UNITY CONTACT CENTER HELP GUIDE

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1 UNITY CONTACT CENTER

The Unity Contact Center platform allows VoIP users to manage omni-channel conversations through the Unity client, in addition to normal VoIP related functionality. This is achieved through several contact center components which are outlined below. Unity Contact Center functionality does not rely on Broadworks call center services being assigned, or even that a Unity call center client be used. Contact center functionality can be provided through any Unity client, for any channel type.

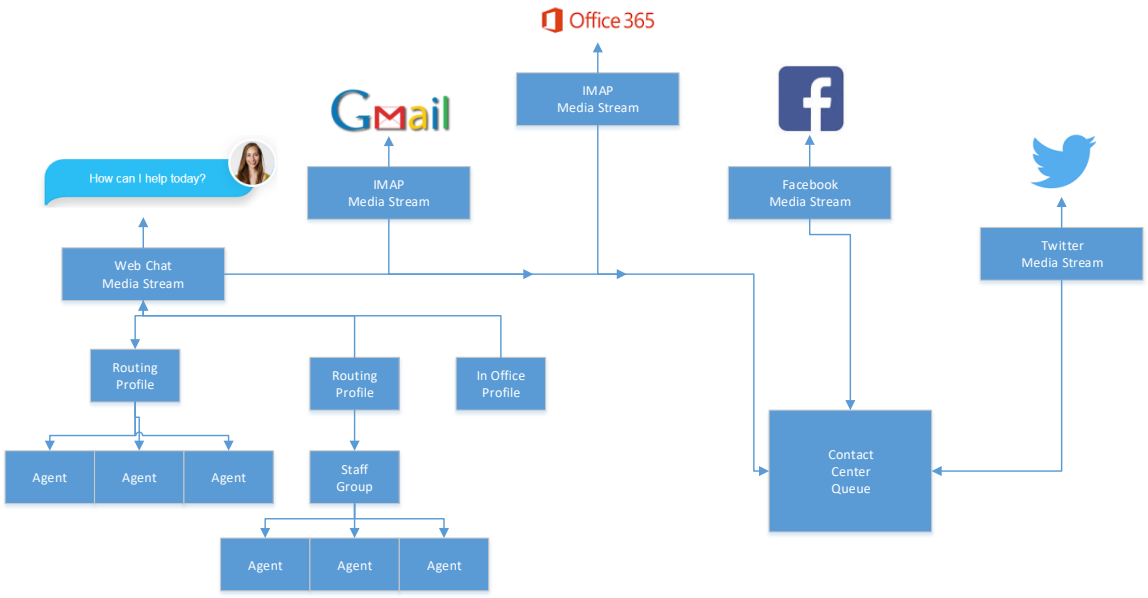
Queue: A contact center Queue is similar to a VoIP call center. It is a logical group of Media Streams that are presented to the agent as a single entity.

Media Stream: A Media Stream is the channel to the public, it represents a web chat or Call Back client, an email address, a Twitter handle or a Facebook login.

Routing Phase: A routing phase is a rule that instructs the contact center which users to alert when a new conversation is delivered through a Media Stream. The rule includes the routing profile (longest idle, circular, simultaneous etc) as well as the duration that agents should be alerted. One or more Routing Phases are associated with a Media Stream, which the contact center engine will process in the order specified. This removes the need for a conversation to overflow to other Queues; each conversation is processed entirely from within the same Media Stream.

Staff Group: A Staff Group allows an administrator to assign a single group of agents to a routing phase, rather than having to assign multiple users one by one. This greatly reduces administrative overhead in a large contact center environment.

The below diagram outlines how these components work together to provide a complete omni-channel queuing and delivery platform.



For example, a visitor to a website starts a webchat conversation. The contact center platform will first look at the date and time to decide whether to Queue the conversation or to follow “unstaffed” behaviour.

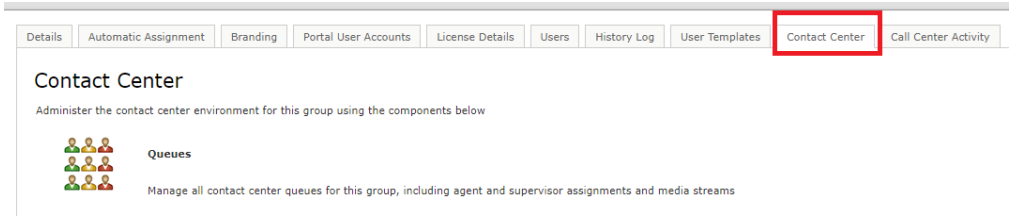
Please note: If there are no agents joined to the Media Stream then the conversation will be processed as "missed".

The contact center will then look at the first Routing Phase, which is to alert the longest idle agent based on all Media Streams in that contact center Queue. Each agent should be alerted for ten seconds before moving onto the next agent, but after trying for 40 seconds the contact center should move to the next routing phase. The second routing phase is to alert all joined agents [that are assigned through a single Staff Group] simultaneously for 60 seconds. If the conversation has not been answered then the "missed" behaviour will alert the visitor that nobody is available for chat right now, an email will then be sent with the details the visitor entered to a predefined email address.

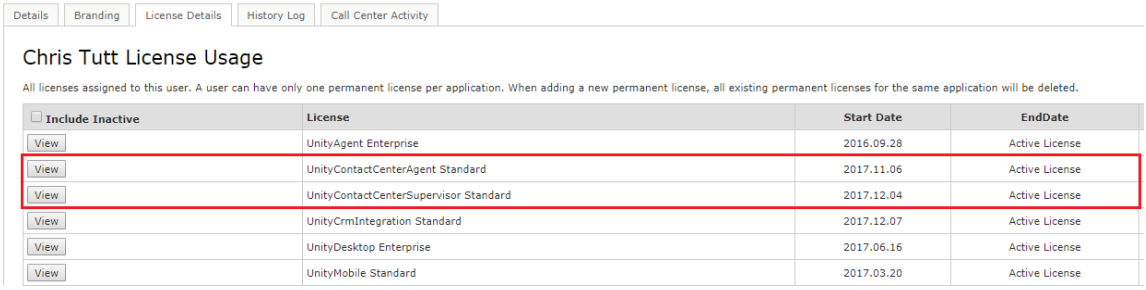
2 ASSIGNING CONTACT CENTER LICENSES

All configuration details for Unity Contact Center are set through the Kakapo Systems portal. To begin, log in to the Kakapo partner portal and select the Contact Center tab at the group or reseller level, please note that a reseller in the portal represents either a Service Provider or Enterprise in BroadWorks.

Important: The Contact Center tab will only be visible if at least one Unity Contact Center license is assigned to a user within that group and/or enterprise.



There are two types of contact center licenses, "Unity Contact Center Agent" and "Unity Contact Center Supervisor". They are assigned in the normal way through the License Details tab, as shown below.



Unlike end-user client licenses, Contact Center Agent and Supervisor licenses are not automatically assigned as trial licenses, they must be explicitly assigned either through the partner portal or API. Please contact Kakapo Systems directly to request evaluation licenses.

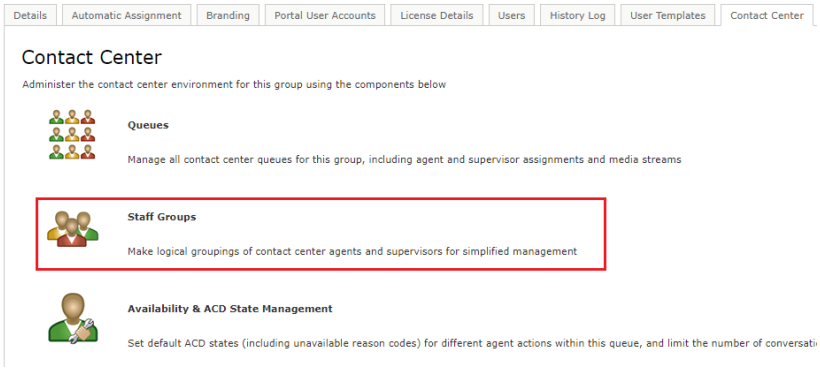
Contact Center licenses must be assigned in addition to any client licenses required. For example, if an agent is using Unity in a BroadWorks call center environment, a Unity Agent license must be assigned for the end-user client, then a Unity Contact Center Agent license must be assigned to add contact center functionality.

3 STAFF GROUPS

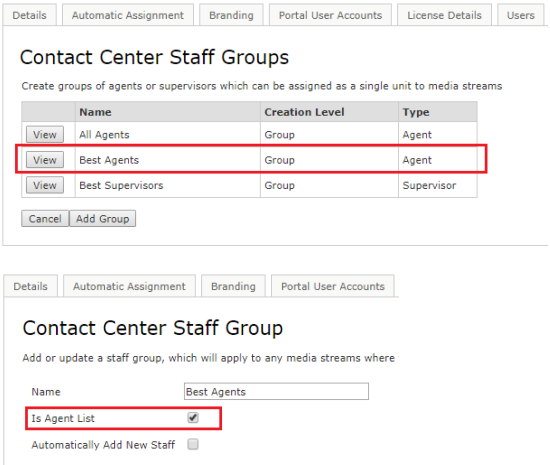
A staff group is a logical group of users that allows an administrator to manage a single entity in a routing phase, rather than having to assign multiple users one by one.

Staff groups can be configured to automatically add any new users, thereby providing a “catch all” group which may be used as the final routing phase for a Media Stream.

Please note: You can only create staff groups at the group or enterprise level, staff groups created at these levels will be available to Queues and Media Streams. A staff group created at the group level will only be available for use within that group, whereas staff groups created at the reseller level will be available for both enterprise and group Queues.



Select staff groups from the contact center menu to see all existing staff groups (including any created at a higher level) and to create a new group.

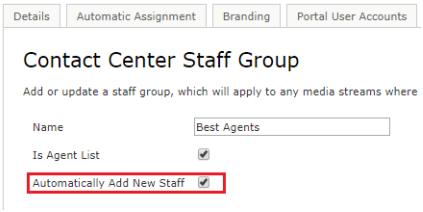


Enter a name for the staff group and specify if the group is for agents or supervisors, a staff group cannot comprise both agents and supervisors together and the “Is Agent List” setting cannot be changed once the staff group has been created.

Changing this setting will automatically repopulate the list with users that have either the “Unity Contact Center Agent” or “Unity Contact Center Supervisor” license assigned. To search for a user simply type the name or login ID in the search box or scroll through the list. To add users to the group select them and click “Add”. All users in the right-hand box have already been added to the staff group. To remove a user from the staff group simply select them from the right-hand box and click remove.

You can move agents up and down the list, which will dictate the order in which these agents are alerted if this staff group is added to a routing profile with circular routing.

To automatically add new staff members to the staff group simply tick the “Automatically Add New Staff” box.

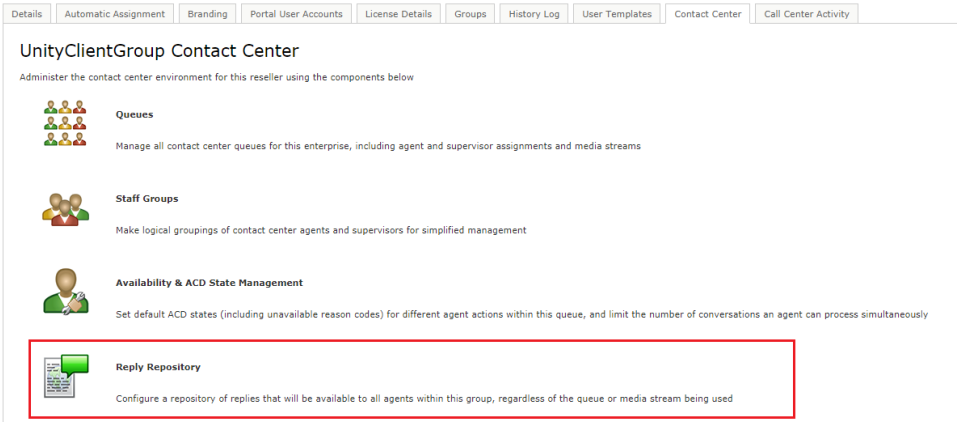


If this box is ticked then every time a Contact Center Agent or Supervisor license is assigned to a new user it will add them into the applicable staff group automatically.

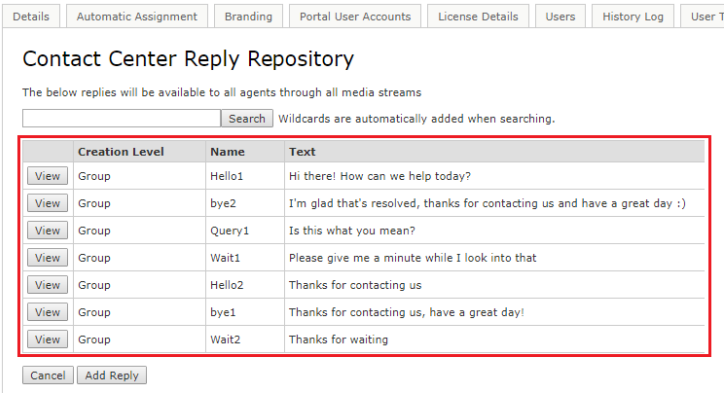
4 REPLY REPOSITORY

Create canned replies for users to easily send common responses to customer queries. These are available at the reseller, group, Queue and Media Stream level. All replies configured at the parent level will be available for all the lower levels. For example, a reply created at the Queue level will be available for all Media Streams of that Queue.

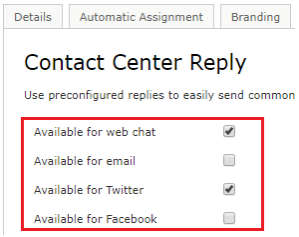
The reply repository can be found in the main contact center menu for all relevant levels, as shown below.



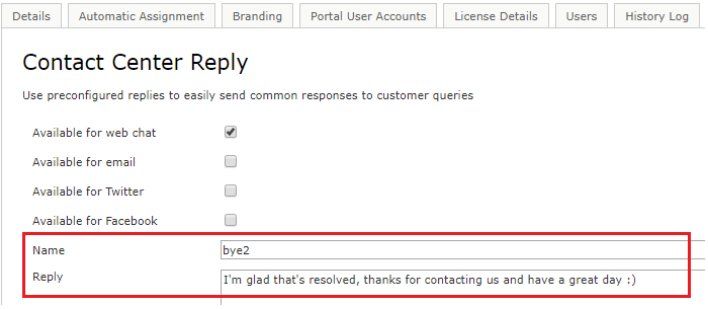
The list will show all existing canned replies, including the level at which they were added.



When adding a reply at the reseller, group or Queue levels you must specify which types of media channel it applies to. Some canned replies such as “please give me a minute to look into that” would not be applicable to an email conversation, while three paragraphs of text would not be relevant in a Twitter conversation. Setting the channel types that the canned reply is available for will ensure that users will only see those canned replies when replying to those type of conversation. A canned reply can be available to multiple channel types.



Once you have selected the applicable Media Streams, give the reply a reference name and enter the reply text. Unity client will search on both the name and reply text when the agent enters search criteria, so rather than having to include reply text the agent can simply type “bye” to see all available farewell replies.

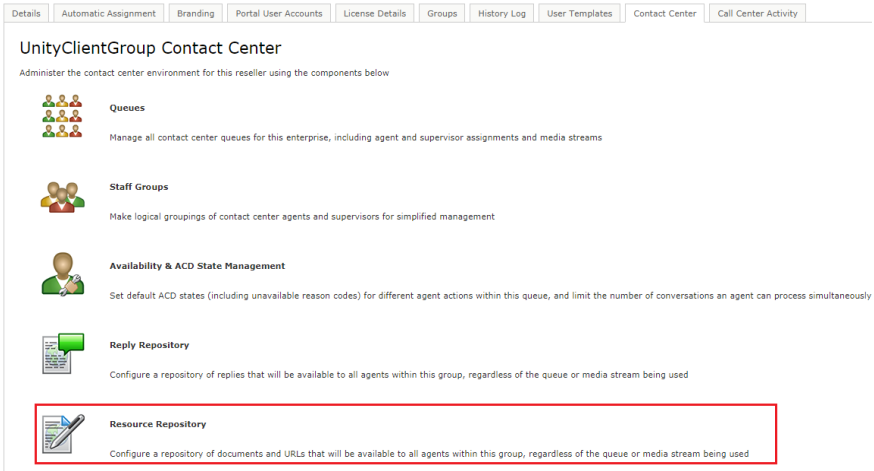


5 RESOURCE REPOSITORY

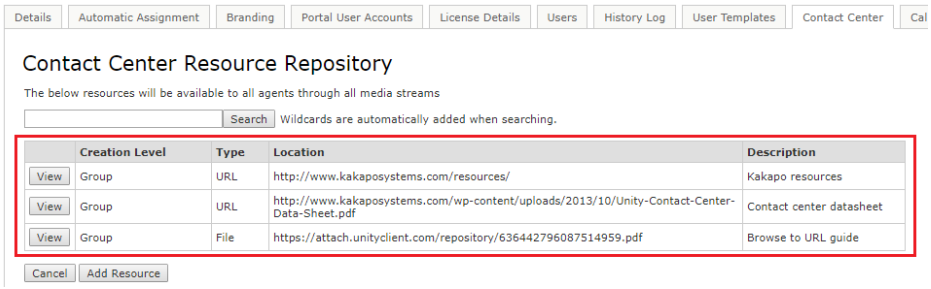
The resource repository is similar to the reply repository outlined above, in that it allows agents to quickly access a range of resources when replying to a conversation, which can easily be passed to the remote party either as a hyperlink (web chat, Twitter, or Facebook) or an email attachment.

As with canned replies, all resources created at the parent level will be available for all the lower levels. For example, a resource created at the group level will be available for all Queues of that group.

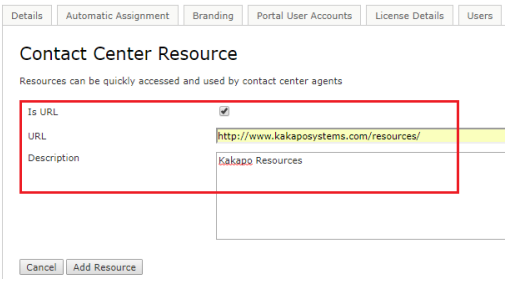
The resource repository can be found in the main contact center menu for all relevant levels, as shown below.



The list will show all existing resources, including the level at which they were added.



You can add a resource as a URL or file upload. If uploading a file, the portal will save the file with a randomly generated filename, but it will ensure the actual name of the file that was uploaded is used in the hyperlink or email attachment.



Add a short description about the resource [which will be used when searching for resources within the Unity client, as outlined below] and then select “Add Resource”.

To delete a resource simply view it from the resource repository list and click Delete.

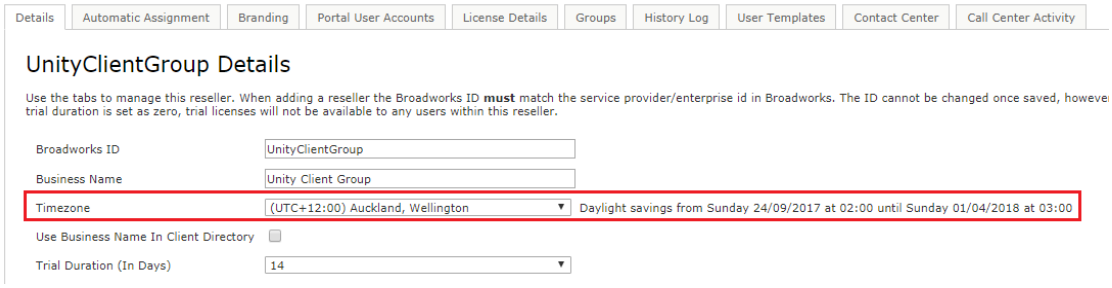
6 IN-OFFICE PROFILES

Easily create profiles for the times that various Media Streams and Queues will be online. In-office profiles are configured at the system provider, enterprise and group level and are available to set at the Queue and Media Stream levels.

If the in-office profile is set at the Queue level it will automatically cascade down to any Media Streams created within that Queue, but it can be overridden at the Media Stream level.

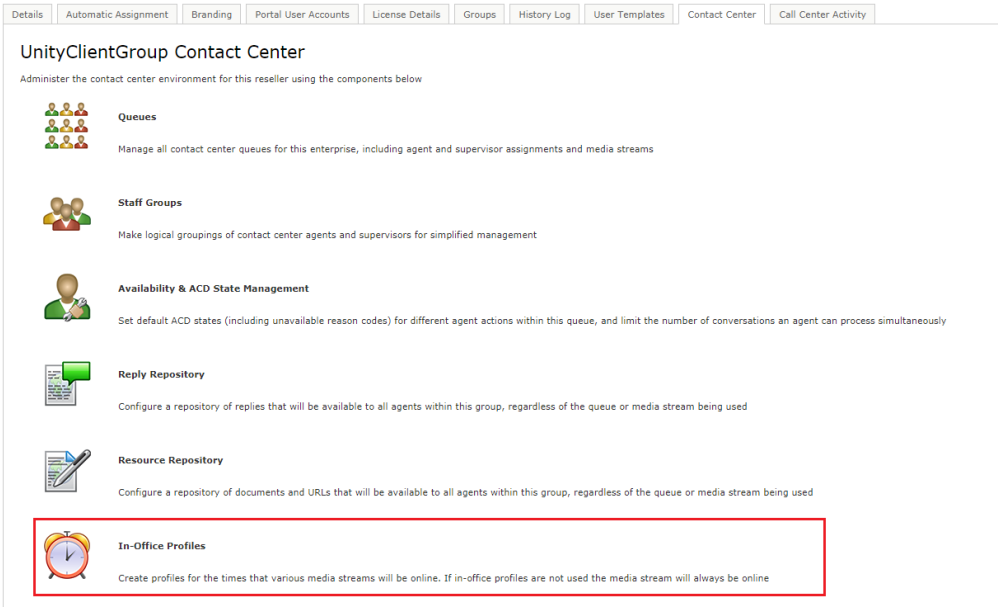
In-office profiles work with the set time zone set for the Media Stream, which cascades down from higher levels in the Unity hierarchy. If an in-office profile is assigned to a Media Stream but no time-zone is set, then Coordinated Universal Time (UTC) will be used as the time-zone, which may lead to unexpected results. Therefore, it is very important that the correct time-zone be used for that Media Stream, which may be different to that set at other levels.

The time-zone is set in the profile tab for all system providers, resellers, groups, Queues and Media Streams, as shown below.

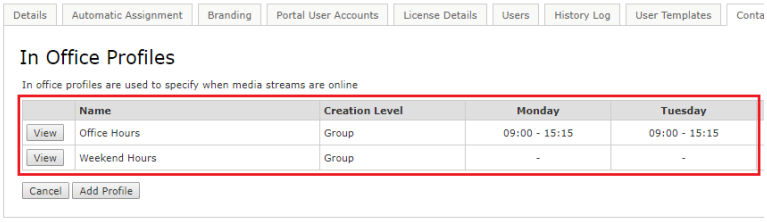


When the time zone is selected the portal will automatically confirm daylight savings parameters, if that location observes daylight savings.

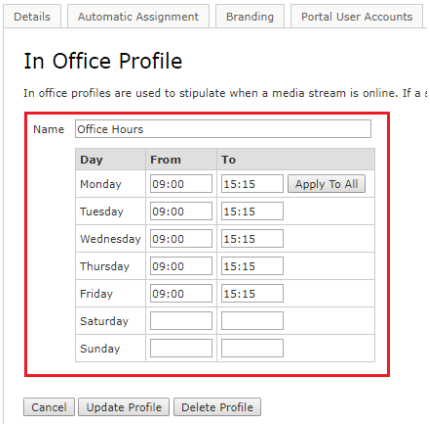
Manage in-office profiles by clicking on the link from the main contact center menu.



You can see which in-office profiles already exist and at which level they were created. These profiles can be assigned to all Queues and Media Streams below this level.



To add a new in-office profile click “Add Profile”, then enter a name for that profile and populate the relevant times using 24-hour time format, as shown below.



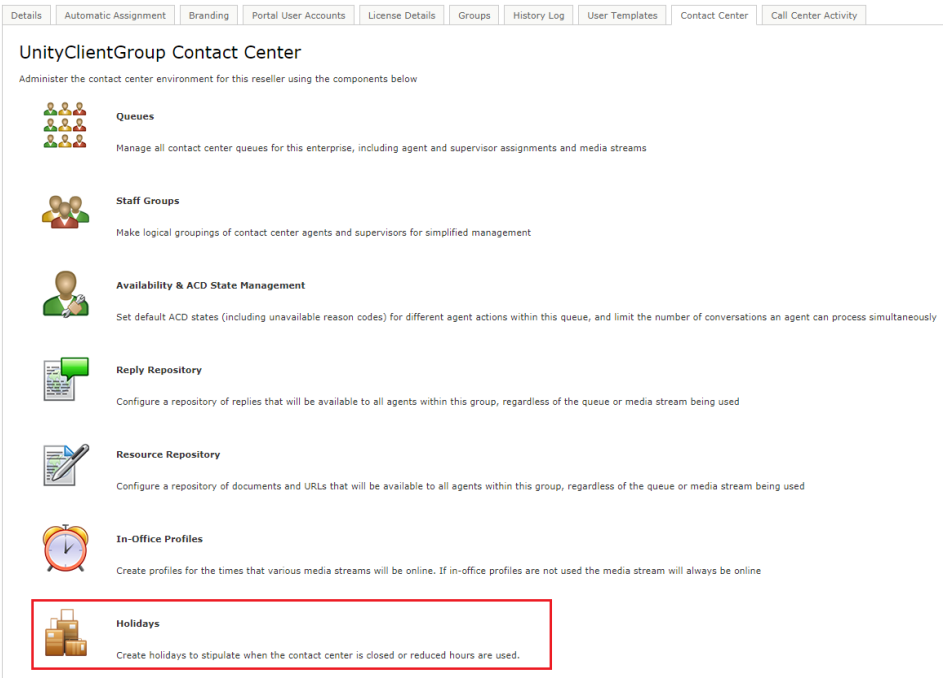
Click “Apply to All” for the times entered on Monday to apply all days. Leave blank the times for the days that the Media Stream is not available.

Please note: If an end time is set but a start time is not present then the Media Stream is not online for that day.

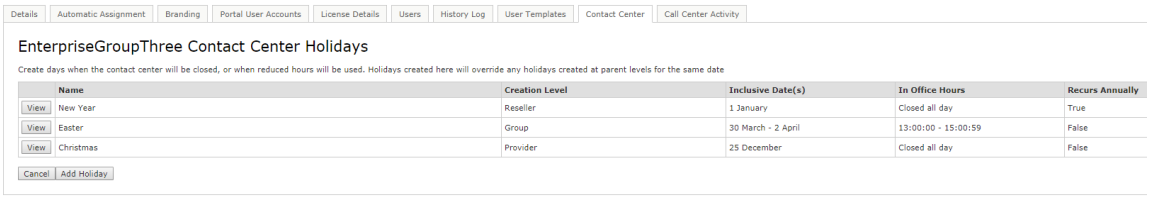
You can create multiple in-office profiles which can then be assigned to a Queue or Media Stream, but only one in-office profile can be assigned at a time. Any dates added in the contact center holiday section will override the in-office profiles.

7 HOLIDAYS

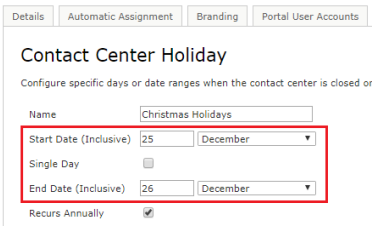
Create holidays to stipulate when the contact center is closed or reduced hours are used. They can be managed through the main contact center menu at all levels of the Unity hierarchy, including system provider, reseller and group. Any holidays created will automatically apply to all child levels, so a holiday created at the system provider level will apply to all Queues for all customers.



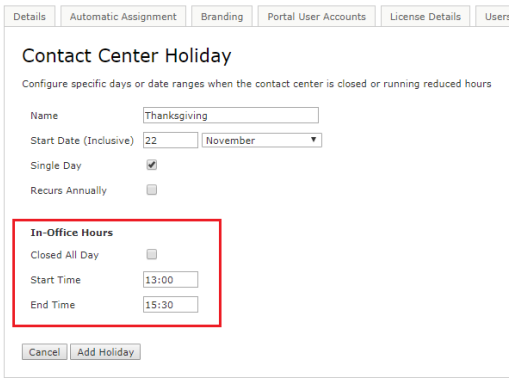
The list will display all holidays created at this level and above, all of which will be used by Queues at this level and below.



To add a new holiday, enter a name and a start date. Tick the “Single Day” box if the holiday is just for one day e.g. a public holiday. If the holiday is over multiple days then untick the box and enter the end date for the holiday, as shown below.



You can also set if the holiday occurs on the same date every year, and if the contact center will be closed for the entire day or if reduced hours will be used. Please note these hours are not related to an in-office profile, they will only be applied on the day(s) of the holiday period.

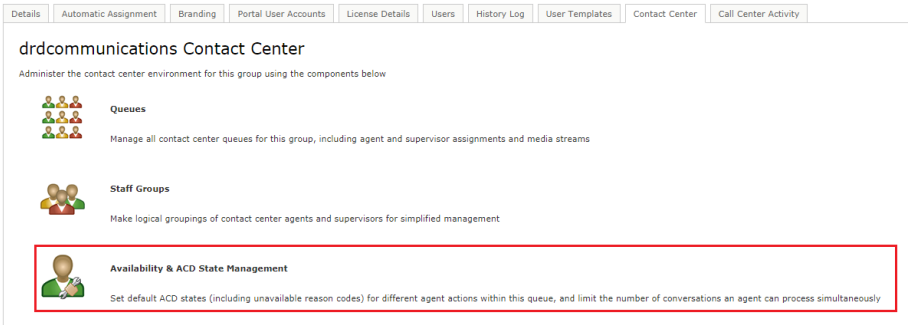


Please note: As mentioned, Holidays will apply to <u>all levels</u> below the level of creation. If you do not want certain holidays to apply to all Queues then you need to create the holiday at the Queue level rather than a higher level.

8 AVAILABILITY & ACD STATE MANAGEMENT

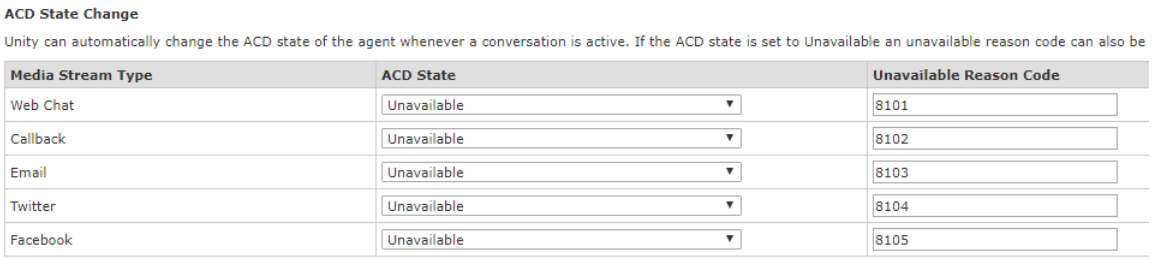
Set default ACD states for different agent actions within the group, Queue or Media Stream and limit the number of conversations an agent can process simultaneously. These can be configured at the group, Queue and Media Stream level and will apply to all lower levels.

Agent Availability can be set at the group, Queue and Media Stream levels through the main contact center menu, as shown below.



8.1 ACD State Change

Select the desired ACD state for an agent when they are processing a webchat, Call Back, email, Twitter or Facebook conversation from the drop-down menu.



ACD State Change

Unity can automatically change the ACD state of the agent whenever a conversation is active. If the ACD state is set to Unavailable an unavailable reason code can also be

Media Stream Type	ACD State	Unavailable Reason Code
Web Chat	Unavailable	8101
Callback	Unavailable	8102
Email	Unavailable	8103
Twitter	Unavailable	8104
Facebook	Unavailable	8105

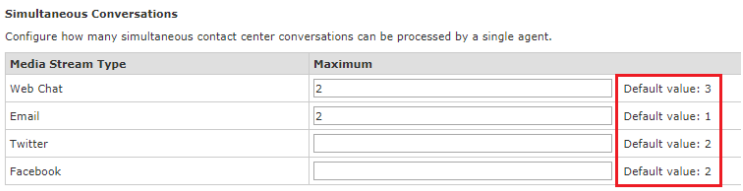
The "Unavailable Reason Code" needs to exactly match the unavailable reason code in BroadWorks, if the code doesn't exist in BroadWorks then it will be ignored by the Unity client.

For example, if the user reserves a web chat conversation then Unity will change their ACD state to "Unavailable – Webchat", assuming the unavailable code "Webchat" has been configured in BroadWorks.

This will prevent calls (and potentially conversations from other channels) from being received by the agent while they are processing the conversation. Of course these ACD states will also feed through to the agent activity BroadWorks call center reports.

8.2 Simultaneous Conversations

Configure how many conversations a user can process concurrently. Enter the maximum number of conversations for each Media Stream type, as shown below.



Simultaneous Conversations

Configure how many simultaneous contact center conversations can be processed by a single agent.

Media Stream Type	Maximum	
Web Chat	2	Default value: 3
Email	2	Default value: 1
Twitter		Default value: 2
Facebook		Default value: 2

Please note that the contact center platform will only consider the maximum number of conversations for the same Media Stream type (web chat, email etc) as the conversation for which the agent is being alerted. Therefore, in the below screenshot the agent can manage up to

three web chats *and* one email *and* three Twitter *and* two Facebook conversations. Maximum simultaneous conversations are not considered for call-backs, because the agent is free to initiate the Call Back in their own time.

Any setting from parent levels will cascade to lower levels, where they can be overridden. If a value is not set then the default value [from the higher level] will be applied.

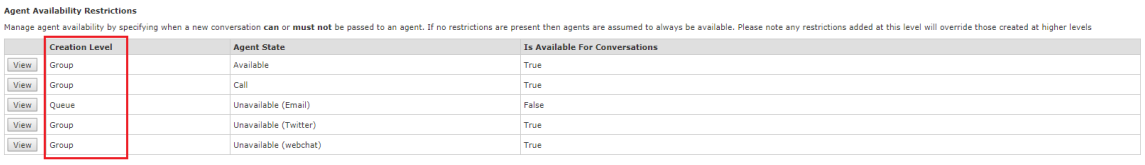
8.3 Agent Availability Restrictions

Unity also allows you to configure when a new conversation can or must not be passed to an agent. Restrictions can work with ACD state changes (as outlined in section 8.1) to build an agent availability profile.

For example, when an agent is replying to a webchat, Twitter or Facebook conversation then the agent should not be available to take call center calls, but when they are replying to an email conversation they are available to take call center Queues.

This type of routing profile can be configured by creating multiple unavailable reason codes in BroadWorks. Then configure Unity to automatically change the ACD state based on the type of Media Stream while adding restrictions to control if an agent is available for subsequent conversations.

The list will show all restrictions for all parent levels as well as the current level, all of which will be considered when deciding if the agent is available for new conversations. If there is a duplicate restriction at a higher level then the restriction at the lower level will take precedence.



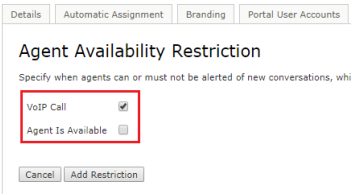
Agent Availability Restrictions

Manage agent availability by specifying when a new conversation **can** or **must not** be passed to an agent. If no restrictions are present then agents are assumed to always be available. Please note any restrictions added at this level will override those created at higher levels

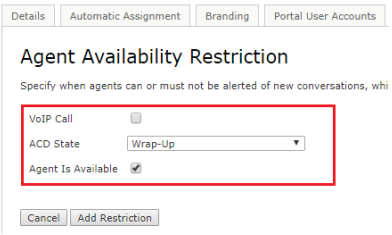
	Creation Level	Agent State	Is Available For Conversations
View	Group	Available	True
View	Group	Call	True
View	Queue	Unavailable (Email)	False
View	Group	Unavailable (Twitter)	True
View	Group	Unavailable (webchat)	True

Restrictions will apply to all Media Streams if set at the group or Queue level, so if each Media Stream will require different restrictions then they should be set at the Media Stream level.

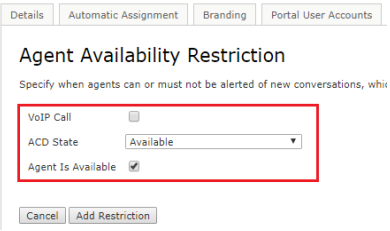
Example 1: If a user is on a VoIP call then the user is not available for a new contact center conversation.



Example 2: If a user is in wrap-up then they are available for a new conversation. This will make the user available for a webchat, email or other Media Stream but it will not make them available for VoIP calls.



Example 3: If a user is available and not on a VoIP call then they are available for a new conversation or VoIP call.



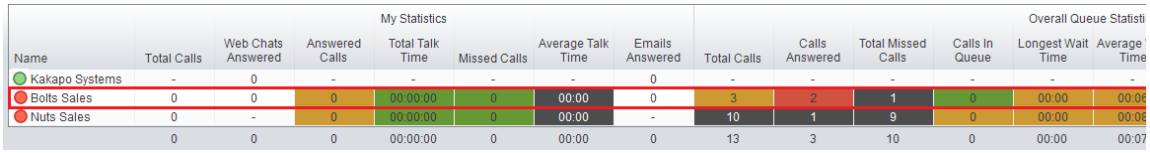
9 QUEUES

A contact center Queue can be thought of as similar to a VoIP call center, in that it allows an agent to receive and reply to conversations through different channels. Unity will combine a BroadWorks call center with a Unity contact center Queue if the call center ID and the contact center identifier are identical. In this case the agent will see a single entry in the personal wallboard that will contain omnichannel statistics from all Media Streams as well as from the call center, and Unity will simultaneously join or leave the agent from both Queues. Therefore, for the agent, this appears and behaves as a single omni-channel Queue.

9.1 Creating a new Queue

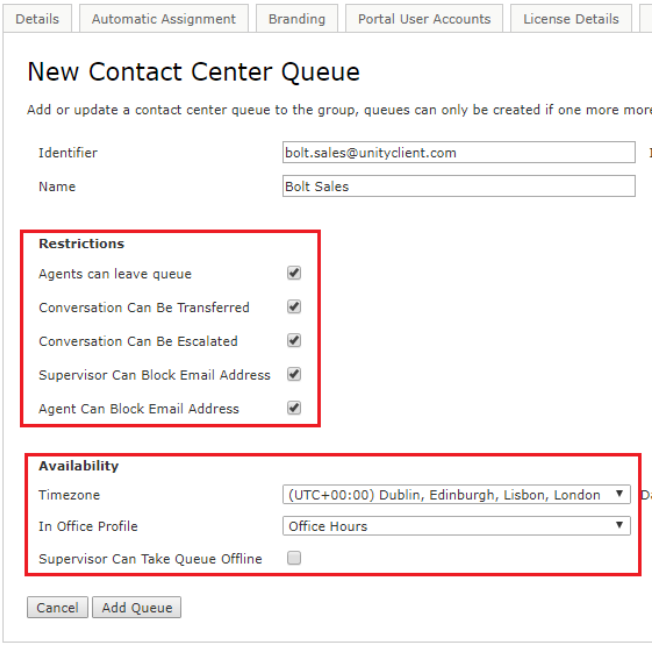
Click “Add Queue” then enter an identifier and a name for the Queue. As previously mentioned, if the identifier matches a BroadWorks call center ID then Unity will combine both Queues in the client. The identifier cannot be modified so please make sure the correct identifier is used.

In the example below, “Kakapo Systems” contact center ID did not match to a Broadworks call center ID therefore you can only see webchat and email stats. “Bolt Sales” ID did match a Broadworks call center ID, therefore you can see all call center and webchat/email stats in a single row, as shown below. (To add and remove statistics from the Personal Wallboard please see section 11.2)



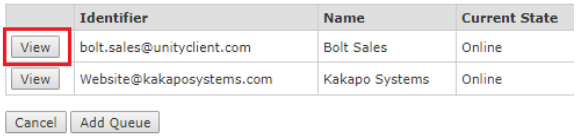
	My Statistics							Overall Queue Statisti					
Name	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Time
Kakapo Systems	-	0	-	-	-	-	0	-	-	-	-	-	-
Bolts Sales	0	0	0	00:00:00	0	00:00	0	3	2	1	0	00:00	00:0
Nuts Sales	0	-	0	00:00:00	0	00:00	-	10	1	9	0	00:00	00:0
	0	0	0	00:00:00	0	00:00	0	13	3	10	0	00:00	00:07

Select from the list of restrictions and set the time zone for that Queue. Select the in-office profile from the drop-down menu (please see the In-Office Profiles in section 6).



You can also allow the supervisor to take the Queue offline by ticking the box, e.g. If there is a fire alarm and the building has been evacuated.

Click “Add Queue”. To then make changes in that Queue select “View” against the Queue name.



9.2 Profile

To configure the contact center Queue click profile.

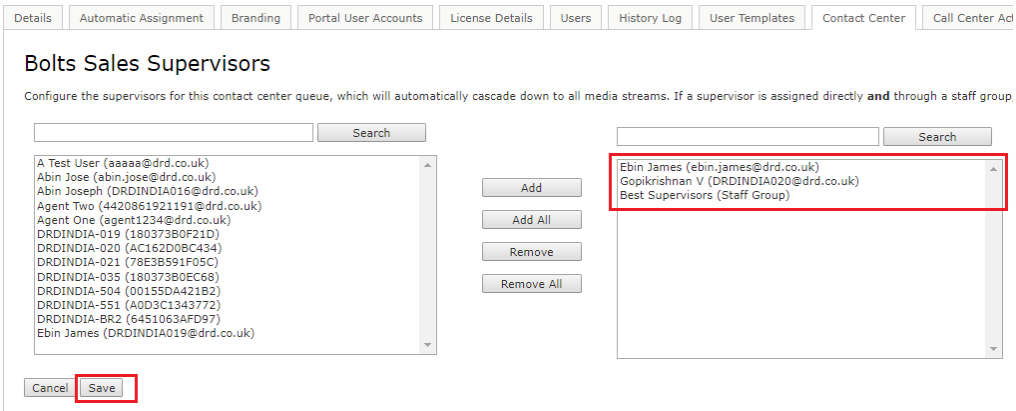
9.3 Media Streams

Manage the Media Streams (webchats and emails etc) associated with this Queue. (Pease see Media Streams in section 10).

9.4 Supervisors

Assign supervisors for this Queue, which will also apply to all Media Streams within the Queue. Displayed are all the users in the group that have a “Unity Contact Center Supervisor” license assigned to them including pre-configured staff groups (please see section 3 for staff groups).

To add users and staff groups to the supervisor list simply select them from the left box and click add. All users and groups in the right box have already been added. Once you have modified the supervisor list click “Save”.



9.5 Availability & ACD State Management

Set default ACD states (including unavailable reason codes) for different agent actions within this Queue, and limit the number of conversations an agent can process simultaneously. Anything entered at this Queue level will override anything entered in the group level. If nothing is set for the Queue level then Unity will take the configuration from the group stage. (Pease see Availability and ACD State Management in section 8).

9.6 Reply Repository

Configure a repository of replies that will be available to users within all Media Streams within this Queue. All reply repositories cascade down from the group so if you are viewing the repository at the Webchat Media Stream level then you will see all replies created at the Queue and group level that are available for Webchats. (Please see Reply Repository in section 4).

9.7 Resource Repository

Configure a repository of documents and URLs that will be available to users within all Media Streams within this Queue. All resources cascade down from the group so if you are viewing the resource repository at the Webchat Media Stream level then you will see all resources created at the Queue and group level that are available for Webchats. (Please see section Resource Repository in section 5).

9.8 Holidays

Create holidays to stipulate when the contact center is closed or reduced hours are used. All holidays cascade down from the group level but you can also create holidays for separate Queues at the Queue level. E.g. If some call centers are in different countries with different public holidays. (Please see Holidays in section 7).

9.9 History Log

View all activity performed in this contact center Queue.

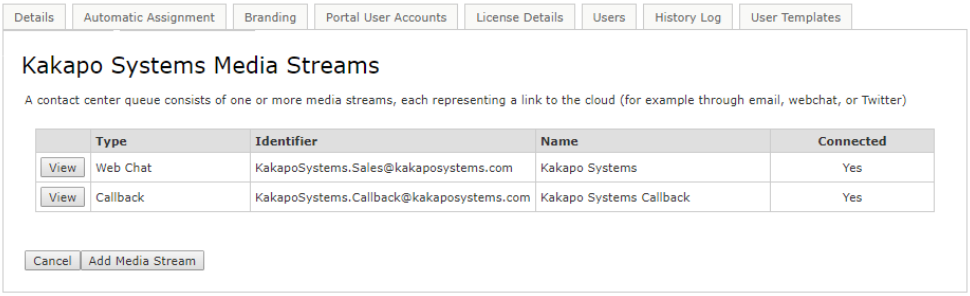
10 MEDIA STREAMS

A Media Stream is the channel to the public, similar to a phone number for a call center. In a contact center environment it represents a web chat or Call Back client, an email address, a Twitter handle or a Facebook login. Multiple Media Streams can belong to the same Queue, but each Media Stream follows a different routing profile.

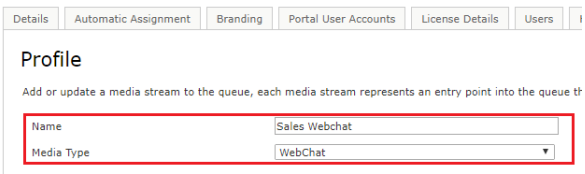
All previously mentioned configuration settings [such as maximum concurrent conversations and restrictions etc] from a parent level will cascade down to all Media Streams by default, however this can be overridden at the Media Stream level.

10.1 Add Media Stream

Click the “View” button next to the Queue that you want to add the Media Stream to and then click Media Streams. You will then be presented with a list of all of the Media Streams in that Queue, as shown below.



Click “Add Media Stream” and enter a name (this name will appear as the “to” field in the Activity Window when a Queued conversation is presented to a user) and then select the type of Media Stream from the drop-down menu.



Set the time zone, it will default to what was set at the parent level but you can override this here. Select from the in-office profiles [if created], this will also default to what was set at the parent level but can be overridden.

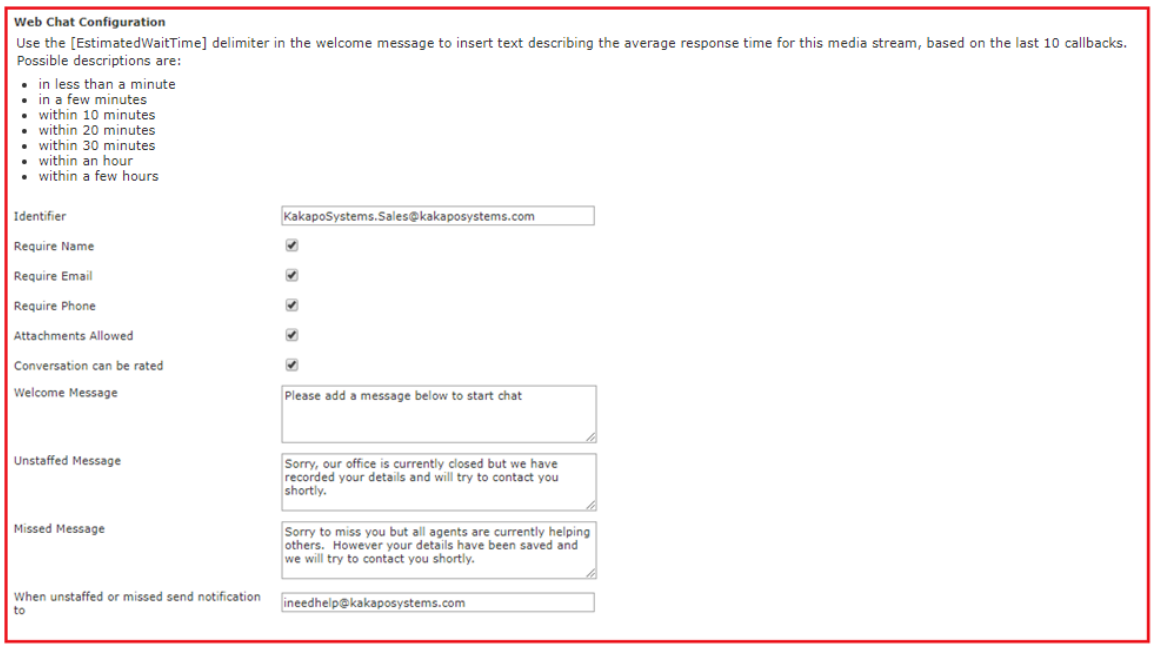
If the “Use Last Agent If Available” setting is checked then the contact center platform will first alert the last agent to reserve a conversation from the email address or phone number of the remote party, for any channel type. This assumes that the user is still an agent of the Media Stream and is joined. That last agent will be alerted before the first routing phase is processed.

10.2 IMAP Mailbox

To set up an email Media Stream enter the relevant IMAP Configuration and any automatic responses then click “Add Media Stream”.

10.3 Webchat

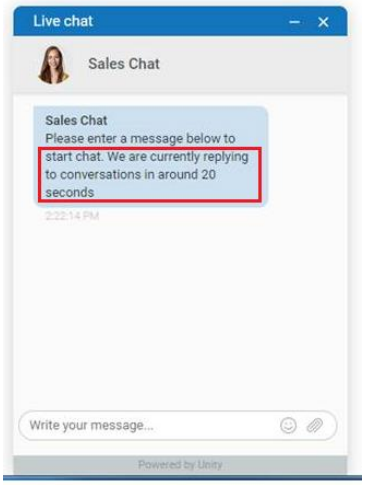
To set up a webchat enter the relevant webchat configuration and any automatic responses.



When the webchat client is loading it will look to see if the estimated wait time delimiters exist in the messages, and if so it will dynamically calculate the estimated wait time based on the last ten conversations that have been assigned to an agent.

The possible descriptions are:

- in less than a minute
- in a few minutes
- within 10 minutes
- within 20 minutes
- within 30 minutes
- within an hour
- within a few hours



Identifier: This can follow whatever naming system you choose but it needs to be globally unique, so we recommend that a domain is included in the identifier to ensure uniqueness.

Require: This forces the customer to enter their name, email and/or phone number before they can use the webchat. The name and phone number are always mandatory for call-back Media Streams.

Attachments allowed: This allows the customer to send attachments through the webchat client.

Conversation can be rated: The customer will be asked to rate the conversation out of five stars once the conversation has ended, a comment can also be entered. Please note that the rating request will appear regardless of who ended the chat.

Welcome message: This is the message that is displayed after the customer has entered the required details but before they have started typing a message. It gives instructions on how to start the chat conversation.

Please note: we recommend having something similar to "please add a message below to start the chat" in the welcome message as web chats are only started once the visitor has sent at least one message.

Unstaffed message: This is the message that will display when the contact center is closed or when there are no agents joined to the Queue. An unstaffed email will be sent to the email address entered with all the relevant information, as shown below.

From: noreply@unityclient.com [mailto:noreply@unityclient.com]
Sent: 11 December 2017 14:04
To: I Need Help <ineedhelp@kakaposystems.com>
Subject: Contact Center Notification

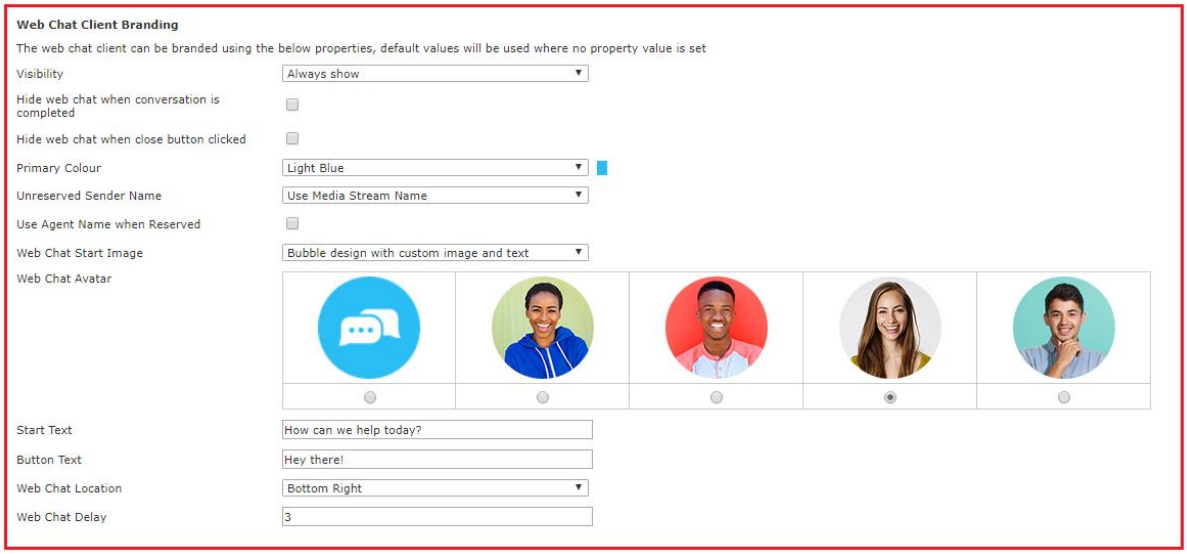
Contact Center Notification

This email is notification that a contact center conversation was missed because of staff unavailability.

Conversation Details	
Received Time	11/12/2017 14:04:24 GMT
Contact Center	Kakapo Systems (Kakapo Systems)
Remote Party Name	Mary Roach
Remote Party Phone	tel://02082281257
Remote Party Email	mailto://mary.roach@gmail.com
Reason	Queue was unstaffed

Missed message: This is the message that will display once all routing phases have completed and the conversation hasn't been answered. A missed email will be sent to the email address entered with all the relevant information, similar to that shown above.

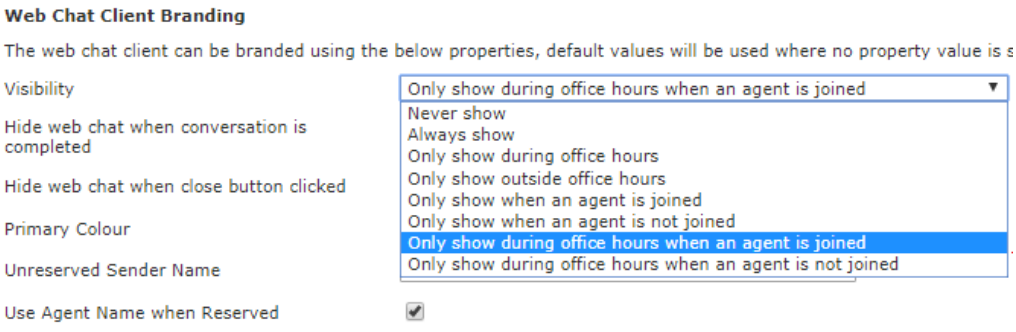
At the bottom of the Media Stream profile page you can brand the webchat using different colours, avatars, text and locations, as shown below. The sample client will change depending on the settings that you choose.



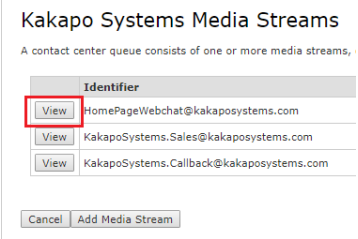
Hide web chat when conversation is completed: This will hide the web chat icon for the user for the rest of that session after the conversation has been completed.

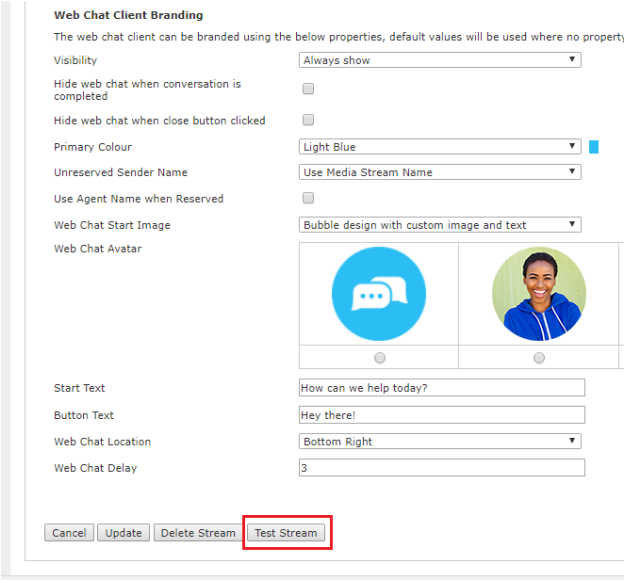
Hide web chat when close button clicked: This will hide the web chat icon for the user for the rest of that session regardless of whether a web chat conversation was initiated.

Visibility: Change the visibility of the Media Stream by selecting the options from the dropdown menu:

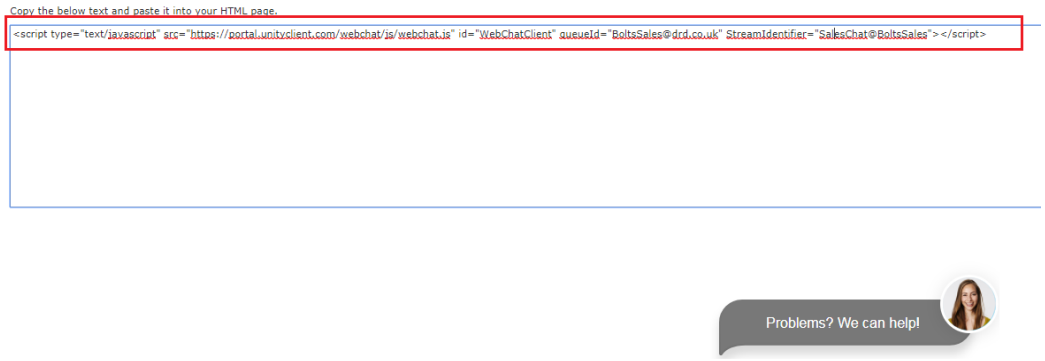


Once the Media Stream has been added, you can test the Media Stream by viewing it from the Media Stream list, then clicking “Test Stream” in the Media Stream profile page, as shown below.





The portal will then show you how the icon will behave and provide you with the HTML code that you need to copy and paste into any webpage where you want to provide the client.

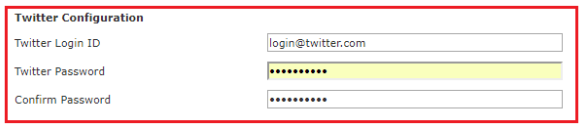


Please note that this HTML script block will not change if the Media Stream is updated, the new settings will be applied when the page is next loaded/refreshed. The HTML script block will be different for each Media Stream.

Please note: the web chat conversation will follow the visitor as they navigate to different webpages or open new tabs on the website.

10.4 Twitter

To log in to a Twitter Media Stream simply enter the Twitter login ID and password then select “Add Media Stream”.

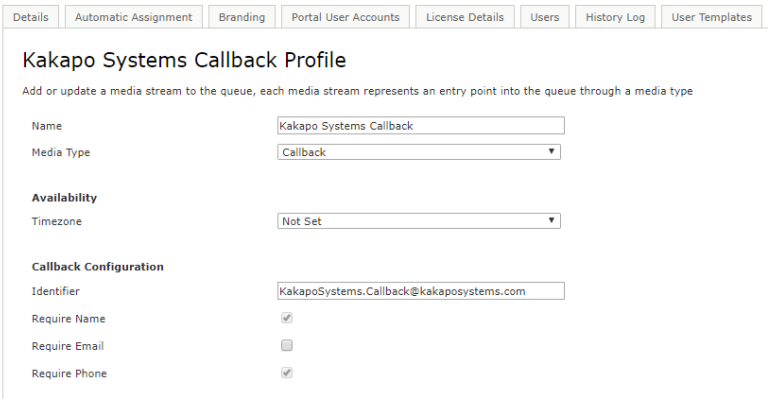


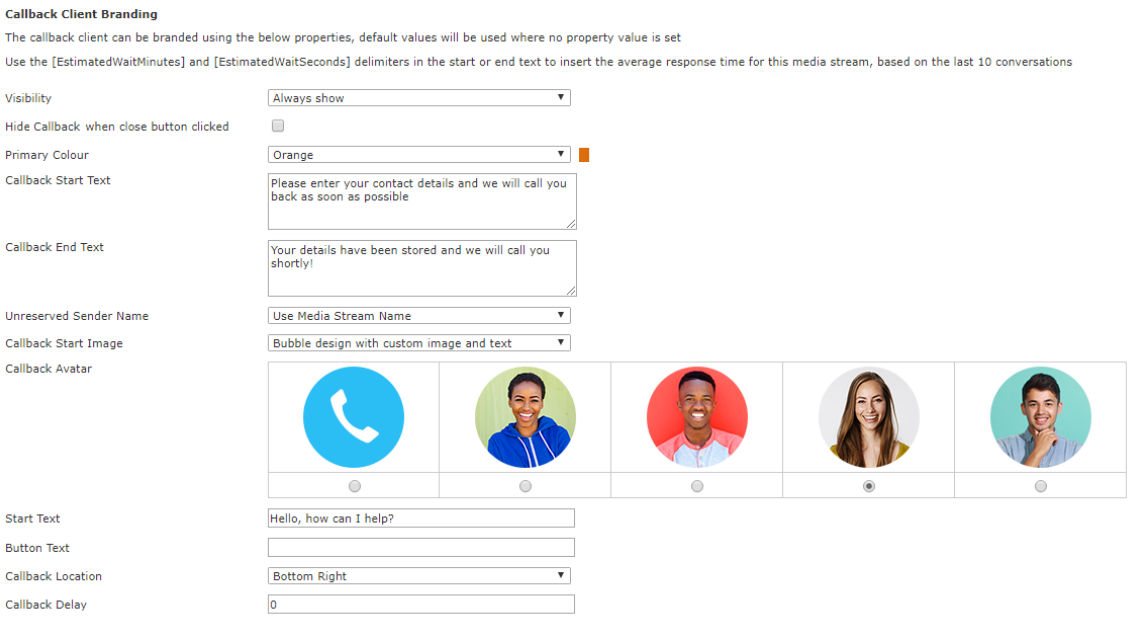
10.5 Facebook

To login to a Facebook Media Stream simply enter the Facebook login ID and password then select “Add Media Stream”.

10.6 Call Back

To add a Call Back Media Stream enter the Call Back configuration and select from the branding options, including colour, avatar, text and location. As mentioned, the name and number are mandatory but you can also choose to require an email address before the Call Back is accepted.

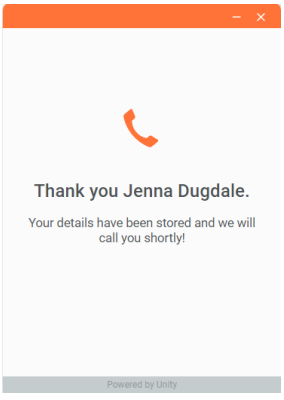




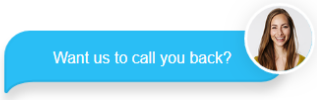
Hide Call Back when close button clicked: This will hide the Call Back icon for the user for the rest of that session one the close button has been clicked.

Call Back Start Text: The beginning message presented to the customer once they have selected the Call Back button.

Call Back End Text: The message presented to the customer after they have submitted their details, as shown below.



Start Text: The message that appears next to the avatar, as shown below. This setting will not always be available, for example the “circular fixed image without text” doesn’t accept start text.



Delay: Delay the Call Back icon appearing on the webpage. E.g. if you only want to offer a Call Back service if the customer has been on the webpage for more than 10 seconds.

Please note: The call-back client will hide after 5 seconds once the visitor has requested the Call Back.

10.7 Profile

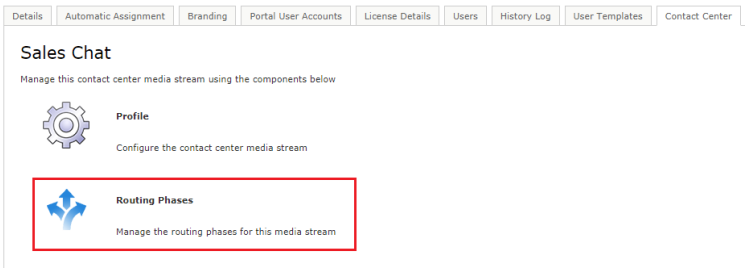
Configure the information for the contact center Media Stream.

10.8 Routing Phases

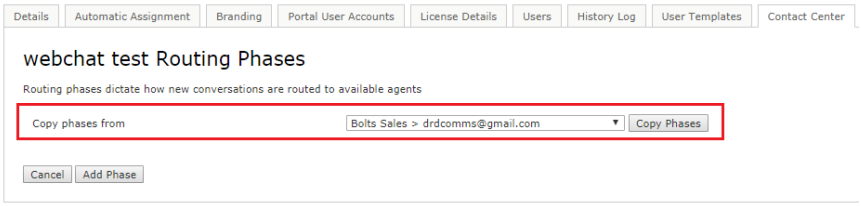
A routing phase is a rule that instructs the contact center who to alert when a new conversation comes in through a Media Stream. Routing phases allow you to configure the type of routing to use (circular, simultaneous, longest idle etc) as well as the period of time a customer will wait before the conversation is classed as missed/abandoned.

As previously mentioned, rather than overflowing to other Queues [as with Broadworks ACD], Unity allows multiple routing phases to be configured for a single Media Stream. When a new conversation is received, the contact center will process all routing phases in order before classing the conversation as abandoned, and acting accordingly.

Routing phases are managed through the contact center Media Stream menu, as shown below.



To add a new routing phase click “Add Phase”. If no phases currently exist for the Media Stream but do for other Media Streams within the group or enterprise, then routing phases can be copied to this Media Stream rather than having to be manually recreated, as shown below. Routing phases can be copied to a Media Stream with phases already set, those phases just need to be deleted in order to see the copy option.



When creating a routing phase you must select the routing policy:

Circular: The conversation alert will move from one user to the next, in the order specified in the agent list for the routing phase. You can move agents up and down this list to change the order.

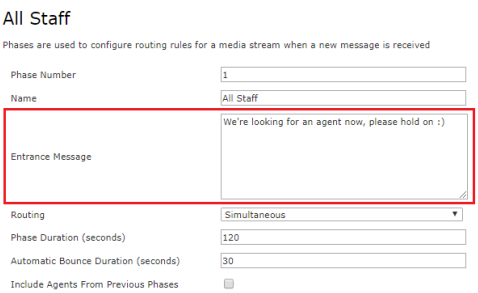
Longest Idle at Agent: Unity will send the conversation request to agents in order of who has been idle for the longest, considering all Media Streams and Queues.

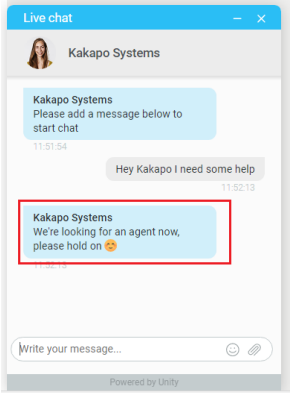
Longest Idle at Media Stream: Unity will send the conversation request to agents in order of who has been idle for the longest time for that particular Media Stream.

Longest Idle at Queue: Unity will send the conversation request to agents in order of who has been idle for the longest out of all the agents in that Queue.

Simultaneous: Unity will send the conversation request to all joined agents at the same time, the Unity client may then reject the conversation based on concurrent conversations and restrictions etc.

If the Media Stream selected is a webchat then an entrance message box will be presented to the customer while an agent is found, as shown below. This is optional but can be used to provide feedback to the visitor.





Loop Through Agents Until Duration Elapsed: Tick this box if you want the conversation request to loop back round to the first agent after it has finished the list of agents and is still unanswered. If you leave this box unticked, then once it has bounced from the last agent in the list then it will go on to the next phase, or if this is the last phase then the conversation will be “missed”.

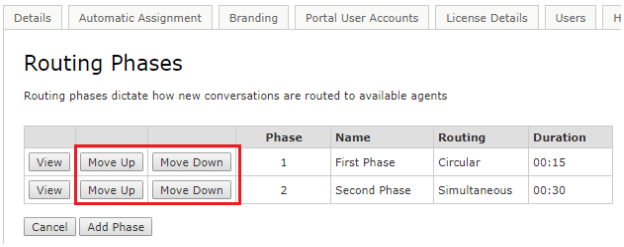
Please note: If an agent is not online then the conversation request will skip over them and go to the next agent.

Phase Duration: How long Unity will perform the configuration in this phase before moving on to the next phase.

Automatic Bounce Duration: How long the conversation request stays unanswered with one agent before it bounces to another. This is not visible if the routing policy is simultaneous.

Add new agents to this phase by selecting them in the left-hand box and clicking “Add”. All agents in the right-hand box have been added to the phase.

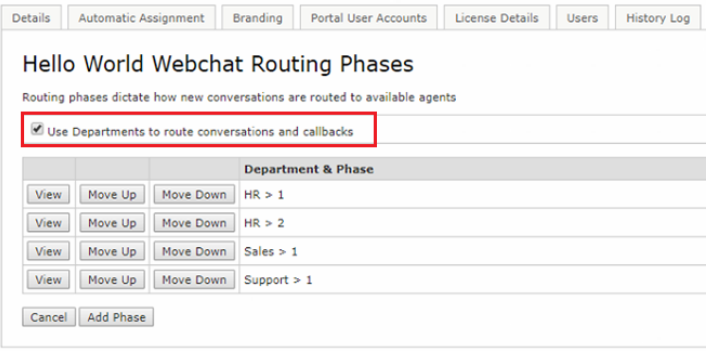
Once you have configured your desired routing phases they will be listed with their name, routing type and bounce duration. Each phase will be given a number based on the order created, and phase 1 will always be the first phase to be processed. You can reorder the phases by using the “Move Up” and “Move Down” buttons in the list, as shown below.



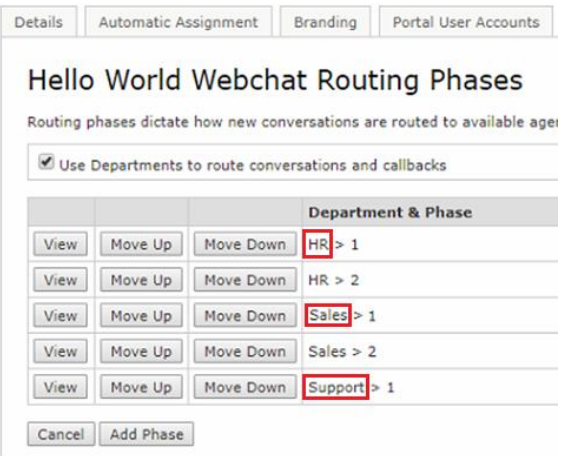
If a conversation still hasn't been answered after all phases for this Media Stream have been completed then the customer will receive the default missed message entered in the "Missed Message" box which has been configured in the Media Stream profile section.

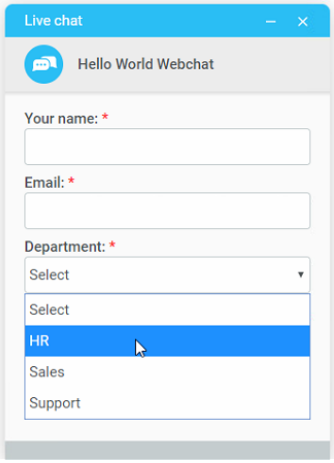
10.9 Routing by Department

Offer customers the option to choose which department they wish to speak to by ticking the "Use Departments to route conversations and Call Back" box in the Routing Phases section:



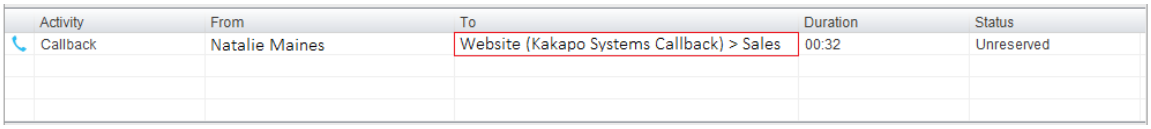
The "Name" field in the Routing Phase becomes the name of the department and is presented to the customers in the drop-down list.





You can set multiple phases for departments and use the Move Up and Move Down buttons to change the order of those phases.

In the client the Agent will be presented with the Call Back request/web chat along with the department name in the Activity Window, as shown below.



If you have configured departments in the Routing Phases but you no longer want to use Departments to route conversations, simply untick the “Use Departments to route conversations and Call Backs” box.

If you get the below error message:
“There are routing phases that contain the same phase number, these must be deleted before the Media Stream can be configured not to use departments”

To correct this you will need to delete any duplicated phase number. E.g. You cannot have Sales>1 and HR>1 as these are both phase 1s.

10.10 Supervisors

Assign supervisors to this Media Stream. Any supervisors assigned here are *in addition* to those assigned at the Queue level.

To add users and staff groups to the supervisor list simply select them from the left box and click add. All users and groups in the right box have already been added. Once you have added your supervisors click “Save”.

10.11 Availability & ACD State Management

Set default ACD states (including unavailable reason codes) for different agent actions within this Media Stream, and limit the number of conversations an agent can process simultaneously. Anything entered at this Media Stream level will override anything entered in the parent level. If nothing is set for the Media Stream level then Unity will take the configuration from the parent level. (Please see section 8 for Availability & ACD State management).

10.12 Reply Repository

Configure a repository of replies that will be available to users within this Media Stream. All reply repositories cascade down from the parent level so if you are viewing the repository at the Webchat Media Stream level then you will see all replies created at the Queue and group level that are available for Webchats. (Please see section 4 for Reply Repository).

10.13 Resource Repository

Configure a repository of documents and URLs that will be available to users within this Media Stream. All resources cascade down from the parent level so if you are viewing the resource repository at the Webchat Media Stream level then you will see all resources created at the Queue and group level that are available for Webchats. (Please see section 5 for Resource Repository).

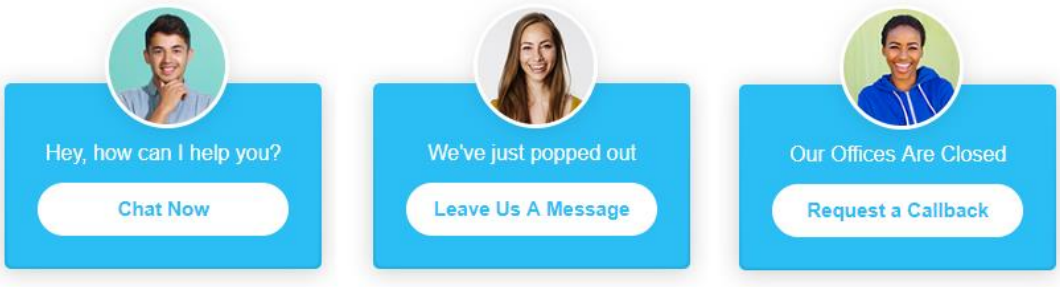
10.14 History Log

View all activity performed in this Media Stream.

11 PRESENCE-BASED SCRIPTING

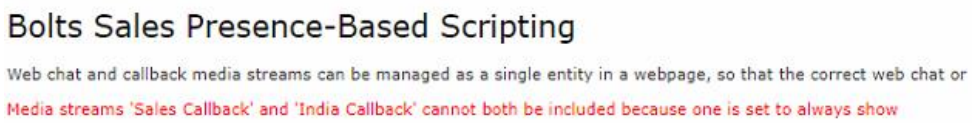
Presence-Based Scripting dynamically changes which Media Stream is shown at any one time, meaning that you can add multiple Media Streams to a web page with just one script block.

E.g. Show Web Chat A when agent is joined. Show Web Chat B when agent is not joined and show Call Back outside of office hours.

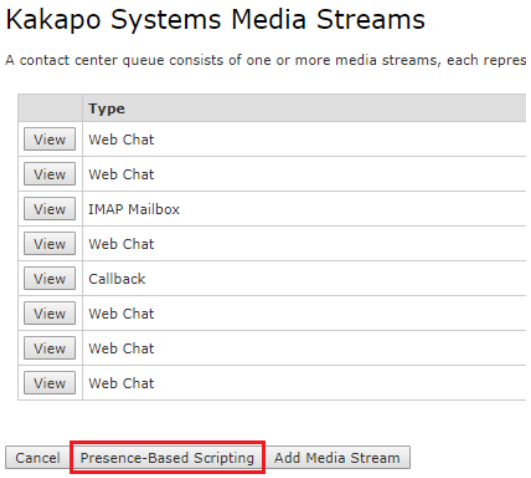


Unity Contact Center will display the Media Streams according to their in-office profile and visibility. Therefore, the visibility of all selected Media Streams must not clash. E.g. If you select

two Media Streams: Media Stream 1 is set to “show during office hours” and Media Stream 2 is set to “show during office hours when agent is joined” then the portal will present you with an error, similar to below.

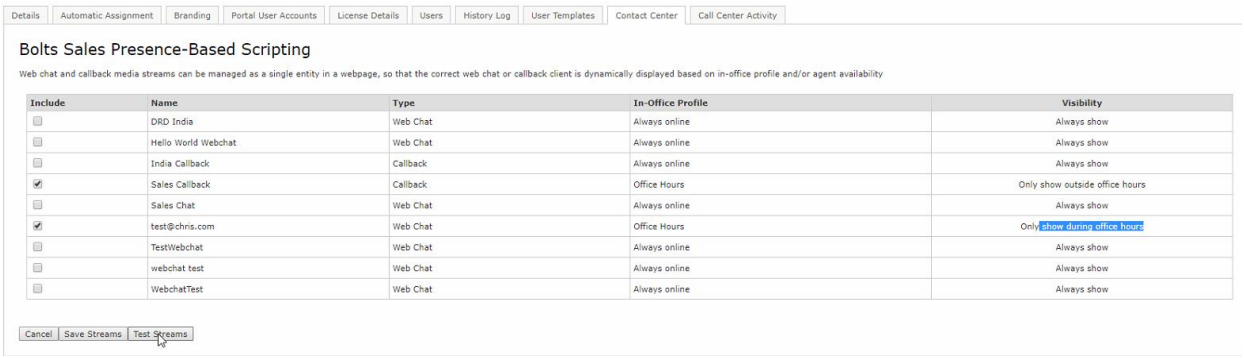


To configure Presence-Based Scripting go to the Queue and then to Media Streams and click Presence-Based Scripting:



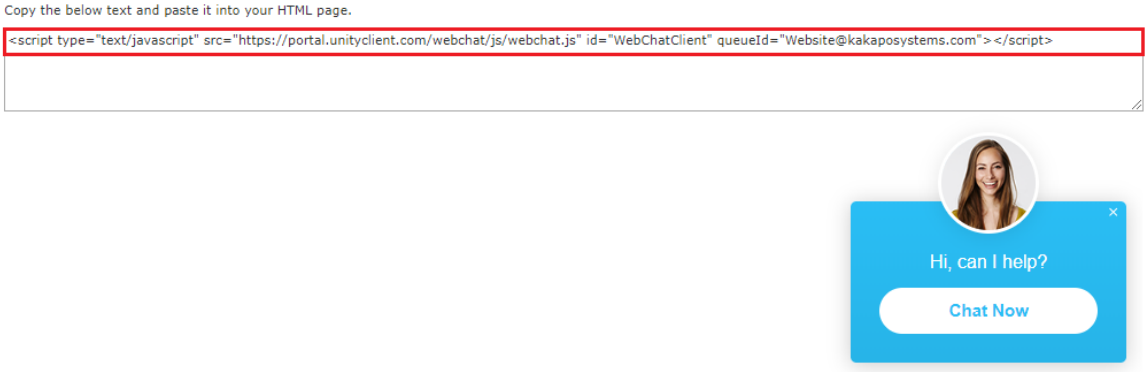
You will then be able to select the desired Media Streams that you want to add.

If you only have one Media Stream available we recommend that you use Presence-Based Scripting anyway in order to make it easier to add additional streams in the future.



Once the Media Streams have been selected you can test them by clicking “Save Streams” and then “Test Streams”.

The portal will then show you how the icon will behave and provide you with the HTML code that you need to copy and paste into any webpage where you want to provide the client.



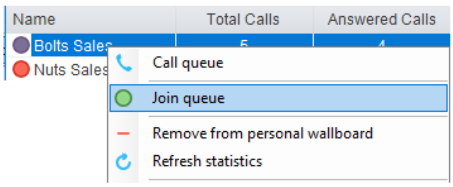
Please note that this HTML script block will not change even if the Media Streams are changed and updated.

12 END USER EXPERIENCE

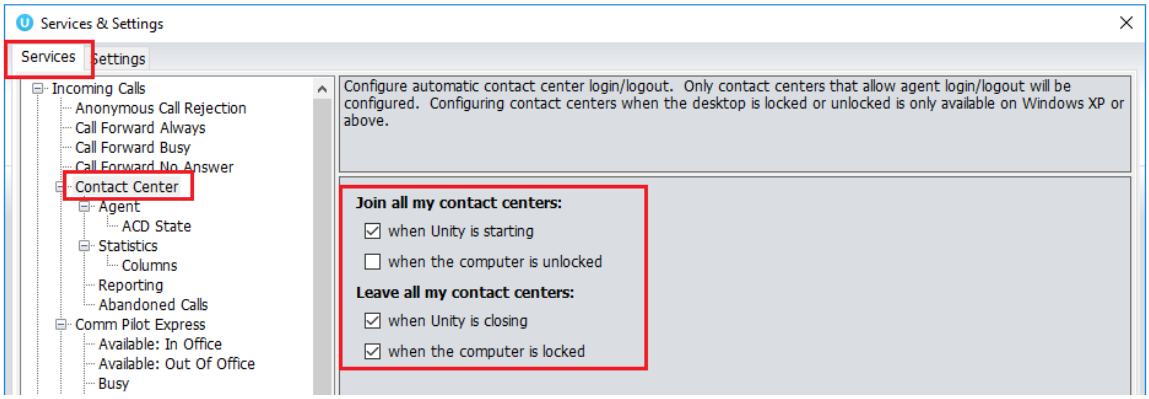
You have now completed configuring the Unity contact center platform, including Queues, Media Streams and agents. This section describes how the agent performs contact center actions within their Unity client.

12.1 Joining or Leaving Queues

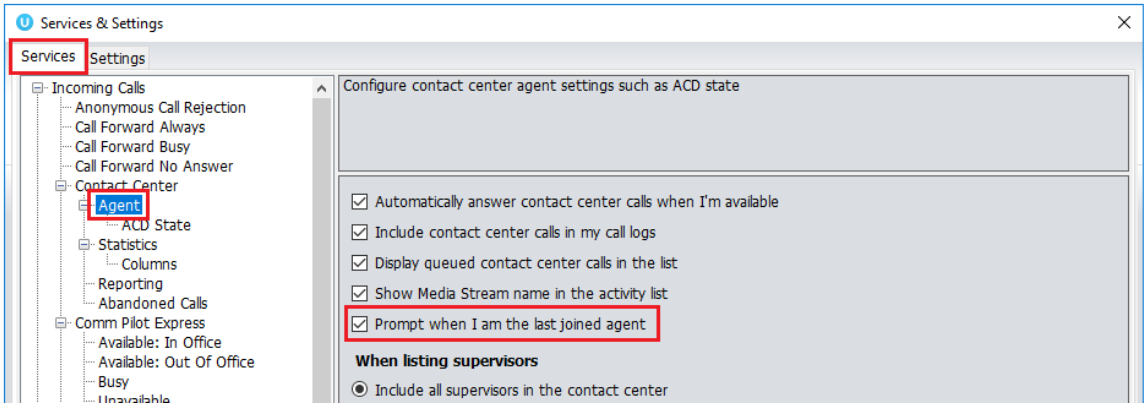
Agents join and leave contact center Queues exactly the same way they would with a call center Queue. Simply right click on the Queue and select join or leave. If icon next to the Queue is green then they are joined to the Queue, if it is red then they are not joined to the Queue.

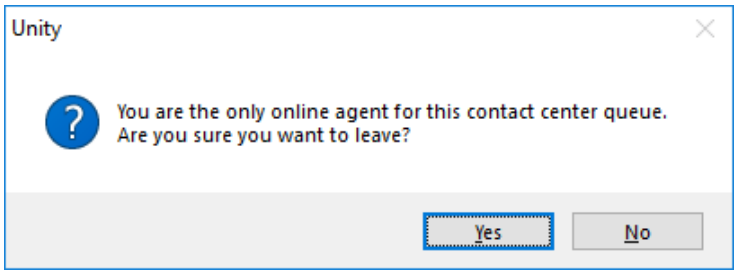


Unity can be configured to automatically join all contact center Queues on start-up, as shown below.



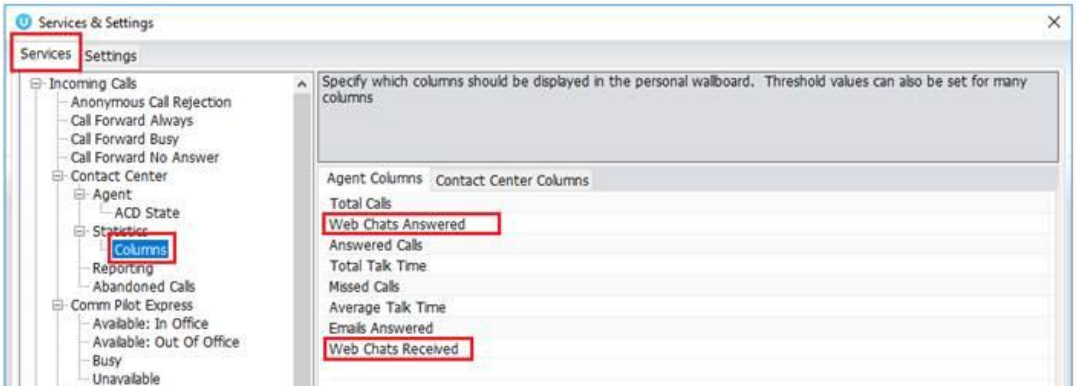
Unity can be configured to prompt the user that they are the last joined agent when they attempt to leave a Queue, as shown below.





12.2 Adding/Removing Contact Center Statistics

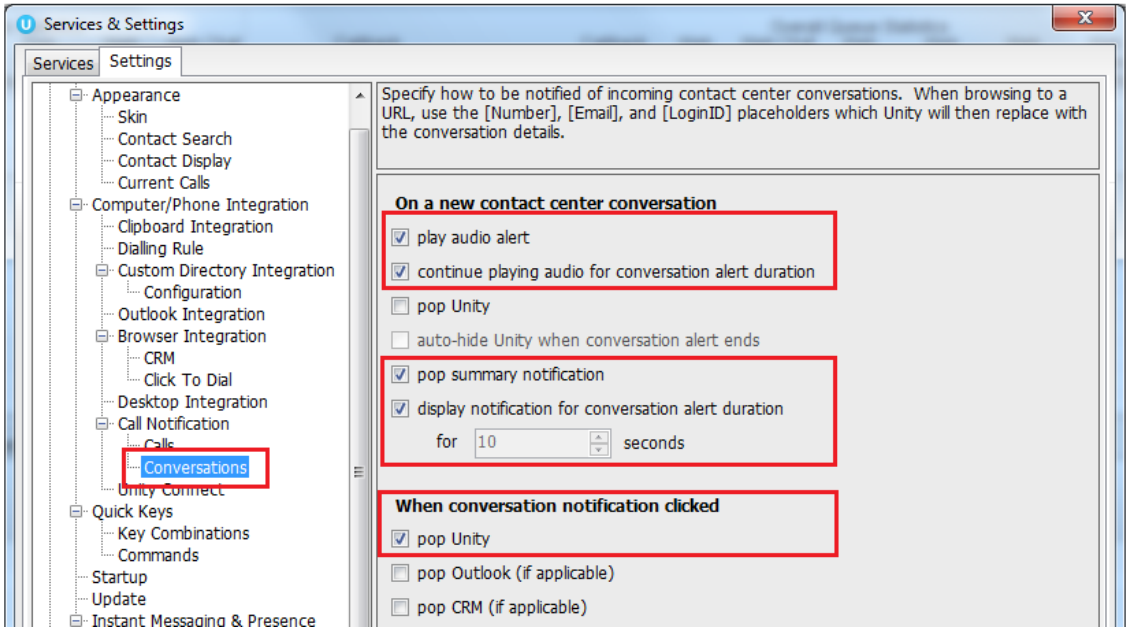
To add Media Stream statistics to the Agent and Contact Center columns in the Personal Wallboard go to settings>services>columns and then add the available contact center stats using the green add icon at the bottom right.



To remove Media Stream statistics simply click on the desired statistic and click the red minus icon at the bottom. You can reorder the statistics by selecting the statistic and using the arrows to move it up and down the column.

12.3 New Conversation Alert

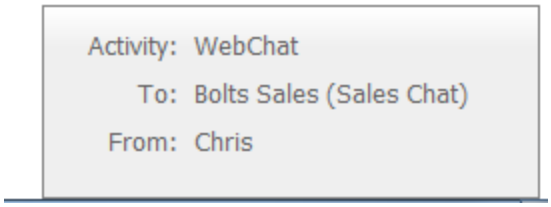
When a new conversation is received, Unity can be configured to show a toast notification and or play an audio alert, as shown below.



At present the alert is just the IM audio alert played in a loop if playing for the alert duration, the ability to change the audio file shortly.

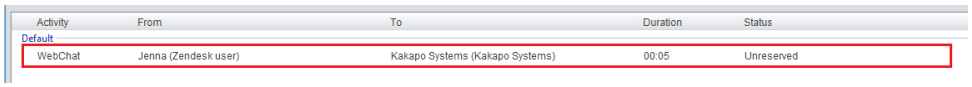
If it's not configured to continue playing then it will just be played once, the same as when you receive an IM.

The summary notification:



12.4 Conversation

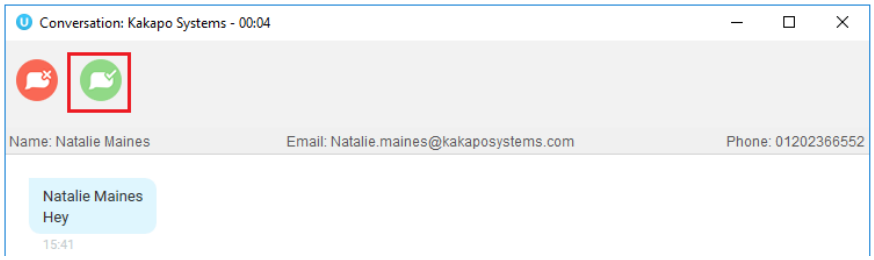
When an agent is joined to the Contact Center Queue and available [although we know that the agent may be available when the ACD state is unavailable, for example unavailable (webchat)] all conversation alerts will be presented in the Activity List, as shown below.



The Activity column in the Activity Window informs the user what type of conversation it is and the From column will populate with the customer's name, Unity will integrate with a CRM platform to show the contact details based on the email address or number if configured in Settings. The duration shows the time since the conversation alert was received, and the status will always be "Unreserved" at first.

12.5 Managing Webchat

When the agent first sees the new webchat conversation in their Activity Window they can either right click to reserve the chat or double click it and then click reserve, as shown below.

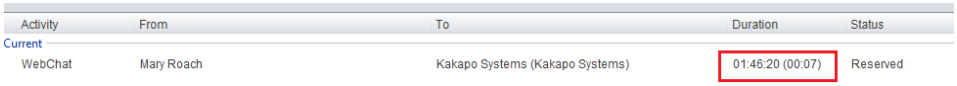


The difference is that by double-clicking the conversation first, the user can see any chat messages that have been entered by the visitor before reserving the conversation.

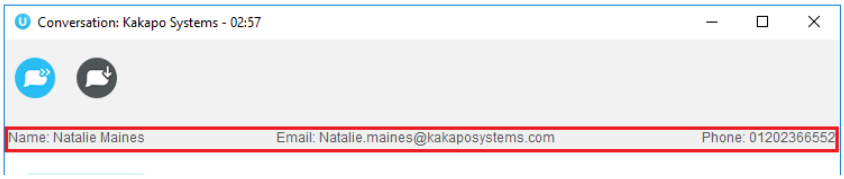
Reserve: To reserve a webchat conversation is to answer it. As soon as an agent reserves the webchat then the routing phases will stop and the conversation will stay with that agent. Any other agents that have been alerted will be told that the conversation was reserved, so it will be removed from their Activity Window. The status of the conversation will change the "Reserved" and the duration will change to the time since the conversation was reserved. Unity will also change the ACD state of the agent if set in the Agent Availability page in the portal.

Reject: Rejecting a conversation cancels the alert, so that the conversation will be removed from your Activity List. The contact center will act accordingly, by alerting another agent if using circular of longest idle routing, or perhaps moving to the next phase. This will override the automatic bounce duration set in the routing phase, if the conversation is not reserved or rejected within the time stated in the "automatic bounce duration" for the routing phase, then the Unity client will automatically reject the conversation alert on behalf of the agent.

If reserved, the webchat will stay in the Activity Window for the duration of the conversation. The duration time in the brackets is the amount of time passed since the customer last sent a message which has not yet been replied to. At any time the Unity user can double-click the conversation from the Activity List to see the webchat window, and can close the conversation window by clicking the X in the top right corner.



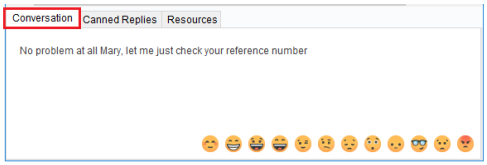
At the top of the webchat box is the customer's name, email and telephone number [if entered], as shown below.



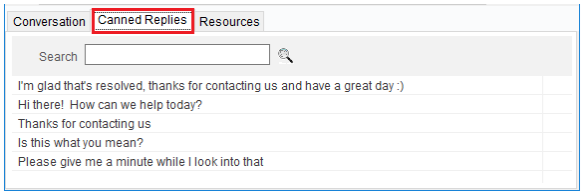
Simply click on the email address to send an email to the customer using the default email program, or click on the number to immediately dial through Unity.

Conversation: This is where the user enters text to send to the customer. Simply type the message in the box and press enter to send.

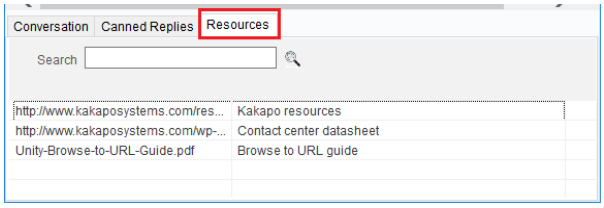
Emojis can also be added to a message by left clicking the relevant image. Or right click on an emoji to send it immediately.



Canned Replies: This is where all canned replies entered at different levels in the portal are stored, the user simply double clicks on a reply to send it. The user can also use the search box to search for specific replies, based on the name or text entered in the portal.

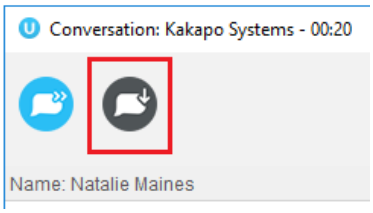


Resources: All URLs and uploaded resources created in the portal are available in this tab, the user simply double clicks on a resource to send it. The user can also use the search box to search for specific resources, based on the filename/URL or description.

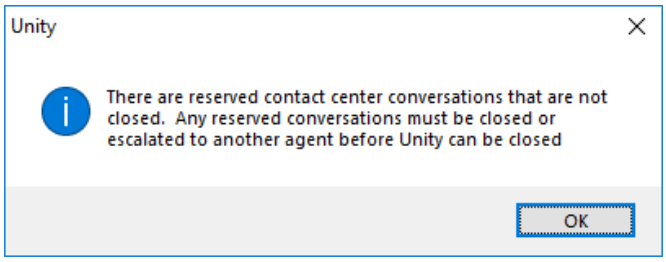


To end a web chat click the Close button on the top of the conversation box, as shown below.

Please note: Clicking the X will only close the webchat box, it will not end the webchat conversation.

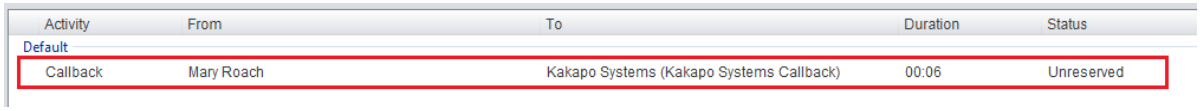


Unity will not allow an agent to close Unity while there are one or more reserved and open contact center conversations in place, all conversations must be transferred or closed before closing Unity.

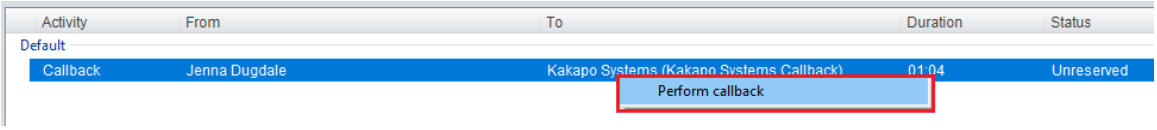


12.6 Managing Call Back

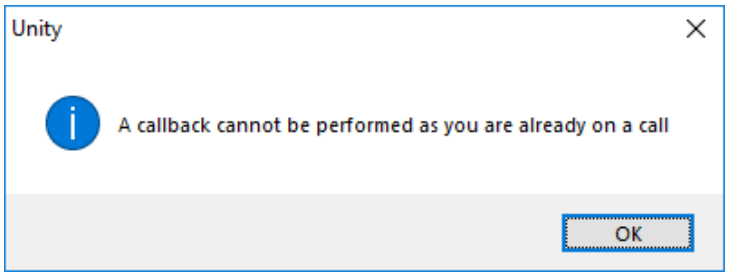
Similar to a webchat conversation, when a new Call Back request comes into the Queue it will appear in the Activity List.



To perform the Call Back simply right or double click on the Call Back request and Unity will immediately dial the number, and change the ACD state if configured. The Call Back request will stay in the Activity List of all users in the routing phase until the Call Back has been performed. If the agent leaves the Queue then any Call Backs for Media Streams within that Queue will be removed, and will be refreshed/displayed when the agent next joins the Queue.

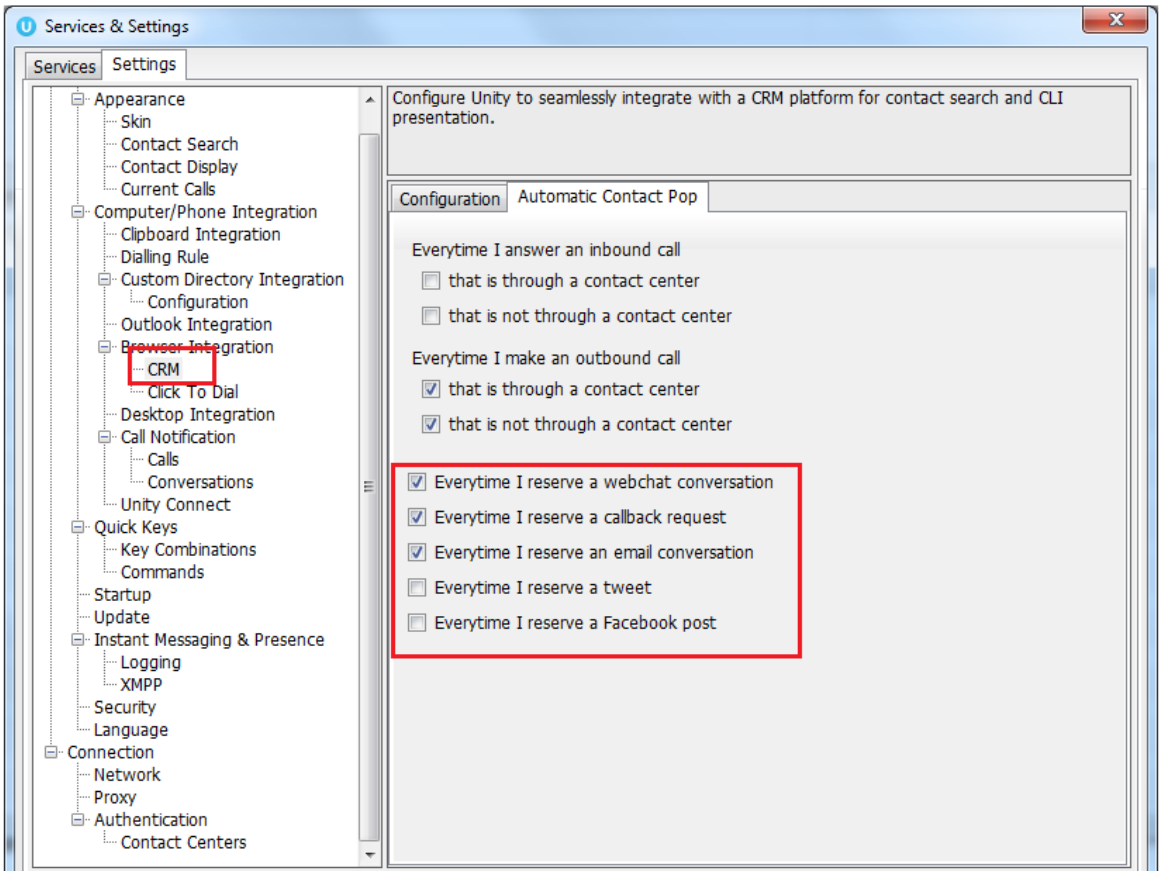
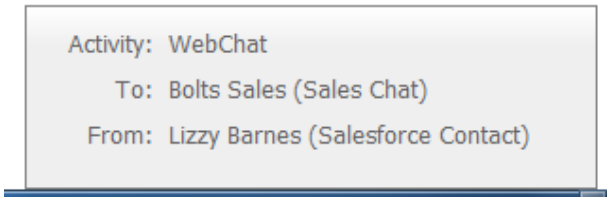


Unity will not allow a user to initiate a Call Back when then are already on a call. If they try to initiate a Call Back they will receive an error message.



12.7 CRM automatic contact pop

Unity can now be configured to automatically pop a CRM contact (assuming a match was made on the CRM platform) when an agent reserves a contact center conversation, as shown below.



If Unity has performed a contact pop from a CRM platform then the notification will be displayed with the relevant information, as shown below.