

UNITY & TELESTAX INTEGRATION – PROVISIONING

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1 Overview

This document covers all aspects related to implementing SMS messaging from Unity clients that utilizes the Telestax SMS cloud platform.

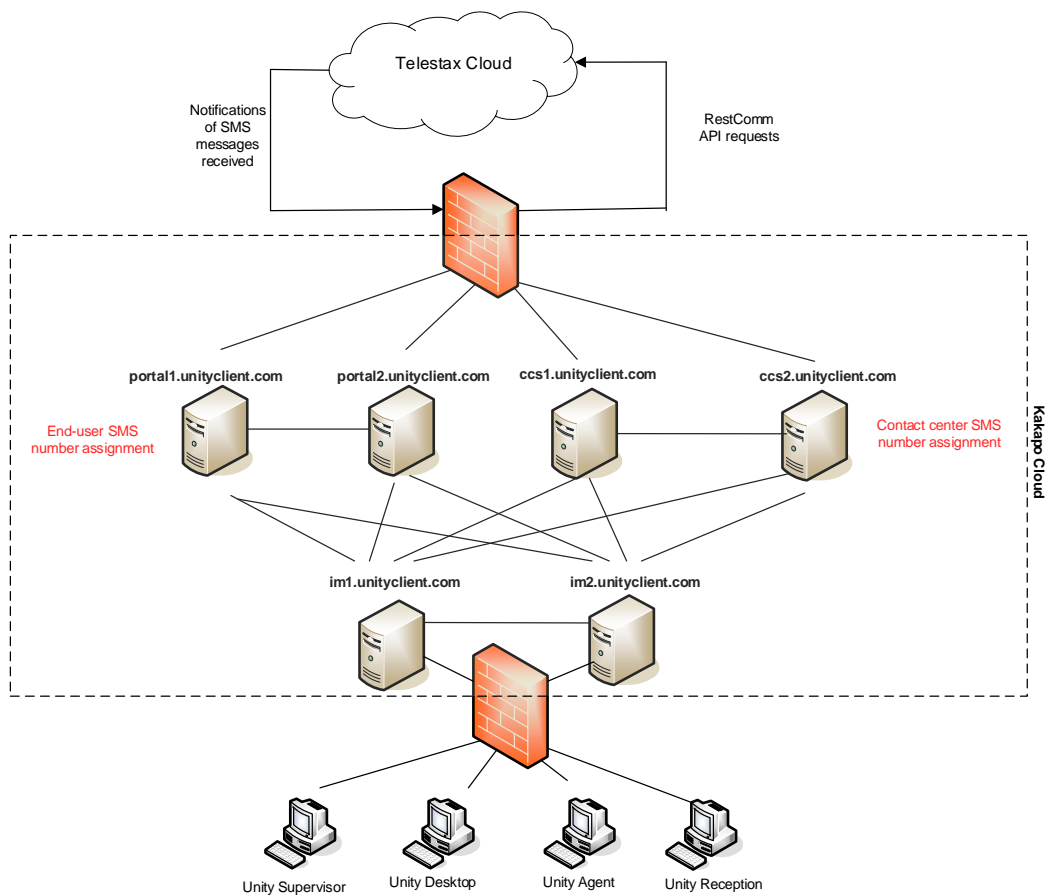
Telestax offer a “one number” solution whereby the direct number of a VoIP end-user can be SMS enabled so that when that number is sent an SMS, it is routed to the Telestax cloud which is preconfigured to send notifications to the Kakapo cloud. The Kakapo cloud recognises the number as being assigned to a specific end-user that has a Unity client license assigned. The Kakapo cloud then sends the SMS to the Unity client using the Kakapo IM&P backbone.

Similarly, a contact center media stream can be configured as the end-point for an SMS number, which may be the main number for a VoIP customer business. When an SMS message is sent to that number the Telestax cloud will send a notification to the Kakapo contact center platform, which will then route the conversation using standard contact center routing profiles. When a contact center agent reserves the conversation they can converse with the customer using SMS, in exactly the same way as they converse with customers through web chat.

When sending an SMS message, the Unity client will send the message to the Kakapo cloud which will forward the message to the Telestax cloud using the account details of the Telestax customer.

BroadWorks system providers maintain a direct relationship with Telestax for SMS enablement and are invoiced directly by them. They also have an account with Kakapo Systems and will be billed separately for the base Unity license (Unity Desktop/Agent/Supervisor/Reception) as well as SMS integration. Each number that is assigned to an end user in the Kakapo partner portal (and therefore SMS enabled through the Telestax cloud) will carry a monthly charge.

The below diagram outlines the connectivity between the Telestax cloud, through the Kakapo cloud to the Unity clients. Please note this Kakapo cloud illustration omits non-relevant infrastructure, and is replicated in two geographically redundant datacenters.



2 Configuration

In order to create a link between the Kakapo and Telestax clouds, the account details of the Telestax account must be saved in the Kakapo partner portal. These are the details of the Telestax account under which all numbers will be assigned, and which will be used when sending SMS messages. This is done by adding a CPaaS platform at the system provider level in the Kakapo portal, as shown below.

Name	<input type="text" value="Kakapo Systems Limited"/>
Timezone	<input type="text" value="(UTC-06:00) Central Time (US & Canada)"/>
Language	<input type="text" value="Default"/>
Accounts Reference	<input type="text"/>
Trial Duration (In Days)	<input type="text" value="14"/>
Use Trial Licenses Until Expiration	<input type="checkbox"/> OFF
Snapshot Report Frequency	<input type="text" value="None"/>

When attempting to add a CPaaS platform, the Kakapo portal will first check to make sure that at least one portal user account has the “Send Alerts” notification setting enabled. If not an error message will be displayed and the Add Platform will be removed.

Details Automatic Assignment Branding Server Hostnames Portal User Accounts License Details Resellers History Log User Templates Call Logging

Kakapo Telestax Demo - CPaaS Platform Assignment

Configure the Unity cloud and clients to integrate with a CPaaS platform for SMS and WhatsApp messaging

CPaaS platforms cannot be added as there are no login users at the system provider level that are configured to receive alerts. These users will be notified of any issues surrounding CPaaS enablement and at least one user must be alerted.

Platform	<input type="text" value="Nexmo"/>
Account/Key	<input type="text"/>
Token/Secret	<input type="text"/>
SMS Available	<input checked="" type="checkbox"/> ON
WhatsApp Available	<input type="checkbox"/> OFF

This is because if SMS enablement fails or an end-user opt-out of receiving SMS messages (both described in sections below), then all portal user accounts with “Send Alerts” enabled will automatically be notified, therefore at least one portal account must be configured to receive alerts.

Notifications

Send Technical Emails OFF

Send Alerts OFF

Send Invoices & Receipts OFF

Send License Expiry Alerts OFF

Please note that if a CPaaS platform exists the Kakapo portal will not allow portal user accounts to be deleted or updated, if it results in no accounts having this setting enabled.

Details Automatic Assignment Branding Server Hostnames **Portal User Accounts** License Details Resellers History Log User Templates Contact Center Call Logging

Update abin.joseph@kakaposystems.com

This user cannot be updated as they are the only user account configured to receive alerts from the Kakapo parter portal. These alerts include notifications for any issues relating to CPaaS enablement, so at least one user must be set as a recipient. Please re-enable this setting, or configure another user to receive alerts before updating this account

User Name

Email Address

When adding a CPaaS platform, select Restcomm from the Platform dropdown. The account details from the Restcomm portal can then be copied and pasted into the properties provided.

Account SID

Auth Token

Platform

Account/Key

Token/Secret

Message Exchange Token

SMS Available ON

WhatsApp Available OFF

When selecting Restcomm you can also enter the Message Exchange token. This is optional but if provided then when adding a number to an end user (as outlined below) the Kakapo portal will first add the number to the Restcomm platform, then add the number to the Message Exchange platform which SMS enables the number with the mobile carrier. This results in one-step provisioning of SMS numbers, so is highly recommended. Please contact Telexis if you are unsure of any of these account details.

When you click Add Platform, the Kakapo portal will use the provided details to connect to the Restcomm platform and check that the UnitySMSConnector application is present. This application is what is used to forward notifications to the Kakapo cloud, it is what all numbers are associated with so it must exist in the Restcomm platform (per account) before CPaaS enablement can commence.

Applications	Numbers	Clients
<input type="text" value="Search..."/>		
Name ^	Type	Numbers
UnitySmsConnector	rvd	12012010580 and

If this application doesn't exist in the Restcomm platform then an error message will be displayed.

Kakapo Telestax Demo - CPaaS Platform Assignment

Configure the Unity cloud and clients to integrate with a CPaaS platform for SMS and WhatsApp messaging

The authentication details are correct, but the UnitySmsConnector application could not be found in the Restcomm platform. Please download the application from <https://portal.unityclient.com/UnitySmsConnector.zip> and import into the Restcomm portal to create this application. Please ensure the new application is named exactly as 'UnitySmsConnector'

Platform: Restcomm

Account/Key: AC04c768310743bc8033c07

Token/Secret: b56e0b4ea4962283bee762

Message Exchange Token:

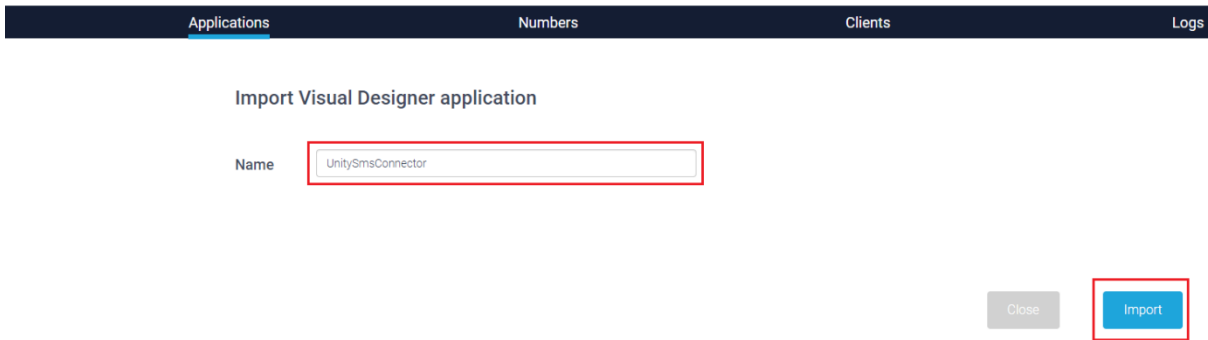
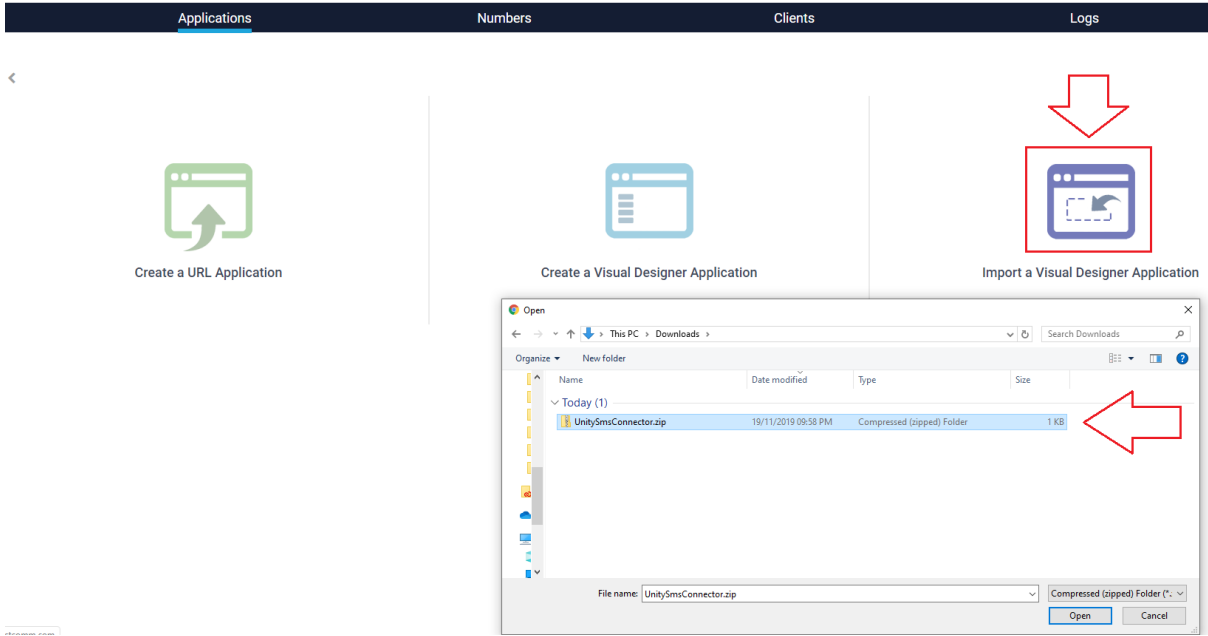
SMS Available: ON

WhatsApp Available: OFF

The UnitySMSConnector application can easily be imported into Restcomm by downloading the zip file from the link in the error message <https://portal.unityclient.com/UnitySmsConnector.zip>, then uploading that same file into Restcomm to create a new application as shown below. It's important that the new application is named UnitySMSConnector.

Applications	Numbers	Clients	Logs
<input type="text" value="Search..."/>			
			<input type="button" value="+ Add New App"/>





Typically, Kakapo Systems will ensure the UnitySMSCConnector application has been created in the Restcomm portal as part of the onboarding process, please note this is only required once per system provider.

Once the CPaaS platform has been saved it will be displayed in the Kakapo portal as below. The account details can be updated if necessary, although this should never be required.

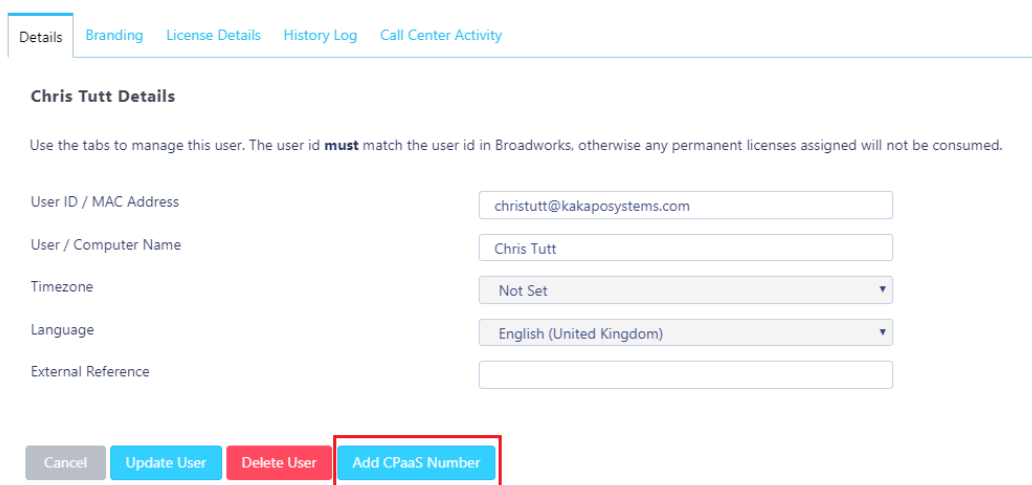
CPaaS Enablement

CPaaS Platform	Account/Key	Token/Secret	SMS	WhatsApp
Restcomm	AC.....8e	b5.....0f	Yes	No

3 Provisioning

Once the CPaaS Platform has been configured at the system provider level then Kakapo and Telestax clouds are joined, there is no other configuration required in either platform. There is no need to create an enterprise in Restcomm per customer business, and no IP whitelisting or domain management is required.

When a user profile page is displayed, the Kakapo partner portal will now display the “Add CPaaS Number” button, as shown below.



Details Branding License Details History Log Call Center Activity

Chris Tutt Details

Use the tabs to manage this user. The user id **must** match the user id in Broadworks, otherwise any permanent licenses assigned will not be consumed.

User ID / MAC Address

User / Computer Name

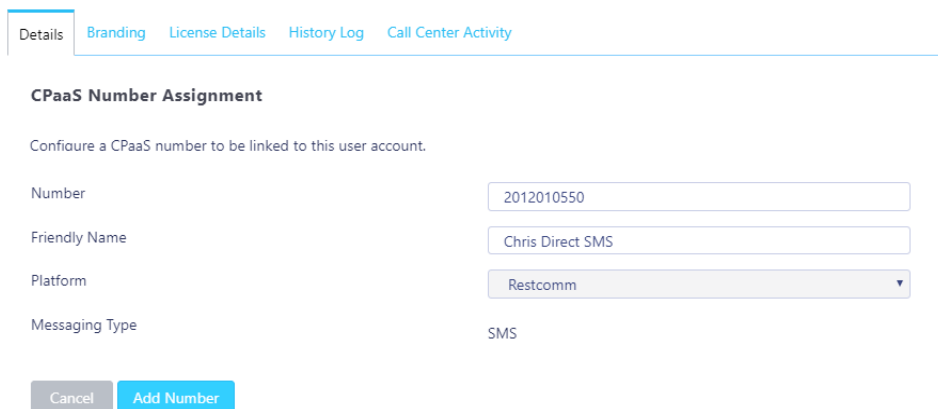
Timezone

Language

External Reference

Cancel Update User Delete User Add CPaaS Number

You will be prompted to enter the SMS number, which can be a standard ten-digit US number. A friendly name can also be set although this is optional, if not set the number will be used as the friendly name. Because Unity doesn't use XMPP, there is no requirement to link the number to a jabber address. Instead the number is linked to the BroadWorks login ID of the end-user in the Kakapo cloud.



Details Branding License Details History Log Call Center Activity

CPaaS Number Assignment

Configure a CPaaS number to be linked to this user account.

Number

Friendly Name

Platform

Messaging Type SMS

Cancel Add Number

When adding the number the Kakapo portal will first check Restcomm to determine if the number already exists. If so it will be configured to use the UnitySMSConnector application and all other configuration settings will be cleared. If not the Kakapo portal will attempt to add the number in Restcomm, assuming that succeeds it will be configured to use the UnitySMSConnector application. If the number cannot be added to Restcomm an error message will be presented.

If the Message Exchange API token was provided when adding the CPaaS platform at the system provider level, the Kakapo portal will next attempt to SMS-enable the number with the mobile carrier. It will check if the number already exists, if so then the SMS enablement status will be determined. If the number is already SMS enabled the number will be assigned to the user in the Kakapo portal. If SMS enablement failed for the number then the Kakapo portal will display an error, otherwise it will record the job ID from the Message Exchange platform for future reference. If the number doesn't exist then Unity will attempt to add the number, and will record the SMS enablement job ID for future reference.

The Kakapo portal attempts to use a transaction when adding numbers. For example if the number was successfully added to Restcomm but then couldn't be added to the mobile carrier, then it will be removed from the Restcomm platform in order to ensure the number is added or not added as a whole.

The number was successfully added to the Restcomm platform but couldn't be SMS-enabled on the mobile carrier platform. The error message received was 'Invalid numbers'. The number has been successfully removed from the Restcomm platform, please try again or contact your system provider for more information

Number	<input type="text" value="20120105500000"/>
Friendly Name	<input type="text" value="Chris Direct SMS"/>
Platform	<input type="text" value="Restcomm"/>
Messaging Type	SMS
<input type="button" value="Cancel"/> <input type="button" value="Add Number"/>	

This logic doesn't apply if the Message Exchange token is not provided at the system provider level, in which case if the number is successfully added to Restcomm then the Kakapo portal will assume it is successfully SMS enabled.

If the Message Exchange token is supplied and the number is added to the Message Exchange platform, then the Job ID previously recorded is used to periodically check the status of the SMS enablement job for that number, this is set to every 20 minutes as jobs typically take between 5-15 minutes to complete.

The SMS enablement status for the number can always be seen when viewing the number profile in the Kakapo portal. If the status is still Pending then a "refresh status" button is displayed.

CPaaS Number Assignment

Configure a CPaaS number to be linked to this user account.

The number has been successfully SMS enabled

Number	2012010660
Friendly Name	Chris Mobile
Platform	Restcomm
Messaging Type	SMS

Cancel Delete Number Update

If SMS enablement fails for any reason the Kakapo portal will automatically send an email to all portal login users at the system provider level that have the “Send Alerts” notification setting enabled. This email will include the number that has failed, the user that it’s currently assigned to, and the reason for the failure (which comes from the Message Exchange platform). All queries regarding failed SMS enablement jobs should be forwarded to Telestax.

All assigned numbers can be viewed in the user profile as shown below. Please note it is possible to have multiple numbers assigned to a user, although each number will incur a monthly charge.

Chris Tutt Details

Use the tabs to manage this user. The user id **must** match the user id in Broadworks, otherwise any permanent licenses assigned will not be consumed.

User ID / MAC Address	christutt@kakaposystems.com
User / Computer Name	Chris Tutt
Timezone	Not Set
Language	English (United Kingdom)
External Reference	

CPaaS Numbers

Number	Friendly Name	CPaaS Platform	Messaging Type
2012010580	Chris Cell	Restcomm	SMS
2012010660	Chris Mobile	Restcomm	SMS