Configure Bold360 for Single Sign-On

Configuring Bold360 for single sign-on (SSO) enables administrators to manage users of Citrix ADC. Users can securely log on to Bold360 by using the enterprise credentials.

Prerequisite

Browser Requirements: Internet Explorer 11 and above

To configure Bold360 for SSO by using SAML:

- 1. In a browser, type <u>https://www.bold360.com/</u> and press **Enter**.
- 2. In the home page, click **LOGIN** and select **Account**.



3. Type your Bold360 admin account credentials (User Name and Password) and click Login.

| BIDCHAT | 24/7 Live Chat Web Interface Login My Account Downloads |
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| Login to Your BoldChat Account User Name Password Login | |

4. Click **Web Interface Login** in the top-right corner.

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| Get Bold360 now! Trial Upgrades Name Bold360 | Options Edition: Plus , Users: 2 | Started: 2019-01-07 | Expires: 2019-01-17 |
| Get Bold360 now! Trial Upgrades Name Bold360 Optional Services | Options Edition: Plus , Users: 2 SMS | Started: 2019-01-07 | Expires: 2019-01-17 CHANGE Enable |

5. In the dashboard page, click **Setup** and select **Account Setup**.

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| 🖾 Visits | Home Best Practices Customer Care Tips Customization Expert Tips Getting Started Increasing Sal | les Web Client Support | | |
| A Reports | BoldChat Open Forum: Web Reports - Recording Now Available April 29th 2015 Our April Open Forum focused on the BoldChat Web Reports. We reviewed: | FOLLOW US ON twitter | | |
| Chat User Name | An overview of BoldChat's web reports, including what reports are available, where to access them, and how to run them Demos of the web reporting capabilities in action A live Q&A format | Introducing Bold360 ai The Most Tightly-Integrated Areat and Chathot Solution | | |
| | If you missed our BoldChat April Open Forum, it's not too late. You can still listen to the recorded forum: | Learn more | | |
| | Click here to listen to the BoldChat Web Reports Open Forum. | bold360ai | | |
| | ATTENTION: New Web Client Features Just Released | RECORDED WEBINARS Getting Started with BoldChat - (training for administrators) | | |
| | November 40, 2012 We've recently made several improvements to the BoldChat web-based interface which users are likely to notice during the normal course of taking chats. As such, we wanted to | View recorded webinar - Watch Now Getting Started with BoldChat (training for agents) | | |
| | make you aware to interim mome outain, we are excited about this Update because these enhancements will most assuredly improve your experience with Boldchat. Search Canned Messages You now have the ability to perform keyword searches analyst your canned messane | view recorded webinar - Watch Now BoldChat Open Forum: Chat Window Customization View recorded webinar - Watch Now | | |

- 6. In the left pane, click **General Account Settings > Single Sign On**.
- 7. Select the **Enable Single Sign On** check box.
- 8. Enter the values for the following fields:

| Required Information | Description |
|-------------------------------------|---|
| ID Provider URL | IdP logon URL |
| Public Key (signature verification) | Copy and paste the IdP certificate. Note: The IdP metadata is provided by Citrix and can be accessed from the link below. The link is displayed while configuring SSO settings for your app. <u>https://gateway.cloud.com/idp/saml/<citrixcloudcust_id>/<app_id> /idp_metadata.xml</app_id></citrixcloudcust_id></u> |



- 9. Click **Test** to validate the SSO connection.
- 10. Finally, click Save.