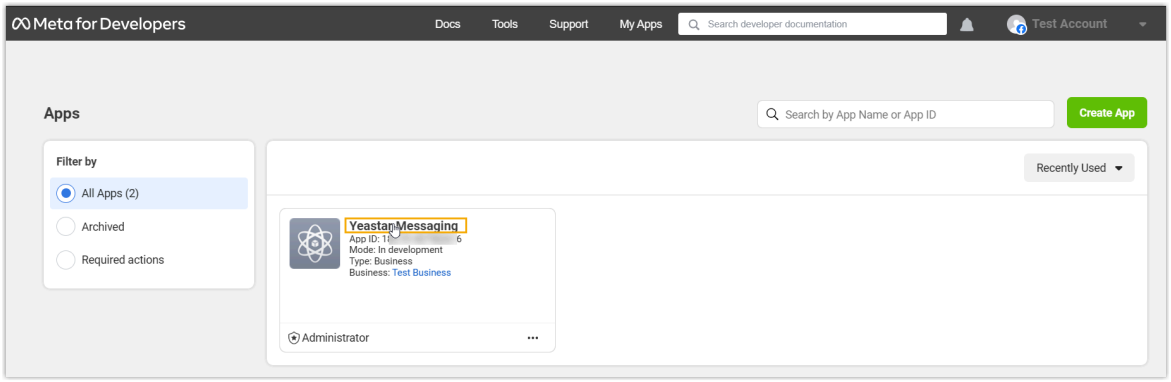
## Step 4. Configure webhook in the Meta app

On the 'Meta for Developers' portal, set up a webhook for your Meta app to receive real-time message events. This allows the PBX to process incoming messages from WhatsApp.

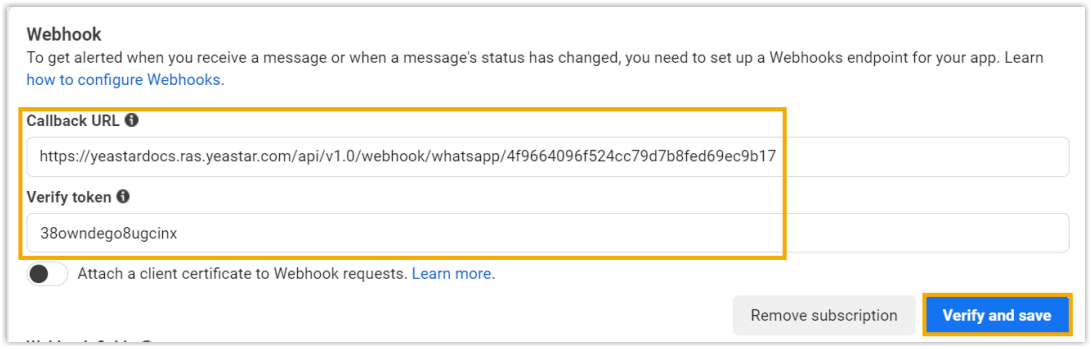
1. Log in to 'Meta for Developers' portal with your Meta Developer account, then go to **My Apps** from the top menu.



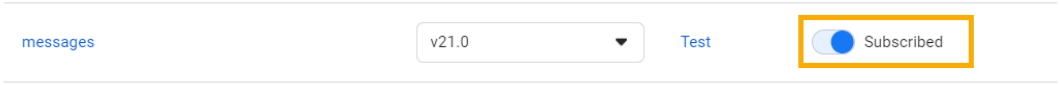

2. Click the created app to enter the details page.




3. Go to **WhatsApp > Configuration** to configure the messaging webhook and subscribe to webhook field, so that PBX can get notified upon receiving WhatsApp messages.
    a. Paste the Webhook URL and verify token obtained from the PBX.

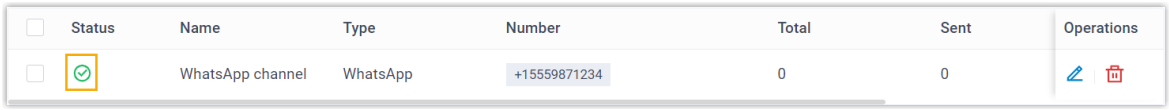



    b. In the **Webhook fields** section, subscribe to **messages** webhook field.



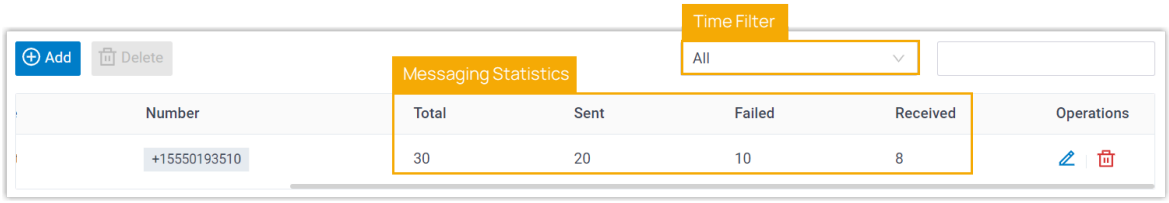

## Result

- The **Status** of the WhatsApp channel shows , which indicates that you have successfully created a WhatsApp channel.




- PBX automatically tracks and records the number of messages sent and received on the channel, where the **Total** column displays the total amount of the sent messages, including both successfully sent messages and failed ones.

> **Tip:**
> You can filter the statistics by a time period using the time filter.




## What to do next

Send text messages to the phone number and see if the specified agent can receive messages on his or her Linkus UC Client.

**Related information**

Check and Manage External Chat Logs
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

# View WhatsApp Message Templates

Yeastar P-Series PBX System supports WhatsApp message templates, allowing extension users to send pre-approved, structured messages to their customers.

## Introduction

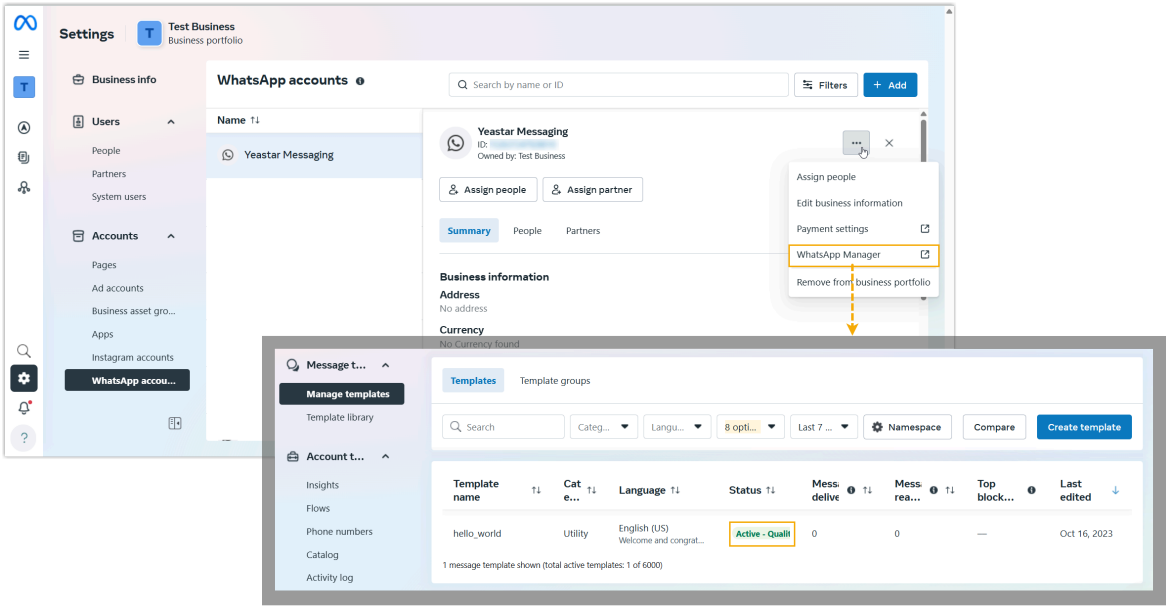
PBX automatically synchronizes approved message templates based on the WhatsApp Business Account ID associated with the WhatsApp channel. By default, extension users can reply to inbound messages within the WhatsApp channel during the WhatsApp 24-hour customer service window. To proactively send messages, such as initiating a new WhatsApp session or launching a WhatsApp campaign for bulk messaging, outside this 24-hour time window, users must use these synchronized template messages.

- For more information about how to view message templates for a WhatsApp channel in PBX, refer to the instructions below.
- For more information about how to use template messages in a WhatsApp campaign, see Create a WhatsApp Campaign.
- For more information about how users can use the message templates, see Agent Guide - Start a Message Session via a WhatsApp Channel.

## Prerequisites

- Ensure that the firmware of PBX server is 37.20.0.21 or later.
- Message templates have been created and approved in your WhatsApp Business Account.

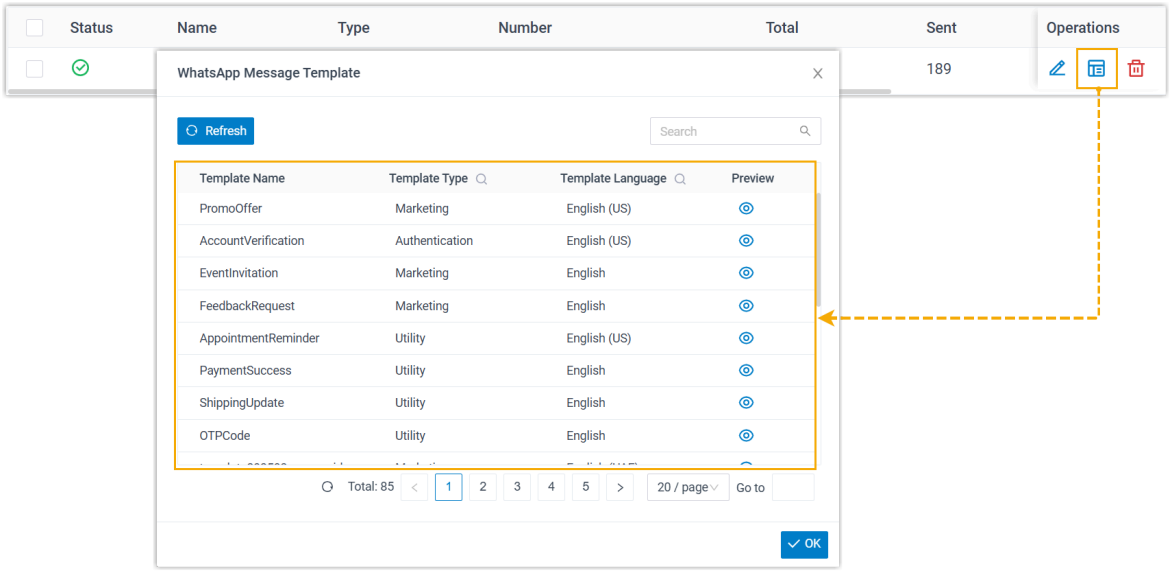
> **Note:**
> - Only templates with **Active** status will be synchronized to the PBX; marketing templates of the **Catalog** type will be excluded.
> - The PBX supports synchronizing up to 250 message templates for each WhatsApp channel.
> - Variable names in the template support only lowercase letters and numbers. Do not use underscores or special characters, as this may affect usage.




- A WhatsApp channel has been set up with your WhatsApp Business Account.

## Procedure

1. Log in to PBX web portal, go to **Messaging > Message Channel**.
2. Click beside a WhatsApp channel.




A window pops up, displaying all synchronized message templates associated with your WhatsApp Business Account.

3. To preview a message template, click .

4. To update the list and content of message templates to the latest version, click **Refresh**.

> **Note:**
> The system automatically refreshes the templates once a day by default. If needed, you can also refresh the list manually.

# Message Queue Setup

## Create a Message Queue

Yeastar P-Series PBX System allows to route messages from different message channels to message queues, so as to share workload between agents and reduce customer service response time. This topic describes how to create a message queue.

### Limitation

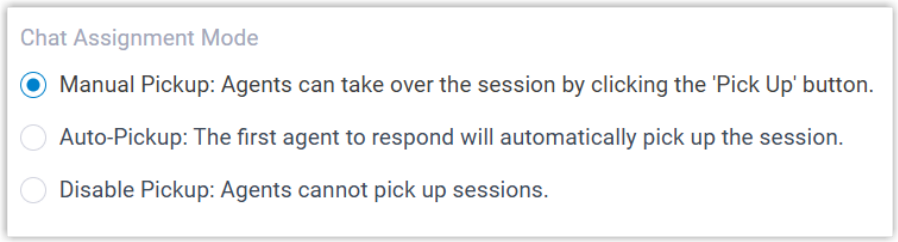
| Product Model | P520 | P550 | P560 | P570 |
|---|---|---|---|---|
| Message Queue | 16 | 16 | 32 | 64 |
| Agents per Message Queue | 20 | 25 | 60 | 120 |

### Requirements

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: 37.20.0.21 or later

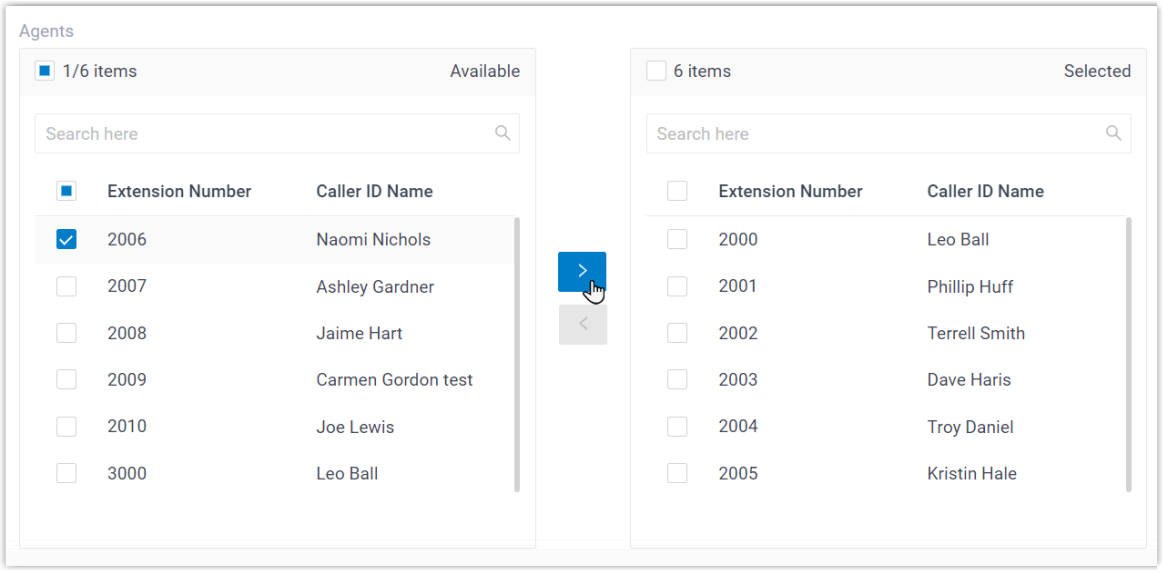
### Procedure

1. Log in to PBX web portal, go to **Messaging > Message Queue**.
2. Click **Add**.
3. In the **Name** field, specify a name to help you identify it.
4. In the **Chat Assignment Mode** section, configure the assignment mode according to your needs.




| Mode | Description |
|---|---|
| Manual Pickup | All agents can view and reply to messages until an agent manually click the **Pick Up** button to pick up the session. |
| Auto-Pickup | All agents can view the messages, and the first agent to reply automatically picks up the session.<br><br>**Tip:**<br>If you select this mode, make sure to inform all agents in the queue in advance to avoid incorrect operations. |
| Disable Pickup | All agents can view and reply to messages, and sessions cannot be picked up. |

5. In the **Agents** section, select the desired extension users from the **Available** box to the **Selected** box.



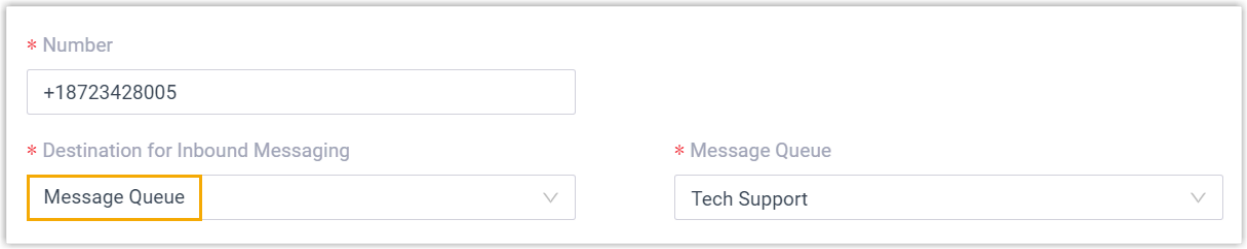

6. Click **Save**.

### Result

All the selected extension users are assigned as agents of the message queue.

### What to do next

Set the message queue as the inbound message destination of a channel number (Path: **Messaging > Message Channel >** **> Messaging Settings**).




**Related information**

Manage Message Queues
User Guide - Manage customer queries from SMS channel on Linkus Web Client / Desktop Client
User Guide - Manage customer queries from SMS channel on Linkus Mobile Client

## Manage Message Queues

This topic describes how to edit a message queue, and delete message queue(s).

### Edit a message queue

1. Log in to PBX web portal, go to **Messaging > Message Queue**.
2. Click beside the queue that you want to edit.
3. Change the settings according to your needs.
4. Click **Save**.

### Delete message queues

**Important:**
Before you delete a message queue, make sure that the queue is not set as the inbound messaging destination of a message channel.

1. Log in to PBX web portal, go to **Messaging > Message Queue**.
2. To delete a queue, do as follows:
    a. Click  beside the queue that you want to delete.
    b. In the pop-up window, click **OK**.
3. To delete queues in bulk, do as follows:
    a. Select the checkboxes of the queues that you want to delete.
    b. At the top of the list, click **Delete**.
    c. In the pop-up window, click **OK**.

# Message Campaign

## Message Campaign Overview

Yeastar P-Series PBX System supports a message campaign feature that allows you to send bulk messages to a group of contacts through specified messaging channel. This feature is commonly used for marketing promotions, notifications, reminders, and customer engagement.

### Requirements

- **Firmware**: Version 37.20.0.21 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)

### Limitations

- You can create up to **1,000** message campaigns.
- Each campaign can include up to **1,000** contacts.

### Supported channels

You can create message campaigns for **SMS** and **WhatsApp** channels, allowing you to reach your contacts through their preferred communication method.

For more information about the campaign configuration, see the following topics:

- Create an SMS Campaign
- Create a WhatsApp Campaign

### Campaign Status

The following table describes different statuses of the message campaign.

| Status | Description |
|---|---|
| Draft | The campaign is saved as a draft. Messages will not be sent. |
| Scheduled | The campaign is scheduled to be sent at the specified time. |
| Pending | The campaign is waiting to send messages because another campaign is in progress. |
| Executing | The campaign is currently sending messages. |
| Completed | The campaign has completed sending all messages. |
| Stop | The campaign was unexpectedly stopped due to a system issue, such as system restart, subscription issue, etc. |
| Retrying | The campaign is retrying to send messages. |

## Create an SMS Campaign

SMS campaigns allow you to send targeted messages directly to your contacts' mobile phones, making it easy to reach customers quickly and efficiently. This topic describes how to create a message campaign for an SMS channel.

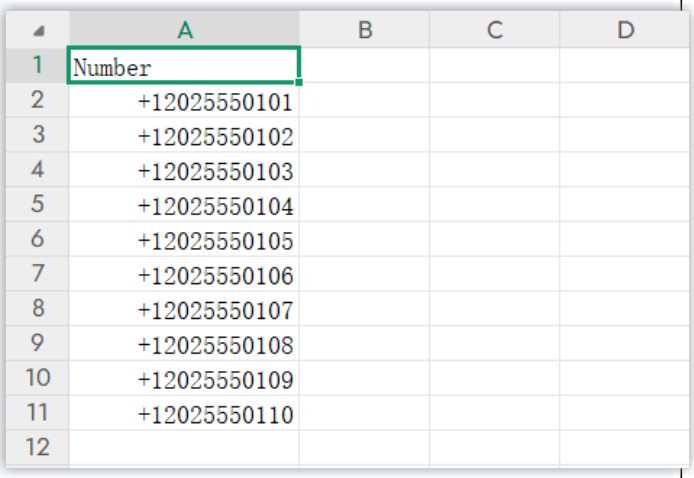
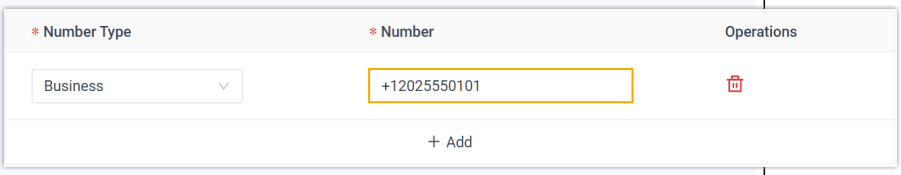
### Requirements

- **Firmware**: Version 37.20.0.21 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)

### Prerequisites

Before you begin, make sure that the following resources are ready for a message campaign:

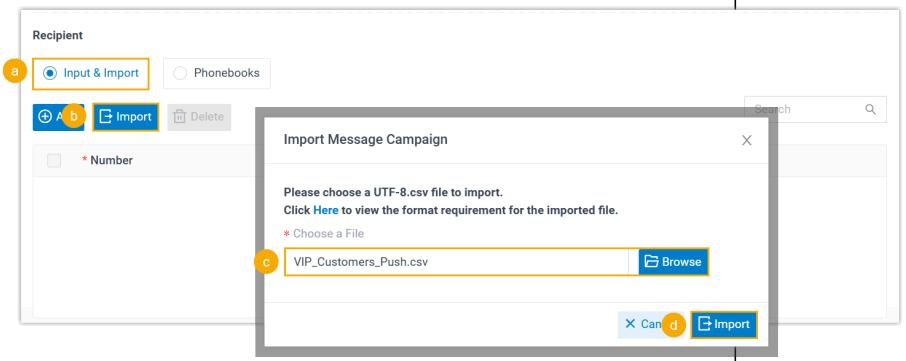
| Item | Description |
|---|---|
| Message Channel | Set up and configure an SMS channel.<br><br>**Note:**<br>Ensure your account with the selected service provider has sufficient credits or quota to support your planned bulk messaging volume. |
| Contact List | Prepare a list of contacts with phone numbers for the campaign. |

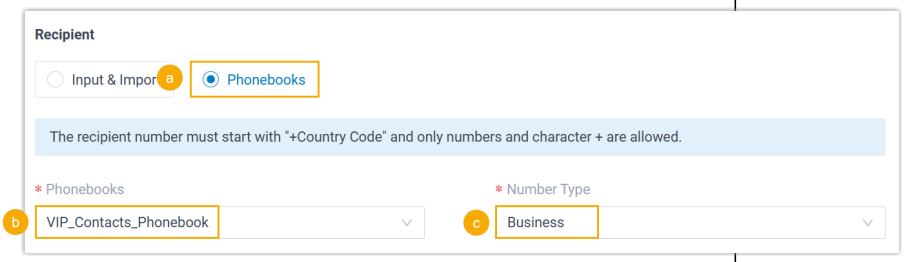
| Item | Description |
| --- | --- |
| | **Note:**<br>Each campaign supports up to 1,000 contacts.<br><br>You can associate a contact list with a campaign using one of the following methods:<br><br>• Manually add contact numbers.<br>• Import a CSV file containing contacts' phone numbers.<br><br>**Note:**<br>To use this method, ensure your file meets the following requirements:<br>◦ **Format**: UTF-8 `.csv`<br>◦ **Size**: Less than 50 MB<br>◦ **File name**: Less than 127 characters<br>◦ **Import parameters**: Use a `Number` field to provide phone numbers in E.164 format (e.g. `+1xxxxxxxxxx`), as shown in the figure below.<br><br>  <br><br><br>• Directly use the existing contacts stored in a PBX phonebook.<br><br>**Note:**<br>To use this method, ensure that the contact's phone number are stored in E.164 format, as shown in the figure below.<br><br>  <br> |

| Item | Description |
|---|---|
| Message Routing Target | Optional. If you want the message campaign to automatically create sessions, configure the desired routing target (either an extension or a message queue) in advance. |

## Procedure

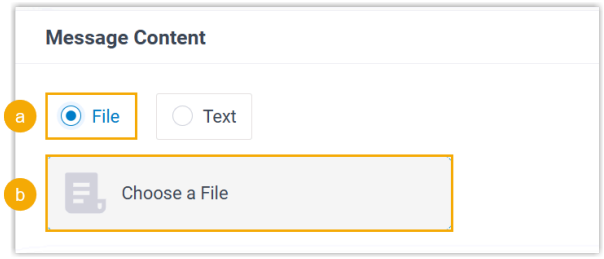
1. Log in to PBX web portal, go to **Messaging > Message Campaign**, then click **Add**.
2. In the **Basic** section, complete the basic settings.
   - **Name**: Enter a name for the campaign to help you identify it.
   - **Message Channel**: Select the desired SMS channel.
   - **Sender**: Select the number associated with the selected SMS channel for message sending.
   - **Recipient**: Specify recipients using one of the following methods.

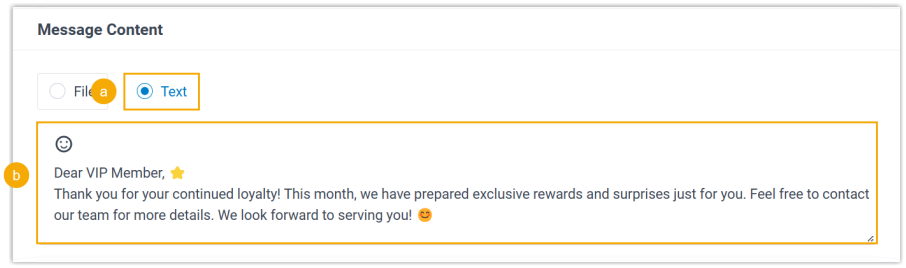
| Method | Instruction |
|---|---|
| Manual entry | Manually add contact numbers in E.164 format (e.g., `+1xxxxxxxxxx`).<br>  <br><br>a. Select **Input & Import**.<br>b. Click **Add** to manually add phone numbers. |
| Import from CSV file | Import a CSV file containing the contacts' phone numbers.<br>  <br><br>a. Select **Input & Import**. |

| Method | Instruction |
| --- | --- |
| | b. Click **Import**.<br>c. In the pop-up window, click **Browse** to select the desired file.<br>d. Click **Import**. |
| Use existing PBX phonebook | Directly use existing contacts stored in your PBX phonebook.<br>  <br>a. Select **Phonebooks**.<br>b. In the **Phonebooks** drop-down list, select the existing phonebook.<br>c. In the **Number Type** drop-down list, select the number type.<br>The system will retrieve phone numbers from the specified number types. |

3. In the **Message Content** section, customize your message content.

   You can send either a text message (SMS) or a multimedia message (MMS) that includes a file.

| Type | Instruction |
| --- | --- |
| File | To send an MMS message that include a file, do as follows:<br>**Note:**<br>• Supported file types are determined by the ITSP of the SMS channel.<br>• The file size can NOT exceed 100 MB.<br>  <br>a. Select **File**. |

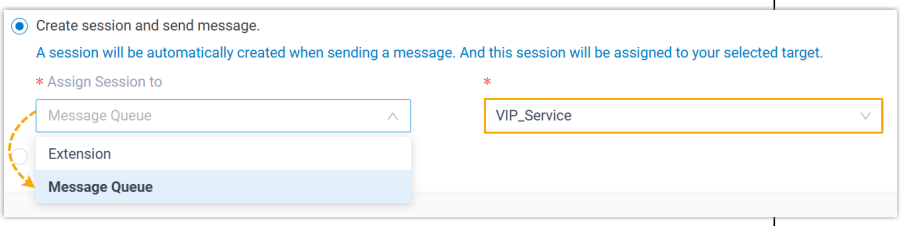
| Type | Instruction |
|---|---|
| | b. Click **Choose a File**, then select a file to upload. |
| Text | To send an SMS message, do as follows:<br><br>**Note:**<br>• The message length is up to 1600 characters.<br>• Emojis are supported.<br><br>  <br><br>a. Select **Text**.<br>b. In the text field, enter the message content and add emojis as needed. |

4. In the **Sending Rules** section, configure the message send time and the mode.
   a. In the **Send Time** section, specify when to send the message.

| Option | Description |
|---|---|
| Send Now | The campaign will be sent immediately after saving. |
| Schedule Sending | The campaign will be sent at a specified date and time.<br><br>  |
| Do NOT Send, Save as Draft | The campaign will be saved as a draft. You can edit or send it later. |

   b. In the **Send Mode** section, set whether to create sessions accordingly.

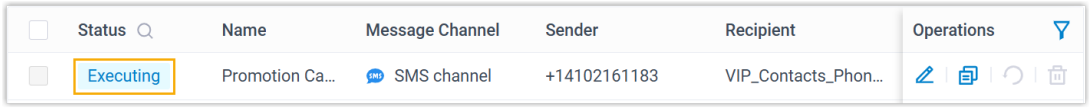
| Option | Description |
|---|---|
| Create session and send message | The system automatically create a session for each contact number when sending the campaign messages, and the sessions will be assigned to a selected target (either an extension or a message queue).<br><br>**Note:**<br>If an active session already exists for a contact number, the campaign message will be sent to the existing |

| Option | Description |
| --- | --- |
| | session instead of creating and assigning a new session to the specified target.<br>  |
| Send messages directly without creating session | No session will be created when sending a message. And the message will not be displayed in **External Chat Logs**. |

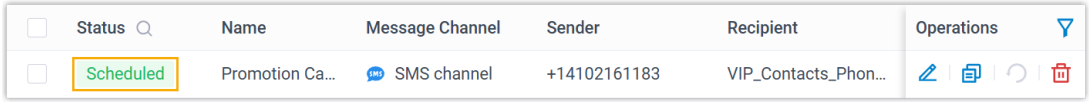
5. Click **Save**.

## Result

- A campaign is created successfully and displayed in the campaign list.
  - If you choose to send messages immediately, the campaign status will display as **Executing**, and messages will be sent to the specified phone numbers right away.



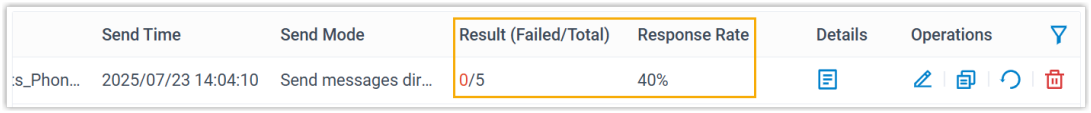

  - If you scheduled the campaign, the campaign status will display as **Scheduled**, and messages will be sent automatically at the specified time.



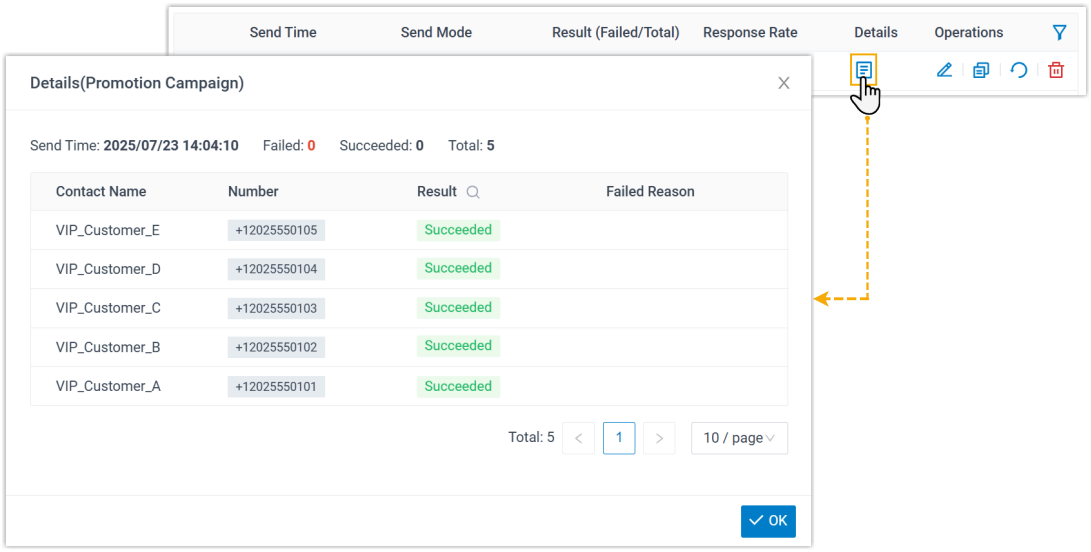

- When a campaign is marked as **Completed**, you can check its results from the campaign list.

> **Note:**
>
> - If there are any failed messages, you can click to retry sending.
> - To create a similar campaign, click to duplicate the campaign.

  - For a quick overview, check the **Result** and **Response Rate** columns.




◦ To see detailed sending information, click .




# Create a WhatsApp Campaign

WhatsApp campaigns allows you to send marketing, utility, and authentication messages directly to your contacts' mobile devices via WhatsApp using message templates, making it easy to reach customers quickly and effectively. This topic describes how to create a message campaign for a WhatsApp channel.

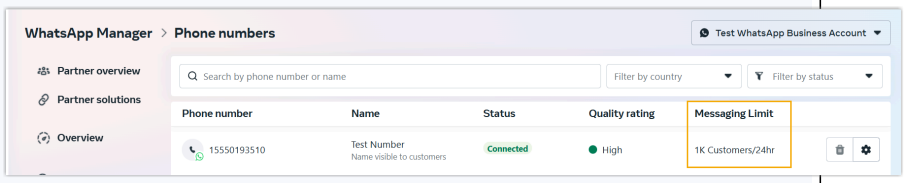
## Requirements

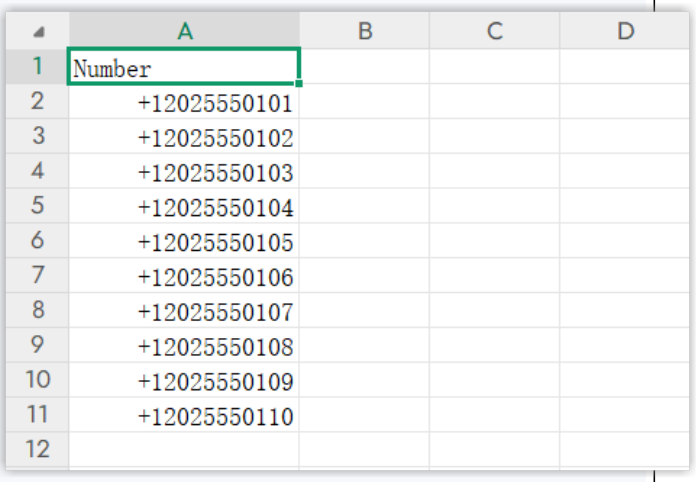
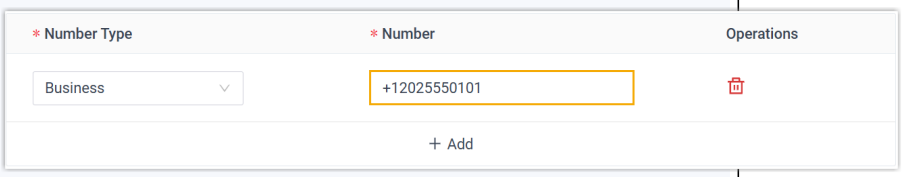
- **Firmware**: Version 37.20.0.21 or later
- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)

## Prerequisites

Before you begin, make sure that the following resources are ready for a message campaign:

| Item | Description |
| --- | --- |
| Message Channel | Set up a WhatsApp Channel with your WhatsApp Business Account.<br><br>**Note:** |

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td></td><td>Ensure your account's messaging limit can support your planned bulk messaging volume.<br> 
</td></tr>
<tr><td>Message Template</td><td>• Create message templates for your WhatsApp Business Account in advance, as message templates must be approved by WhatsApp before use.<br><br>Note:<br>Variable names in the template support only lowercase letters and numbers. Do not use underscores or special characters, as this may affect usage.<br>• Refresh the template list in PBX to ensure all approved templates from your WhatsApp account are synchronized to PBX and available for your campaign. For more information, see View WhatsApp Message Templates.</td></tr>
<tr><td>Contact List</td><td>Prepare a list of contacts with phone numbers for the campaign.<br><br>Note:<br>Each campaign supports up to 1,000 contacts.<br><br>You can associate a contact list with a campaign using one of the following methods:<br><br>• Manually add contact numbers.<br>• Import a CSV file containing contacts' phone numbers.<br><br>Note:<br>To use this method, ensure your file meets the following requirements:<br>◦ Format: UTF-8 <code>.csv</code><br>◦ Size: Less than 50 MB<br>◦ File name: Less than 127 characters<br>◦ Import parameters: Use a <code>Number</code> field to provide phone numbers in E.164 format (e.g. <code>+1xxxxxxxxxx</code>), as shown in the figure below.</td></tr>
</table>

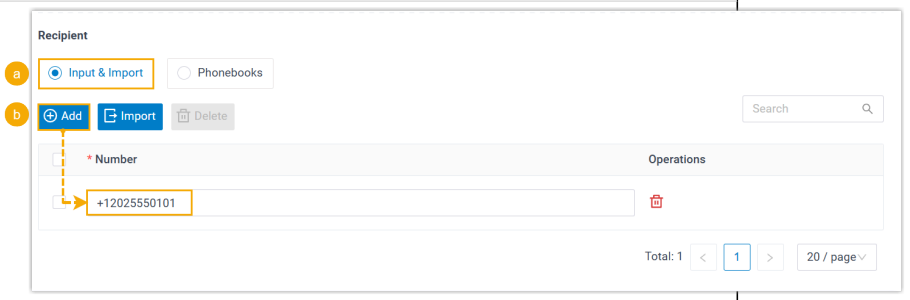
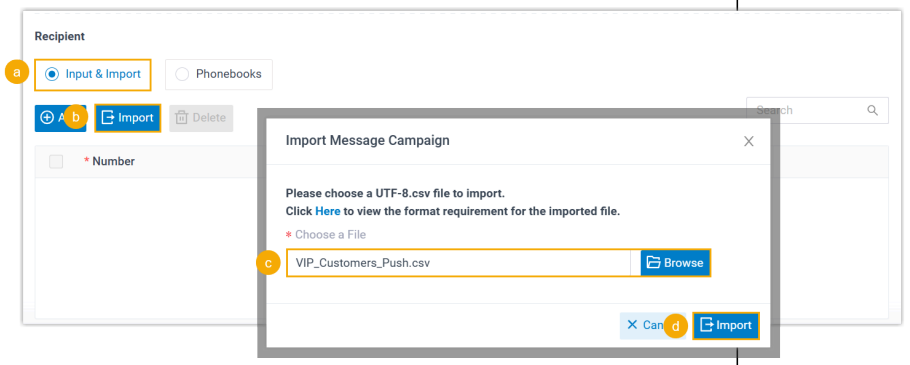
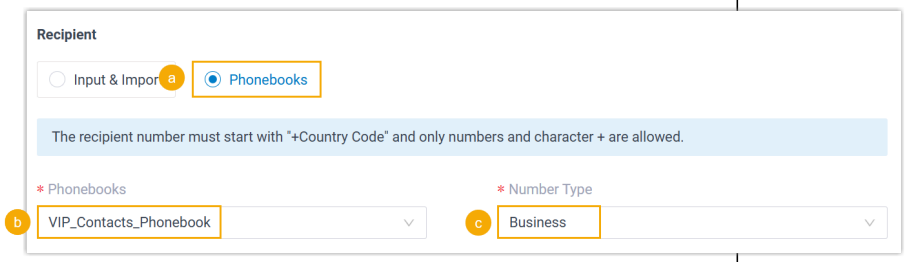
<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td></td><td>

<table>
<tr><th></th><th>A</th><th>B</th><th>C</th><th>D</th></tr>
<tr><td>1</td><td>Number</td><td></td><td></td><td></td></tr>
<tr><td>2</td><td>+12025550101</td><td></td><td></td><td></td></tr>
<tr><td>3</td><td>+12025550102</td><td></td><td></td><td></td></tr>
<tr><td>4</td><td>+12025550103</td><td></td><td></td><td></td></tr>
<tr><td>5</td><td>+12025550104</td><td></td><td></td><td></td></tr>
<tr><td>6</td><td>+12025550105</td><td></td><td></td><td></td></tr>
<tr><td>7</td><td>+12025550106</td><td></td><td></td><td></td></tr>
<tr><td>8</td><td>+12025550107</td><td></td><td></td><td></td></tr>
<tr><td>9</td><td>+12025550108</td><td></td><td></td><td></td></tr>
<tr><td>10</td><td>+12025550109</td><td></td><td></td><td></td></tr>
<tr><td>11</td><td>+12025550110</td><td></td><td></td><td></td></tr>
<tr><td>12</td><td></td><td></td><td></td><td></td></tr>
</table>
• Directly use the existing contacts stored in a PBX phonebook.<br><br>
Note:<br>
To use this method, ensure that the contact's phone number are stored in E.164 format, as shown in the figure below.<br>


</td></tr>
<tr><td>Message Routing Target</td><td>Optional. If you want the message campaign to automatically create sessions, configure the desired routing target (either an extension or a message queue) in advance.</td></tr>
</table>

## Procedure

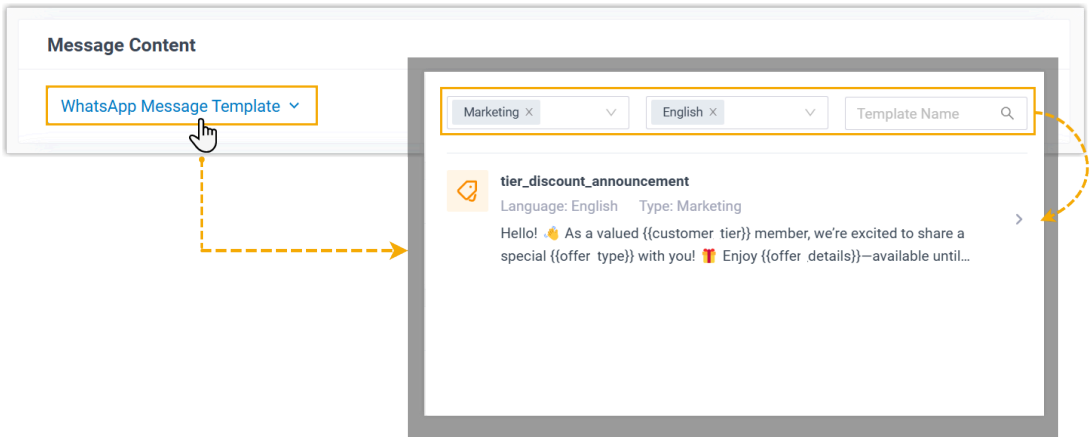
1. Log in to PBX web portal, go to **Messaging > Message Campaign**, then click **Add**.
2. In the **Basic** section, complete the following settings.
   - **Name**: Enter a name for the campaign to help you identify it.
   - **Message Channel**: Select the desired WhatsApp channel.
   - **Sender**: Select the associated WhatsApp phone number for message sending.
   - **Recipient**: Specify recipients using one of the following methods.

| Method | Instruction |
| --- | --- |
| Manual entry | Manually add contact numbers in E.164 format (e.g., `+1xxxxxxxxxx`). |

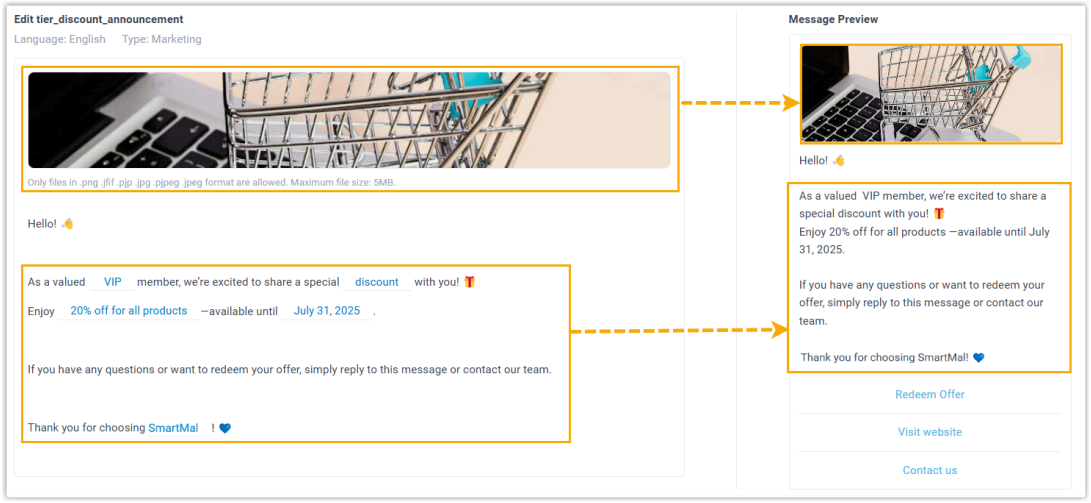
| Method | Instruction |
| --- | --- |
| |  <br>a. Select **Input & Import**.<br>b. Click **Add** to manually add phone numbers. |
| Import from CSV file | Import a CSV file containing the contacts' phone numbers.<br>  <br>a. Select **Input & Import**.<br>b. Click **Import**.<br>c. In the pop-up window, click **Browse** to select the desired file.<br>d. Click **Import**. |
| Use existing PBX phonebook | Directly use existing contacts stored in your PBX phonebook.<br>  <br>a. Select **Phonebooks**.<br>b. In the **Phonebooks** drop-down list, select the existing phonebook.<br>c. In the **Number Type** drop-down list, select the number type. |

| Method | Instruction |
| --- | --- |
| | The system will retrieve phone numbers from the specified number types. |

3. In the **Message Content** section, configure the message template to be sent.
    a. Click **WhatsApp Message Template**, then search and select the desired message template.

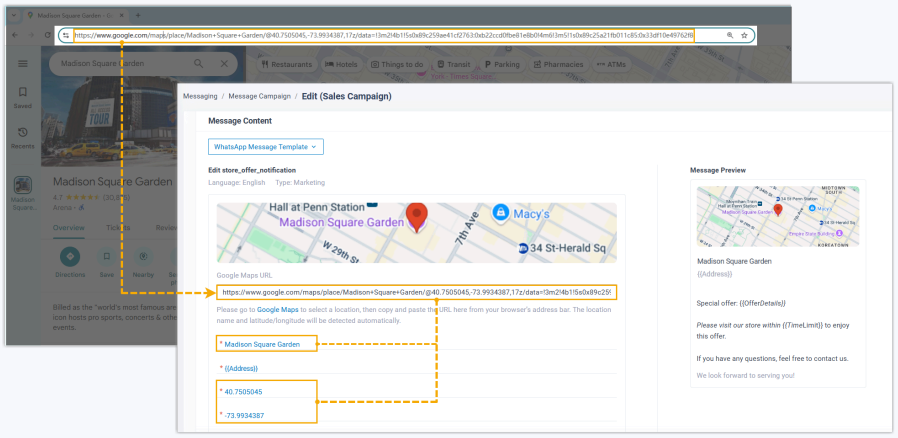



    b. If the template includes media or variable placeholders, upload the required media files and fill in specific values for all variables.




**Note:**

- You can preview the final message contents on the right panel.
- For location information, you can simply paste the Google Maps URL, the system will auto-fill the name and coordinates based on the URL. However, you need to manually enter the detailed address for the `{{Address}}` variable.



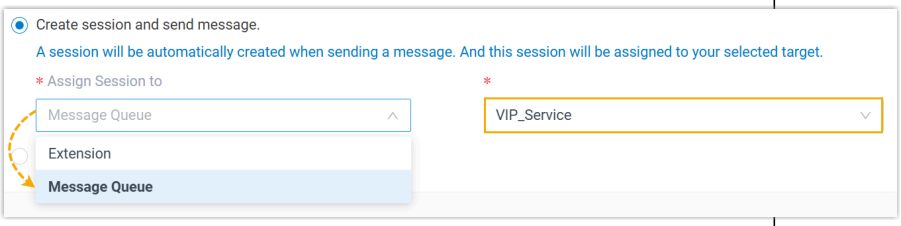

4. In the **Sending Rules** section, configure the message send time and the mode.
    a. In the **Send Time** section, specify when to send the message.

| Option | Description |
|---|---|
| Send Now | The campaign will be sent immediately after saving. |
| Schedule Sending | The campaign will be sent at a specified date and time.<br>  |
| Do NOT Send, Save as Draft | The campaign will be saved as a draft. You can edit or send it later. |



    b. In the **Send Mode** section, set whether to create sessions accordingly.

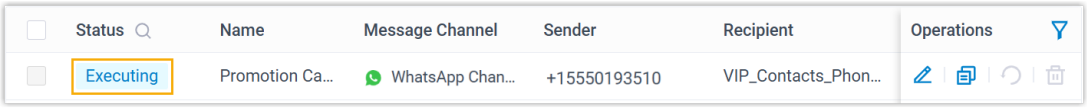
| Option | Description |
|---|---|
| Create session and send message | The system automatically create a session for each contact number when sending the campaign messages, and the sessions will be assigned to a selected target (either an extension or a message queue).<br><br>**Note:**<br>If an active session already exists for a contact number, the campaign message will be sent to the existing session instead of creating and assigning a new session to the specified target. |

| Option | Description |
| --- | --- |
| |  |
| Send messages directly without creating session | No session will be created when sending a message. And the message will not be displayed in **External Chat Logs**. |

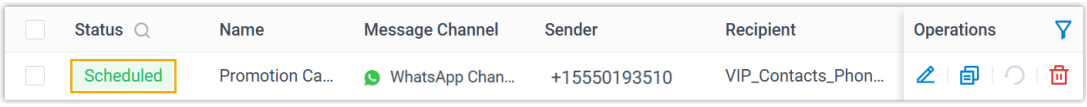
5. Click **Save**.

## Result

- A campaign is created successfully and displayed in the campaign list.
  - If you choose to send messages immediately, the campaign status will display as **Executing**, and messages will be sent to the specified phone numbers right away.



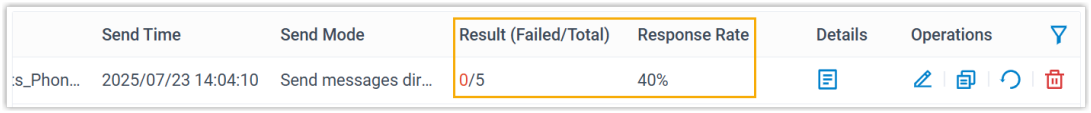

  - If you scheduled the campaign, the campaign status will display as **Scheduled**, and messages will be sent automatically at the specified time.



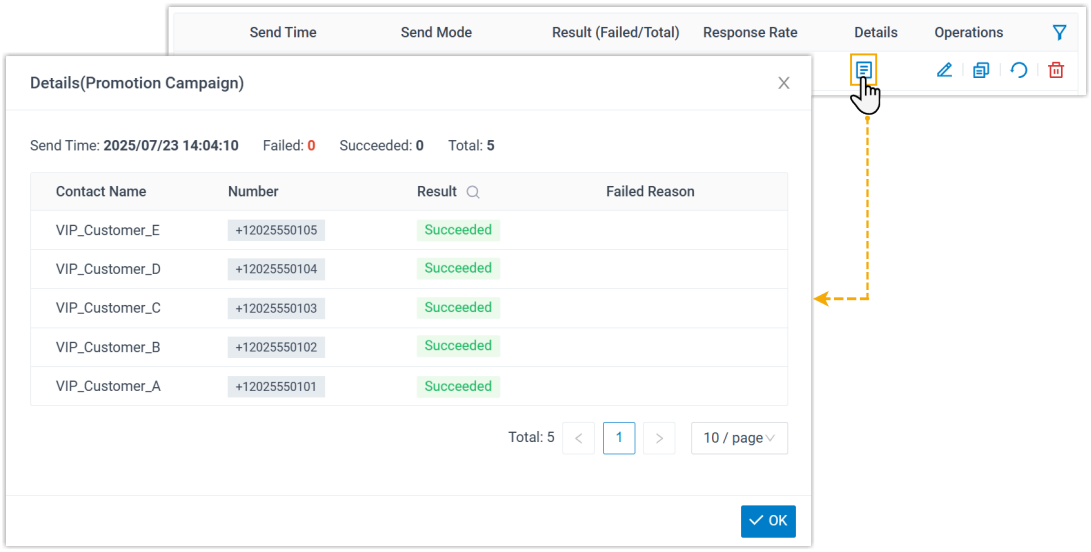

- When a campaign is marked as **Completed**, you can check its results from the campaign list.

> **Note:**
>
> - If there are any failed messages, you can click to retry sending.
> - To create a similar campaign, click to duplicate the campaign.

  - For a quick overview, check the **Result** and **Response Rate** columns.




◦ To see detailed sending information, click .




# External Chat Log Management

## Check and Manage External Chat Logs

External chat logs are comprehensive records of sessions and messages coming from various messaging channels. This topic describes how to check the external chat logs (including session information, session operation records, and detailed chat histories) and how to delete the session or chat histories on Yeastar P-Series PBX System.

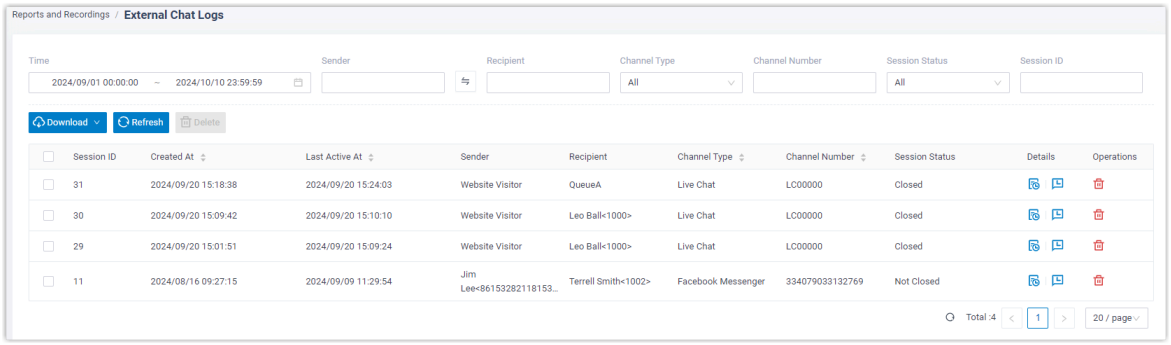
### Requirements

The firmware version of Yeastar P-Series PBX System is 37.13.0.25 or later.

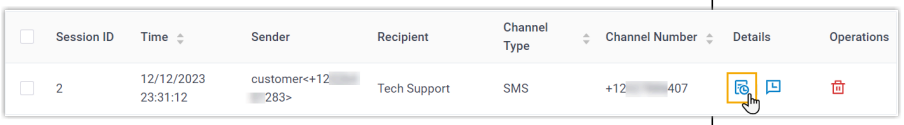
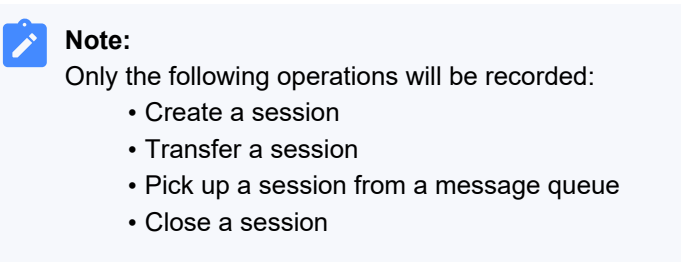
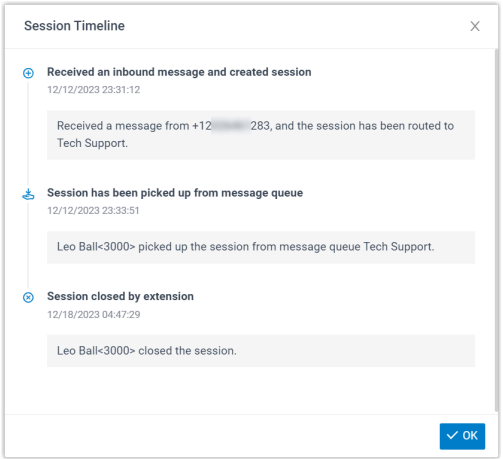
### Procedure

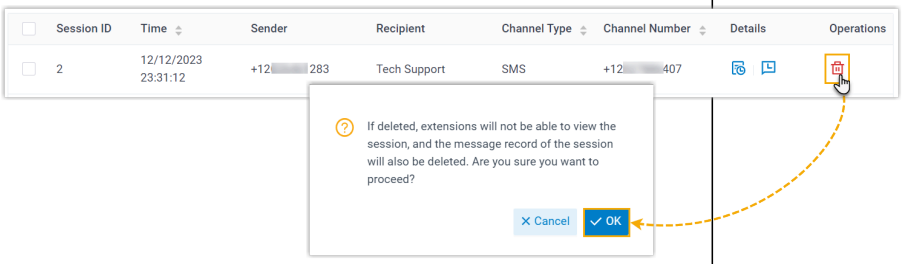
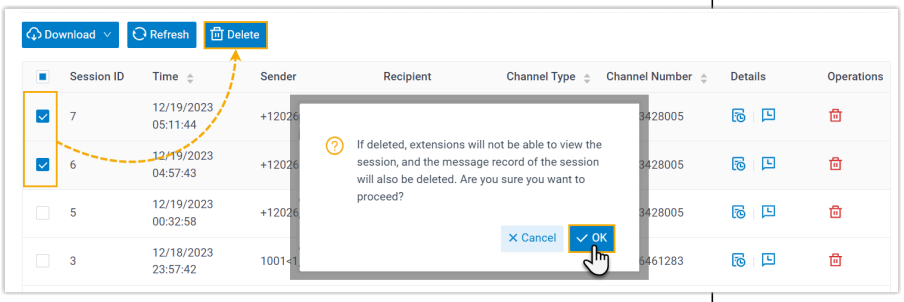
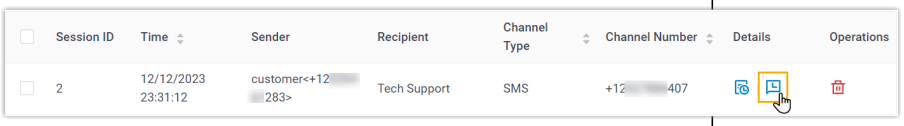
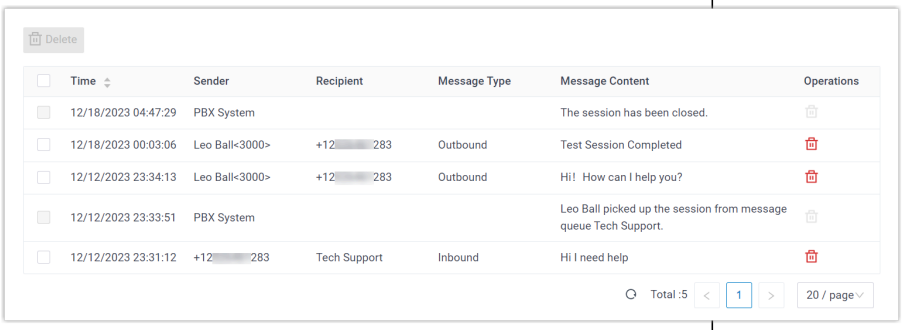
1. Log in to PBX web portal, go to **Reports and Recordings > External Chat Logs**.
2. **Optional:** Set criteria (time, channel type, or other objects) to filter the desired records.

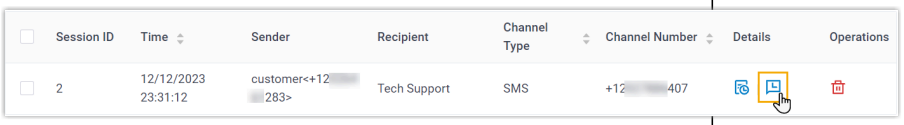
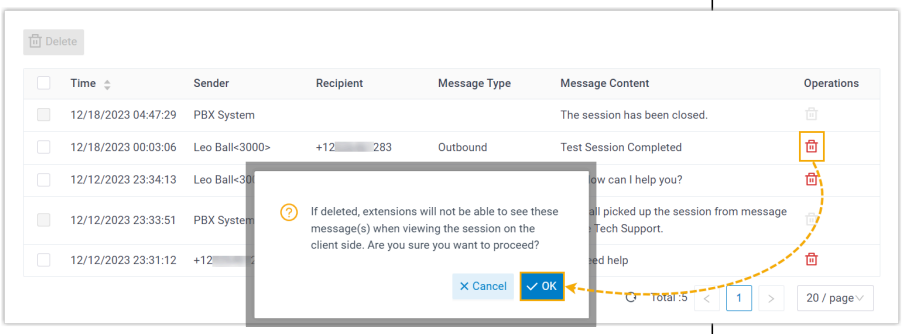
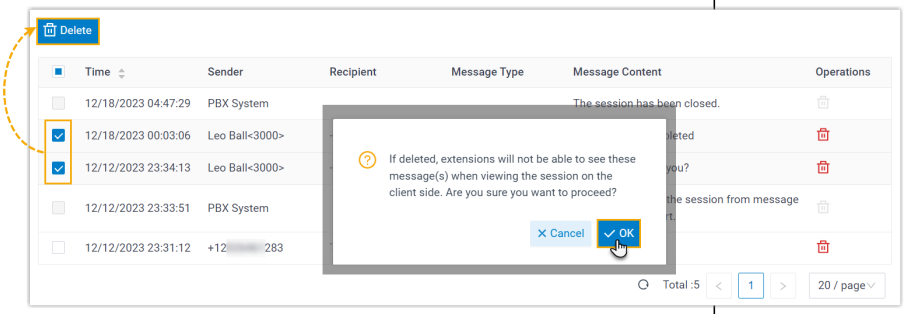
   The relevant records of external chat sessions are displayed on the page.




3. Check and manage the records according to your need.

| Operation | Instruction |
|---|---|
| **External Chat Session** | |
| Check operation records of an external chat session | a. Click  beside the desired session.<br>  <br>A window pops up, displaying the operation records of the session in a timeline view.<br>  <br>**Note:**<br>Only the following operations will be recorded:<br>• Create a session<br>• Transfer a session<br>• Pick up a session from a message queue<br>• Close a session<br>  |

| Operation | Instruction |
| --- | --- |
| Delete external chat session(s) | • To delete a session, do as follows:<br>  <br><br>a. Click  beside the session that you want to delete.<br>b. In the pop-up window, click **OK**.<br>• To delete multiple sessions, do as follows:<br>  <br><br>a. Select the desired sessions, then click **Delete**.<br>b. In the pop-up window, click **OK**. |
| **External Chat History** | |
| Check the detailed chat histories of a session | a. Click  beside the desired session.<br>  <br><br>The detailed messages in the session are displayed.<br>  <br> |
| Delete chat histories of a session | **Note:** |

| Operation | Instruction |
| --- | --- |
| | Messages sent by the PBX system can NOT be deleted.<br><br>a. Click beside the desired session.<br>  <br><br>The detailed messages in the session are displayed.<br>b. To delete a single message, do as follows:<br>  <br><br>i. Click beside the desired message.<br>ii. In the pop-up window, click **OK**.<br>c. To delete multiple messages, do as follows:<br>  <br><br>i. Select the desired messages, then click **Delete**.<br>ii. In the pop-up window, click **OK**. |

# Download External Chat Logs

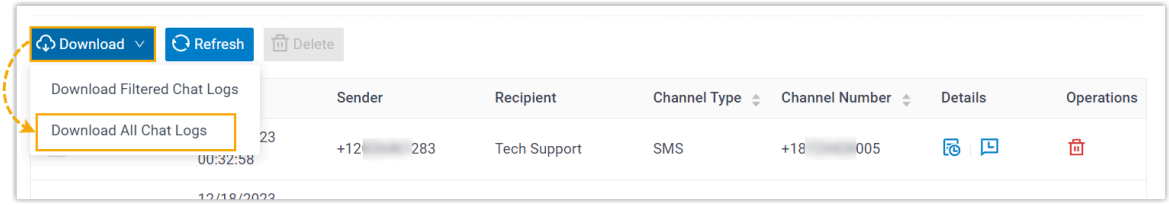
This topic describes how to download external chat logs for legal compliance, dispute resolution, training, or other purposes.

## Requirements

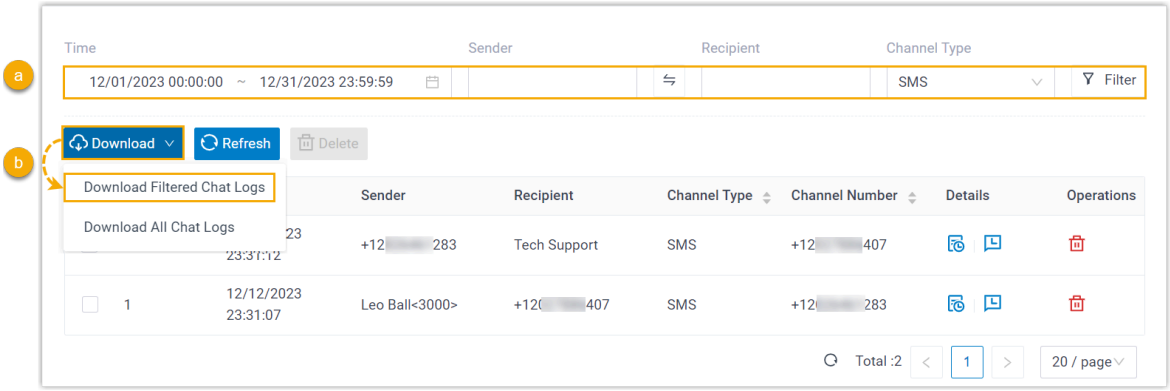
The firmware version of Yeastar P-Series PBX System is 37.13.0.25 or later.

## Procedure

1. Log in to PBX web portal, go to **Reports and Recordings > External Chat Logs**.
2. To download all chat logs, click **Download** at the top of the list, then click **Download All Chat Logs**.




3. To download specific chat logs, do as follows:




   a. Set criteria to filter the desired records.

      The relevant records of external chat sessions are displayed on the page.

   b. At the top of the list, click **Download**, then click **Download Filtered Chat Logs**.

## Result

The external chat logs are downloaded to your computer, and each downloaded chat log has two CSV files:

- **Session_Record**: This file includes basic information about all the chat sessions in the download list.
- **Chat_Data_Record**: This file contains detailed chat histories of the entire chat session.

# Agent Guide

## Omnichannel Messaging Agent Guide

This guide provides guidance on how to manage incoming customer inquiries on a unified agent portal available on web, desktop, and mobile devices.

### Audience

This guide is intended for customer service representatives (agents) who handles chat interaction with customers through multiple digital messaging channels.

### Agent portal

To enhance communication mobility and improve agent productivity, Yeastar provides a unified agent portal integrated into the Linkus UC Clients that is available on mobile, desktop, and web-based platforms. Agents can efficiently handle message-based interactions come from multiple digital channels through the supported clients.

| Supported Client | Description |
| --- | --- |
| Linkus Web Client / Desktop Client | The Linkus Web Client and Desktop Cleint allows agents to manage customers' chat interactions directly from a web browser or a Desktop application.<br>• For instructions on handling message-based interactions with customers on Linkus Web Client and Desktop Client, see Agent operations on Web Client / Desktop Client.<br>• For more information about utilizing Linkus Web Client and Desktop Client, see Linkus Web Client User Guide and Linkus Desktop Client User Guide. |
| Linkus Mobile Client | The Linkus Mobile Client is suitable for agents who need the flexibility to handle customers' chat interactions on the go.<br>• For instructions on handling message-based interactions with customers on Linkus Mobile Client, see Agent operations on Mobile Client.<br>• For more information about utilizing Linkus Mobile Client, see Linkus Mobile Client User Guide. |

# Agent Operations on Web Client / Desktop Client

## Start a Messaging Session with a Customer on Web Client / Desktop Client

If you need to send customers messages for notifications, marketing campaigns or other purposes, you can proactively start a messaging session.

> **Note:**
> You can proactively start a messaging session via **SMS** or **WhatsApp** messaging channel.

### Requirements

#### PBX Server

Contact system administrator to make sure that PBX server meets the following requirements:

- **PBX Version**: 37.20.0.21 or later.
- **Plan**: **Enterprise Plan** or **Ultimate Plan**
- **Messaging**:
  - At least one SMS or WhatsApp messaging channel is set up on PBX.
  - You have been granted with the permission to create message sessions in the channel.
  - To initiate a session via the WhatsApp channel, only WhatsApp-approved message templates can be used. Ensure that the desired templates have been synchronized to the PBX.

#### Linkus Desktop Client

Make sure that the version of your Linkus Desktop Client meets the following requirement:

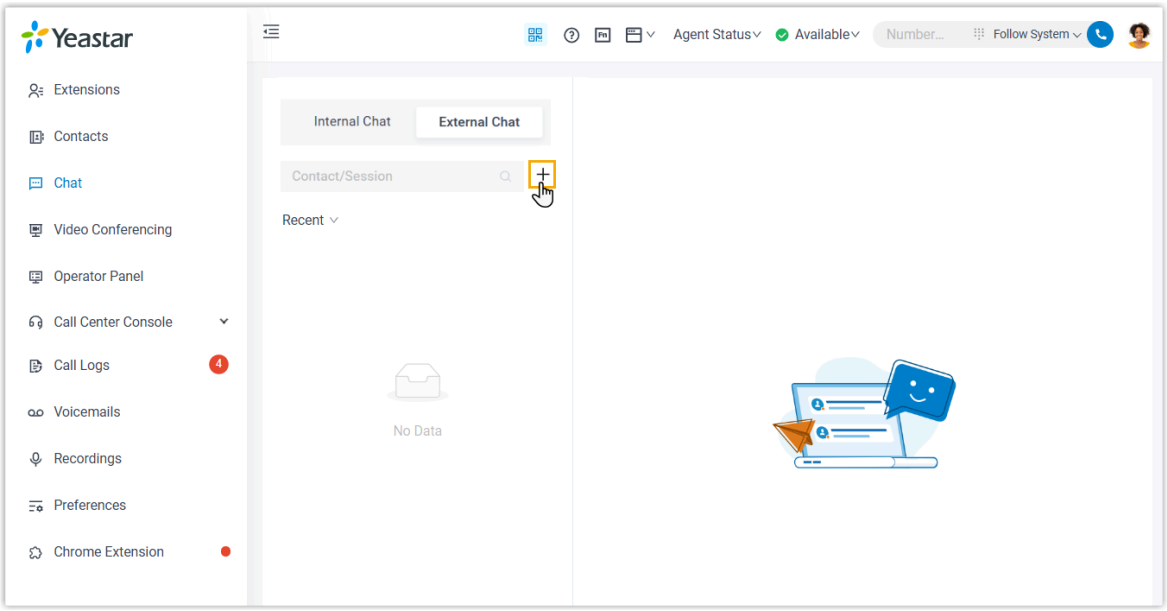
- **Windows Desktop**: 1.7.3 or later
- **macOS Desktop**: 1.7.3 or later

## Supported methods

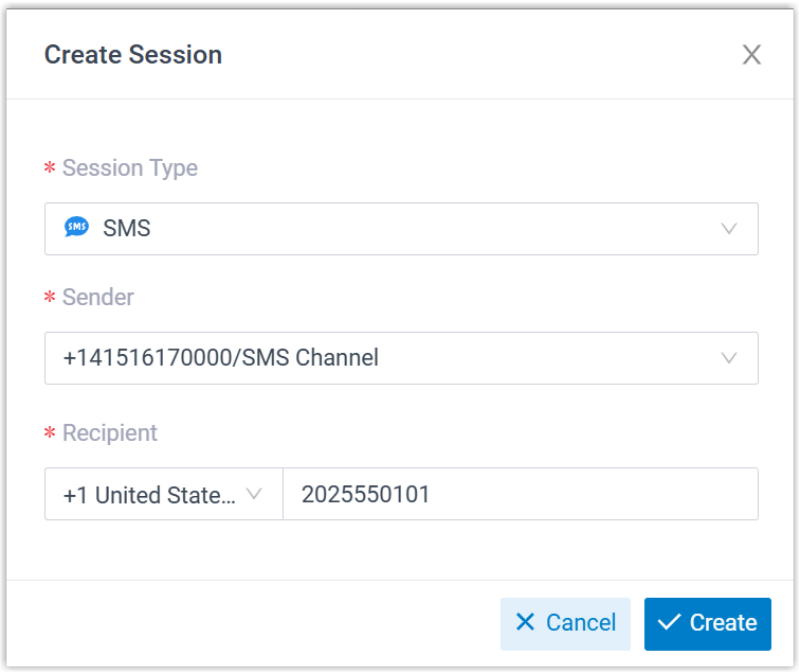
- Start a session via an SMS channel
- Start a session via a WhatsApp channel

## Start a session via an SMS channel

1. On Linkus Web Client or Desktop Client, go to **Chat > External Chat**.
2. Click + to add a session.



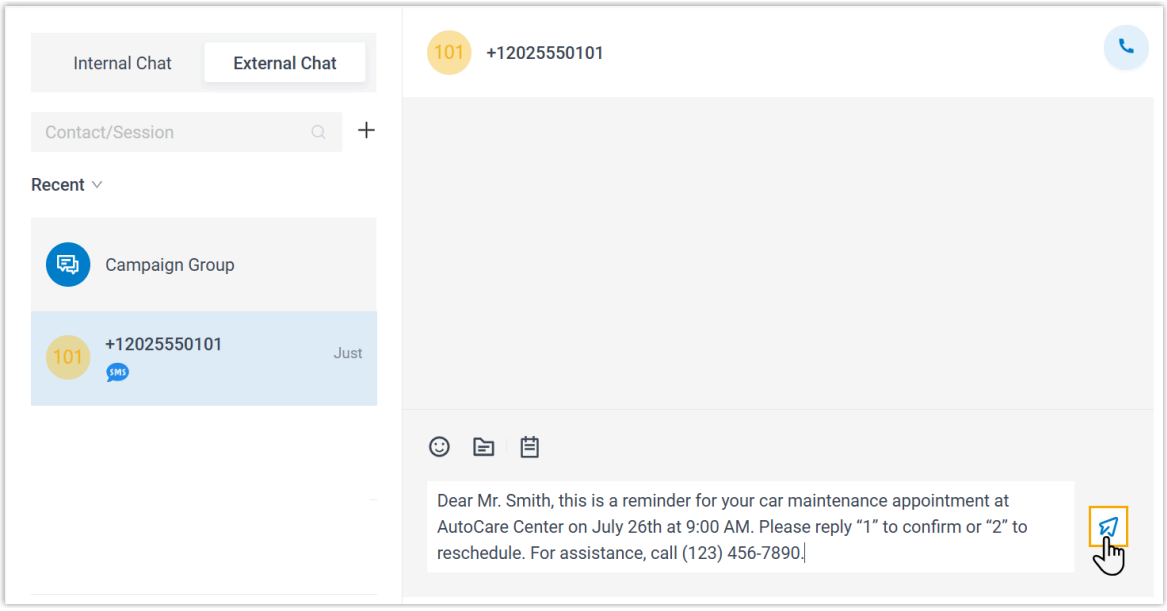

3. In the pop-up window, complete the following settings.




- **Session Type**: Select **SMS**.
- **Sender**: Select the desired channel number for sending messages.
- **Recipient**: Select a country/region code, then enter the recipient number.

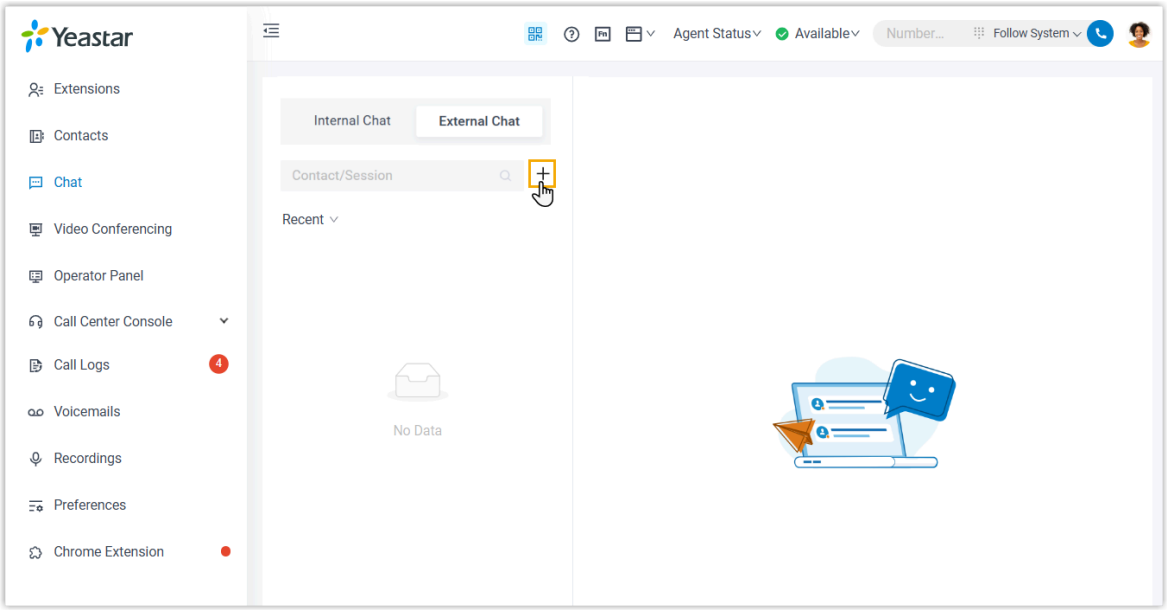
4. Click **Create**.

   The SMS messaging session is created, you can send massages and chat with your customer.

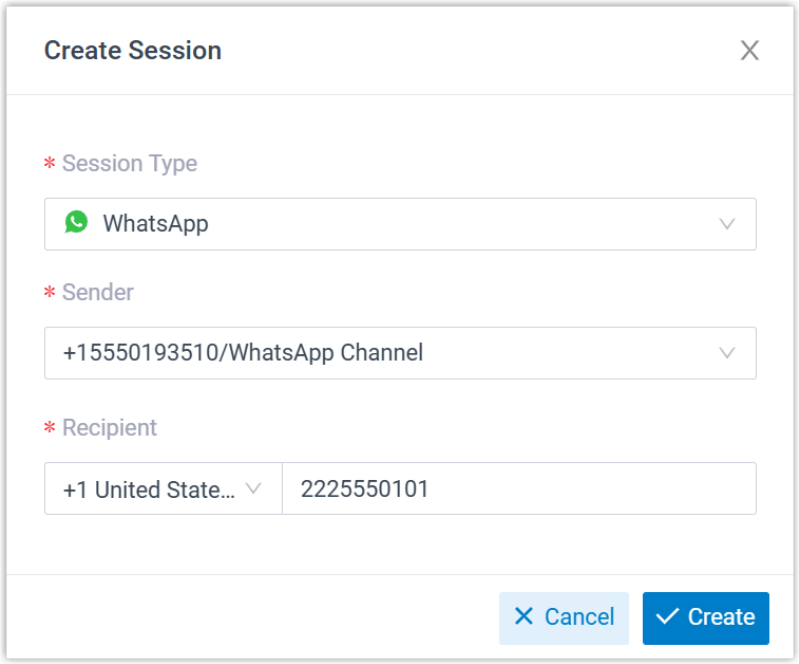


## Start a session via a WhatsApp channel

1. On Linkus Web Client or Desktop Client, go to **Chat > External Chat**.
2. Click + to add a session.




3. In the pop-up window, do as follows:



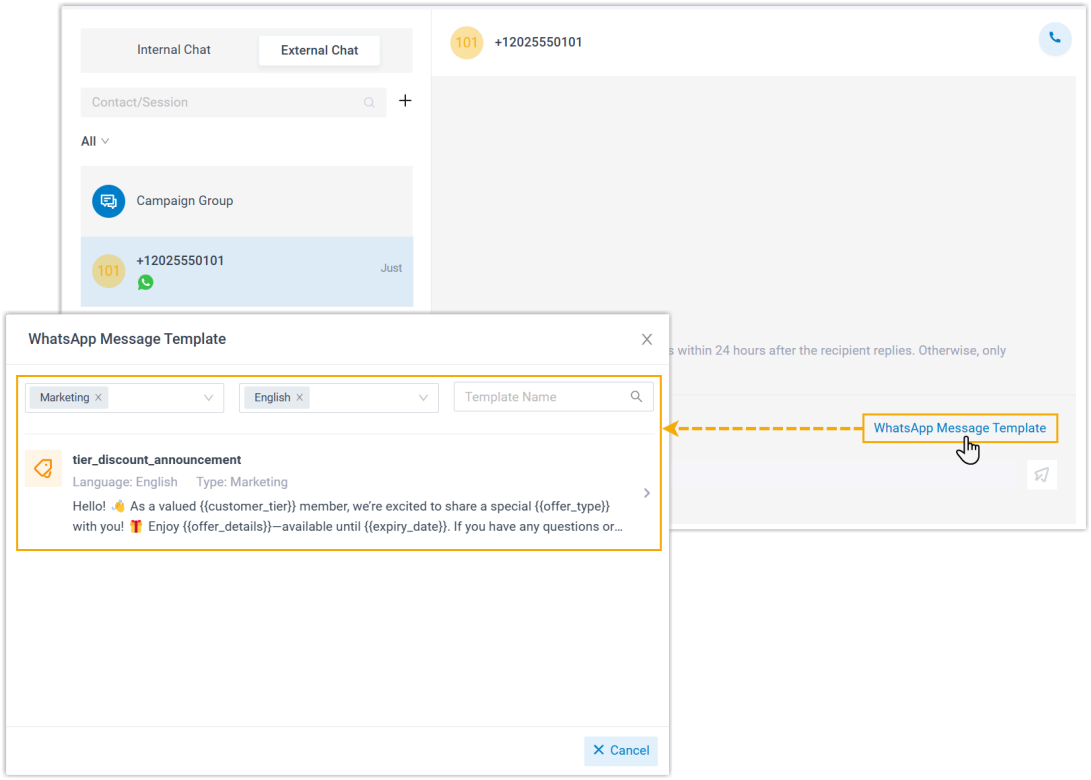

- **Session Type**: Select **WhatsApp**.
- **Sender**: Select the associated phone number for sending messages.

- **Recipient**: Select a country/region code, then enter the recipient number.

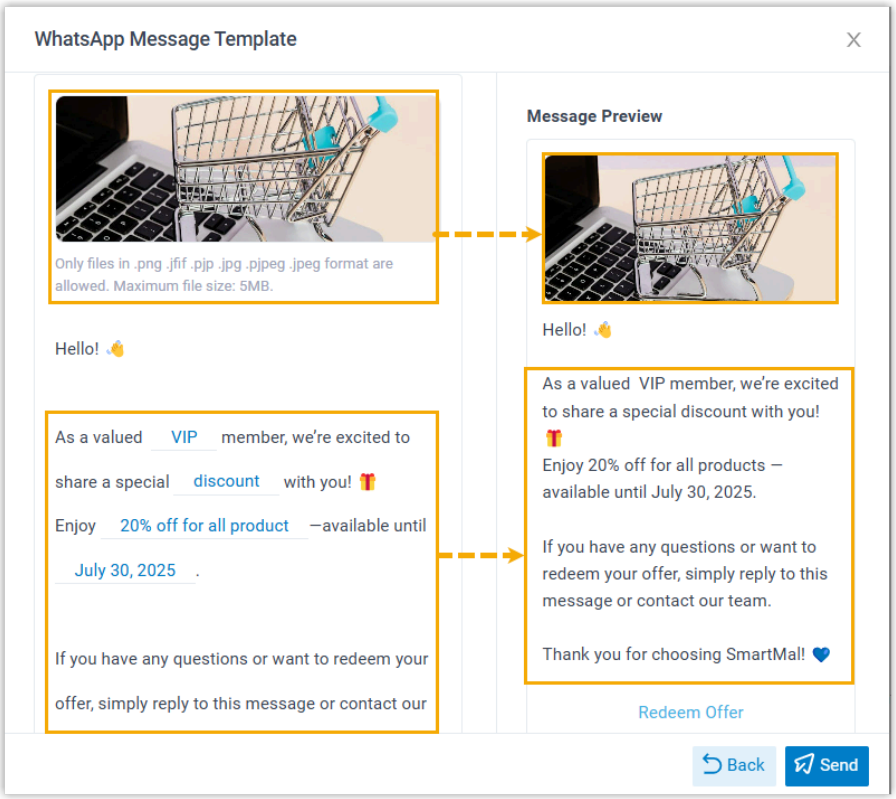
4. Click **Create**.

   The WhatsApp messaging session is created.

5. In the session, send the desired message template to your customer.
   a. Click **WhatsApp Message Template**, then search and select the desired template.

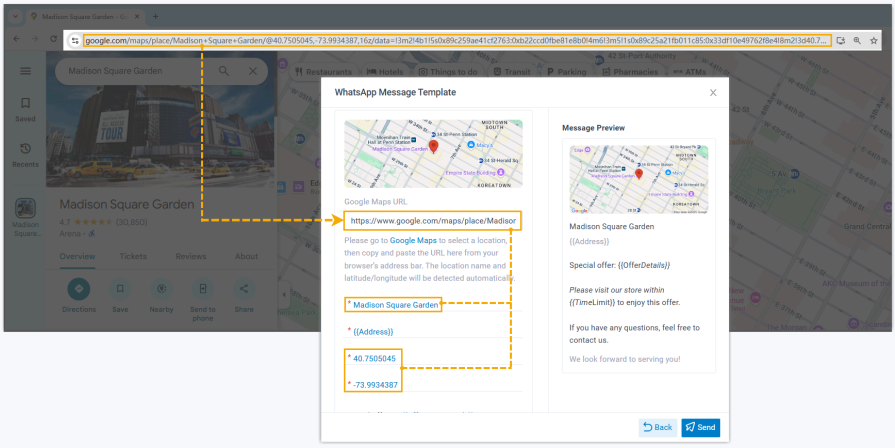



   b. If the template includes media or variable placeholders, upload the required media files and fill in specific values for all variables.




**Note:**

- You can preview the final message contents on the right panel.
- For location information, you can simply paste the Google Maps URL, the system will auto-fill the name and coordinates based on the URL. However, you need to manually enter the detailed address for the `{{Address}}` variable.




c. Click **Send**.

**Related information**

[Manage Customer Queries from External Messaging Channels on Web Client / Desktop Client]

# Manage Customer Queries from External Messaging Channels on Web Client / Desktop Client

This topic describes how to manage the messaging sessions of customer queries on Linkus Web Client and Desktop Client.

## Requirements

### PBX Server

Contact system administrator to make sure that PBX server meets the following requirements:

- **PBX Version**: 37.20.0.128 or later.
- **Plan**: **Enterprise Plan** or **Ultimate Plan**
- **Messaging**: At least one messaging channel is set up on PBX.

### Linkus Desktop Client

Make sure that the version of your Linkus Desktop Client meets the following requirement:

- **Windows Desktop**: 1.2.14 or later
- **macOS Desktop**: 1.2.14 or later

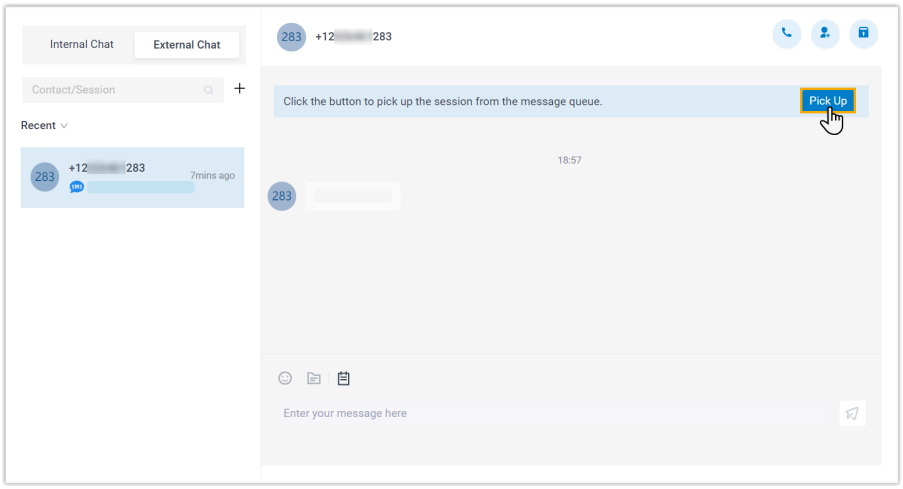
## Pick up a messaging session

If you are an agent of a message queue, when the queue receives inbound message(s) in a new session, you can see the message(s) and pick up the session from the queue.

**Note:**
The pickup operation is only available when the chat assignment mode of your message queue is set to **Manual Pickup** or **Auto-Pickup**.

- If the mode set to **Manual Pickup**, you need to manually pick up the session.

- If the mode is set to **Auto-Pickup**, the session will be automatically assigned to you if you are the first agent to reply. You can also manually pick up the session in this mode if needed.



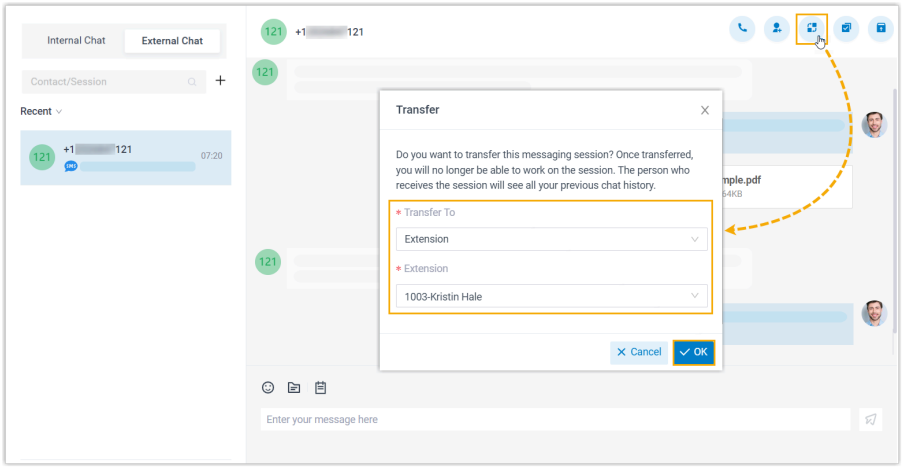

1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. To manually pick up a session, click **Pick Up** at the top of the messaging session.

   There is a prompt indicating that you have picked up the session from the message queue; Only you can see the session and respond to messages in the session.

## Transfer a messaging session

During a session, you can transfer a customer's conversation to another colleague or a message queue for further handling. Alternatively, if advanced message processing or automation is required, you can transfer the session to a third-party message analytics platform.

**Note:**
The option to transfer sessions to a third-party message analytics platform will only appear if the system administrator has integrated the PBX server with a third-party platform via API.



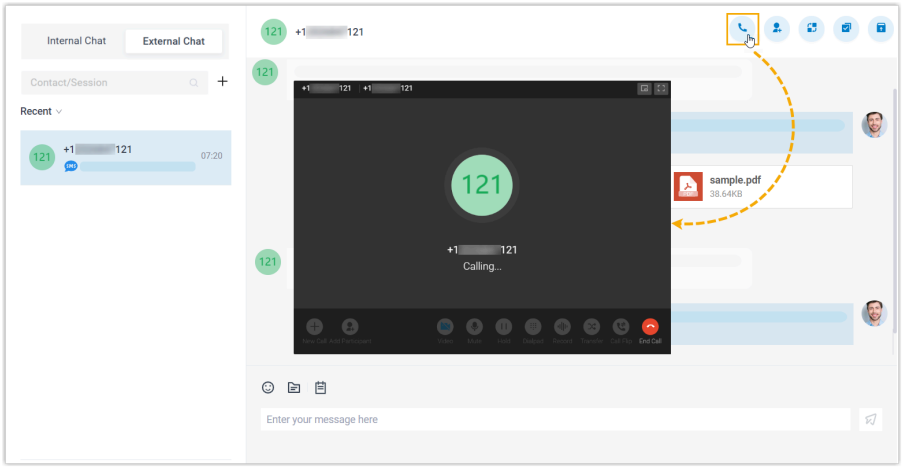

1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. At the top-right corner of the messaging session, click .
3. In the pop-up window, select the desired destination and click **OK**.

   The messaging session is removed from your external chat list, and transferred to the colleague / message queue / Third-party message analytics platform with whole chat history.

## Initiate a voice call from a messaging session

You can initiate a voice call right from the messaging session to resolve a customer's issue if necessary.

> **Note:**
> This operation requires the permission to make outbound calls. Contact the system administrator to check if you have the permission.

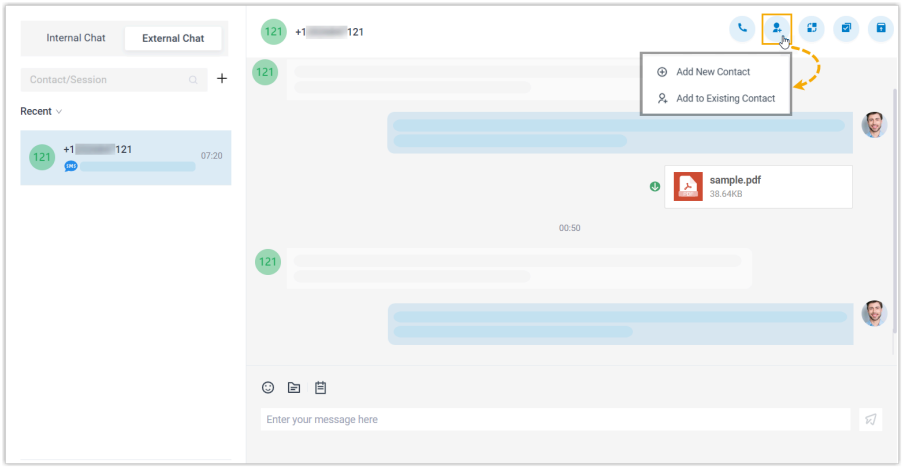



1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. At the top-right corner of the messaging session, click .

   Linkus Web Client quickly dials out the customer's number, and the call is sent through the PBX.

## Add a customer to Contacts

You can add a customer to Contacts right from the messaging session.

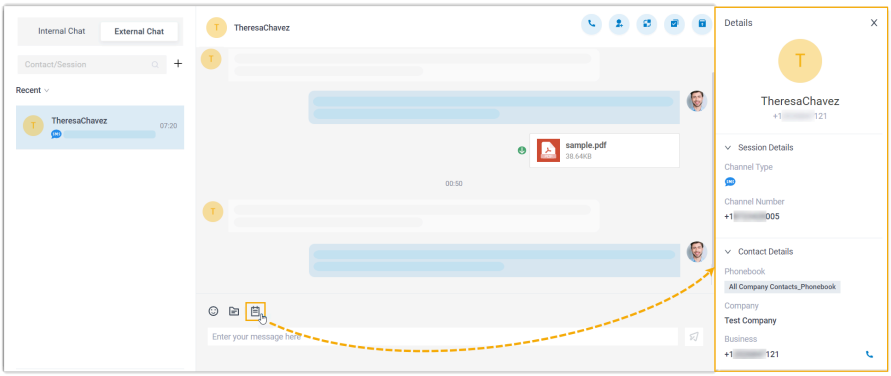



1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. At the top-right corner of the messaging session, click .
3. Add the customer to Contacts according to your needs.
   - To add the customer as a new contact, click **Add New Contact** and enter the customer's information.

- To add the customer to an existing contact, click **Add to Existing Contact** and edit the contact's information as needed.

## View messaging session details

You can check the detailed information of a messaging session, including the message source channel, channel number, etc.

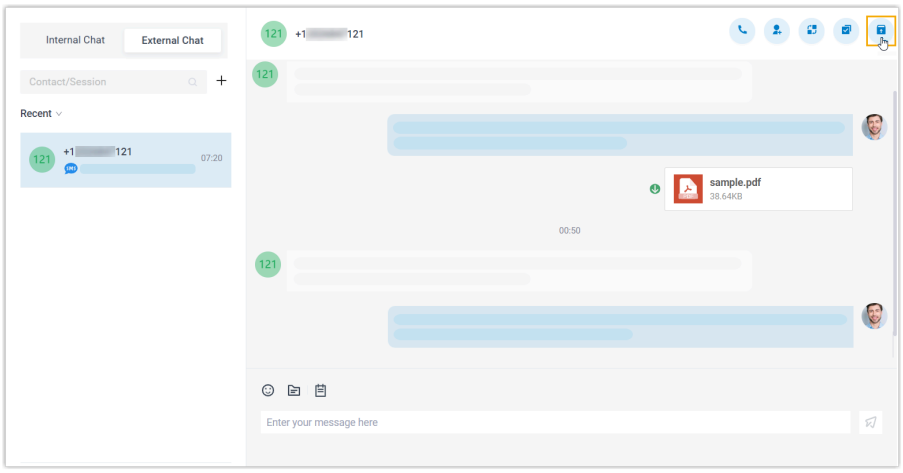



1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. At the bottom of the messaging session, click .

   The details of the messaging session is display at the right panel.

## Archive a messaging session

You can archive a messaging session if there is no response from the customer or you wish to refer back to the session later.



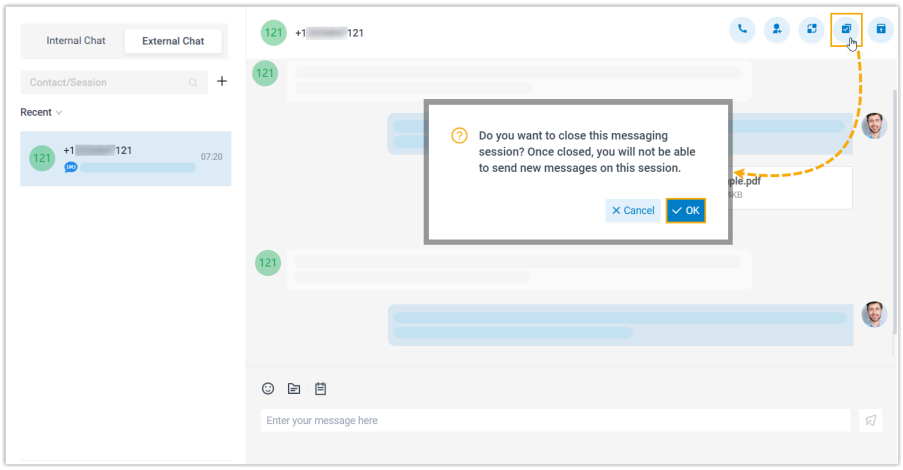

1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.

2. At the top-right corner of the messaging session, click .
   The messaging session is moved from **Recent** list to the **Archived** list.

> **Note:**
> To start the conversation again, you can directly send a message in the archived messaging session, or click at the top-right corner to unarchive the messaging session. The unarchived session will be moved back to the **Recent** list.

## End a messaging session

When you're done helping a customer, you can end the messaging session.

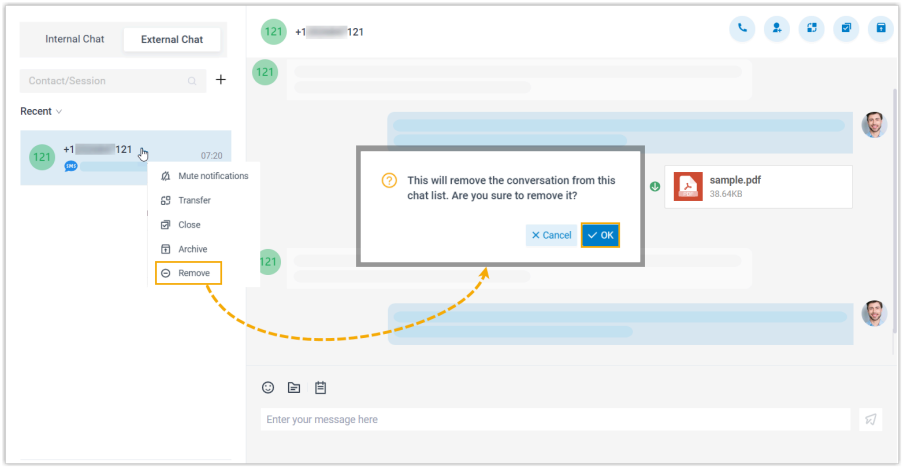



1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. At the top-right corner of a messaging session, click .
3. In the pop-up window, click **OK**.

   The messaging session is closed and moved to the **Archived** list; You can NOT send messages on this session any more. Next time the customer sends messages, a new messaging session will be created.

## Remove a messaging session

To remove a messaging session, do as follows:

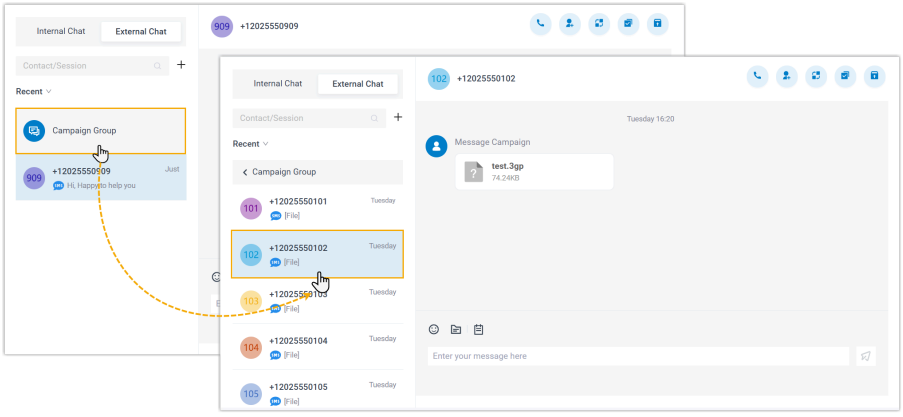



1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. In the external chat list, right click the messaging session that you want to remove.
3. Click **Remove**.
4. In the pop-up window, click **OK**.

   The messaging session is removed from all your Linkus clients.

## Handle campaign sessions

If system administrator sets message campaigns to send messages in bulk, and assigns the campaign sessions to your extension or the message queue you belong to, you can view and manage these campaign sessions.




1. On Linkus Web Client or Desktop Client, click **Chat**, then click the **External Chat** tab.
2. In the external chat list, click **Campaign Group**.

   All sessions created by message campaigns will be listed.
3. Click a session to view and respond to customer replies as needed.

# Agent Operations on Mobile Client

## Start a Messaging Session with a Customer on Mobile Client

If you need to send customers messages for notifications, marketing campaigns or other purposes, you can proactively start a messaging session.

> **Note:**
> You can only proactively start a messaging session via SMS messaging channel.

### Requirements

#### PBX Server

Contact system administrator to make sure that PBX server meets the following requirements:

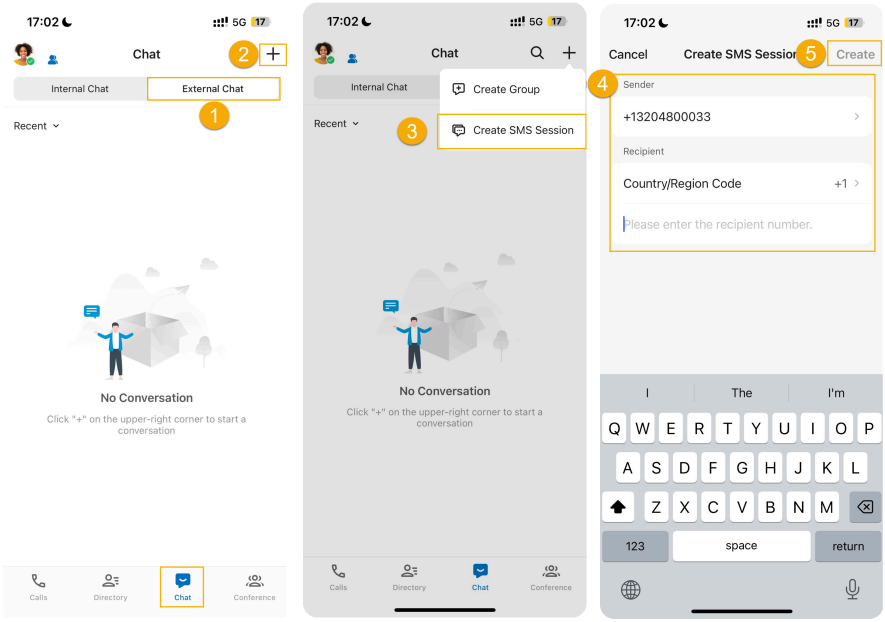
- **Version**: 37.12.0.57 or later.
- **Plan**: **Enterprise Plan** or **Ultimate Plan**
- **Messaging**: At least one messaging channel is set up on PBX.

#### Linkus Mobile Client

Make sure that the version of your Linkus Mobile Client meets the following requirements:

- **Linkus iOS Client**: Version 5.7.3 or later
- **Linkus Android Client**: Version 5.7.4 or later

## Procedure




1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. At the top-right corner, tap +.
3. In the drop-down menu, select **Create SMS Session**.
4. Select sender and recipient.
    a. In the **Sender** drop-down list, select the channel number for sending messages.
    b. In the **Recipient** drop-down list, select a country/region code, then enter the recipient number.
5. At the top-right corner, tap **Create**.

## Result

The messaging session will appear in the external chat list after you send a message.

### Related information

Manage Customer Queries from External Messaging Channels on Mobile Client

# Manage Customer Queries from External Messaging Channels on Mobile Client

This topic describes how to manage the messaging sessions of customer queries on Linkus Mobile Client.

## Requirements

### PBX Server

Contact system administrator to make sure that PBX server meets the following requirements:

- **Version**: 37.20.0.128 or later.
- **Plan**: **Enterprise Plan** or **Ultimate Plan**
- **Messaging**: At least one messaging channel is set up on PBX.

### Linkus Mobile Client

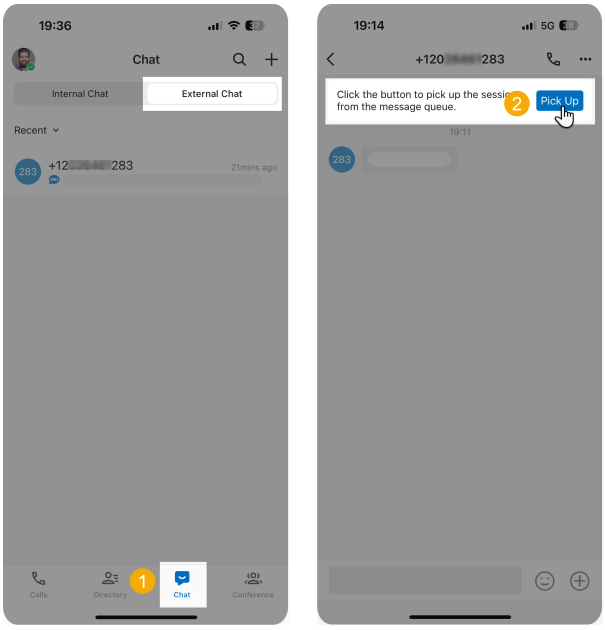
Make sure that the version of your Linkus Mobile Client is 5.19.7 or later.

## Pick up a messaging session

If you are an agent of a message queue, when the queue receives inbound message(s) in a new session, you can see the message(s) and pick up the session from the queue.

**Note:**
The pickup operation is only available when the chat assignment mode of your message queue is set to **Manual Pickup** or **Auto-Pickup**.

- If the mode set to **Manual Pickup**, you need to manually pick up the session.
- If the mode is set to **Auto-Pickup**, the session will be automatically assigned to you if you are the first agent to reply. You can also manually pick up the session in this mode if needed.



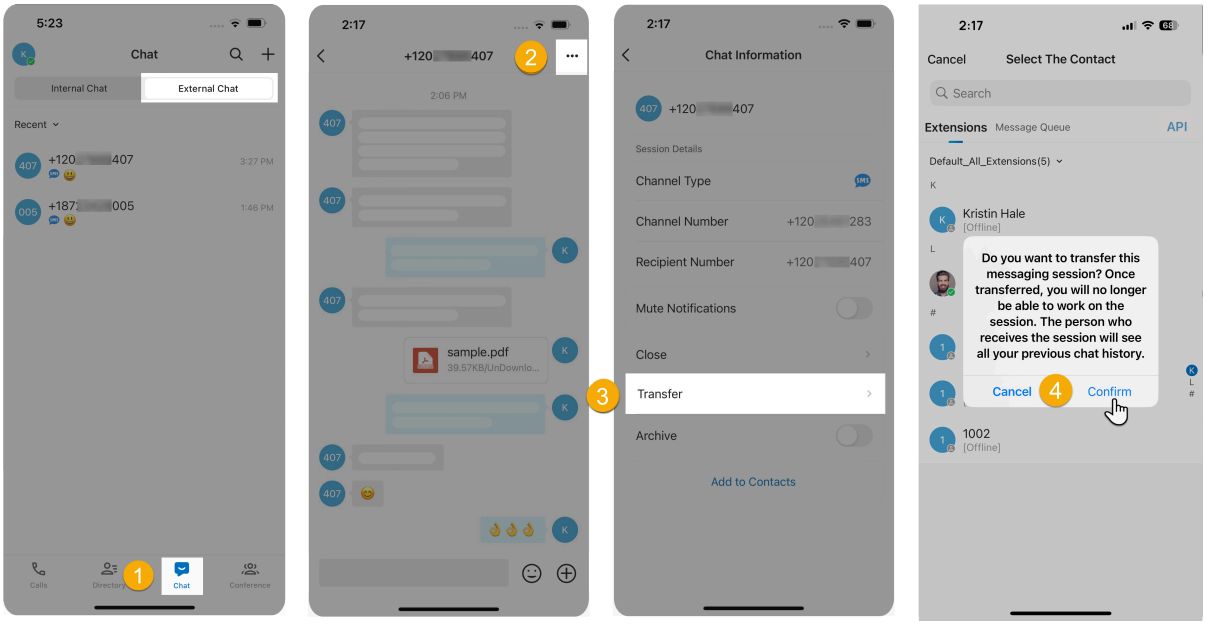

1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. To manually pick up a message session, tap **Pick Up** at the top of the session.

   There is a prompt indicating that you have picked up the session from the message queue; Only you can see the session and respond to messages in the session.

## Transfer a messaging session

During a session, you can transfer a customer's conversation to another colleague or a message queue for further handling. Alternatively, if advanced message processing or automation is required, you can transfer the session to a third-party message analytics platform (API).

> **Note:**
> The option to transfer sessions to a third-party message analytics platform will only appear if the system administrator has integrated the PBX server with a third-party platform via API.



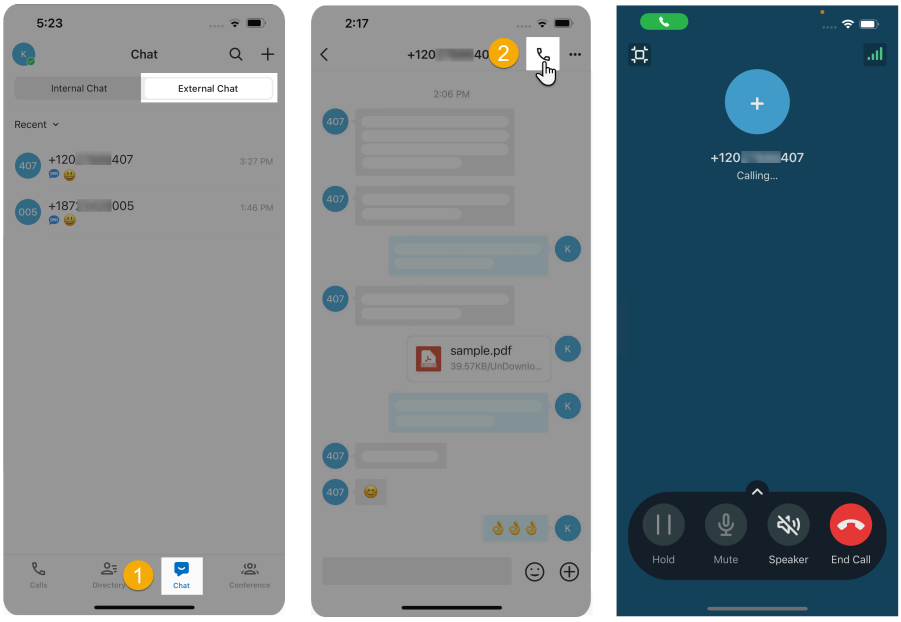

1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In an active messaging session, tap ••• at the top-right corner.
3. On the **Chat Information** page, tap **Transfer**.
4. Search and select the colleague, then tap **Confirm** in the pop-up window.

   The messaging session is removed from your external chat list, and transferred to the colleague / message queue / Third-party message analytics platform with whole chat history.

## Initiate a voice call from a messaging session

You can initiate a voice call right from the messaging session to resolve a customer's issue if necessary.

> **Note:**
> This operation requires the permission to make outbound calls. Contact the system administrator to check if you have the permission.

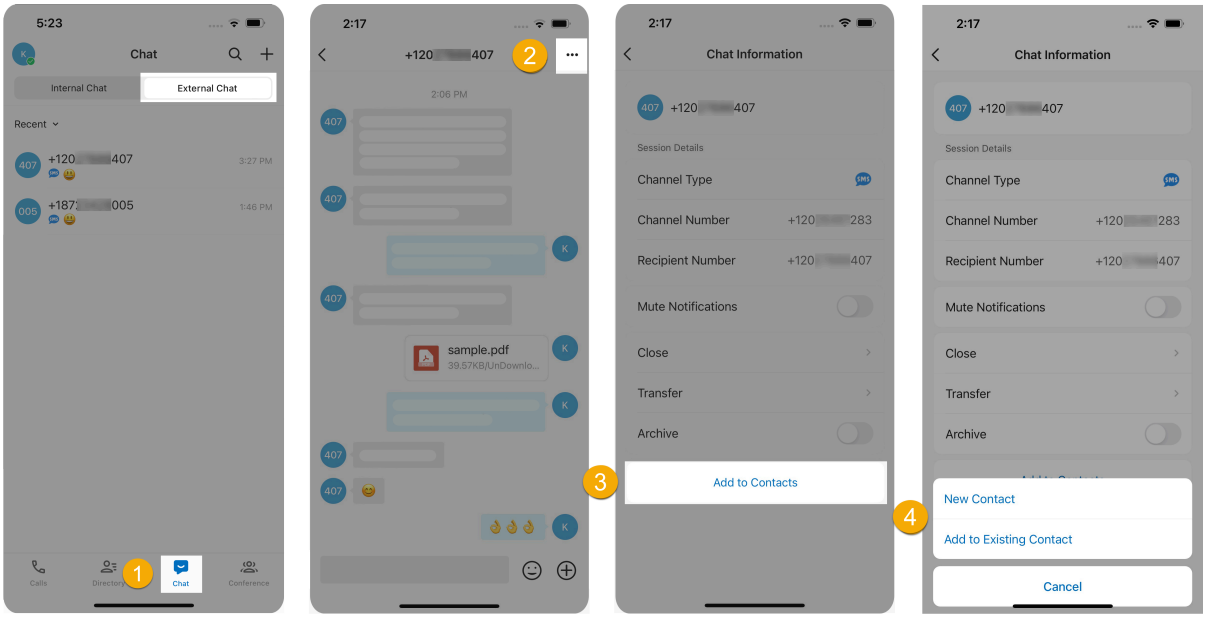



1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In a messaging session, tap at the top-right corner.

   Linkus Mobile Client quickly dials out the customer's number, and the call is sent through the PBX.

## Add a customer to Contacts

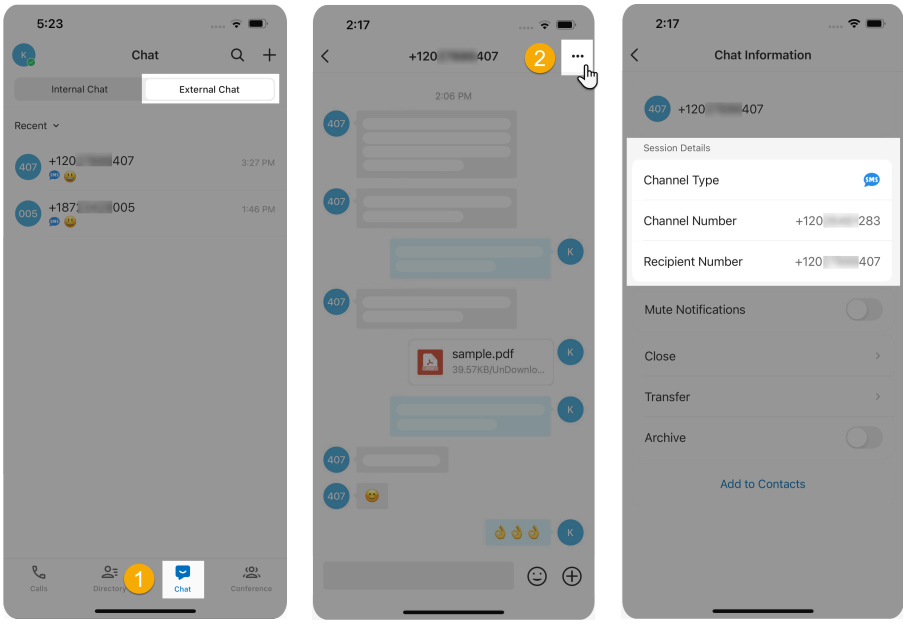
You can add a customer to Contacts right from the messaging session.



1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In a messaging session, tap ••• at the top-right corner.
3. At the bottom of the **Chat Information** page, tap **Add to Contacts**.
4. Add the customer to Contacts according to your needs.
    - To add the customer as a new contact, click **New Contact** in the pop-up window, and enter the customer's information.
    - To add the customer to an existing contact, click **Add to Existing Contact** in the pop-up window, select the contact and edit the information as needed.

## View messaging session details

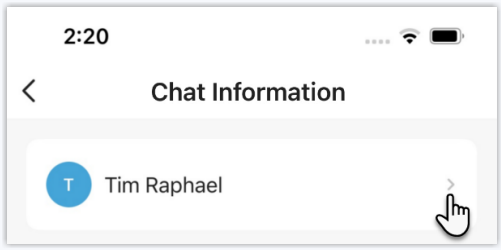
You can check the detailed information of a messaging session, including the message source channel, channel number, etc.




1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In a messaging session, tap ••• at the top-right corner.

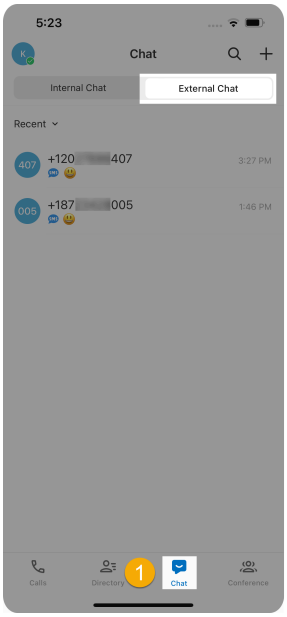
   The details of the messaging session is displayed in the **Session Details** section.

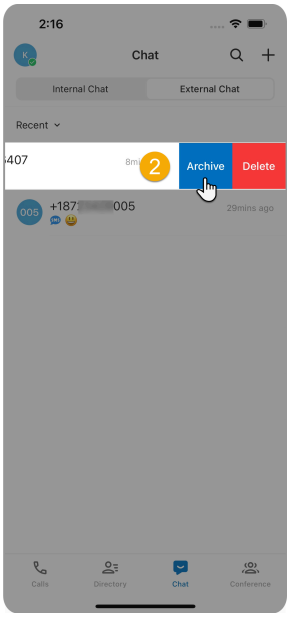
> **Note:**
> If the customer is an existing contact, you can also tap the customer to quickly access the contact's information.




## Archive a messaging session

You can archive a messaging session if there is no response from the customer or you wish to refer back to the session later.



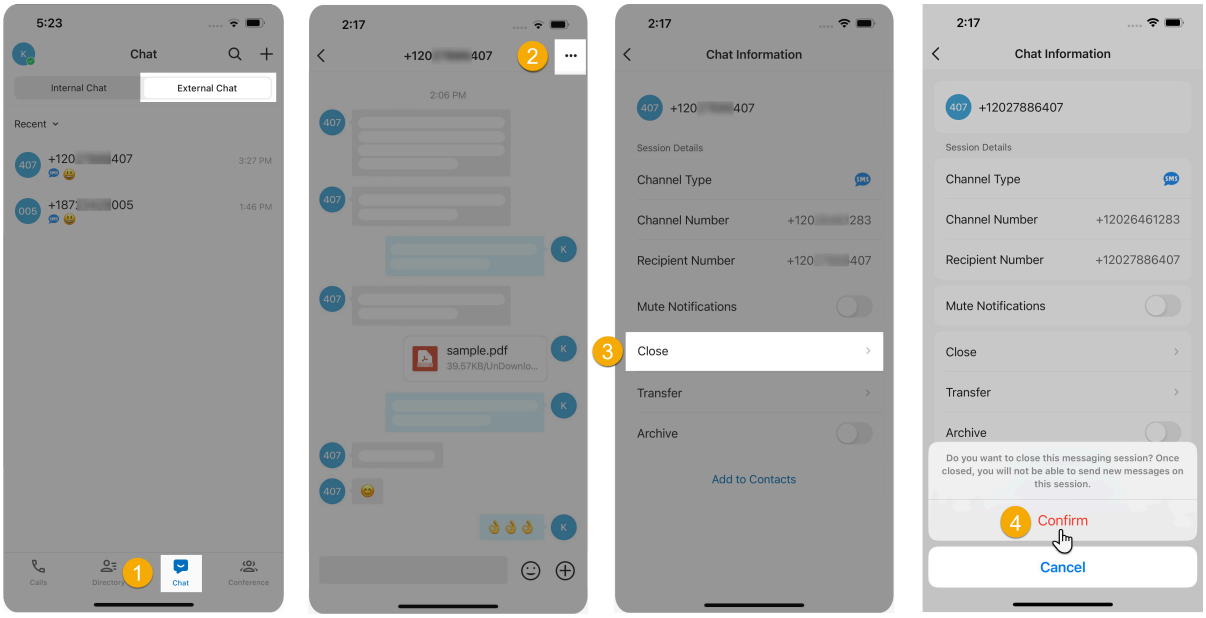

1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In the external chat list, touch and hold an active messaging session, then tap **Archive**.

   The messaging session is moved from **Recent** list to the **Archived** list.

> **Note:**
> To start the conversation again, you can directly send a message in the archived messaging session, the messaging session will be automatically unarchived and moved back to the **Recent** list.

## End a messaging session

When you're done helping a customer, you can end the messaging session.

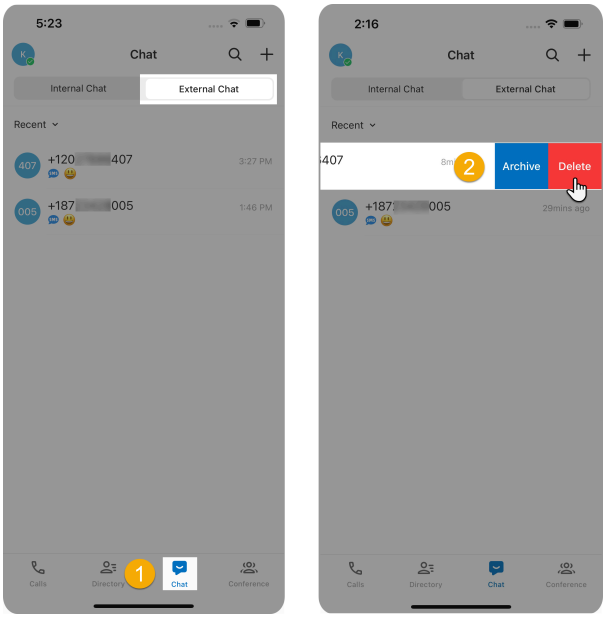



1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In an active messaging session, tap ••• at the top-right corner.
3. On the **Chat Information** page, tap **Close**.
4. In the pop-up window, click **Confirm**.

   The messaging session is closed and moved to the **Archived** list; You can NOT send messages on this session any more. Next time the customer sends messages, a new messaging session will be created.

## Remove a messaging session

To remove a messaging session from the chat list, do as follows:

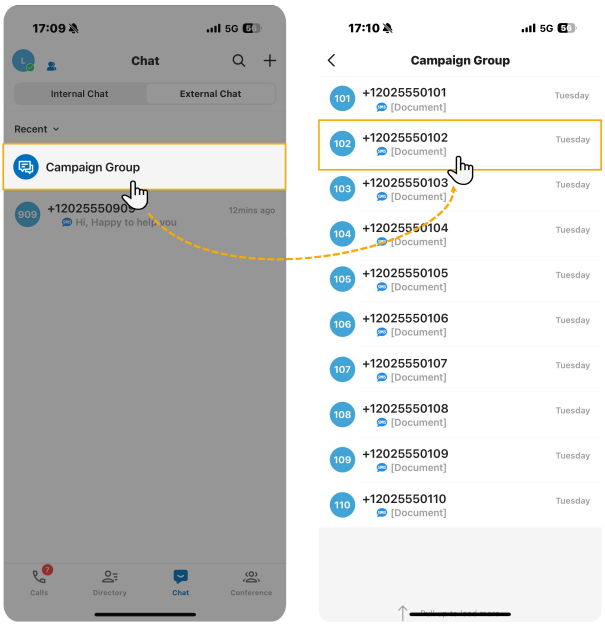



1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In the external chat list, touch and hold a messaging session, then tap **Delete**.

   The messaging session is removed from the chat list on all your Linkus clients.

## Handle campaign sessions

If system administrator sets message campaigns to send messages in bulk, and assigns the campaign sessions to your extension or the message queue you belong to, you can view and manage these campaign sessions.



1. On Linkus Mobile Client, go to **Chat > External Chat**.
2. In the external chat list, tap **Campaign Group**.

   All sessions created by message campaigns will be listed.
3. Tap a session to view and respond to customer replies as needed.