

# **Omnichannel Messaging Guide**

## Yeastar P-Series Cloud Edition

Version: v1 Date: 2024-07-08





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## **Omnichannel Messaging Overview**

Yeastar P-Series Cloud Edition provides an omnicahnnel 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.

#### **Automatic 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. The system automatically assigns chats to the first agent that picks up the session from the queue.

## Roles in omnichannel messaging

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

Role	Description
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. For more information, see <u>Omnichannel Messaging Administrator Guide</u> .
Agent	Agents that are responsible for interacting with customers from various messaging channels, handling inquiries, resolving issues, and providing support and services. For more information, see <u>Omnichannel Messaging Agent Guide</u> .

## 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.

## Steps to set up omnichannel messaging

#### 1. Set up messaging 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:
	Set up an SMS Channel for Bandwidth
	<u>Set up an SMS Channel for Flowroute</u>
	<ul> <li>Set up an SMS Channel for Telnyx</li> </ul>
	<ul> <li>Set up an SMS Channel for Twilio</li> </ul>
	<ul> <li>Set up an SMS Channel for SIPTRUNK</li> </ul>
	<ul> <li>Set up an SMS Channel for VoiceMeUp</li> </ul>
	<ul> <li>Set up an SMS Channel for VoIP.ms</li> </ul>
	For SMS Service Providers that are not listed above, they can add their SMS service to Yeastar P-Series Cloud Edition using SMS API. After the integration is complete, you can create an SMS channel for the Service Provider on your PBX.

Channel	Instruction
	For more information about the SMS service integration and the SMS channel setup after the integration, see <u>Integrate SMS Service</u> with Yeastar P-Series Cloud Edition 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. • Set up a WhatsApp Channel

#### 2. Set up messaging 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 <u>Create a Message Queue</u> and <u>Manage Message</u> <u>Queues</u>.

#### 3. Manage messaging 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 <u>Check and Manage External Chat Logs</u> and <u>Down-load External Chat Logs</u>.

## Message Channel Setup

## SMS Channel

## Set up an SMS Channel for Bandwidth

This topic describes how to set up a Bandwidth SMS channel on Yeastar P-Series Cloud Edition, 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 84.12.0.23 or later
- Plan: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: 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.
- Domain Certificate: A valid domain certificate is installed.

#### Note:

If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (**ycmcloud.com**, **yeastarcloud.com**, or **yeastarycm.co.za**), you NEED to install a valid domain certificate for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

#### 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 <u>Bandwidth supported MMS file types</u>.

#### 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 <u>Allowed Country/Region IP Access Pro-</u><u>tection</u> 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: 24 hours

#### Prerequisites

- You have created a sub-account and associated with your location in Bandwidth.
- You have purchased phone number(s) in Bandwidth.

## Procedure

- <u>Step 1. Obtain a Webhook URL on PBX</u>
- 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

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 > Messaging Channel.
- 2. Click Add, and select SMS.
- 3. In the ITSP drop-down list, select Bandwidth.

A Webhook URL for Bandwidth is generated and displayed in the **Webhook URL** field.

#### 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.

Authentication Messaging Settings	
Please refer to the User Guide for information on how to configure the following settings.	
* Name	* Webhook URL
	https://docs.example.yeastarcloud.com/api/v1.0/webhook/bandwidth/dda1867b098f44ceaf1c 🚇
* ITSP	<u>↑</u>
Bandwidth V	

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 <u>complete</u> <u>the phone number registration</u> 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 <u>PBX's Web-hook URL</u>.

Dashboard Numbers Orders Applications Insights				Search Q LEARNING LAB & SUPPORT Test Company (******) Account Log out
Applications				
Your messaging URI: https://messaging.bandwidth.com/api/v2/users/**	*****/messages COPY			API CREDENTIALS DEVELOPER DOCS 🗊
Applications	Create Application			
Applications help to direct call and messaging events, like take an incoming call and connect it with the right phone number or endpoint.		hook URL	* Application ID: We create this for you	
	Send 'message-sending' callbacks 🔊			

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

Associate a location	
Select the location you want to associate with this application  Location Yeastar Test  ASSOCIATE ANOTHER LOCATION	

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

Yeastar Test	
SETTINGS VOICE MESSAGING UC	
SMS SETTINGS SMS Enabled	
X Short Codes	
Geographic reach           CAN         ZONE 1         ZONE 2         ZONE 3         ZONE 4         ZONE 5           Selected countries apply to both SMS and MMS	
SMS Protocol     HTTP     API-based     V2 Messaging	
* Applications Yeastar SMS messaging	
MMS SETTINGS	
• MMS Protocol HTTP API-based	
Y2 messeyiny	
	DELETE × CANCEL     SAVE CHANGES

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

() Dashboard Numbers Orders App	lications Insights
My Numbers Hosted Messaging External Number	5
My Numbers	
MY INVENTORY LINE FEATURES MOV	E NUMBERS
SEARCH FOR NUMBERS ACTIVE ON YOUR ACCO How do you want to search? Show all numbers on your account (sub-acc Find the sub-account and location informati Search for a number based on IP address or Sub-account:	DUNT ount / location) on for a telephone number DNS Location:
SEARCH RESULT (ACCOUNT: TEST COMPANY)	Move Number  * Sub-Account Yeastar Test * Location Yeastar Test

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

Dashboard Numbers Orders Applications Insights		Search Q. LEARNING LAB & SUPPORT Test company(*******) Account Log out		
Applications Dote down Account ID				
		API CREDENTIALS DEVELOPER DOCS 😿		
Applications <u>+ CREATE APPLICATION</u> Applications help to direct call and messaging events, like take an incoming call and connect II with the right phone number or endpoint.	SMS for Yeastar	Note down Application ID     *Application ID:     9*****41-**********		
Yeastar SMS messaging Messaging Application	Application type:     MESSAGING     Use multiple callback URLs			

### 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the **Authentication** tab, enter the authentication information of Bandwidth.

Authentication Messaging Settings			
Please refer to the User Guide for information on how to con	nfigure the following se	ttings.	
Name		* Webhook URL	
Bandwidth SMS channel		https://docs.example.yeastarcloud.com/api/v1.0	)/webhook/bandwidth/dc 🕒
ITSP			
Bandwidth	$\checkmark$		
Application ID		* Account ID	
	<i>ب</i> د		بېر
Username		* Password	
	×~~		<u>بر</u>

- 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** drop-down list, 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.

Close Session Automatically	
* Session Timeout (Days)	
1	

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

Add				X
* Number +14102161183				
* Destination for Inbound Messaging		* Extension		
Extension Extensions allowed to create messaging sessions	$\vee$	3000-Leo Ball		~
4 items Available		2 items	Selected	
Search here Q		Search here	٩	
Extension Num Caller ID Name		Extension Num	Caller ID Name	$\overline{\uparrow}$
1002 Terrell Smith		1000	Leo Ball Phillip Huff	
1003 Dave Haris				
1004 Troy Daniel				✓ × Cancel Save

• Number: Enter the purchased number 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 <b>Extension</b> drop-down list.
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message Queue</b> drop-down list.
	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.

- 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  $\bigotimes$ .

Status	Name	Туре	Number	Total	Sent	Operations
	Bandwidth SMS channel	SMS	+14102161183	0	0	⊿ 🗇

• 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.



 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-as-

sembled when they are received, increasing the number of sent mes-1 sages. • You can filter the statistics by a time period using the time filter. All 🕀 Add 📋 Delete Number Total Sent Failed Received Operations +14102161183 30 20 10 8 🖉 🛛 🗒

#### 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**

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

## Set up an SMS Channel for Flowroute

This topic describes how to set up a Flowroute SMS channel on Yeastar P-Series Cloud Edition, 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	<ul> <li>Firmware: Version 84.12.0.23 or later</li> <li>Plan: Enterprise Plan (EP) or Ultimate Plan (UP)</li> <li>Domain Name: 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.</li> <li>Domain Certificate: A valid domain certificate is installed.</li> </ul>
	Note: If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (ycmcloud.com, yeastarcloud.com, or yeastarycm.co.za), you NEED to install a valid domain certificate

Platform	Requirement
	for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.
Flowroute	API Version: v2.1
	Note: You can check or update the API version on <u>Flowroute</u> (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 <u>Flowroute supported MMS file types</u>.

#### 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 <u>Allowed Country/Region IP Access Pro-</u><u>tection</u> 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: 24 hours

## Procedure

- <u>Step 1. Obtain a Webhook URL on PBX</u>
- 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 > Messaging Channel**.
- 2. Click **Add**, and select **SMS**.
- 3. In the ITSP drop-down list, select Flowroute.

A Webhook URL for Flowroute is generated and displayed in the Webhook URL field.

#### 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.

Please refer to the User Guide for information on how to configure the following settings.         * Name       * Webhook URL         Image: Setting setti	Authentication	Messaging Settings		
Name  * Webhook URL  https://docs.example.yeastarcloud.com/api/v1.0/webhook/flowroute/dd  * ITSP	Please refer to the Us	er Guide for information on how to config	jure the following setti	ings.
* ITSP	Name			* Webhook URL
	ITSP			https://docs.example.yeastarcioud.com/api/vito/webhook/howroute/du

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 <u>complete the phone</u> <u>number registration</u> 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.

flowroute.	Yeastar	Shirley . 🕶
🙆 DASHBOARD	Manage Purchase Port Orders E911 CNAM	🖨 Support 🛩
Billing	Managa your DIDs	✓ Download your DIDs (.csv)
LIII CORS & STATS	Manage your DIDs	
	1 b Choose a DID Action V Apply Action d	
# DIDS	Choose a DID Action Route Options Set Route	Search numbers, routes, etc. Q
	Set Failover Route ↓ DID ↓ Add New Route ↓ Failover ↓ Messaging ↓ CNAM ↓ CNAM Route ↓ Dokups ↓ Storage	
	Set Alias         Get Alias           Can Alias         Clear Alias           EP11 Options         tion	- PURCHASED DC~WSHNGTNZ
	Assign / Enter E911 Profile 18002786915 Unassign E911 Profile tion Opted-out Yes - Messaging Options	- PURCHASED DC~WSHNGTNZ
	Show 25 ventries Showing 1 to 2 of 2 entries Showing 1 to 2 of 2 entries Showing 1 to 2 of 2 entries Set Callback URL Clear Callback URL Clear CAllback URL Clear CAllback URL Clear CAllback URL Clear CAllback URL Clear CAllback URL	Previous Next

- 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 <u>PBX's Webhook URL</u> for the number individually.

flowroute. Yeastar	Staley. •
OXXXHDDARD     Manage     Purchase Port Orders E911 CNAM	🗘 Support •
CO RELATE CONS STORES Manage your DIDs Consess a DID Action	
Choole ( ptp Action     Coole ( ptp Acti	Vierch numbers, routes, etc. Q
PARTENINGS     P	Set Callback URL for your Phone Number
Assay (Fries C91) Police 1800/276/015 Store 25 entries Store 25 entries Store 25 entries Store 26	Individual Caliback URL lets young na mesuaging Caliback URL to a specific long code or tol-free phone number in your account for POSI nonfunctions of inhomod SMS or IMMS messages, or delivery receipts (DRs) of SMS messages unaiverse from that during the set. DID(s) on which Caliback URL will be set.
Centr Callback URL CANA Options Set CNAM Storage Preset Centr CNAM Storage Preset Enable CNAM Lookups	14102161183 Select callasct type(t) you would like to assign: https://doc.meanpleyeestarcloud.com/api/v1.0/webhool/flowroute/
	© SHS Callback © HHS Callback
	2 SHS DLR Caliback

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

flowroute	Yeastar							
🔀 DASHBOARD	Account Information User Profile Featur	res Fraud Control Balance Management API Control 10DLC Registration Toll Free Verification	🖨 Support 👻					
BILLING	Massaging \A/abb							
LLL CDRS & STATS	Plessaging vvebno	DOKS						
	rownoute provide calabact mountations for incoming sims and mins messages, as well as Devery Receipts (ULIAS) for outbound sins and mins messages. Please ensure all Webbooks can be reached from the public internet. If you wish to restrict access to your Webbook URL's, you can whitelist the Flowroute Server IPs.							
# DIDS	See the <b>Developer Docs</b> for more information.  • Setting a callback url for an account	See the Developer Docs for more information.  • Setting a callback url for an account						
	Setting a callback unifor a phone number  SMS  Control  Contr							
	5115	https://docs.exampleyeastarcloud.com/api/v1.0/webhook/flowroute/b3ee2						
	ммѕ	C Enabled						
		https://docs.example.yeastarcloud.com/api/v1.0/webhook/flowroute/b3ee2 C Update URL MMS calibacis are automatically returned in v2.1 format. You may continue to use the v2.0 format. for your other calibacis.						
	SMS DLR							
		https://docs.example.yeastarcloud.com/api/v1.0/webhook/flowroute/b3ee2						
		5MS Delivery Receipts are forwarded from the terminating carrier. Not all terminating carriers support DLRs.						
	MMS DLR	Contraction Contra						
		https://docs.example.yeastarcloud.com/api/v1.0/webhook/flowroute/b3ee2						
		MMS Delivery Receipts are forwarded from the terminating carrier. As with SMS DLRs, they are not supported by all terminating carriers.						

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



For security reasons, we cannot show it to you agai

82<sup>c</sup> :db

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

Yeastar

flowroute.	Yeastar Shriev	
	Account Information User Profile Features Fraud Control Balance Management API Control 10DLC Registration Toll Free Verification 🗘 Support	rt 🕶
BILLING	<ul> <li>YEAP only appres to incoming one of the second se Second second se</li></ul>	
ulii cors <del>a</del> stats	API Keys	
	Flowroute allows you to create different API Key Sets to provide and revoke access to your account resources via our APIs. When you create an API Key, you will be provided with a matching 'Secret Key'. This key is only displayed once, so be sure to add it to your key store at that time.	
# DIDS	API Key access can be set to auto expire on the date specified. Account-holders with multiple API keys on an account will be informed through email when an API key is expiring or has expired. The account Dashboard will also display a banner with any keys which have or will be expiring soon. Notifications are sent to the main email account at 30 days, 10 days and 1 day prior to expiration.	
	Add new API Key	
	NAME DESCRIPTION EXPIRATION	
	Enter name description (Optional)	
	API Kove O Customize Columns v /7 Columns) 2 Items Filter By All v Sourch by name Q	
	Name Account Description Access Key Secret Key Expires Created Actions	
	Yeastar <u>1 4</u> •••••• Never Apr 07, 2020 11:49 PM +00:00 <b>CF Edit Expire</b> Det	
	Yeastar Docs 5	

## 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the **Authentication** tab, enter the authentication information of Flowroute.

Please refer to the User Guide for information on how to configure the follo	ving settings	3.
Name		* Webhook URL
Flowroute SMS channel		https://docs.example.yeastarcloud.com/api/v1.0/webhook/flowroute/dda 😰
ITSP		
Flowroute		
Access Key		* Secret Key
۲۰	t	

- 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** drop-down list, 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.

	Close Session Automatically	
*	Session Timeout (Days)	
	1	

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

Add					×
<ul> <li>* Number</li> <li>+14102161183</li> <li>* Destination for Inbound Messaging</li> <li>Extension</li> </ul>	~	* Extension 3000-Leo Ball			~
Extensions allowed to create messaging sessions          4 items       Available         Search here       Q         Extension Num       Caller ID Name		2 items Search here Extension Num	Selected	$\overline{\uparrow}$	
Extension Group     Default_All_Ext       1002     Terrell Smith       1003     Dave Haris       1004     Troy Daniel		000	Leo Ball Phillip Huff	<ul> <li>∧</li> <li>✓</li> <li>✓</li> </ul>	
				× Cancel	🕞 Save

- Number: Enter the purchased number 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 <b>Extension</b> drop-down list.
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message Queue</b> drop-down list.
	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.

• 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  $\overline{\heartsuit}$ .

Status	Name	Туре	Number	Total	Sent	Operations
$\oslash$	Flowroute SMS channel	SMS	+14102161183	0	0	⊿ 団

• 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.

 ${}_{\circ}$  You can filter the statistics by a time period using the time filter.

				Time Filter			
↔ Add		Messaging Statistics		All			
	Number	Total	Sent	Failed	Received	Operations	
1	+14102161183	30	20	10	8	⊿ 団	

## 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**

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

## Set up an SMS Channel for Telnyx

This topic describes how to set up a Telnyx SMS channel on Yeastar P-Series Cloud Edition, 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 84.12.0.23 or later
- Plan: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: 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.
- Domain Certificate: A valid domain certificate is installed.

## Note:

If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (**ycmcloud.com**, **yeastarcloud.com**, or **yeastarycm.co.za**), you NEED to install a valid domain certificate for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

## 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 <u>Telnyx supported MMS file types</u>.

### 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 <u>Allowed Country/Region IP Access Pro-</u><u>tection</u> 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: 24 hours

## Procedure

- Step 1. Obtain a Webhook URL on PBX
- <u>Step 2. Configure a number for SMS on Telnyx</u>
- 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the ITSP drop-down list, select Telnyx.

A Webhook URL for Telnyx is generated and displayed in the Webhook URL field.



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.

Authentication Messaging Settings	
Please refer to the User Guide for Information on how to configure the following settings.	
* Name	Webhook URL     https://docs.example.weastarcloud.com/ani//1.0/webhook/telnvy/dda1867b098/44ceaftd182
+ ITSP Telnyx ∨	]

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 <u>complete the phone</u> <u>number registration</u> to avoid disruption in message delivery.

Log in to <u>Telnyx portal</u>, and complete the following settings:

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

逾telnyx		Numbers / Search & Buy N	umbers			Updated + Balance 🛛	Available Credit 🙀 Cart
Platform Status	*	Search & Buy Numbers My Num	nbers Channels Orders Verified Nur	nbers			
Mumbers	^	Local Numbers Toll-Free Nu	mbers			Example Searches	Try Improved Search
Port Numbers Requirements		Search Type         Region (Re           Region         V	equired) States of America X V	Number Features SMS × MMS × V			
C Messaging	×	Advanced Search 🐱					
6 Voice	v	Search Numbers					
V Identity	~	Ċ.					
Video		Number	Location/Rate Center	Features	Upfront Price	Monthly Price	
Retworking Storage		+1 571 547 4395	WASHINGTON ZONE 8, VA, US	6 6 4 7 7 9	\$1.00	\$1.00	Add to Cart
S Bundles		+1 607 400 9361	HARTWICK, NY, US	<i>C</i> , 🖻 🎕 🇀 C	\$1.00	\$1.00	Add to Cart

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

<b>க்telny</b> x		Program	nmable Messaging / Messaging Profiles	Ipdated + Balance • Available Credit 📜 Cart S
Platform Status     Home	<b></b>	Messaging	profiles Learn & Build Rate Limits Toll Free Messaging 🚥 Keyword Management 🚥	
Numbers	~	Send and r	ure your Messaging Profiles eceive SMS on Alphanumeric IDs, Long Code, Toll Free, and Short Code numbers. teamwill film is 10 meancement are accounted.	Add new profile
Programmable M	lessaging	The defaul	r account nimit is no message per second	
10DLC	loodiging	Stati	Create Messaging Profile	phone numbers
Short Code			Your Messaging Profile allows you to configure your message settings across a group of numbers	
Hosted SMS				
Voice	~		Profile Info	/
Identity	~		Profile Name API Version	
Video			API VI API VZ V IWEXIT API	
Wireless			messaging capabilities. <u>Learn more</u>	Areas
Retworking				
Storage				
S Bundles			Inbound Settings Control how your profile handles incoming messages	
			Send a webhook to this URL: If the primary U	URL fails, send webhook to:
			https://docs.example.yeastarcloud.com/api/v1.0/webhook/telnyx/dda186;	
			If you wish to send and receive using an <u>SMPP bind</u> , please email <u>sales@telnyx.com</u> .	
			Save Cancel	

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

ふtelnyx		Numbers / My Numbers			Updated a few seconds ago	Available Credi \$91.84 USD	t 🙀 Cart 🛽 🔊
Platform Status	[]]	- Searcing Bay Humbers My Numbers Channels	Orders Verified Numbers				
Mumbers	^	My Numbers					
My Numbers		Phone (Partial or Full)	Number Status	Connection/Application	Tag		
Port Numbers			Select one	$\sim$ Type to filter for more connections	<ul> <li>✓ Select an option</li> </ul>		~
Requirements  Messaging  Voice Identity  Video	> > >	Messaging Profile Type to filter for more profiles					
Wireless  Ketworking  Storage		Showing results 1 - 1 of 1 🔹 Sort by Order Date 👻			Show Column V Export CSV	/ •	Manage Channels ©
(\$) Bundles		Number  Status	SIP Connection/App @ \$	Messaging Profile	Services	Tags	Actions
Reports Account Settings	~		Toquitor to com		w ≈ m ∿ ~ w	no tay	

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

- 1		Messaging	~									
	Ċ	Voice	~	API Keys				Updated a few seconds ago	+ 891.	nce 😡 Available Credit .84 USD \$91.84 USD	🏋 Cart	S
	$\bigtriangledown$	Identity	~									
	ç	Video		API Keys Credentials P	ublic Key							
		Wireless										
	((to	Networking	- 1	API Keys						1		
	ଚ୍ଚ	Storage	- 1	Create and manage API Keys to use	e with the Telnyx API v2					Create API K	API V1 Tok	ens
	\$	Bundles								~ ``		
			- 1			Create API Key			ĸ			
	(B)	Reports	<i>.</i>	Status	API Key	cleate AFTRey			Jsed		j –	
	8	Account Settings				Once created you will be able to view the API Key secret among other info in the table view.				1		
1		My Account						0		and the second		
(I		Rilling					Cancel	Create				
N		Dining										
		Keys & Credentials										
		Access Control Lists										
		Advanced Features										

5. Note down the API key in **API Key** tab, and the Public key in **Public Key** tab.

API Keys Credentials	Public Key			
API Keys Create and manage API Keys to	o use with the Telnyx API v2		Cre	API V1 Tokens
Status	API Key	Created	Last Used	
active	KEY0187BCB628492C31157264********	4/26/2023	39 minutes ago	۵
API Keys Credentials	Public Key			
Public Key Use your public key to validate	Telnyx API V2 webhooks			
Key wb3e752ygLAsyjMuc4ni	ivit p			

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

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

Authentication Messaging Settings		
Please refer to the User Guide for information on how to configure the follo	wing setting	S.
* Name		* Webhook URL
Telnyx SMS channel		https://docs.example.yeastarcloud.com/api/v1.0/webhook/telnyx/dda18
* ITSP		
Telnyx		
* API Key		* Public Key
	Ļ	······

- Name: Enter a name to help you identify the channel.
- ITSP: Select Telnyx.
- API Key: Paste the <u>API Key obtained from Telnyx</u>.
- Public Key: Paste the Public Key obtained from Telnyx.
- 4. In the **Messaging Settings** tab, configure the channel.
  - a. In the **Message Sending Rate** drop-down list, 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.

<b>~</b>	Close Session Automatically
* Se	ssion Timeout (Days)
1	

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

Add							Х
* Number +14102161183							
* Destination for Inbound Mes	saging			* Extension			
Extension		$\sim$		3000-Leo Ball			$\sim$
Extensions allowed to create r	nessaging sessions Available		2 ite	ms	Selected	ł	
Search here	Q		Search	n here	Q		
Extension Num Extension Group	Caller ID Name Default_All_Ext			Extension Num 1000	Caller ID Name	$\overline{\uparrow}$	
1002	Terrell Smith			1001	Phillip Huff		
1003	Dave Haris					~	
1004	Troy Daniel					$\pm$	
						X Cancel	Save

- Number: Enter the purchased number 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 <b>Extension</b> drop-down list.
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message Queue</b> drop-down list.
	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.

- 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  $\Theta$ .

Status	Name	Туре	Number	Total	Sent	Operations
	Telnyx SMS channel	SMS	+14102161183	0	0	🖉 🗇

• 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.
- $\circ$  You can filter the statistics by a time period using the time filter.

(+) Add	🔟 Delete	Messaging St	atistics	All	$\checkmark$	
	Number	Total	Sent	Failed	Received	Operation
	+14102161183	30	20	10	8	⊿ 団

#### 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**

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

## Set up an SMS Channel for Twilio

This topic describes how to set up a Twilio SMS channel on Yeastar P-Series Cloud Edition, 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 84.12.0.23 or later
- Plan: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: 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.
- Domain Certificate: A valid domain certificate is installed.

## Note:

If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (**ycmcloud.com**, **yeastarcloud.com**, or **yeastarycm.co.za**), you NEED to install a valid domain certificate for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

## 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 <u>Twilio supported MMS file types</u>.

#### 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 <u>Allowed Country/Region IP Access Pro-</u><u>tection</u> 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: 24 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the ITSP drop-down list, select Twilio.

A Webhook URL for Twilio is generated and displayed in the Webhook URL field.

#### 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.

Authentication	Messaging Settings	
Please refer to the U	Jser Guide for information on how to configure the following settings.	
* Name	* Webhook URL	
	https://docs.example.yeastarcloud.com/api/v1.0/webhook/twilio/dda18	86 🖻
⊧ ITSP Twilio	Î	

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 regis-

tered, 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 <u>complete the phone</u> <u>number registration</u> to avoid disruption in message delivery.

Log in to Twilio portal, and complete the followings:

1. Search and purchase a number with SMS feature.

*i* **Tip:** You can check the SMS service pricing <u>here</u>.

Console testaccount@mail	.com's Account						Q Jump to	Account v Billing v	Test Account ~
Develop Monitor	Buy a Number								Î
<ul> <li>Elastic SIP</li> <li>Trunking</li> </ul>	Country us (+1) United States - US Q	Capabilities Voice SMS	MMS	Fax					
H Phone Numbers     Manage     Active numbers	Search criteria           Number         Search by digits or phrases           Search by area code, prefix, or characters you was	Match to First part of numl at in your phone number	per 💌	Search Reset fi	iters				
Released numbers	Advanced Search								
Verified Caller IDs TwiML apps > Port & Host	Number	Туре	Voice	SMS	Capabilities MMS	Fax	Address Requirement	Monthly fee	
Regulatory     Compliance	+1 972 996 7252 ▲ Richardson, TX US	Local	6	Ę	æ	ŵ	None	\$1.15	Buy
<ul> <li>&gt; C Messaging</li> <li>&gt; S Voice</li> </ul>	+1 248 313 6929 A Walled Lake, MI US	Local	6	Ē	ø	۵	None	\$1.15	Buy

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

Console     testaccount@mail.co	om's Account			Q Jump to	Account 🗸 Billing	▼ Test Account ▼	
Develop Monitor	Active Numbers	;				Buy a number $\Rightarrow$	
General Elastic SIP     Trunking	A2P 10DLC registration requ	Messaging Configuration					
✓ # Phone Numbers	Check the A2P 10DLC regist						
Active numbers Released numbers	Inventory Filters Number		A2P 10DLC	registration required for US messaging.			
Buy a number Verified Caller IDs TwiMI anns	Number		To send SMS/MMS status of your phon Initiate A2P 10DL	messages to the US with this US local number. a registration process is required. <u>Learn</u> enumbers. [2] C registration >	more about A2P 10DLC regis	tration [2] or <u>Check the A2</u>	P 10DLC registration
Port & Host     Regulatory     Compliance	+1410 216 1183 ▲ US. US						
<ul> <li>&gt; □ Messaging</li> <li>&gt; % Voice</li> </ul>		Routing ( Regional ) United States (US1) Region message routing is: Active					
		Messaging Service					
		No options					~
		Configure with Webbook TwiMI Bin Eurotion Studio Flow Provy Service					
		A marrora comer in		1101		HTTP	
		Webhook	~	https://docs.example.yeastarcloud.com/api/v1.0/webhook/twilio/dda18i		HTTP POST	~
		Primary handler fails		URL		HTTP	
		Webhook	*			HTTP POST	×

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.

۵	Console <u>testaccount@mail.</u>	com's Account	Q Jump	Account	✓ Billing ✓ TA Test Account ✓
Deve	lop Monitor	Messaging Geograph	ic Permissions		Î
	Numbers 🔺				
v 🖵 I	Messaging	Filter by country			1
	Overview	٩			
,	Try it out				
	Services	North America			
>	Senders	Anguilla (+1264)	Antique and Barbuda (+1268)	Aruba (+297)	
	Content Editor	Ascension (+247)	Bahamas (+1242)	Barbados (+1246)	
	*Beta	Belize (+501)	Bermuda (+1441)	Canada (+1)	
~	Settings	Cayman Islands (+1345)	Costa Rica (+506)	Cuba (+53)	
	General	Curaçao and Caribbean Netherlands (B Eustatius, Sint Maarten, Saba) (+599)	onaire, Sint 🗌 Dominica (+1767)	Dominican Republic (+1829)	
	Log archives	Dominican Republic (+1849)	Dominican Republic (+1809201)	Dominican Republic (+1809)	
L,	Geo permissions	El Salvador (+503)	Greenland (+299)	Grenada (+1473)	
	Add one i <sup>×</sup> Date	Guadeloupe (+590)	Guatemala (+502)	Haiti (+509)	
	Add-ons+ beta	Honduras (+504)	Jamaica (+1876)	Martinique (+596)	
Docs	and Support	Mexico (+52)	Montserrat (+1664)	Nicaragua (+505)	
		Panama (+507)	Puerto Rico (+1787)	St Kitts and Nevis (+1869)	
	«	Save geo permissions			

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.



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.



Console     testaccount@mail.e	com's Account	Q Jump to Account v Billing v (1) Test Account v
Develop Monitor	All U.S. SMS and MMS messages from unregistered 100LC phone numbers are now blocked. Please register your numbers, get approved and respectively.	sume messaging. <u>Learn more (?</u>
	Ahoy , welcome to Twilio!	
Messaging     Govent	Connect to 3rd-party applications Vou'l need 3 things to use Twillo with most 3rd-party applications: Account SD and Auth token Twillo phone number Cet a trial phone number Read Srid-early integration FAQ (2)	Invite teammates Ad developers in your team to your account. Invite teammates → Talk to Sales Connect with a Twilic expert to find out what products and plans best suit your needs. Talk to Sales (2)
Docs and Support	Account Info      Account SID      Account SID      Account SID      Auth Token      Auth Token      Authys store your token securely to protect your account. Learn more (5)      Always store your token securely to protect your account.	How does Twillo work? (5 Understand how to use Twillo in a 2-minute video.      Ait documentation (5 Learn the bias of Twilio APIs.      Surecost helic center (6 Troubleshoot common issues.
«		

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

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

Authentication Messaging Settings	
Please refer to the User Guide for information on how to configure the following settings.	
* Name	* Webhook URL
Twilio SMS channel	https://docs.example.yeastarcloud.com/api/v1.0/webhook/twilio/dda1867b098f44ceaf1d182c
* ITSP	
Twilio	
* Account SID	* Auth Token
	······································

- Name: Enter a name to help you identify the channel.
- ITSP: Select Twilio.

- Account SID: Paste the <u>Account SID obtained from Twilio</u>.
- Auth Token: Paste the Auth Token obtained from Twilio.
- 4. In the Messaging Settings tab, configure the channel.
  - a. In the **Message Sending Rate** drop-down list, 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.

<b>~</b>	Close Session Automatically
* S	ession Timeout (Days)
1	

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

Add					×
* Number					
+1/102161182					
+14102101103					
* Destination for Inbound Messaging		* Extension			
Extension		3000-Leo Ball			$\sim$
Extensions allowed to create messaring session	25				
	15		0.1		
4 items Availab	le	2 items	Selected		
Search here C	L	Search here	Q		
Extension Num Caller ID Name		Extension Num	Caller ID Name	$\overline{\uparrow}$	
Extension Group Default_All_Ext		1000	Leo Ball		
1002 Terrell Smith	>	1001	Phillip Huff		
1002 Dava Haria	<				
Dave Halls					
1004 Troy Daniel				$\perp$	
				× Cancel	G Save

- Number: Enter the purchased number 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 <b>Extension</b> drop-down list.
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message Queue</b> drop-down list.
	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.

- 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  $\Theta$ .

Status	Name	Туре	Number	Total	Sent	Operations
$\odot$	Twilio SMS channel	SMS	+14102161183	0	0	2 回

• 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.

 $\circ$  You can filter the statistics by a time period using the time filter.

				Time Filter		
🕀 Add 👘	Delete	Messaging	Statistics	All		
	Number	Total	Sent	Failed	Received	Operations
	+14102161183	30	20	10	8	2 団

# 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**

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

# Set up an SMS Channel for SIPTRUNK

This topic describes how to set up a SIPTRUNK SMS channel on Yeastar P-Series Cloud Edition, 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	<ul> <li>Firmware: Version 84.14.0.24 or later</li> <li>Plan: Enterprise Plan (EP) or Ultimate Plan (UP)</li> <li>Domain Name: 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.</li> <li>Domain Certificate: A valid domain certificate is installed.</li> </ul>
	Note: If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (ycmcloud.com, yeastarcloud.com, or yeastarycm.co.za), you NEED to install a valid domain certificate for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.
SIPTRUNK	• <b>Telephone number</b> : The DID number(s) should be SMS/MMS compatible and registered with 10DLC.
	<ul> <li>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.</li> <li>If your business communicates with US-based customers, you should complete the 10DLC registration for your phone numbers to avoid disruption in message delivery.</li> </ul>
	Submit a request to your service provider for the required number(s). For more information, see <u>SMS Process &amp;</u> <u>Expectations</u> .

# 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 SIP-TRUNK.

## 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 <u>Allowed Country/Region IP Access Pro-</u><u>tection</u> 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: 24 hours

## Procedure

- <u>Step 1. Obtain a Webhook URL on PBX</u>
- <u>Step 2. Configure messaging feature on SIPTRUNK</u>
- 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the ITSP drop-down list, select SIPTRUNK.

A Webhook URL for SIPTRUNK is generated and displayed in the Webhook URL field.

lmportant:

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.

Authentication Messaging Settings	
Please refer to the User Guide for information on how to con	figure the following settings.
* Name	* Webhook URL https://docs.example.yeastarcloud.com/api/v1.0/webhook/siptrunk/f4e0 😰
* ITSP SIPTRUNK	

4. Note down the Webhook URL.

## Step 2. Configure messaging feature on SIPTRUNK

Log in to <u>SIPTRUNK customer portal</u>, and complete the following settings:

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

CUSTOMER PORTAL	TE	ELEPH	NC	E NUM	BERS					
(1) Dashbaard	Create	e CSV (all 4 numbe	rs) Bu	lk Update Recent	Orders View by T	runk Search View	/Set CNAM	Versil to Fersil	Description, Location	Description: Consul
Dashboard	euic	Number	Type	Primary	Secondary	PSIN Forward	PSTN Backup	Villali to Email	Description: Location	Description: General
🛋 Profile		14102161183	STD	Trunk 1	not set	not set	not set	not set		
Payment Center >										
SIP Trunking	Call Det	ail Records								
0.4.1.1	SIP Trun	nks								
S Number Porting >	Telepho	ne Numbers		r new numbers						
🚍 Billing	Order Te	elephone Numb	oers							
🖶 Fax	Internat	ional Calling								

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

	API Keys Webhooks API Docs Package Pricing How to Use Messaging	
& Dashboard	• Me Webhooks Create New Webhook	
🏥 Profile	• 101	
ayment Center >	Me Inbound Description Active Delete	
℅ SIP Trunking >	You Webhooks cLos	
	Set a vebbook name Greate	
🚍 Billing		1
Fax	Webhooks ctor	ε
Ø Messaging	Weomolok Lifested	
<ul> <li>Support</li> </ul>		
Ny System Status		

b. Assign the Webhook to the DID number.

CUSTOMER PORTAL	API Keys Webhooks API Docs Package Pricing How to Use Messaging
	Messaging Resources:
& Dashboard	Messaging Setup Process & Timeline
Profile	10DLC Registration Form Help Sheet
Payment Center	Messaging Knowledgebase
📎 SIP Trunking	Your Messaging DIDs:
🐇 Number Porting	DID Enabled Assign WebHook
🚍 Billing	14102161183 😨 🗀 🗸 Vieward Starley S
Fax	N2
Ø Messaging	
③ Support	
Nystem Status	

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



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

CUSTOMER PORTAL	API Keys Webhooks API Docs Package Pricing How to Use Messaging	
& Dashboard	API Keys Create New API Key CLOSE	
Profile		
Payment Center >	Access API Keys CLOSE be3791eb-1bfd-43c1 Veastar_PBX Create	
SIP Trunking >	ок	
	API Keys	CLOSE
🚍 Billing	API Key Created.	
🖶 Fax	Access Key: baad 2273 Secret Key: 9041 (1997) 30XAPT (Key: 1994)	
O Messaging	YmFhYTdIYTctOGVjMS00YmY5LWI1NjYtMDI3MGE1MWEyMjczOjkwNGYyMDBILTZrmMjktNDBInNC05YWiwLWM1ZjM5N2I30Dk5Zg== Description: test	
<ul><li>? Support</li></ul>		
Ny System Status		

# 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the Authentication tab, enter the authentication information of SIPTRUNK.

Authentication Messaging Settings		
Please refer to the User Guide for information on how to configure the following	ig settings.	
* Name	* Webhook URL	
SIPTRUNK SMS channel	https://docs.example.yeastarcloud.com/api/v1.0/webhook/siptrunk/f4e0	þ
* ITSP		
SIPTRUNK V		
* Access Key	* Secret Key	
······	······ ,	×

- 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** drop-down list, 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.

	Close Session Automatically
* Sea	ssion Timeout (Days)
1	

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

Add							Х
* Number +14102161183							
* Destination for Inbound I	lessaging			* Extension			
Extension		$\sim$		3000-Leo Ball			$\sim$
Extensions allowed to creat	te messaging sessions Available		2 ite Searc	e <b>ms</b> h here	Selecter Q		
Extension Num	Caller ID Name			Extension Num	Caller ID Name		
Extension Grou	p Default_All_Ext			1000	Leo Ball	$\uparrow$	
1002	Terrell Smith			1001	Phillip Huff		
1003	Dave Haris					$\sim$	
1004	Troy Daniel					$\pm$	
						× Cancel	🕞 Save

- Number: Enter the purchased number 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 <b>Extension</b> drop-down list.
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message Queue</b> drop-down list.
	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.

- 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  $\Theta$ .

Status	Name	Туре	Number	Total	Sent	Operations
$\oslash$	SIPTRUNK SMS Channel	SMS	+14102161183	0	0	⊿□団

• 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.

(+) Add	[II] Delete	Messaging St	atistics	All	~	
	Number	Total	Sent	Failed	Received	Operation
1	+14102161183	30	20	10	8	⊿ 🗇

## 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 User Guide - Manage customer gueries from SMS channel on Linkus Desktop Client User Guide - Manage customer gueries from SMS channel on Linkus Mobile Client

# Set up an SMS Channel for VoiceMeUp

This topic describes how to set up a VoiceMeUp SMS channel on Yeastar P-Series Cloud Edition, 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 84.14.0.24 or later
- Plan: Enterprise Plan (EP) or Ultimate Plan (UP)
- Domain Name: 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.
- Domain Certificate: A valid domain certificate is installed.



Note:

If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (**ycmcloud.com**, **yeastarcloud.com**, or **yeastarycm.co.za**), you NEED to install a valid domain certificate for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

## 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 Voice-MeUp.

#### 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 <u>Allowed Country/Region IP Access Pro-</u><u>tection</u> 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: 24 hours

#### **Procedure**

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

## 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 > Messaging Channel.
- 2. Click Add, and select SMS.
- 3. In the **ITSP** drop-down list, select **VoiceMeUp**.

A Webhook URL for VoiceMeUp is generated and displayed in the **Webhook URL** field.

## 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.

Authentication	Messaging Settings		
Please refer to the Us	ser Guide for information on how to configure the followi	ng settings.	
* Name		* W	lebhook URL
		h	ttps://docs.example.yeastarcloud.com/api/v1.0/webhook/voicemeup/1: 😰
* ITSP			1
VoiceMeUp	$\vee$		i

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.

voice me up	=	
0	S DID Numbers *	Account ID: 80020576 Account status : Active Account status : Active Account balance : \$124.25 USD CR (Postpaid)
A Home		
📌 Favorites 🧹	O     O     Refresh     Print     O     Contextual Help	
🛃 Account 🧹 🤇	9. Search T Filters B Export	Reset Apply -
	* A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	
🖌 Reports 🗸	Search String	
😋 Services 🛛 🗸 🗸	Use new lines or commas for multiple search (CTRI-INITIR to submit)	
😪 Global Settings	Search Field(s)	
😔 e911 Service	✓ ID     ✓ Friendly Name     ✓ Phone Number     Forward Number     DNIS Rewrite	Comments
Whitepages (411 Directory)		
😵 International Calling		
🐥 Call Filters	16 items per page V Showing item 1 to 3. Total: 3	IP IH
🐥 Channels / Virtual PRI		Ontions
📫 Peers / SIP Trunks 🛛 🕂		Options Action
DID Numbers	🗌 📀 54213 14102161183 Local 🗖 🛱 💼 +1 410-216-1183 SIP / !Test -	Yeastar Interop 1 Peer(s) 🕕 🔽 rait -
Port Requests	🗌 📀 54214	Peer(s) +1 rdit -
le Virtual Fax	🗌 🥥 55486	Peer(s)
		Email us

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

Available Options			
Bosic Call Flow Peer / SiP Trunk Route call to selected peer(s) Media playback Play a media file to the calter	Call queue Send call to a call queue Voicemail Send call to a voice mailbox	Call forward	Call director  Send coll to director service
Applications Virtual fax Send call to fax service	Virtual attendant Route the call to a virtual attendant profile	SIP URI Route call to another 5IP address	Conference  Multiple party conference system
Additional Options Call recording Record inbound calls associated to this number	Filters Block calls based on selected criteria	SMS/MMS options Modify SMS/MMS options for this number	Advanced options Additional options for advanced users
€ Peer Pa SMS/MMS options Enable SMS/MMS for this DID ✓	SMS/MMS Profile (Optional) You don't have any SMS Profil SMS/MMS Profiles If you are not using an SMS/SMS Pro	es Re, please use the options below.	
Enable forwarding 🔮	Forwarding number		
Enable email notifications 9	Notification email		
Enable autoreply	Autoreply message		
Enable Callback URL 🖗	Callback URL https://docs.example.yeas Advanced option : Incoming SMS/M	tarcloud.com/api/v1.0/webhook/voicemeu MS messages will be transmitted to the Callback URL	p/885c2304e9a04a85a749552a56c279b4
Enable SMS DNIS Override	SMS DNIS override	Reset Save	Email us

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

voice me up	≡	veastar_interop -
Tonnie Yeastar	tes Users & Access ★ Manage account's users and access	
🗙 Favorites 🧹	D Bafreah 1      Print      Contractual Help	
🗶 Account 🗸 🗸	9. Search T Filters	Reset Apply -
Account Preferences     Plan & Services     International Rates     International Rates     Invoices & Payments     Loser Preferences	$\begin{array}{c c c c c c }\hline \bullet & h & h & c & h & c & h & c & h & h & 1 & J & K & L & M & N & 0 & P & Q & R & S & T & U & V & W & X & V & Z \\\hline \\ \hline \\ \\ \hline \\$	
28 Users & Access	Search Heid(s)	
<ul> <li>Change Requests</li> <li>Sub-Accounts &amp; Resale</li> <li>Brand &amp; Whitelabel</li> </ul>	If items per page     Showing item 1 to 8. Total: 8	
History <	□ ID 11 Type 11 Access Username 11 First Name 11 <sup>1</sup> Last Name 11 <sup>2</sup> Email 11 Notification	s Action
Services		
Cloud PBX <		
Quick Search Q		
ڻ		,

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

Type 🖸 andard	V User Permissions		Please remember to adjust the permissions after saving, as new users will have access to all applications by default.
rname	_		
astar_test			
User Password A Notifications PAccess		Last Name	
Example		Yeastar	
mail		Phone Number	Extension
example@yeastar.com		<b>I</b> • <b>I</b> +] •	
ax Number		Preferred Language	
	_		
User Access			
User Apassword Notifications		Allow access to the API	
User Password Notifications Access          Allow login to the client section         Security Risk         AP access is a big security risk because it allows any	one with the key to make changes in	Allow access to the AP	ose it an where.
User Password Notifications Access Allow login to the client section  Security Risk API access is a big security risk because it allows any tilent Account ID Auth To secure	one with the key to make changes in ken	Allow access to the API	ose it anywhere.
User Password Notifications Access Allow login to the client section Security Risk API access is a big security risk because it allows any lient Account ID 0020576 MMPORTAI	one with the key to make changes in ken 17 - Regenerating a token renders the previo	Allow access to the API	e it anywhere.
User Password Notifications Access          Allow login to the client section         Allow login to the client section         Allow login to the client section         Allow count of the client section         Allow count ID         0020576         Important         PI URL         ttps://clients.voicemeup.com/api/vl1/xml/get_request	one with the key to make changes in ken 17 - Regenerating a taken renders the previo	Allow access to the AP	Tregenerate the Token

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.

LUSEr 🔒 Password	A Notifications			
Allow login to the client section $\checkmark$ Allow access to the API				
API access is a big security Risk	urity risk because it allows anyone with the key to make changes in your account. Make sure not to disclose it			
Client Account ID	Auth Token			
80020576 (2) 🙀 🕫 Regenera				
	IMPORTANT - Regenerating a token renders the previous token obsolete.			

# 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the **Authentication** tab, enter the authentication information of VoiceMeUp.

Authentication Messaging Settings		
* Name	* Webhook URL	
VoiceMeUp SMS channel	https://docs.example.yeastarcloud.com/api/v1.0/webhook/voicemeup/8/	
* ITSP		
VoiceMeUp $\lor$		
* Username	* Auth Token	
·······	······	

- Name: Enter a name to help you identify the channel.
- ITSP: Select VoiceMeUp.
- Username: Paste the <u>username of the VoiceMeUp account</u>.
- 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** drop-down list, 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.

Close Session Automatically	
* Session Timeout (Days)	
1	

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

Add					×
Number     +14102161183     Destination for Inbound Messaging     Extension Extension Extensions		* Extension 3000-Leo Ball			v
A items     Search here	Available	2 items	Selected		
Extension Num     Caller II       Extension Group     Default       1002     Terrell S       1003     Dave Hi       1004     Troy Da	All_Ext > mith <	Extension Num 1000 1001	Caller ID Name Leo Ball Phillip Huff	<ul><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li></ul>	
TOU4 Troy Da	niei			⊻ X Cancel	Save

- Number: Enter the purchased number 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 <b>Extension</b> drop-down list.

Option	Description
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message Queue</b> drop-down list.
	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.

- 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  $\Theta$ .

Status	Name	Туре	Number	Total	Sent	Operations
	VoiceMeUp SMS channel	SMS	+14102161183	0	0	⊿ ⊡

• 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.
- $\circ$  You can filter the statistics by a time period using the time filter.

				Time Filter		
🕀 Add 📋 🛙	Delete	Messaging Statisti	cs	All	~	
	Number	Total	Sent	Failed	Received	Operations
1	+14102161183	30	20	10	8	⊿ 団

# 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**

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

# Set up an SMS Channel for VoIP.ms

This topic describes how to set up a VoIP.ms SMS channel on Yeastar P-Series Cloud Edition, 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 84.14.0.24 or later
- Plan: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Domain Name**: 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.
- Domain Certificate: A valid domain certificate is installed.

# Note:

If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (**ycmcloud.com**, **yeastarcloud.com**, or **yeastarycm.co.za**), you NEED to install a valid domain certificate for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.

# Supported message types and limits

## Supported message types

The supported message types are determined by VoIP.ms.

## 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 <u>Allowed Country/Region IP Access Pro-</u><u>tection</u> 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: 24 hours

## **Prerequisites**

Obtain the following information from VoIP.ms:

- API address for verifying authentication
- API address for sending messages
- Message sending rate limit
- API key and Secret for the messaging channel integration
- 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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the **Authentication** tab, complete the following settings.

ſ	* Name	* Webhook URL	
l	VoIP.ms SMS Channel	https://docs.example.yeastar.com/api/v1.0/webhook/voipms/06257da982a74216a8d521d195	۵
l	* ITSP		
l	VolP.ms V		
l	* API Key	* Secret	
l	·····	·····	<i></i> 4
l	* API Address for Sending Messages	* API Address for Verifying Authentication	
l	https://voip.ms/sendmessage	https://voip.ms/verify	
l			

- Name: Enter a name to help you identify the channel.
- ITSP: Select VolP.ms.
- API Key: Enter the API key provided by VoIP.ms.
- Secret: Enter the Secret provided by VoIP.ms.
- API Address for Sending Messages: Enter the corresponding API address provided by VoIP.ms. For example, https://voip.ms/sendmessage.
- API Address for Verifying Authentication: Enter the corresponding API address provided by VoIP.ms. For example, https://voip.ms/verify.
- Webhook URL: Copy the webhook URL and paste it in the customer portal of VoIP.ms.

#### Note:

For the detailed introduction of webhook settings on VoIP.ms, contact the service provider.

- In the **Messaging Settings** tab, configure the channel.
  - a. In the Message Sending Rate drop-down list, 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	se Session Automatically
* Sess	on Timeout (Days)
1	

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

Number     +14102161183     Destination for Inbound Messaging     Extension     Cutent of the state in	~
+14102161183  Destination for Inbound Messaging Extension  Extension  4 items Available Search here Q Extension	~
Destination for Inbound Messaging     * Extension       Extension        Stension allowed to create messaging sessions     3000-Leo Ball       Xtension allowed to create messaging sessions     2 items       Search here     Q	~
Extension     3000-Leo Ball       xtensions allowed to create messaging sessions     2 items       4 items     Available     2 items       Search here     Q	~
A tiems     Available     2 items     Selected       Search here     Q     Search here     Q	
Extension Num Caller ID Name Extension Num Caller ID Name	
Extension Group Default_All_Ext 1000 Leo Ball	
1002     Terrell Smith	
1003 Dave Haris	
1004 Troy Daniel	

- **Number**: Enter the purchased number 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 <b>Extension</b> drop-down list.
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message</b> <b>Queue</b> drop-down list.
	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

Option	Description
	session will be able to receive and respond to the follow-up inbound messages in the session.

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

## Result

• A messaging channel is created successfully. You can see the channel displayed in the Messaging Channel list with **Status** showing  $\Theta$ .

Status	Name	Туре	Number	Total	Sent	Operations
	VoIP.ms SMS Channel	SMS	+14102161183	0	0	⊿ ⊡

• 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.
- $\circ$  You can filter the statistics by a time period using the time filter.

(+) Add	T Delete			All	$\sim$	
		Messaging St	atistics			
	Number	Total	Sent	Failed	Received	Operation
	+14102161183	30	20	10	8	⊿ 尚

# 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**

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

# Integrate SMS Service with Yeastar P-Series Cloud Edition using SMS API

Yeastar P-Series Cloud Edition 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 Cloud Edition, Yeastar PBX and Service Provider must meet the following requirements.

Platform	Requirement
Yeastar PBX	<ul> <li>Firmware: Version 84.14.0.24 or later</li> <li>Plan: Enterprise Plan (EP) or Ultimate Plan (UP)</li> <li>Domain Name: 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.</li> <li>Domain Certificate: A valid domain certificate is installed.</li> <li>Note: If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (ycmcloud.com, yeastarcloud.com, or yeastarycm.co.za), you NEED to install a valid domain certificate for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.</li> </ul>
Service Provider	<ul> <li>API: Service Provider should provide the following API interfaces.</li> <li>HTTPS REST API for verifying authentication</li> </ul>

Platform	Requirement
	<ul> <li>HTTPS REST API for sending messages</li> </ul>
	Customer Portal Feature: Service Provider should offer the following
	features on its customer portal.
	<ul> <li>Provide an API key to authenticate API requests sent from PBX system.</li> </ul>
	<ul> <li>Provide a Secret for PBX system to verify webhook requests sent by the Service Provider.</li> </ul>
	<ul> <li>Support for configuring Webhook through the customer portal.</li> </ul>
	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:

Verify SMS channel connectivity

<u>Send messages through Service Provider</u>

Secret

The Secret is used to authenticate the webhook requests sent from Service Provider to PBX.

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 <u>Receive messages from Service Provider</u>.

# Verify SMS channel connectivity

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	Туре	Description
Authorizatio	String	Pass the API key in the header.
n		<pre>Format: Bearer {api_key}</pre>

#### **Query parameter**

Parameter	Туре	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 <sup>⊘</sup> (Connected).

#### **Error response**

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

Parameter	Туре	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.ErrInvalidPhon eNumber	Invalid phone number.
10002	channel.ErrInvalidPara m	Invalid parameter in the request.
10003	channel.ErrUnsupportM edia	Resource type not supported (MMS).
10004	channel.ErrAuthFail	Authentication failed.
10005	channel.ErrAuthFail	No permission.
10006	channel.ErrTooManyRe quest	Too many requests.
10007	channel.ErrServiceUnav ailable	Service unavailable on recipient's platform.
10008	channel.ErrExceedsSiz eLimit	File size exceeds the limit.

#### • Exceptions

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

Channel Status	Trigger Condition
Unauthorized	<ul> <li>Authentication failed, Service Provider returns HTTP status code 401/403/404.</li> <li>The returned challenge code does not match the one sent by the PBX.</li> </ul>
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	<ul> <li>Service Provider does not return an HTTP status code, possibly due to TCP connection issues or non-existent domain.</li> <li>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.</li> </ul>

# 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	Туре	Description
Content-Ty	String	Define the content type of the request
ре		payload.

Parameter	Туре	Description
		Valid value: application/json
Authorizatio	String	Pass the API key in the header.
n		<pre>Format: Bearer { api_key }</pre>

### **Request body**

PBX will pass the outbound message in the request body.

Param eter	Туре	Description	
from	String	Phone number of the message sender.	
		Note: This parameter should be in E.164 format. For example, +8618012121222.	
to	String	Phone number of the message recipient.	
		Note: This parameter should be in E.164 format. For example, +8618012121222.	
text	String	The textual content of the message.	
media_ur Is	Array <str ing&gt;</str 	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

}

#### • 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":["docs.example.yeastarcloud.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":"b30led3f-1490-491f-995f-6e64e69674d4",
    // Message ID (Required)
        "from": {
        // Message sender's information
            "carrier": "PBX",
            "line_type": "VoIP",
            "phone_number": "+8618012121222"
        },
        "text": "Hello world!",
        // Textual content of the message
```

```
"media": [
  // Media content of the message
            {
                "content_type": null,
  // Media type
                "sha256": null,
  // SHA256 value of the media content
                "size": null,
  // Media file size
                "url":
 "https://docs.example.yeastarcloud.com/
profile_images/1142168442042118144/AW3F4fFD_400x400.
png" // URL pointing to the media content
           }
        ],
        "to": [
  // Message recipient's information
            {
                "carrier": "T-MOBILE USA, INC.",
                "line_type": "Wireless",
                "phone_number": "+8618012121223",
                "status": "queued"
            }
         ],
        . . .
        }
}
```

#### **Error response**

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

Parameter	Туре	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.ErrInvalidPhon eNumber	Invalid phone number.
10002	channel.ErrInvalidPara m	Invalid parameter in the request.
10003	channel.ErrUnsupportM edia	Resource type not supported (MMS).
10004	channel.ErrAuthFail	Authentication failed.
10005	channel.ErrAuthFail	No permission.
10006	channel.ErrTooManyRe quest	Too many requests.
10007	channel.ErrServiceUnav ailable	Service unavailable on recipient's platform.
10008	channel.ErrExceedsSiz eLimit	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	<ul> <li>Service Provider does not return a data.id.</li> <li>Service Provider returns HTTP status code 404, prompting service not found.</li> <li>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.</li> <li>Message delivery fails, and Service Provider does not return error information or the returned response body is not in JSON format.</li> </ul>
Authentication Failed	<ul> <li>Service Provider returns HTTP status code 401.</li> <li>Service Provider returns error code 10004 or 10005.</li> </ul>
Recipient Platform Service Unavailable	<ul> <li>Service Provider returns HTTP status code 403.</li> <li>Service Provider returns error code 10007.</li> </ul>
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	Service Provider returns error code 10008.

Error Prompt	Trigger Condition
limit of the	
recipient's	
platform.	

## **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:



- 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 <u>a SHA256</u> <u>signature</u> 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://docs.example.yeastarcloud.com/
api/v1.0/webhook/general/429ced149ff9437695be795aff3
8407b
```

#### Headers

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

#### **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	Requ ired	Туре	Description
data.event_ty pe	Yes	Strin g	Event type. Valid value: message.received.
data.payload.i d	Yes	Strin g	Message ID.
			Note: The maximum character length is 255.
data.payload.f rom.phone_nu mber	payload.f Yes St phone_nu g		Phone number of the message sender.
			Note: This parameter should be in E.164 format. For example, +8618012121222.
data.payload.t o.phone_num ber	Yes	Strin g	Phone number of the message recipient.
			Note: This parameter should be in E.164 format. For example, +8618012121222.
data.payload.t	Yes	Strin g	Textual content of the message.
			Important: Either data.payload.text or data.payload.media must be provided.
data.payload. media	Yes	es Array < <u>med</u>	The information and URL pointing to the media content of the message.
			Important: Either data.payload.text or data.payload.media must be provided.
data.payload.r eceived_at	Yes	Strin g	The time when the message was received (ISO 8601 format).

Parameter	Requ ired	Туре	Description
			Format: YYYY-MM-DDTHH:MM:SS.mmm+/-HH:MM. Example: 2019-12-09T20:16:07.588+08:00.
data.payload.r ecord_type	Yes	Strin g	Record type. Valid value: message.

#### media

Param eter	Requ ired	Туре	Description	
content _type	No	Strin g	The type of the media file.	
		9	<i>i</i> Tip: Refer to the <u>Media</u> <u>Types</u> for the corresponding value.	
sha256	No	Strin g	The SHA256 value of the media file.	
size	No	Integ er	File size.	
url	Yes	Strin g	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: docs.example.yeastarcloud.com
Content-Type: application/json
X-Signature-256: sha256={signature}
{
    "data": {
        "event_type": "message.received",
        "
```

```
"id":
 "b301ed3f-1490-491f-995f-6e64e69674d4",
  //Event ID
        "occurred_at":
 "2019-12-09T20:16:07.588+00:00",
        "payload": {
            "completed_at": null,
            "cost": 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,
                    "size": 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-aldebe
b9e675"
        },
        "record_type": "event"
    },
    "meta": {
        "attempt": 1,
        "delivered_to":
 "http://webhook.site/04bbd2e3-09b5-4c9e-95de-aldebe
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.			

Item	Limitation
	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 <u>Allowed Country/Region IP Access</u> <u>Protection</u> 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	24 hours

#### Prerequisites

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



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 > Messaging Channel**.
- 2. Click Add, and select SMS.
- 3. In the **Authentication** tab, complete the following settings.

https://docs.example.yeastar.com/api/v1.0/webhook/general/65bf6bcee6734c0583		
* Secret		
* API Address for Verifying Authentication		
https://service-provider.example.com/verify		

- 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**: Enter the Secret obtained from the Service Provider's customer portal.
- 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: Enter the corresponding API address provided by the Service Provider. For example, https://service-provider.example.com/verify.
- Webhook URL: Copy the webhook URL and paste it in the Service Provider's customer portal.
- 4. In the Messaging Settings tab, configure the channel.
  - a. In the **Message Sending Rate** drop-down list, 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						
+14102161183						
Destination for Inbound Mes	saging		* Extension			
Extension		$\sim$	3000-Leo Ball			$\sim$
Search here	٩		Search here	Q		
Search here			Search here			
					$\overline{\uparrow}$	
Extension Group	Default_All_Ext		1000	Leo Ball		
1002	Terrell Smith		1001	Phillip Huff		
1003	Dave Haris					
1004	Tray Daniel					

- **Number**: Enter the purchased number 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 <b>Extension</b> drop-down list.
	Only the extension user can receive inbound messages from the number.
Message Queue	If selected, choose a queue from the <b>Message Queue</b> drop-down list.
	All the agents in the selected message queue can receive inbound message(s)

Option	Description		
	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.		

- 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  $\bigotimes$ .

	Status	Name	Туре	Number	Total	Sent	Operations
l	$\odot$	General SMS Channel	SMS	+12 07	0	0	⊿ ⊡

• 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.

					Time Filter		
		Messaging Statistics		All			
4	Number	Total	Sent	Failed	Received	Operations	
1	+14102161183	30	20	10	8	2 🗇	

#### 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

<u>User Guide - Manage customer queries from SMS channel on Linkus Web Client</u> <u>User Guide - Manage customer queries from SMS channel on Linkus Desktop Client</u> <u>User Guide - Manage customer queries from SMS channel on Linkus Mobile Client</u>

# Social Media Channel

# Set up a WhatsApp Channel

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

# Requirements

Platform	Requirement
Yeastar PBX	<ul> <li>Firmware: Version 84.12.0.23 or later</li> <li>Plan: Enterprise Plan (EP) or Ultimate Plan (UP)</li> <li>Domain Name: 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.</li> <li>Domain Certificate: A valid domain certificate is installed.</li> </ul>
	Note: If the root domain of your Cloud PBX is NOT the standard Yeastar-provided domains (ycmcloud.com, yeastarcloud.com, or yeastarycm.co.za), you NEED to install a valid domain certificate

Platform	Requirement
	for the PBX first, otherwise the messaging channel will encounter authentication failure, or will fail to receive messages.
WhatsApp	<ul> <li>• Product: WhatsApp Business Platform</li> <li>• Account:         <ul> <li>• <u>A Meta Developer account</u></li> </ul> </li> </ul>
	Note: 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.
	∘ <mark>A Business Manager account</mark>
	Note: After you set up a Business Manager account, <u>verify your</u> <u>business</u> .

# Limitations

Learn about the limitations of WhatsApp messaging channel.

ltem	Description		
Message type	Supports text messages and multimedia messages, where the multimedia message types are determined by WhatsApp. For more information, see <u>WhatsApp supported media types</u> .		
	Important: When sending multimedia messages (such as images), WhatsApp downloads the file from a link provided by the PBX. Therefore, if you have set <u>Allowed Country/Region IP Access Protection</u> 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	Supports to receive and reply to <b>Inbound</b> messages, but agents can NOT initiate a messaging session with a WhatsApp user.		
Message sending rate	Supports to send up to <b>80</b> messages per second.		
File size	Supports to send a file with a maximum size of <b>100 MB</b> .		
File retention period	Files can be retained for <b>24 hours</b> .		

ltem	Description
Session auto closure	A session that has been inactive for more than <b>24 hours</b> will be closed automatically.

### Procedure

- Step 1. Create a Meta app on 'Meta for Developers' portal
- Step 2. Create an admin system user 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

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



2. Create an app of the **Business** type.

#### Note:

/

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

Create an app	× Cancel	Create an app	× Cancel
What do you want your app to do? Use cases are made up of permission, products and features. Each option under related use cases. You'll configure and customize these use cases once your app is creased. More people to log in with their Facebook account option and services for permission to access their data. Get gaming login and request data from players.	N YOUF	Type     O Details	Select an app type The app type can be charged after your app is created. Learn more Pusiness Output a con manage business assets like Pages, Events, Groups, Ads, Messenger, WhatAge, and Instagram Grouph API using the available business permissions, features and products. Add an app name
One players a way to log into your game across multiple platforms and ask users for permission to a player and use counter player analyses and used to be and added to be added	Iccess Icct Other	Det	This is the game that will show on your My Appa page and associated with your app. D. You can share the nume that in Settings. Yestist Messaging 17 App contact email This is the set of the an address you check regularly. We may contact you also
Other Cipitor other products and data permissions such as ads management, Instant Games and more. Yo asked to select an app type and then you can add the permissions and products you need.	aufil be		process, top temportantia or incompt ryper days a sense or compromote. Testaconstiffinations Business Account - Optional Connecting to Business Account to por again only required for cartial products and permissions. You'll be asked to connect a Business Account into proceedings accounts from products and permissions.
			Test Dustness By proceeding, you agree to the Meta Platform Terms and Developer Policies. Previous Center

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

R	S		
Webhooks	WhatsApp	Facebook Login for Business	
Subscribe to changes and receive updates in real time without calling the API.	Integrate with WhatsApp	A secure way for businesses to give your app permissions to access data.	
Read Docs Set up	Read Docs Set up	Read Docs Set up	

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

- 4. On the left navigation bar, go to **API Setup** page of the WhatsApp product, and complete the followings:
  - a. To use your own WhatsApp phone number for messaging, click the From dropdown list in the Select phone numbers section, and click Add phone number to add your phone number for messaging.

Send and receive messages	
Step 1: Select phone numbers	
From Send free messages with the provided test phon- pricing. Learn more.	e number. You can use your own phone number which is subject to limits and
Test number: +1 555 019 3510	•
• (S) Test Number +1 555 019 3510	Business Account ID:
+ Add phone number	

b. In the **From** drop-down list, select the desired phone number, then note down the number and the corresponding **Phone number ID** as you will need to add them on the PBX later.

In this example, select the default test number provided by WhatsApp.

Send and receive messages
Step 1: Select phone numbers
From Send free messages with the provided test phone number. You can use your own phone number which is subject to limits and pricing. Learn more. Test number: +1 555 019 3510 • Phone number ID: 11 9 ①
То
Select a recipient phone number •
Step 2: Send messages with the API

c. If you use the test number provided by WhatsApp, you need to specify the recipients' phone number in the **To** drop-down list, otherwise message sending may fail.

Step 1: Select phone numbers			
From Send free messages with the provided test phone number. You can use	our own nhone numbers	which is subject to limits and pricing. Learn more	
Test number: +1 555 019 3510 🔹	Add a recipient pho You can have up to 5 p	<b>ne number</b> hone numbers to receive free test messages.	×
	Phone number		
Phone number ID: 1 7 💭 WhatsApp Business Acc	US +1 🗸	(800) 278-6915	0
To	By continuing, you are	giving consent to receive messages at this phone	number.
		С	ancel Next
Manage phone number list	press enter. To create vo	ur own message template click here	

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.

🔓 Dashboard				
Required actions		App ID	App secret	
App settings	^	9 3	74 2	Reset
Basic		Display name	Namespace	
Advanced		Yeastar Messaging		

# Step 2. Create an admin system user on 'Meta Business Suite' portal

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



You are redirected to the **Business settings** page of <u>'Meta Business Suite' portal</u>.

- 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.

Filter by name or ID	Q Add	Admin access	r		Edit
Authorized user Admin system user		Generating Access     System Users can o	<b>Token</b> only ge	<b>is</b> inerate access tokens for permissions their app has been granted through App Rev	iew.
		C Generate new token	8	Revoke tokens 🛆 Add assets	
		Assigned	asse	A Add assets	
		Here are the	asset	s Authorized user (System User) can access. View and manage their	
Assign Assets to Auth	orized user			×	
Select asset type Select as		ssets		App Partial access	
Pages	Search 8	Search & filter Q		Develop app	A
Ad accounts Catalogs	Name		0	Can change app settings, test the app and view analytics. View insights Can view app analytics.	1
Apps	1	Yeastar Messaging	0	Test app Can test the app	
Pixels				Can test tile app.	
Instagram accounts				Full control	
Datasets				Manage app Can manage roles, change app settings, test the app and view analytics.	

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

∾ <sup>Meta</sup> Business settings	≡	Whats	App Accounts	
Test Business	•	Filter	by name or ID Q + Add	S Test WhatsApp Business Account Owned by: Test Business ID: 106151595840235 Remove
- Accounts	^	Test W	/hatsApp Business Account	2 Add people
Pages				People Settings Pages
Ad accounts Business asset groups				People
Apps				These people have access to Test WhatsApp Business Account. You can view, edit or delete their
Instagram accounts			Add people to Test WhatsApp Bu	usiness Account ×
WhatsApp Accounts			Select people	Assign access
-			Search & filter	Q WhatsApp account
		1 Person Selected	Partial access Manage phone numbers and message templates	
			Authorized user (System Us	<ul> <li>You can create message templates, add phone numbers, access metrics and send messages to customers.</li> </ul>
				Full control Manage WhatsApp business accounts You can do all of the above, and also assign users and view payment information.
				Assign

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.

Meta Business settings	≡	System users			
T Test Business	•	Filter by name or ID	Q Add	Authorized user Admin access	Edit
Users People Partners	^	Authorized user Admin system user		Generating Access Tokens     System Users can only generate access tokens for permissions their through App Review.     Generate new token	app has been granted
Generate token Select app: Yeastar Messaging Token expiration Choose when this token will expire. refresh.	Learn about to	× when expiration and	pages_read_enga pages_manage_n pages_manage_e pages_manage_c v whatsapp_busine ads_managemen pages_read_user, pages_manage_p	gement vetadata ds as_messaging content osts ss_management	
Never			instagram_manag pages_manage_in read_page_mailbx instagram_conter pages_manage By clicking 'Generate to system user Authorized	e_messages stant_articles xxes t_publish ngagement ken', you agree to install selected app for user. Cancel Generate token	

A window pops up to show 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.

Generate token	×
An access token has been generated for Test Business as following:	
System user: Authorized user	
Assigned app: Yeastar Messaging	
Access token: EA	
ZD	
Copy and save this token as it won't be stored at Facebook	
ок	

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

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

Authentication Messaging Settings		
Please refer to the User Guide for information on how to configu	ire the following se	ttings.
* Name		* Webhook URL
WhatApp channel		https://docs.example.yeastarcloud.com/api/v1.0/webhook/whatsapp/dd
* Verify Token		
38owndego8ugcinx	E	
* Access Token		* App Secret
	<i>ب</i> بر	

- Name: Enter a name to help you identify the channel.
- Webhook URL: Note down the Webhook URL, as you will need it later on What-sApp.
- Verify Token: Note down the verify token, as you will need it later on Whats-App.
- Access Token: Paste the <u>Access Token obtained from 'Meta Business Suite'</u> portal.

App Secret: Paste the <u>App Secret obtained from 'Meta for Developers' portal</u>.
4. In the **Messaging Settings** tab, configure the channel.

Authentication	Messaging Settings			
* Phone Number			* Phone Number ID	
+15550193510			1 9	
* Destination for Inbou	nd Messaging		* Extension	
Extension		~	3000-Leo Ball	$\checkmark$

- Phone Number: Enter the <u>WhatsApp phone number</u> in E.164 format ([+] [country code][phone number]). For example, +15550193510.
- Phone Number ID: Paste the phone number ID.
- **Destination for Inbound Messaging**: Specify the destination of inbound messages from the number.

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

5. Click Save.

# Step 4. Configure webhook in the Meta app

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



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

🕫 Meta for Developers	Docs	Tools Sup	oport My Apps Q Search dev	veloper documentation	🕝 Test Account 🛛 👻
Apps				Q Search by App Name or App ID	Create App
Filter by <ul> <li>All Apps (2)</li> </ul>					Recently Used 👻
Archived Required actions	App ID: 10 6 Mode In development Type: Business Business: Test Business		App (D: 9 App (D: 9 Mode: In development Type: Business Business: Test Business		
			Administrator     Adm		

- 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.

{ô} App settings	~							
) App roles	~	Quickstart > Configu	ration					
🗘 Alerts	~	Webhook To get alerted when you rece how to configure Webhooks.	Webhook To get alerted when you receive a message or when a message's status has changed, you need to set up a Webhooks endpoint for your app. Learn how to configure Webhooks.					
App Review	~	Callback URL ()	Verify token  Edit No token added					
Products	Add Product							
Webhooks		Webhook fields () No fields selected	Manage					
WhatsApp	^		Edit webhook's callback URL ×					
Quickstart		Permanent token	Callback URL https://doi.org/ani/v1.0/webbook/wbatsapp/dda1867b/098f					
API Setup		Learn how to create a perma	Verify token					
Configuration			38owndego8ugcinx					
			Cancel Remove webbook Verify and save					

b. Subscribe to messages webhook field.

<ul> <li>App settings</li> <li>App roles</li> <li>Alerts</li> <li>App Review</li> </ul>	* * *	Webhook To get alerted when you receive a message or whe how to configure Webhooks. Callback URL ① https://docs.example.yeastarcloud.com/api/v1.0/ Webhook fields ①	en a message's status has changed, you need to set up a Verify token ① /webhook/whats	Webhooks endpoint for your app. Lea
Products Webhooks	Webhook fields  Successfully subscribed	to the <b>messages v17.0</b> webhook field at 2:24:16 PM		×
WhatsApp	Name	Test version	Subscription version	Subscribe
Quickstart API Setup	message_template_quality_	update v17.0	▼ Te v17.0 ▼	
Configuration	message_template_status_l	update v17.0	▼ Te v17.0 ▼	je phone numb
Adding tog	messages	v17.0	▼ Te v17.0 ▼	
	phone_number_name_upda	v17.0	▼ Te v17.0 ▼	
	phone_number_quality_upd	ate v17.0	▼ Te v17.0 ▼	
	security	v17.0	▼ Te v17.0 ▼	
				Done

### Result

• The **Status** of the WhatsApp channel shows  $^{\bigodot}$ , which indicates that you have successfully created a WhatsApp channel.

Status	Name	Туре	Number	Total	Sent	Operations
$\oslash$	WhatsApp channel	WhatsApp	+15550193510	0	0	⊿ 🗄

• 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:

i

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

			Time Filter		
	Messaging Statistics		All		
Number	Total	Sent	Failed	Received	Operations
+15550193510	30	20	10	8	⊿ 🗇

### 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**

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

# Message Queue Setup

# Create a Message Queue

Yeastar P-Series Cloud Edition 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

Maximum Number of Extensions (N)	N ≤50	50 < N ≤ 200	N > 200
Message Queue	16	32	64
Agents per Message Queue	25	60	120

#### **Requirements**

- Plan: Enterprise Plan (EP) or Ultimate Plan (UP)
- Firmware: 84.13.0.25 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 **Agents** section, select the desired extension users from the **Available** box to the **Selected** box.

1/6	1/6 items Available		6 ite	ms		Selected
Searc	h here	٩	Search	n here		Q
	Extension Number	Caller ID Name		Extension Number	Caller ID Name	
<ul> <li></li> </ul>	2006	Naomi Nichols		2000	Leo Ball	
	2007	Ashley Gardner		2001	Phillip Huff	
	2008	Jaime Hart		2002	Terrell Smith	
	2009	Carmen Gordon test		2003	Dave Haris	
	2010	Joe Lewis		2004	Troy Daniel	
	3000	Leo Ball		2005	Kristin Hale	

5. 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 > 2 > Messaging Settings).
```

* Number			
+18723428005			
* Destination for Inbound Messaging		* Message Queue	
Message Queue	$\checkmark$	Tech Support	$\vee$

#### **Related information**

Manage Message Queues

<u>User Guide - Manage customer queries from SMS channel on Linkus Web Client</u> <u>User Guide - Manage customer queries from SMS channel on Linkus Desktop Client</u> <u>User Guide - Manage customer queries from SMS channel on Linkus Mobile Client</u>

# 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  $\checkmark$  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**.

# **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 Cloud Edition.

# Requirements

The firmware version of Yeastar P-Series Cloud Edition is 84.13.0.25 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.

iime 12/01/2023 00:00:00 ~ 12/31/2023 23:59:59 ⊟		Se	Sender 🗲		Recipient		Channel Type SMS				
		3 23:59:59 📋							$\sim$		
Download 🗸 🤅	🖸 Refresh 🗄 D										
Session ID	Time 🝦	Sender	Recipient	Char	nnel Type 🍦	Channel Numbe	r ÷	Details		Operation	
2	12/12/2023 23:31:12	+12 283	Tech Support	SMS	i	+12 407		<b>I</b>		⊡	
1	12/12/2023 23:31:07	Leo Ball<3000>	+12( 407	SMS	i	+12 283		<b>I</b>		団	
						O Total	2		2	0 / page >	

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

Operation	Instruction		
External Chat Session			
Check operation records of an external chat	a. Click 🔯 beside the desired session.		
Check operation records of an external chat session       a. Click Session beside the desired session.         Session D       Time to Sender       Recipient       Channel Type to Channel Number to Details         2       12/12/2023       customer<12	Details	Operations	
	Instruction         a. Click  beside the desired session.         session ID Time : Sender Recipient Channel Type : Channel Number : Details Operations         2       12/12/2023         2.3:31:12       customer<+12		
	A window pops up, displaying the operation records of the session in a timeline view.		
	<ul> <li>Note:</li> <li>Only the following operations will be recorded:</li> <li>Create a session</li> <li>Transfer a session</li> <li>Pick up a session from a message queue</li> <li>Close a session</li> </ul>		

Operation	Instruction		
	Session Timeline       X            • Received an inbound message and created session         12/12/2023 23:31:12          Received a message from +12       283, and the session has been routed to          Tech Support.         Session has been picked up from message queue          12/12/2023 23:33:51          Leo Ball<3000> picked up the session from message queue Tech Support.            Session closed by extension          12/12/2023 04:47:29          Leo Ball<3000> closed the session.		
Delete external chat session(s)	<ul> <li>• To delete a session, do as follows:</li> <li>Session ID Time  Sender Recipient Channel Type Channel Number Channel N</li></ul>	Details ©	Operations
	a. Select the desired sessions, then click Delete. b. In the pop-up window, click OK.	Details Ref L Ref L Ref L	Operations © 0 0 0 0 0 0 0 0 0 0 0 0 0
External Chat History			
Check the detailed chat histories of a session	a. Click 🕒 beside the desired session.		

Operation	Instruction
	Session ID Time   Sender Recipient Channel   Channel  Channel Number   Details Operation  Type
	2 12/12/2023 customer<+12 Tech Support SMS +12 407 R 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	The detailed messages in the session are displayed.
	Delete
	Time  Sender Recipient Message Type Message Content Operations
	12/18/2023 04:47:29 PBX System The session has been closed.
	12/12/2222 23:34:13     Lee bail-30002     +12     2:03     Outbound     mit new carrier point     Imit new carrier point       12/12/2023 23:33:51     PBX System     Lee bail picket support     Imit new carrier point     Imit new carrier point
	12/12/2023 23:31:12         +12         283         Tech Support         Inbound         Hi I need help         10
	Q Total:5 < 1 > 20 / page ∨
	a. CIICK ► beside the desired session.         session ID       Time ÷       Sender       Recipient       Channel Type       Channel Number ÷       Details       Operation
	The detailed messages in the session are displayed. b. To delete a single message, do as follows:
	Image: Delete         Time ≙         Sender         Recipient         Message Type         Message Content         Operations
	12/18/2023 04:47:29     PBX System     The session has been closed.
	12/18/2023 00:03:06 Leo Ball<3000> +12 283 Outbound Test Session Completed
	12/12/2023 23:34:13 Leo Ball<30 ow can I help you?
	12/12/2023 23:33:51       PBX System       If deleted, extensions will not be able to see these message(s) when viewing the session on the client side. Are you sure you want to proceed?       all picked up the session from message
	12/12/2023 23:31:12       +12         ★ Cancel       ✓ 0K         C = Total:5       <
	i. Click <sup>III</sup> beside the desired message. ii. In the pop-up window, click <b>OK</b> . c. To delete multiple messages, do as follows:

Operation	Instruction	
	Delete	erations
	1/11/2     Virtual of the second	crations
	12/18/2023 00:03:06 Leo Ball<3000>	
	12/12/2023 23:34:13     Leo Ball<3000>     If deleted, extensions will not be able to see these message(s) when viewing the session on the     you?     Image: constraint of the second sec	
	client side. Are you sure you want to proceed? the session from message	
	□ 12/12/2023 23:31:12 +12 283	
	O Total :5 < 1 > 20	/ page $\vee$
	i. Select the desired messages, then click <b>Delete</b> . ii. In the pop-up window, click <b>OK</b> .	

# 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 Cloud Edition is 84.13.0.25 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**.

1	O Download V O Refresh	ad       Image: Delete         id Filtered Chat Logs ad All Chat Logs UU:32:58       Sender       Recipient       Channel Type + Channel Number + Details       Operation         23       +12       283       Tech Support       SMS       +18       005       Image: Details       Operation					
	Download Filtered Chat Logs	Sender	Recipient	Channel Type 👙	Channel Number 👙	Details	Operations
	Download All Chat Logs 23	+12 283	Tech Support	SMS	+18 005	E D	圓
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3. To download specific chat logs, do as follows:

	Time	Sen	der	Recipient		Channel Type	
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	Download All Chat Logs 23 23:31:12	+12 283	Tech Support	SMS	+12 407		圃
	1 12/12/2023 23:31:07	Leo Ball<3000>	+12( 407	SMS	+12 283		圃
					O Total	:2 < 1 >	20 / page $\vee$

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	The Linkus Web Client allows agents to manage customers' chat interactions directly from a web browser.
	<ul> <li>For instructions on handling message-based interactions with customers on Linkus Web Client, see <u>Agent operations on Web Client</u>.</li> <li>For more information about utilizing Linkus Web Client, see <u>Linkus Web</u> <u>Client User Guide</u>.</li> </ul>
Linkus Desktop Client	The Linkus Desktop Client allows agents to manage customers' chat interactions with a desktop application installed on the agent's computer, providing a robust and stable environment for agents to perform their tasks.
	<ul> <li>For instructions on handling message-based interactions with customers on Linkus Desktop Client, see <u>Agent operations on Desktop Client</u>.</li> <li>For more information about utilizing Linkus Desktop Client, see <u>Linkus</u> <u>Desktop Client User Guide</u>.</li> </ul>
Linkus Mobile Client	The Linkus Mobile Client is suitable for agents who need the flexibility to handle customers' chat interactions on the go.
	<ul> <li>For instructions on handling message-based interactions with customers on Linkus Mobile Client, see <u>Agent operations on Mobile Client</u>.</li> </ul>

Supported Client	Description
	<ul> <li>For more information about utilizing Linkus Mobile Client, see <u>Linkus</u> <u>Mobile Client User Guide</u>.</li> </ul>

# Agent Operations on Web Client

# Manage Customer Queries from External Messaging Channels

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

# **Requirements**

Contact system administrator to check if PBX server meets the following requirements:

- Version: 84.12.0.32 or later.
- Plan: Enterprise Plan or Ultimate Plan
- Messaging: At least one messaging channel is set up on PBX.

# Pick up a messaging session

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



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

2. At the top of the messaging session, click **Pick Up**.

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 hand off a customer's issue to another colleague or a message queue by transferring the messaging session.

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		o e e			
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- 1. On Linkus Web Client, click **Chat**, then click the **External Chat** tab.
- 2. At the top-right corner of the messaging session, click  $\square$ .
- 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 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.

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- 1. On Linkus Web Client, click **Chat**, then click the **External Chat** tab.
- 2. At the top-right corner of the messaging session, click  $\mathbf{\varsigma}$ .

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.

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- 1. On Linkus Web Client, click **Chat**, then click the **External Chat** tab.
- 2. At the top-right corner of the messaging session, click 2.
- 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, click **Chat**, then click the **External Chat** tab.
- 2. At the bottom of the messaging session, click  $oxed{\Xi}$ .

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, 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

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Internal Chat	External Chat	121	
Recent ~ 121 +1 121	07:20	⑦ Do you want to close this messaging session? Once closed, you will not be to send new messages on this session	able
		× Cancel	× OK
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		o e é	
		Enter your message here	<i>ସ</i>

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

- 1. On Linkus Web Client, click Chat, then click the External Chat tab.
- 2. At the top-right corner of a messaging session, click  $\mathbf{\nabla}$ .
- 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:
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121	07:20 Å Mute notification 5 Transfer Close Å Archive Remove	This will remove the conversation from this chat list. Are you sure to remove it? Cancel VOK	
		ⓒ E E Enter your message here	Ø

- 1. On Linkus Web 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.

# Agent Operations on Desktop Client

# Manage Customer Queries from External Messaging Channels

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

### **Requirements**

**PBX Server** 

- Version: 84.12.0.32 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:

- Widows Desktop: 1.2.14 or later
- macOS Desktop: 1.2.10 or later

## Pick up a messaging session

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

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			Enter your message here	R

- 1. On Linkus Desktop Client, click **Chat**, and click the **External Chat** tab.
- 2. At the top of the messaging session, click **Pick Up**.

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 hand off a customer's issue to another colleague or a message queue by transferring the messaging session.

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-0		7
		× Cancel VO

- 1. On Linkus Desktop Client, click **Chat**, and click the **External Chat** tab.
- 2. At the top-right corner of the messaging session, click  $\square$ .
- 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 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.

#### Add a customer to Contacts

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

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- 1. On Linkus Desktop Client, click Chat, and click the External Chat tab.
- 2. At the top-right corner of the messaging session, click  $^{2}$  .
- 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 Desktop Client, click **Chat**, and click the **External Chat** tab.
- 2. At the bottom-left of the messaging session, click oxtimes.

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.

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20		Enter your message here	Ø

- 1. On Linkus Desktop Client, click **Chat**, and click the **External Chat** tab.
- 2. At the top-right corner of a 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  $\fbox$  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.

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Ŷ	
<del></del>	
	Enter your message here

- 1. On Linkus Desktop Client, click Chat, and click the External Chat tab.
- 2. At the top-right corner of a messaging session, click  $\mathbf{\overline{<}}$ .
- 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 Desktop Client, click **Chat**, and 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.

# Agent Operations on Mobile Client

# Start a Messaging Session with a Customer

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

- Version: 84.12.0.57 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 5.2.9 or later
- Linkus Android Client: Version 4.13.16 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. Tap the **Sender** field, then select the channel number for sending messages.
- 5. In the **Recipient** field, enter the recipient's phone number in E.164 format ([+][country code][phone number]). For example, +18003275906.
- 6. At the top-right corner, tap **Create**.

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

#### **Related information**

Manage Customer Queries from External Messaging Channels

# Manage Customer Queries from External Messaging Channels

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

### Requirements

#### **PBX Server**

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

- Version: 84.12.0.57 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 5.2.9 or later
- Linkus Android Client: Version 4.13.16 or later

# Pick up a messaging session

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

- 1. On Linkus Mobile Client, go to **Chat > External Chat**.
- 2. In the messaging session, tap **Pick Up** at the top.

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 hand off a customer's issue to another colleague or a message queue by transferring the messaging session.

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407 +120 4 s 🙂	07 3:27 PM				Session Details Channel Type	505	Default_Al	L_Extensions(5) ∽	
005 +187: 0 	05 1:46 PM	407			Channel Number	+120 283	Kris [Of	stin Hale <sup>[line]</sup>	
		E	K		Recipient Number	+120407	L	Do you want to transfer this messaging session? Once	
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- 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 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.

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- 1. On Linkus Mobile Client, go to **Chat > External Chat**.
- 2. In a messaging session, tap  $\checkmark$  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.

5:23		🕆 🖿	2:17		🗢 🔳	2:17		🗢 🔳
K	Chat	Q +	<	+120 407	2	<	Chat Inform	ation
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- 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.

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					K		Recipient Number	+120 407	Recipient No	umber +12027886407
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Calls Dire		Conference			☺ ⊕					Cancel
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- 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:

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005 +187 005 @ @		1:46 PM	005 +187 @ @	005	29mins ago
& <u>≙</u> =		Ö	e	0	<b>P</b> @
Calls Directory	Chat	Conference	Calls	Directory	Chat Conference

- 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.