

CONTACT CENTER ADMINISTRATION

The Unity Contact Center environment is managed in the Kakapo partner portal, through the Contact Center tab which appears at the System Provider, Reseller and Group levels once a contact center license has been assigned to a user.

Any portal admin can manage the contact center environment from the level in the hierarchy that they logged-in and below. If the portal user should be able to manage the contact center environment but not have access to any other details (such as licensing, branding etc) then the Contact Center Viewer permission will ensure that when they login they will only have access to contact center related pages.

If the user is permitted to create contact center Media Streams then the “Can Assign & Unassign Licenses” permission must be assigned. If not then the user will be able to manage the contact center environment (according to their permissions) but not create new Media Streams as this is a billable action.

It is also strongly advised that the correct time-zone is specified for the portal user, as this is used when displaying statistics in the contact center dashboards, as outlined below.

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[Branding](#)
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[License Details](#)
[Users](#)
[History Log](#)
[User Templates](#)
[Contact Center](#)
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Update stevetutt74@gmail.com

User Name

stevetutt74@gmail.com

Email Address

stevetutt74@gmail.com

Timezone

(UTC+00:00) Dublin, Edinburgh, Lisbon, Lr

Daylight savings from Sunday 28/03/2021 at 01:00 until Sunday 31/10/2021 at 02:00

Password

Confirm Password

[Send Password Reminder](#)

Is Contact Center Viewer

ON

Permissions

Can Assign & Unassign Licenses

ON

This permission is required when creating media streams and assigning CPaaS numbers

Can Create Objects

ON

Can Update Objects

ON

Can Delete Objects

ON

Can Reactivate Objects

ON

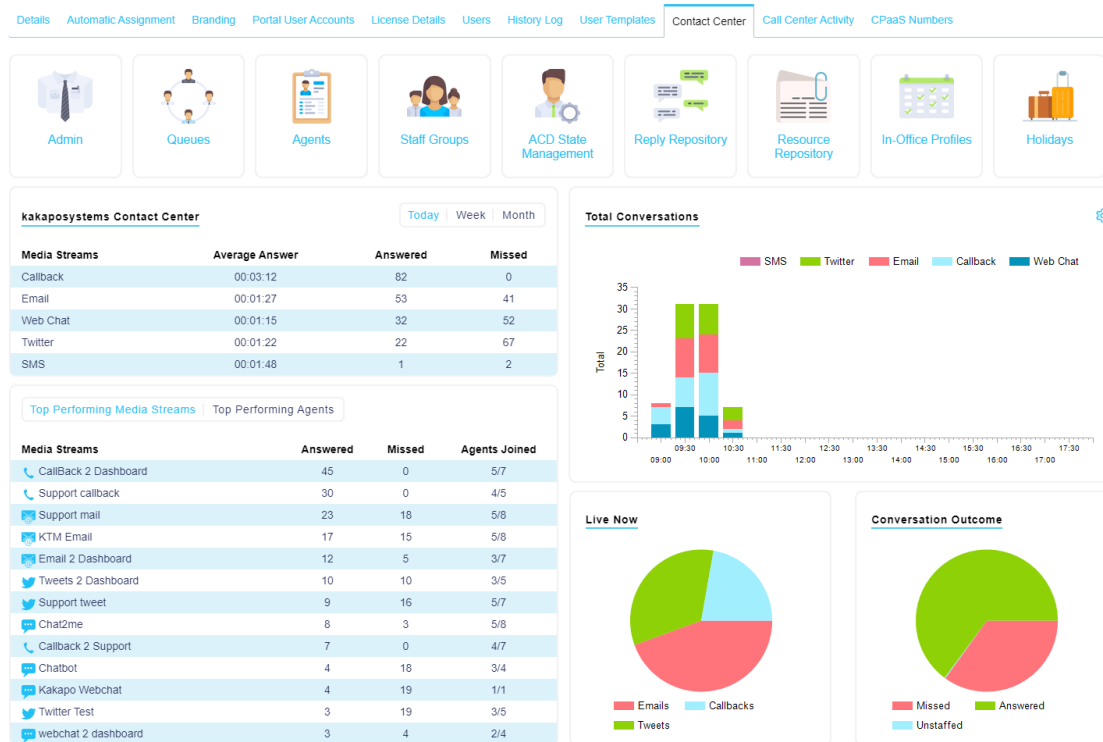
Cancel

Update Account

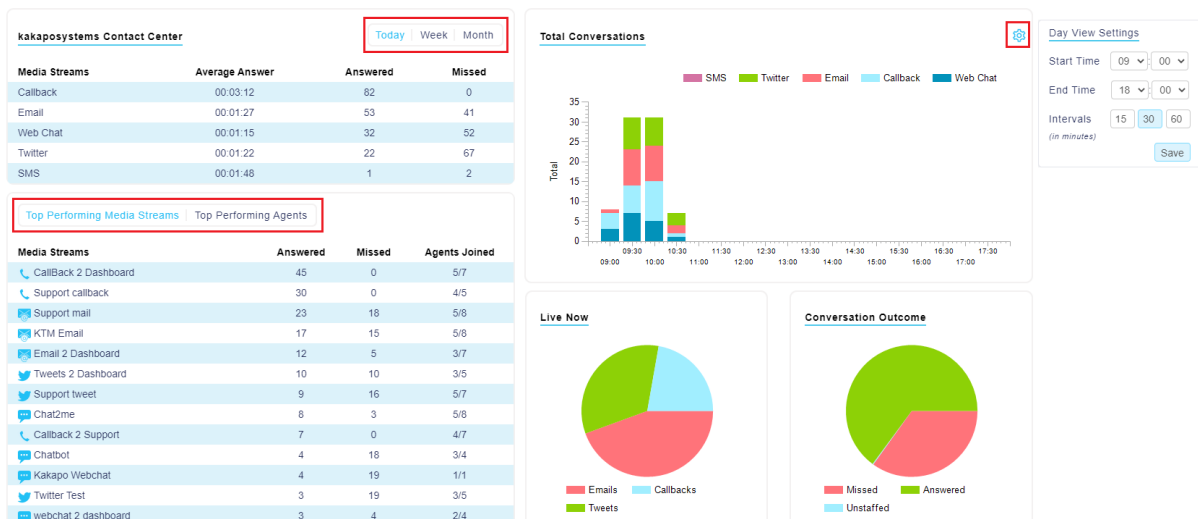
Delete Account

A Dashboard is presented when configuring the overall Group or Reseller contact center, an individual Queue or Media Stream. The dashboard will contain buttons to perform all necessary actions, as well as overall statistics regarding the level in the hierarchy where the dashboard is being shown. For example when showing the dashboard at the Group or Reseller level it will show all conversations for

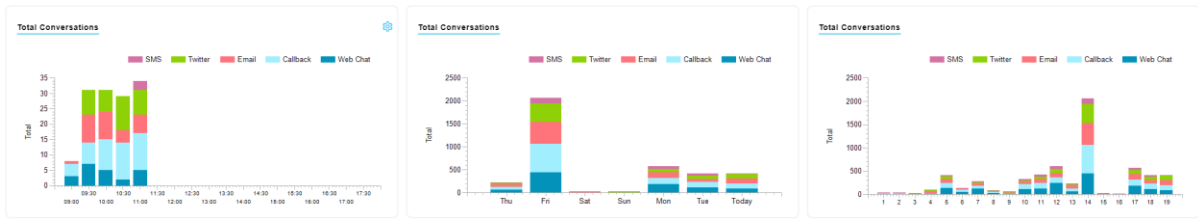
all Queues within the contact center environment, whereas if viewing the dashboard for a Queue it will include only those conversations for Media Streams within the Queue.



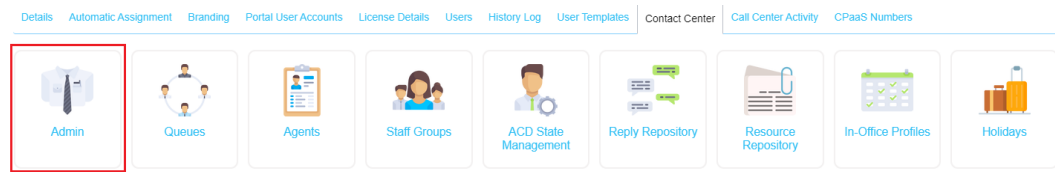
There are various toggles that can be used to change the statistics being shown. For example the charts can be changed to show total conversations for today only, for the week (the past seven days) or for the month so far.



When showing the statistics for today only, further filtering is available to specify the start and end time (using the time-zone of the logged-in portal user) and the intervals to use in the bar chart. These additional filters are available when showing statistics for today only.



1 ADMIN



The Admin section allows general administrative settings to be configured. Currently this is limited to specifying the notification email addresses for authorization requests, for example when the contact center platform is unable to connect to a mail server or if a Media Stream was created without authentication details [as outlined in section 3].

The contact center platform will notify all email addresses in this list, please ensure each email address is entered on a separate row.

kakaposystems Contact Center Administration

Perform general administrative actions for the contact center environment

Third-Party Authorization

Send Authorization Requests To
(One Email Address Per Line)



engineering@kakaposystems.com
support@kakaposystems.com

Cancel

Update

Below is an example of the “Authorization failed” email, which will be branded using the same branding settings as the partner portal. The recipient can click the “Click Here” button to [re-]enter authentication details for the Media Stream.

Contact Center Authorization Failed



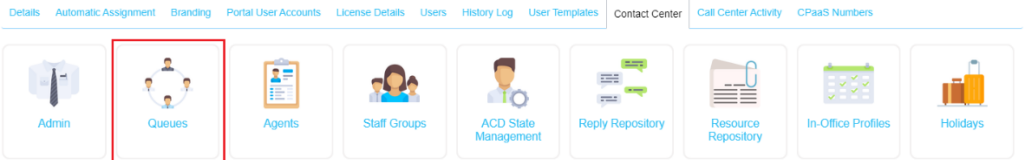
You have been sent this email because a Unity contact center channel has failed to authenticate, please click to update the authorization details.

[Click Here](#)

Media Stream Details	
Type	Twitter
Name	GK Test

Please contact your contact center provider if any further information is required.

2 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 (called Media Streams).

2.1 Creating a Queue

The list of active queues will include the number of agents joined, which is comprised of the total individual agents joined to the underlying Media Streams that make up that queue, each agent will only be counted once even if they are associated to multiple Media Streams.

DetailsAutomatic AssignmentBrandingPortal User AccountsLicense DetailsUsersHistory LogUser TemplatesContact CenterCall Center ActivityCPaaS Numbers

kakaposystems Contact Center Queues

Multi-media queues currently used by this group.

Q

Wildcards are automatically added when searching.

Name	Timezone	Agents joined
Kakapo Live Streams	GMT Standard Time	3/6
Kakapo Sales	GMT Standard Time	6/8
Kakapo Support Channels	GMT Standard Time	11/16
KS Sales	Greenwich Standard Time	1/3
Production Streams	GMT Standard Time	10/21
Ross and Zara Fashion	GMT Standard Time	1/4

Cancel

Add Queue

Click “Add Queue” to add a new Queue.




Add or update a contact center queue to the group, queues can only be created if one more more contact center agents exist in the group

If you want the Contact Center Queue to match a BroadWorks Call Center Queue and be a combined queue in the Unity client, then toggle the “Is BroadWorks ACD Queue” switch and enter the BroadWorks ACD Queue identifier. The identifier cannot be modified so please make sure the correct identifier is used.

Add or update a contact center queue to the group, queues can only be created if one more more contact center agents exist in the group.

If you do not enter an ACD Queue Service ID the admin portal will automatically generate a random identifier which will not match a BroadWorks Call Center Queue.

In the example below, “Kakapo Systems” Contact Center ID did not match to a BroadWorks Call Center ID therefore you can only Web Chat and Email stats are visible. The identifier for “Bolt Sales” does match a BroadWorks Call Center ID, therefore you can see all BroadWorks Call Center and Web Chat/Email stats in a single row, as shown below.

My Statistics								Overall Queue Statistics					
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 Wait Time
 Kakapo Systems	-	0	-	-	-	-	0	-	-	-	-	-	-
 Bolts Sales	0	0	0	00:00:00	0	00:00	0	3	2	1	0	00:00	00:00
 Nuts Sales	0	-	0	00:00:00	0	00:00	-	10	1	9	0	00:00	00:00
	0	0	0	00:00:00	0	00:00	0	13	3	10	0	00:00	00:00

When an agent joins or leaves the “Bolts Sales” queue in Unity client, they will be joined to or removed from both the contact center queue and the BroadWorks ACD queue simultaneously.

Select from the list of restrictions and set the time zone for that Queue. Select the in-office profile from the drop-down menu. Many of these settings are used as default values when creating Media Streams under the Queue and are further discussed in section 3 below.

You can also allow the supervisor to take the Queue offline, for example if there is a fire alarm and the building has been evacuated.

Once the Queue has been created, simply click the name in the Queue list to drop into that level.

kakaposystems Contact Center Queues

Multi-media queues currently used by this group.

g

Wildcards are automatically added when searching.

Name	Timezone	Agents joined
Kakapo Live Streams	GMT Standard Time	3/5
Kakapo Sales	GMT Standard Time	6/8
Kakapo Support Channels	GMT Standard Time	11/16
KS Sales	Greenwich Standard Time	1/3
Production Streams	GMT Standard Time	10/21
Ross and Zara Fashion	GMT Standard Time	1/4

Cancel

Add Queue

The Queue Dashboard will then be displayed. To change the configuration for the Contact Center Queue click “Profile”, other action/buttons are described in sections below.

DetailsAutomatic AssignmentBrandingPortal User AccountsLicense DetailsUsersHistory LogUser TemplatesContact CenterCall Center ActivityCPaaS Numbers

ProfileMedia StreamsSupervisorsACD State ManagementReply RepositoryResource RepositoryHolidaysHistory Log

Production Streams

TodayWeekMonth

Media Streams	Average Answer	Answered	Missed
Web Chat	00:00:00	0	0
Callback	00:00:00	0	0
Email	00:00:00	0	0
Twitter	00:00:00	0	0
SMS	00:00:00	0	0

Top Performing Media Streams

Top Performing Agents

Media Streams	Answered	Missed
Callback	0	0
R & D	0	0
Sales SMS	0	0
Unity Connect Email	0	0
webchat 2	0	0

Total Conversations

Legend: SMS, Twitter, Email, Callback, Web Chat

Total

09:3010:3011:3012:3013:3014:3015:3016:3017:30

Live Now

0

Conversation Outcome

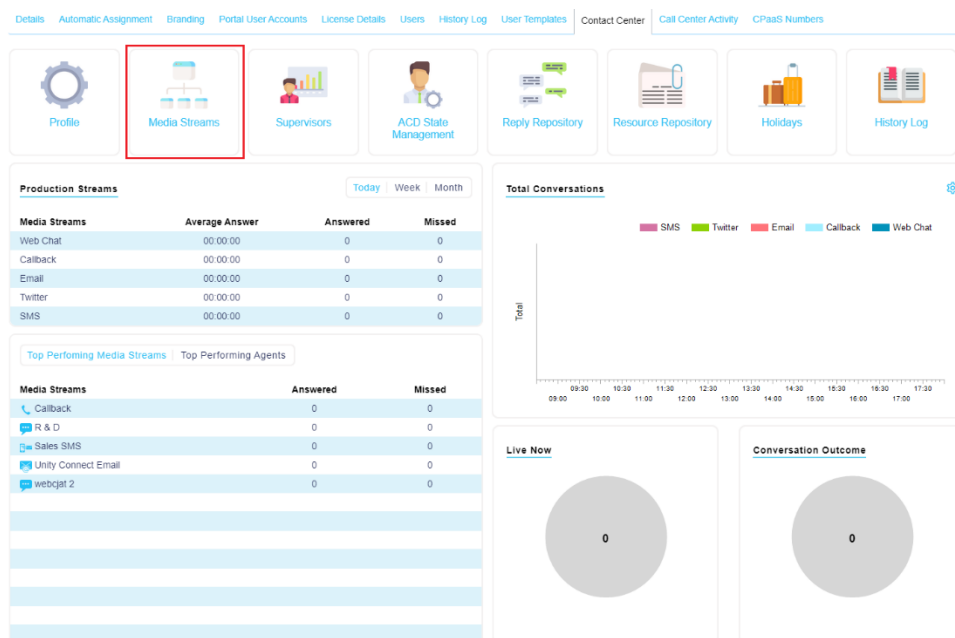
0

3 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 widget on a web page, an email address, SMS number or Twitter handle. Multiple Media Streams can belong to the same Queue, but each Media Stream follows a different routing profile and has it's own set of associated agents.

3.1 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.



This will present a list of all active Media Streams for that Queue. The list will include the visibility, In-Office Profile and status of each Media Stream. These properties work together when using Presence-Based Scripting, which is outlined below. The Visibility setting can quickly be changed without having to modify the Media Stream profile.

Details	Automatic Assignment	Branding	Portal User Accounts	License Details	Users	History Log	User Templates	Contact Center	Call Center Activity	CPaaS Numbers
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Kakapo Live Streams Media Streams

A contact center queue consists of one or more media streams, each representing a link to the cloud (for example through email, webchat, or Twitter)

Type	Name	Visibility	In-Office Profile	Live Now
Email	ABC Email		Always online	
Web Chat	Bolts Sales	Never show	Always online	
Callback	Call Back Testing	Always show	Standard Hours	
Web Chat	Kakapo Systems Web Chat	Only show during office hours when an agent is joined	Always online	
SMS	Kakapo US Sales SMS		Always online	
Web Chat	Kakapo Web Chat Outside Office Hours	Never show	Extended Hours	
Web Chat	Leboora Sales	Never show	Always online	
Twitter	Twitter Support		Always online	

[Cancel](#)
[Presence-Based Scripting](#)
[Add Media Stream](#)

Click Add Media Stream to see the Media Stream profile page. There are several common properties for all Media Streams, but many of the settings change depending on the media type.

Begin by entering a name, this name will appear as the “To” field in the Activity Window when a conversation is presented to a user in Unity client.

Select the type of Media Stream from the drop-down menu.

Name

Language

Media Type

Conversation Can Be Transferred ☐

Conversation Can Be Escalated ☐

When the Media Type is selected, the page will change to show configuration and branding settings for that conversation type, for example if the type is SMS then the CPaaS number will need to be provided.

Next set the time zone and In-Office Profile, by default these are inherited from the Queue profile.

Conversation Can Be Transferred

Conversations can be transferred to other Agents using the Unity interface.

Conversation Can Be Escalated

Conversations can be escalated to a supervisor using the Escalate button.

Use Last Agent If Available

If this setting is active then the Contact Center platform will first alert the last Agent to reserve a conversation from that customer [if that agent is online and joined to the Queue] before starting the first Routing Phase. This setting isn’t available for all conversation types. Routing Phases are discussed in detail below.

Reopen Conversation On Reply

Some Media Stream types allow a previously closed conversation to be automatically re-opened [and assigned to the last agent] if a new message is received from the remote party within a predefined duration from when the conversation was closed. This will not be considered a new conversation so contact center statistics will not be incremented.

Availability

Timezone	(UTC+00:00) Dublin, Edinburgh, Lisbon, Londr	Daylight savings from Sunday 28/03/2021 at 01:00 until Sunday 31/10/2021 at 02:00
In Office Profile	Always online	
Use Last Agent If Available	?	OFF
Reopen Conversation On Reply	?	ON
Reopen Conversation If Reply Received Within	3	Days (24 hours)

3.2 Web Chat

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

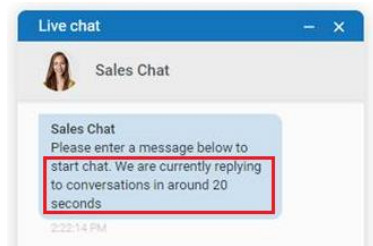
Web Chat Configuration

Use the [EstimatedWaitTime] delimiter in the welcome message to insert text describing the average response time for this media stream, based on the last 10 web chats. 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

Require Name	ON	
Require Email	ON	
Email Transcript Available	?	ON
Require Phone	OFF	
Attachments Allowed	ON	
Conversation Can Be Rated	ON	
Record Visitor Journey	?	ON
External Reference Label	?	Ticket Number
Welcome Message	Welcome! Please tell us how we can help. We expect to reply [EstimatedWaitTime] so please be patient :)	
Unstaffed Message	Sorry we're unavailable at present but we have been told about this conversation and will email you shortly	
Missed Message	Sorry you missed us! We've recorded your details and will contact you as soon as possible	
When Unstaffed Or Missed Send A Notification To These Addresses (One Email Address Per Line)	notifycc@kakaposystems.com managers@kakaposystems.com	

When the Web Chat widget is loading it will look to see if 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 for that Media Stream.



Require: This forces the customer to enter their name, email and/or phone number before they can start the Web Chat conversation.

Attachments allowed: This allows the customer to send attachments through the Web Chat widget.

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.

Record Visitor Journey: If this setting is active then the Web Chat widget will create a cookie on the visitor web site for the current session, and for every page loaded that includes the widget the URL of that page will be added to the cookie. If a conversation is subsequently started, all stored URLs from the cookie will be recorded in the contact center platform, thereby providing information about the visitor journey before the conversation was started. Please note that only web pages that include the Web Chat widget will be added to the visitor journey.

External reference label: Add a custom required field e.g. Ticket Number.

External Reference Label ?

This will be shown in the Web Chat widget and passed through to Unity clients, it is mandatory if present.

Ticket Number: *

Department: *

Select ▼

Chat Now!

If a value isn't entered for this property in the Media Stream profile then this will not be shown in the Web Chat widget.

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 the first 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(es) 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

Please ensure emails from noreply@unityclient.com are not treated as junk mail.

Missed message: This is the message that will display once all Routing Phases have completed and the conversation hasn’t been answered. A “conversation missed” email will be sent to the email address(es) entered with all the relevant information, similar to that shown above.

Notification Emails: This is a list of email addresses that should receive notifications of missed or unstaffed conversations. Please ensure a separate line is used for each email address.

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


Web Chat Client Branding

The web chat client can be branded using the below properties, default values will be used where no property value is set

Visibility

Hide web chat when conversation is completed ☐

Hide web chat when close button clicked ☐

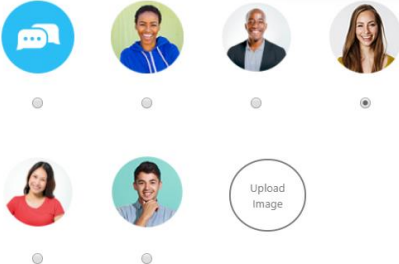
Primary Colour 

Unreserved Sender Name

Use Agent Name when Reserved ☐

Web Chat Start Image

Web Chat Avatar



To add a custom colour, select “Custom” from the drop down menu and then use the colour picker or enter the hex colour code:



To upload a custom image to use as the start image [which will appear on the web page to let the visitor know that web chat or call-back is available] simply click the Upload Image button and select a file. You may need to crop the image when adding.

Use Agent Name and Avatar When Reserved: When the conversation is reserved by an Agent, the name of the agent will be shown in the Web Chat widget. If the agent has an avatar uploaded in the portal then this will also be shown.

Hide Web Chat when conversation is completed: This will hide the Web Chat icon for the user for the rest of that visitor 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 visitor 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. For example, the Web Chat widget should be shown during business hours when one or more Agents are joined to the Queue, but the Callback client should be shown outside of business hours. This is further discussed in the Presence-Based Scription section.

Web Chat Window type: Choose to show the Web Chat as a small window attached to the bottom of the page, or docked to the side of the page. Both will remain open as the customer navigates throughout the website, assuming each page includes the HTML script required to display the web chat widget.

Once the Media Stream has been added, you can test the Media Stream by selecting it from the list, then clicking the Profile from the Dashboard page for that Media Stream, then clicking “Test Stream” at the bottom of the Media Stream profile page, as shown below.

Details Automatic Assignment Branding Portal User Accounts License Details Users History Log User Templates **Contact Center** Call Center Activity CPaaS Numbers

Kakapo Live Streams Media Streams

A contact center queue consists of one or more media streams, each representing a link to the cloud (for example through email, webchat, or Twitter)

Type	Name	Visibility	In-Office Profile	Live Now
Email	ABC Email		Always online	●
Web Chat	Bolts Sales	Never show	Always online	●
Callback	Call Back Testing	Always show	Standard Hours	●
Web Chat	Kakapo Systems Web Chat	Only show during office hours when an agent is joined	Always online	●
SMS	Kakapo US Sales SMS		Always online	●
Web Chat	Kakapo Web Chat Outside Office Hours	Never show	Extended Hours	●
Web Chat	Leboora Sales	Never show	Always online	●
Twitter	Twitter Support		Always online	●

Cancel Presence-Based Scripting Add Media Stream

Details Automatic Assignment Branding Portal User Accounts License Details Users History Log User Templates **Contact Center** Call Center Activity CPaaS Numbers

Profile

Routing Phases

ACD State Management

Reply Repository

Resource Repository

History Log

Web Chat Location Bottom Right

Web Chat Delay 4

Cancel Update Delete Stream Test Stream

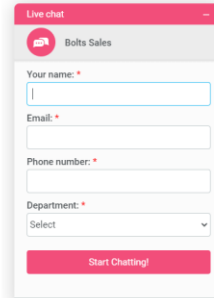
A new browser tab will show you how the Web Chat widget will behave and provide you with the HTML code that you need to copy and paste into any webpage where you want to show the widget.

Copy the below text and paste it into your HTML page.

Please ensure it is pasted at the bottom body section of the webpage, rather than the head section. This is because the client may need to manipulate other components in the web page depending on display settings, for example if the conversation window should be shown as a docked panel

```
<script type="text/javascript" src="https://portal.unifyclient.com/webchat/js/webchat.js" id="WebChatClient" queueId="KakapoLiveStreams@KakapoSystems.com" StreamIdentifier="bolt.sales@kakapo.com"></script>
```

Create Test HTML File

A live chat widget for 'Bolts Sales'. It features a pink header with a speech bubble icon and the text 'Live chat' and 'Bolts Sales'. Below the header, there are four input fields: 'Your name:', 'Email:', 'Phone number:', and 'Department:' (a dropdown menu). At the bottom is a pink button labeled 'Start Chatting!'.

Please note: The HTML code will not change if the Media Stream is updated, instead the new settings will be applied when the page is next loaded/refreshed. However the HTML code will be different for each Media Stream, unless Presence-Based Scripting is used. This is further outlined in section 13.

Please ensure the HTML code is copied and pasted exactly as provided in the test page, as shown above. A test HTML page can also be created and saved locally to further test the widget.

3.3 Twitter

To create a Twitter Media Stream simply set the Media Type and common properties. A Twitter handle can be provided but this isn't mandatory at this stage.

Twitter Configuration

Twitter Handle

KakapoSystems

Cancel

Add Media Stream

If one is provided then the portal will check that the handle provided isn't being used by another Twitter media stream.

New Media Stream

Add or update a media stream to the queue, each media stream represents an entry point into the queue through a media type

This Twitter handle is already being used, please use another

3.3.1 When a Twitter Handle is Specified

If the Twitter handle is provided when creating the Media Stream then the portal will save the details and prompt the user to either perform Twitter OAuth authorization or to send the “Authorization Required” email to the email addresses provided in the Admin page. If there are no addresses then the only option will be to perform Twitter authorization.

Twitter Sales Profile

Add or update a media stream to the queue, each media stream represents an entry point into the queue through a media type

The Twitter media stream has been successfully created, please complete Twitter authorization using the button below

Name:

Language:

Media Type:

Conversation Can Be Transferred: ☒ ON

Conversation Can Be Escalated: ☐ OFF

Availability

Timezone: Daylight savings from Sunday 28/03/2021 at 01:00 until Sunday 31/10/2021 at 02:00

In Office Profile:

Use Last Agent If Available: ☐ OFF

Reopen Conversation On Reply: ☐ OFF

Twitter Configuration

Twitter Handle:

"Authorization Required" email address(es) not specified in Admin page

Twitter Support Profile

Add or update a media stream to the queue, each media stream represents an entry point into the queue through a media type

The Twitter media stream has been successfully created, please either complete Twitter authorization or send an authorization request email using the buttons below

Name:

Language:

Media Type:

Conversation Can Be Transferred: ☒ ON

Conversation Can Be Escalated: ☐ OFF

Availability

Timezone: Daylight savings from Sunday 28/03/2021 at 01:00 until Sunday 31/10/2021 at 02:00

In Office Profile:

Use Last Agent If Available: ☐ OFF

Reopen Conversation On Reply: ☐ OFF

Twitter Configuration

Twitter Handle:

"Authorization Required" email address(es) specified in Admin page

3.3.2 When a Twitter Handle is not Specified

If the Twitter handle isn't provided when creating the Media Stream then the Media Stream will be created and the “Authorization Required” email will automatically be sent to those emails specified in the Admin page. If no email addresses have been provided then the portal will prompt that a Twitter handle must be specified

Details Automatic Assignment Branding Portal User Accounts License Details Users History Log User Templates **Contact Center** Call Center Activity CPaaS Numbers

New Media Stream

Add or update a media stream to the queue, each media stream represents an entry point into the queue through a media type

The Twitter handle must be specified

Name:

Language:

Media Type:

Conversation Can Be Transferred: ☒ ON

Conversation Can Be Escalated: ☐ OFF

Availability

Timezone: Daylight savings from Sunday 28/03/2021 at 01:00 until Sunday 31/10/2021 at 02:00

In Office Profile:

Use Last Agent If Available: ☐ OFF

Reopen Conversation On Reply: ☐ OFF

Twitter Configuration

Twitter Handle:

When the Twitter handle is specified then the Media Stream will be added and the user prompted to complete Twitter Authorization.

Unity Sales Profile

Add or update a media stream to the queue, each media stream represents an entry point into the queue through a media type

The Twitter media stream has been successfully created, please complete Twitter authorization using the button below

Name	<input type="text" value="Unity Sales"/>
Language	<input type="text" value="English (United Kingdom)"/>
Media Type	<input type="text" value="Twitter"/>
Conversation Can Be Transferred	<input checked="" type="checkbox"/> ON
Conversation Can Be Escalated	<input type="checkbox"/> OFF

Availability

Timezone	<input type="text" value="(UTC+00:00) Dublin, Edinburgh, Lisbon, L"/>	Daylight savings from Sunday 28/03/2021 at 01:00 until Sunday 31/10/2021 at 02:00
In Office Profile	<input type="text" value="Always online"/>	
Use Last Agent If Available	<input type="checkbox"/> OFF	
Reopen Conversation On Reply	<input type="checkbox"/> OFF	

Twitter Configuration

Twitter Handle	<input type="text" value="UnitySales"/>
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3.3.3 Twitter OAuth Authorization

When performing Twitter Authorization [either through the partner portal or the “Authorization Required” email] then Twitter will open in a new browser tab asking that the “Unity Contact Center” Twitter app is authorized, as shown below. Enter your Twitter login details and click Authorise app.

Authorise Unity Contact Center to use your account?



Unity Contact Center

www.kakaposystems.com

Provides integration between Twitter and Unity Contact Center to route tweets and direct messages to Unity agents

☐ Remember me · [Forgotten your password?](#)

This application will be able to:

- Read Tweets from your timeline.
- See who you follow, and follow new people.
- Update your profile.
- Post Tweets for you.
- Access your direct messages.

The page will then redirect to the partner portal which will show the below message if Twitter authorization was successful

Authentication Succeeded

The media stream was successfully authorized with Twitter, please close this browser tab

If the Twitter login details were incorrect then Twitter will prompt for them to be entered again.

If the Twitter login details change then click into the Profile page for the Media Stream and either reset the Twitter credentials or resend the “Authorization Required” email [if Admin email addresses have been provided].

Unity Sales Profile

Add or update a media stream to the queue, each media stream represents an entry point into the queue through a media type

Name

Language

Media Type

Conversation Can Be Transferred ☒ ON

Conversation Can Be Escalated ☐ OFF

Availability

Timezone Daylight savings from Sunday 28/03/2021 at 01:00 until Sunday 31/10/2021 at 02:00

In Office Profile

Use Last Agent If Available ☐ OFF

Reopen Conversation On Reply ☐ OFF

Twitter Configuration

Twitter Handle

3.4 Email

To add an email Media Stream, select Email from the Media Type dropdown list, set the common properties for the Media Stream and configure the mail server details as shown below.

Email Configuration

Please note, distribution lists are not supported. STMP and IMAP authorization must be enabled for the mailbox, find out how to enable these features [here](#). Please note this make take up to 24 hours to update in Office365.

If using Multi-Factor Authorization the password set in the media stream must be an app password. Please click [here](#) for steps to create the app password

Email Platform

Email Address

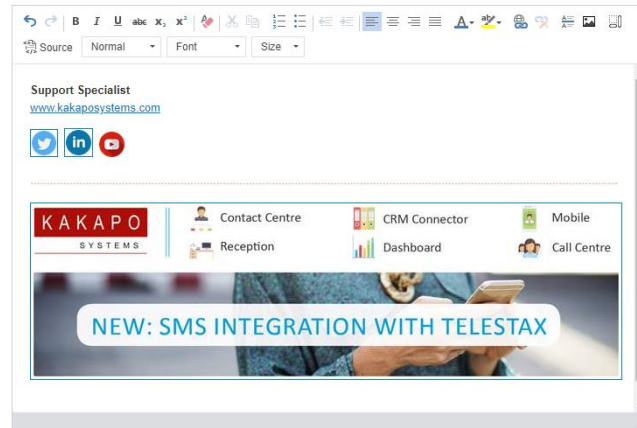
Password

Confirm Password

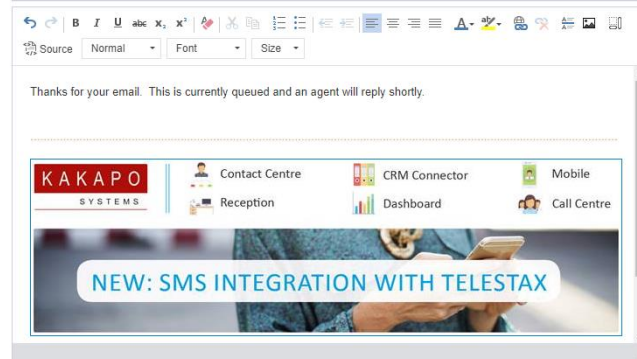
If the authentication details are not known then the Media Stream can still be created by setting the Media Type and common properties. The email address, mail server type and password do not need to be set, but when the Media Stream is created an “Authorization Required” email will be sent to the email address[es] specified in the Admin page, as outlined in section 2. If no Admin email addresses were specified then the portal will prompt to enter authentication details before the Media Stream can be created.

At the bottom of the page simply copy/paste or create a new email signature and type an initial reply which will be sent to customers automatically either during business hours or out of business hours [depending on the In Office Profile that has been selected].

Email Signature



Initial reply within business hours



3.5 Callback

Call-back Media Streams are very similar to Web Chat Media Streams, but rather than a conversation being started, the Call-back widget will send the entered details to the contact center platform for processing.

To add a Call-back Media Stream enter the Call-back configuration and select from the Call-back widget branding options, including colour, avatar, prompts and location. The name and phone number are mandatory for Call-back Media Streams, but you can also choose to require an email address before the Call-back request is accepted.

Callback Configuration








Use the [EstimatedWaitTime] delimiter in the welcome message to insert text describing the average response time for this media stream, based on the last 10 callbacks. Possible descriptions are:

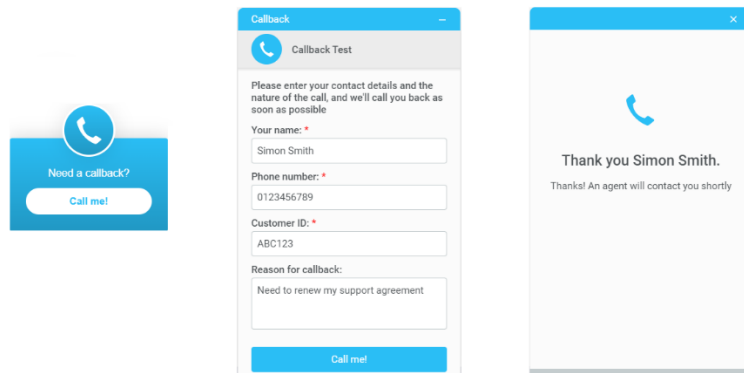
- in less than a minute
- in a few minutes
- within 10 minutes
- within 20 minutes
- within 30 minutes
- within an hour
- within a few hours

Require Name	<input checked="" type="checkbox"/> ON
Require Email	<input type="checkbox"/> OFF
Require Phone	<input checked="" type="checkbox"/> ON
Record Visitor Journey	<input checked="" type="checkbox"/> ON
External Reference Label	<input type="text" value="Customer ID"/>
Callback Start Text	<input type="text" value="Please enter your contact details and the nature of the call, and we'll call you back as soon as possible"/>
Callback End Text	<input type="text" value="Thanks! An agent will contact you shortly"/>

The branding settings are very similar to the Web Chat Media Stream and, when updated, will apply to the Call-back widget when next loaded

Callback Client Branding

Visibility	<input type="text" value="Always show"/>
Hide Callback When Close Button Clicked	<input type="checkbox"/> OFF
Primary Colour	<input type="text" value="Light Blue"/> 
Callback Window Header	<input type="text" value="Use Media Stream Name"/>
Callback Start Image	<input type="text" value="Box design with custom image and text"/>
Callback Avatar	<div><div> <input checked="" type="radio"/></div><div> <input type="radio"/></div><div> <input type="radio"/></div><div> <input type="radio"/></div></div> <div><div> <input type="radio"/></div><div> <input type="radio"/></div><div><input type="text" value="Upload Image"/></div></div>
Invert Start Image	<input type="checkbox"/> OFF
Callback Window Type	<input type="text" value="Window"/>
Start Text	<input type="text" value="Need a callback?"/>
Button Text	<input type="text" value="Call me!"/>
Callback Widget Location	<input type="text" value="Bottom Right"/>
Callback Widget Delay	<input type="text" value="0"/>



Hide Callback when close button clicked: This will hide the Call-back icon for the user for the rest of that session once the close button has been clicked, so as not to continue disturbing the web site visitor.

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 widget will automatically hide after 5 seconds once the visitor has requested the call-back.

3.6 SMS

Please note that SMS Media Streams are only available if the System Provider has integrated with one of the supported CPaaS providers. Please refer to the online documentation regarding SMS integration for further information.

To configure an SMS Media Stream the common properties must be specified, as well as the phone number and CPaaS platform if the System Provider has integrated with more than one CPaaS platform, otherwise the Platform property will not be shown.

SMS Configuration

The number must be in E.164 format, otherwise CPaaS integration will fail. E.164 is the international telephone numbering plan that ensures each device on the PSTN has a globally unique number. This is what allows calls and messages to be correctly routed to individual phones in different countries. E.164 numbers are formatted as [+][country code][subscriber number including area code] and can have a maximum of fifteen digits.

Number	<input type="text" value="+19498812476"/>
Platform	<input type="text" value="Twilio"/>
MMS Available	<input checked="" type="checkbox"/>
Remote Numbers Can Be Blocked	<input checked="" type="checkbox"/>
Initial reply within business hours	<input type="text" value="Thanks for your message. One of our agents will reply shortly"/>
Initial reply outside of business hours	<input type="text" value="Thanks for your message. The office is currently closed, but one of our agents will reply during office hours"/>

Depending on the CPaaS platform being used, the number may need to be in E.164 compliant format.

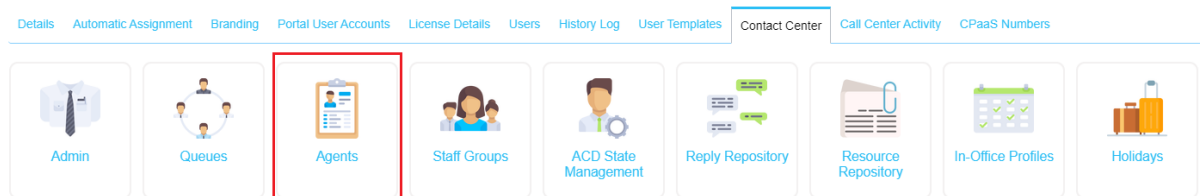
MMS Available: The contact center platform supports inbound MMS messages. In addition some CPaaS platforms allow outbound MMS messages, although these will be charged separately and may be outside of any bundles offered. This setting will only appear if outbound MMS is available.

When a URL is sent from Unity client, the contact center platform will determine if the file is MMS compliant for that CPaaS provider, based on the file type and size. If this property is active and the file is MMS compliant then the contact center will send the file as an MMS message, otherwise an SMS will be sent with the URL to the file. This setting can be toggled at any time through the Profile page.

Remote Numbers Can Be Blocked: If activated then the Agent or Supervisor can block the number which will automatically close the conversation and ensure that any future messages from the remote party number are ignored.

4 AGENTS

A full list of all Agents is available at the Group or Reseller level and is accessed through the Dashboard page.



The Agent list will include the current online state for that agent, meaning their Unity client is running and connected to the Contact Center platform – this does not indicate the joined state for any Queues that the agent belongs to.

kakaposystems Contact Center Agents

<input type="text"/> <input type="button" value="Q"/> Wildcards are automatically added when searching.		
User ID	User Name	Online State
B_Hutton@kakaposystems.com	Benedict Hutton	Offline
C_Berry@kakaposystems.com	Charles Berry	Offline
christutt@kakaposystems.com	Chris Tutt	Online
jenna.wimshurst@kakaposystems.com	Jenna Wimshurst	Offline
jenson.franklin@kakaposystems.com	Jenson Franklin	Offline
sraven.jose@kakaposystems.com	Sraven Jose	Online
stevetutt@kakaposystems.com	Steve Tutt	Offline

Clicking on an Agent in the list will show the profile page, which allows the user to change the time-zone, language and Staff Group assignment [outlined below] for that Agent. The profile picture can be set by clicking on the photo.

Details

History Log

Steve Tutt Details

User ID

stevetutti@kakaposystems.com

Name

Steve Tutt


Timezone

Not Set

Language

Default

User Profile Image



Staff Group Membership

Name	Included
All Agents	<input type="checkbox"/> OFF
Kakapo Development Team	<input type="checkbox"/> OFF
Kakapo Support Team	<input type="checkbox"/> OFF
Supervisors	<input checked="" type="checkbox"/> ON

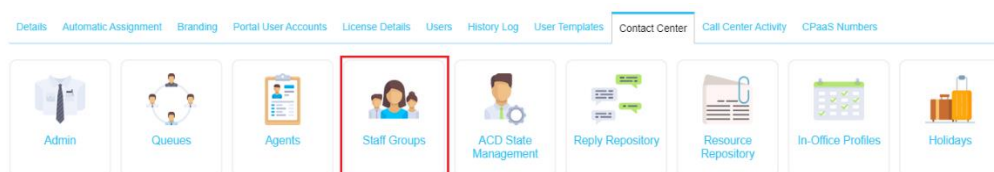
Cancel

Update Agent

5 STAFF GROUPS

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

Staff Groups are managed at the Group or Reseller level and are accessed through the Dashboard page



Select Staff Groups from the Contact Center menu to see all existing Staff Groups and to create a new group.

kakaposystems Contact Center Staff Groups

Create groups of agents or supervisors which can be assigned as a single unit to media streams

Name	Creation Level	Type
All Agents	Group	Agent
Kakapo Development Team	Group	Agent
Kakapo Support Team	Group	Agent
Supervisors	Group	Supervisor

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.

Contact Center Staff Group

Add or update a staff group, which will apply to any media streams where this staff group is assigned. Please note agents and supervisors cannot belong to the same staff group. The order of included users will be used when this staff group is assigned to a routing phase with circular routing

Name

Is Agent List ☒ ON

Automatically Add New Staff ☐ OFF

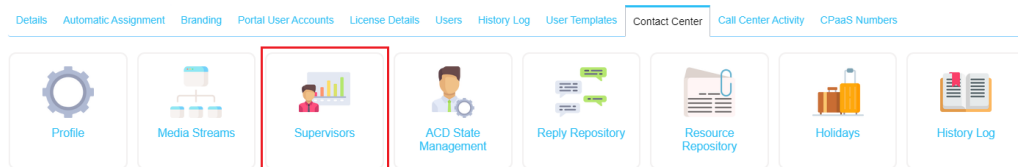
Automatically Add New Staff: Staff Groups can be configured to automatically add any new users, thereby providing a “catch all” group which may be used as the final routing phase for a Media Stream. Whenever a contact center Agent or Supervisor is assigned to a user they will be automatically added to all Agent or Supervisor lists that have this setting enabled, and will be automatically removed from these lists when the license is unassigned.

To search for a user simply type the name or login ID in the search box or scroll through the list. To add users simply select them and click “Add”. All users in the right-hand box have already been added to the Staff Group. To remove a user 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 Phase with circular routing.

6 SUPERVISORS

Supervisors can only be assigned at the Queue level, in which case they will automatically supervise all Media Streams within the Queue.



Displayed are all the users in the Group or Reseller that have a “Unity Contact Center Supervisor” license assigned to them including pre-configured Supervisor Staff Groups.

Production Streams Supervisors

Configure the supervisors for this contact center queue, which will automatically cascade down to all media streams. If a supervisor is assigned directly **and** through a staff group, then only the staff group assignment will be saved

A screenshot of the 'Production Streams Supervisors' configuration interface. It features two search boxes at the top, each with a search icon. Below the left search box is a list of users and staff groups: 'Steve Tutt (stevetutt@kakaposystems.com)', 'Steve Wardle (steve.wardle@kakaposystems.com)', and 'Supervisors (Staff Group)'. Below the right search box is a list of users: 'Charles Berry (C_Berry@kakaposystems.com)' and 'Chris Tutt (christutt@kakaposystems.com)'. Between the two lists are four buttons: 'Add', 'Add All', 'Remove', and 'Remove All'. At the bottom left are 'Cancel' and 'Save' buttons.

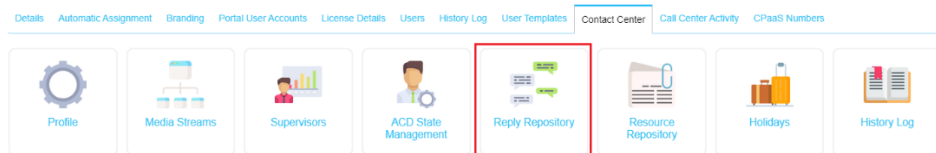
To add users and Staff Groups to the Supervisor list simply select them from the left box and click Add. All users and Staff Groups in the right box have already been added. You can also search for specific users or Staff Groups, or quickly add/remove all items from the list.

Once you have modified the supervisor list click “Save”.

7 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 applicable Media Streams of that Queue.

The reply repository can be found in the Dashboard page for all relevant levels, as shown below.



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

Production Streams Reply Respository

The below replies will be available to all agents through all media streams

Q

Wildcards are automatically added when searching.

Creation Level	Reply	Text
Queue	Account Number	Can I please get your account number and secret word
Group	Data Protection	For data protection purposes, could you please confirm your name, date of birth and post code?
Group	Welcome	Hi there how can I help?
Group	Greeting	Hi there, thanks for getting in touch. How can I help you?
Group	Goodbye	If there's anything else I can help you with, just let me know. Have a good day!

Cancel
Add Reply

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 agents only see those canned replies when replying to those type of conversation. A canned reply can be available to multiple channel types.

Contact Center Reply

Use preconfigured replies to easily send common responses to customer queries

Available for web chat

Available for email

Available for Twitter

Available for SMS

Name

Reply

ON

OFF

OFF

ON

Account Number

Can you please confirm your account number and full company name

Cancel
Add Reply

Name

Reply

Contact Center Reply

Recent announcements

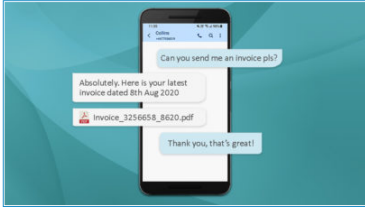
HTML TEXT

Source

Normal

Font

Size



[Kakapo Systems Launch SMS Queues for Unity Contact Center](#)

On 28 Sep, 2020

Post by: Team Kakapo

LONDON, UNITED KINGDOM, September 28, 2020 /EINPresswire.com/ — Kakapo Systems,

[NEW Portal Dashboards for Contact Center](#)

On 22 Jul, 2020

Post by: Team Kakapo

Configure, report and visualise everything that's happening in Unity Contact Center with the new Portal Dashboards

[Read More](#)

Sales Missed

16

Answered Calls

13

Missed Calls

3

Abandoned Calls

2

Received Calls

3

Engaged Calls

1

Supervisor Transferred

0

Overloaded Calls

5

Longest Wait Time

00:00:00

Average Wait Time

00:02:15

Current Handle Time

00:12:55

Current Speed of Answer

00:00:11

Cancel

Add Reply

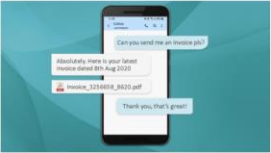

HTML replies will also be shown in the canned reply list

Details Automatic Assignment Branding Portal User Accounts License Details Users History Log User Templates **Contact Center** Call Center Activity

Unity Connect Email Reply Repository

The below replies will be available to all agents through this media stream only

Wildcards are automatically added when searching.

Creation Level	Reply	Text
Media Stream	Recent announcements	<p>News</p>  <p>Kakapo Systems Launch SMS Queues for Unity Contact Center On 28 Sep, 2020 Post by: Team Kakapo LONDON, UNITED KINGDOM, September 28, 2020 /EINPresswire.com/ — Kakapo Systems.</p> <p>NEW: Portal Dashboards for Contact Center On 22 Jul, 2020 Post by: Team Kakapo Configure, report and visualise everything that's happening in Unity Contact Center with the new Portal Dashboards</p> <p>Read More</p> 

Search









8 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 (files & URLs) when replying to a conversation, which can easily be passed to the remote party either as a hyperlink (Web Chat , Twitter, SMS 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 and Media Streams of that Group.

The resource repository can be found in the Dashboard page for all relevant levels, as shown below.

Details Automatic Assignment Branding Portal User Accounts License Details Users History Log User Templates **Contact Center** Call Center Activity CPaaS Numbers

 Profile
  Media Streams
  Supervisors
  ACD State Management
  Reply Repository
  **Resource Repository**
 Holidays
  History Log

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

Kakapo Live Streams Resource Repository

The below resources will be available to all agents through all media streams of this queue

Wildcards are automatically added when searching.

Creation Level	Type	Location	Description
Queue	URL	https://www.kakaposystems.com/files/Unity-Product-Description-Comparison-Table.pdf	Product Comparison
Queue	URL	https://www.kakaposystems.com/files/2018/07/Zendesk-Integration.pdf	Zendesk Integration
Queue	File	https://uatt.ch/repository/637141669249921642.pdf	Latest Release Notes
Group	File	https://uatt.ch/repository/637371399774437138.pdf	

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.

Contact Center Resource

Resources can be quickly accessed and used by contact center agents

Is URL

☐

URL

Description

Contact Center Resource

Resources can be quickly accessed and used by contact center agents

Is URL

☐

File

Description

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

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

9 IN-OFFICE PROFILES

Create and manage profiles for the times that various Media Streams and Queues will be online. In-Office Profiles are configured at the System provider, Reseller and Group level and are available to set at the Queue and Media Stream levels.

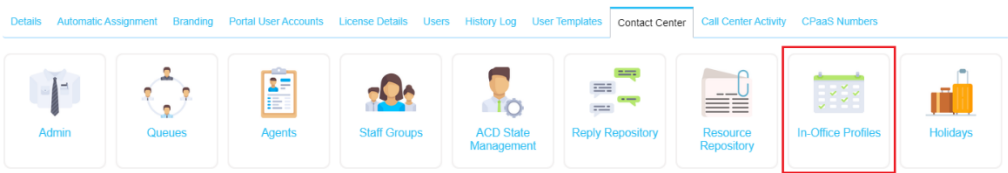
If the In-Office Profile is set at the Queue level it will automatically cascade down to any Media Streams created within that Queue, but it can be overridden at the Media Stream level.

In-Office Profiles work with the time-zone set for the Media Stream, which cascades down from higher levels in the portal hierarchy. If an In-Office Profile is assigned to a Media Stream but no time-zone is set, then Universal Coordinated 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 all Media Streams, which may be different for other Media Streams even within the same Queue.

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

Manage in-office profiles by clicking on the link from the Dashboard.



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.

kakaposystems In Office Profiles

In office profiles are used to specify when media streams are online

Name	Creation Level	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Extended Hours	Group	09:00 - 20:00	09:00 - 20:00	09:00 - 20:00	09:00 - 20:00	09:00 - 22:00	-	-
Standard Hours	Group	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00
Test Hours	Group	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00

Cancel Add Profile

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.

In Office Profile

In office profiles are used to stipulate when a media stream is online. If a start time is not present it means the media stream is not online that day. The time format must be HH:MM based on a 24-hour clock, meaning 07:30 represents 7:30 AM and 19:00 represents 7:00 PM

Name

Day	From	To
Monday	<input type="text" value="13:00"/>	<input type="text" value="17:30"/>
Tuesday	<input type="text" value="13:00"/>	<input type="text" value="17:30"/>
Wednesday	<input type="text" value="13:00"/>	<input type="text" value="17:30"/>
Thursday	<input type="text" value="13:00"/>	<input type="text" value="17:30"/>
Friday	<input type="text" value="13:00"/>	<input type="text" value="17:30"/>
Saturday	<input type="text"/>	<input type="text"/>
Sunday	<input type="text"/>	<input type="text"/>

Cancel Add Profile

Apply To All

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

Please note: Both the start and end times must be set for a day in order to include it in the profile, if only the start or end time is provided then it will be excluded for that day, meaning it will be treated as “outside office hours” by any Media Streams that use that profile.

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 [as outlined in the Queue and Media Stream sections]. Any dates added in the contact center Holiday section will override the in-office profile.

An In-Office Profile cannot be deleted if it is assigned to a Queue or Media Stream. In this case the portal will list current assignments so it can be unassigned before being deleted

In Office Profile

In office profiles are used to stipulate when a media stream is online. If a start time is not present it means the media stream is not online that day. The time format must be HH:MM based on a 24-hour clock, meaning 07:30 represents 7:30 AM and 19:00 represents 7:00 PM

The in-office profile cannot be deleted as it is assigned to the below queues and/or media streams
Kakapo IndiaContact
Kakapo IndiaContact > Kakapo India Tweet

Name

Test Hours

Day	From	To
Monday	08:00	17:00
Tuesday	08:00	17:00
Wednesday	08:00	17:00
Thursday	08:00	17:00
Friday	08:00	17:00
Saturday	08:00	17:00
Sunday	08:00	17:00

Cancel

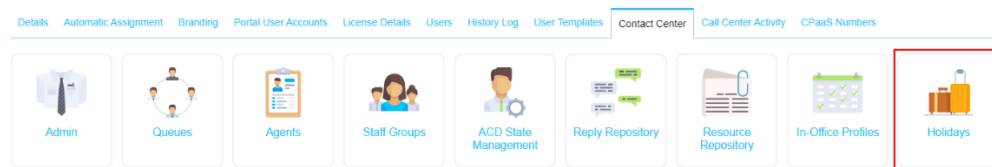
Update Profile

Delete Profile

Apply To All

10 HOLIDAYS

Create Holidays to stipulate when the contact center is closed or reduced hours are used. They can be managed through the Dashboard page 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. Unlike In-Office Profiles, Holidays do not need to be explicitly assigned; they will automatically be used by any Media Streams under the level that it was created at.

When a conversation is started, or when a web page is loaded, all Holidays are considered before the In-Office profile. If there is a Holiday for the given date then the In-Office Profile will not be considered.

The list will display all Holidays created at this level and above, all of which will be used by Media Streams at this level and below.

kakaposystems Contact Center Holidays

Create days when the contact center will be closed, or when reduced hours will be used. Holidays created here will override any holidays created at parent levels for the same date

Name	Creation Level	Inclusive Date(s)	In Office Hours	Rekurs Annually
New Year	Group	1 January	Closed all day	True
May Day	Group	The first Monday in May	13:00:00 - 16:59:59	True
Christmas Day	Group	25 December - 25 December	Closed all day	True

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 switch the toggle and enter the end date.

You can set if the Holiday occurs on the same date every year, or if it's dependant on the weekday. The Holiday can stipulate if the Media Stream is closed for the entire day or if reduced hours will be used. As previously mentioned, these hours are not related to an in-Office Profile, they will only be applied on the day(s) of the holiday period and override the In-Office Profile. However these hours *will* work with the time-zone of the Media Stream to ensure local timeframes are used.

Contact Center Holiday

Configure specific days or date ranges when the contact center is closed or running reduced hours

Name

☐ Fixed day ☒ Floating day

Rekurs Annually ☒ ON ☐ OFF

In-Office Hours

Closed All Day ☐ OFF ☒

Start Time

End Time

If using reduced hours, make sure the end time is one minute before the actual end time. The portal will then add 59 seconds, for example if the end time is 4 pm then set the end time as 15:59 [a 24-hour time format is required], the end-time will then be set as 15:59:59.

Please note: As mentioned, Holidays will apply to all levels 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. This also applies to Media Streams.

11 AVAILABILITY & ACD STATE MANAGEMENT

11.1 ACD State Change

If the contact center agent is also an agent in a BroadWorks ACD queue [meaning ACD states are available in Unity Client], then the contact center can be configured to automatically change the agent's ACD state when they reserve a conversation of a certain type. For example, the following Unavailable ACD states could be created in BroadWorks:

Agent Unavailable Codes

Add, modify, or remove Agent Unavailable Codes for Call Centers and Route Points.

☒ Enable Agent Unavailable Codes

Default code on Do Not Disturb activation:

Default code on personal calls:

Default code on consecutive bounces:

Default code on not reachable:

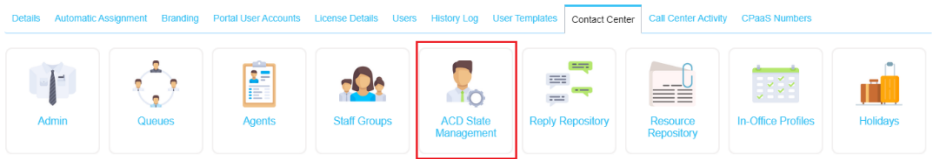
☐ Force use of agent unavailable codes with default code:

Active	Code	Description	Edit
<input checked="" type="checkbox"/>	0001	Lunch	Edit
<input checked="" type="checkbox"/>	0002	Training	Edit
<input checked="" type="checkbox"/>	0003	In a Meeting	Edit
<input checked="" type="checkbox"/>	0004	Comfort Break	Edit
<input checked="" type="checkbox"/>	7001	Replying to Web Chat	Edit
<input checked="" type="checkbox"/>	7002	Replying to Call Back	Edit
<input checked="" type="checkbox"/>	7003	Replying to Tweet	Edit
<input checked="" type="checkbox"/>	7004	Replying to Email	Edit
<input checked="" type="checkbox"/>	7005	Replying to SMS	Edit

[Page 1 of 1]

ACD State Management could then be configured to match those BroadWorks ACD unavailable reason codes, thereby providing a way for other Agents and Supervisors to know what that user is doing based on their ACD state. It also means that the Agent won't receive ACD calls from the BroadWorks call center while replying to a contact center conversation, because their ACD state will be Unavailable. Lastly it means the BroadWorks Agent Activity report can be used to provide a more mixed view of overall agent activity.

ACD State Management can be set at the Reseller/Group, Queue and Media Stream levels, the bottom-most setting will take precedence. This is done through the Dashboard page at each level



Using the above example the ACD State Management of the contact center would be configured to match the BroadWorks ACD environment as shown below

kakaposystems Availability & ACD State Management

Configured Unity to automatically change the ACD state based on the media stream, and set limits for simultaneous conversations

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 specified. If this code doesn't exist it will be ignored by the client

Media Stream Type	ACD State	Unavailable Reason Code
Web Chat	Unavailable	7001
Callback	Unavailable	7002
Email	Unavailable	7003
Twitter	Unavailable	7004
SMS	Unavailable	7005

Agent Unavailable Codes

Add, modify or remove Agent Unavailable Codes for Call Centers and Issue Traces

OK Add Edit Cancel

☒ Enable Agent Unavailable Codes

Default code on the last Unavailable activation: None

Default code on previous call: None

Default code on consecutive bounce: None

Default code on not reachable: None

☐ Force code on agent unavailable codes with default code: None

Active	Code	Description	Rate
<input checked="" type="checkbox"/>	0001	Lunch	EST
<input checked="" type="checkbox"/>	0002	Training	EST
<input checked="" type="checkbox"/>	0003	in a Meeting	EST
<input checked="" type="checkbox"/>	0004	Content Brown	EST
<input checked="" type="checkbox"/>	7001	Replying to Web Chat	EST
<input checked="" type="checkbox"/>	7002	Replying to Call Back	EST
<input checked="" type="checkbox"/>	7003	Replying to Email	EST
<input checked="" type="checkbox"/>	7004	Replying to Twitter	EST
<input checked="" type="checkbox"/>	7005	Replying to SMS	EST

The Unavailable Reason Code field needs to exactly match the unavailable reason code in BroadWorks if set. If the code doesn't exist in BroadWorks then it will be ignored by the Unity client, meaning the ACD state won't be changed.

If the ACD state is not Unavailable then the Unavailable Reason Code can't be set. For example, if the business wants an Agent to be able to process calls while replying to all conversations except Web Chats and Call-backs then the ACD State Management may be set as below

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 specified, if this code doesn't exist it will be ignored by the client

Media Stream Type	ACD State	Unavailable Reason Code
Web Chat	Unavailable	7001
Callback	Unavailable	7002
Email	Available	
Twitter	Available	
SMS	Available	

Because Web Chat is a real-time media type [meaning visitors don't expect a significant delay when conversing to an agent] it is common practice not to have an agent process a call and Web Chat conversation concurrently. Setting the ACD state to Unavailable for Web Chats will ensure this is the case.

If viewing the ACD State Management for an individual Media Stream then only that conversation type will be shown

Kakapo Systems Web Chat Availability & ACD State Management

ACD State Change
Unity can automatically change the ACD state of the agent whenever a conversation through this media stream is active. If the ACD state is set to Unavailable an unavailable reason code can also be specified, if this code doesn't exist it will be ignored by the client

ACD State: Unavailable

11.2 Simultaneous Conversations

Configure how many conversations an Agent can process concurrently. Enter the maximum number of conversations for each conversation 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	<input type="text" value="1"/>	Default value: 1
Email	<input type="text" value="2"/>	Default value: 4
Twitter	<input type="text" value="2"/>	Default value: 3
SMS	<input type="text" value="2"/>	Default value: 2

If viewing the ACD State Management page at the Queue or Media Stream level then the default value (from the parent level) will also be provided. If a value is not set then the default value will be applied.

Please note that the contact center platform will only consider the maximum number of reserved conversations for the same type (Web Chat, Email etc) as the conversation for which the Agent is being alerted. Therefore, in the above screenshot the Agent can concurrently manage one Web Chat *and* two emails *and* two Tweets *and* two SMS conversations. There is no maximum concurrent number of Call-backs, because the Agent is free to initiate the Call-back in their own time.

11.3 Agent Availability Restrictions

Unity also allows you to configure when an Agent can or must not be alerted of a new conversation. These restrictions can work with ACD state changes to build an Agent availability profile.

For example, perhaps the business policy states that an Agent should be able to take a call or a Web Chat, but not both concurrently. The above ACD State Change settings will ensure that when the Agent

is replying to a Web Chat then ACD calls won't be presented to them, because their ACD state is Unavailable. The maximum concurrent value ensures that if the Agent is in a Web Chat conversation then they will be alerted of new Web Chat conversations. However if the Agent is on a call then the contact center needs to know not to alert the agent of any new Web Chat conversations, Agent Availability Restrictions provide this functionality.

Agent Availability Restriction

Specify when agents can or must not be alerted of new conversations, which will apply to all media streams of this contact center queue

VoIP Call ☒ ON ☐

Agent Is Available ☐ OFF ☒

Similarly if the Agent is available to take ACD calls then perhaps they shouldn't be alerted of new conversations, the below restriction will achieve this:

Agent Availability Restriction

Specify when agents can or must not be alerted of new conversations, which will apply to all media stream

VoIP Call ☐ OFF ☒

ACD State

Agent Is Available ☐ OFF ☒

Agent Availability Restrictions can be set at the Group/Reseller, Queue and Media Stream levels, so if the Agent shouldn't be alerted of new Web Chats but they should for other conversation types, then this restriction should be added only for Web Chat Media Streams.

When adding restrictions for Unavailable ACD state several permutations are possible:

Agent Availability Restriction

Specify when agents can or must not be alerted of new conversations, which will apply to all media streams of this contact center queue

VoIP Call ☐ OFF

ACD State 0001
The wildcard character * can be used to represent all unavailable reason codes

The Agent's ACD Unavailable Reason Code must be a specific value for the Restriction to be used, in this case 0001 "Lunch"

Agent Is Available ☐ OFF

Agent Availability Restriction

Specify when agents can or must not be alerted of new conversations, which will apply to all media streams of this contact center queue

VoIP Call ☐ OFF

ACD State
The wildcard character * can be used to represent all unavailable reason codes

The Agent must be in ACD State "Unavailable" with no Unavailable Reason Code for the restriction to be used, if any Unavailable Reason Code is present then the restriction will be ignored

Agent Is Available ☒ ON

Agent Availability Restriction

Specify when agents can or must not be alerted of new conversations, which will apply to all media streams of this contact center queue

VoIP Call ☐ OFF

ACD State *
The wildcard character * can be used to represent all unavailable reason codes

The Agent must be in ACD State "Unavailable" with any Unavailable Reason Code for the restriction to be used, including if no Unavailable Reason Code is present

Agent Is Available ☒ ON

The Agent Availability Restriction 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 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 presented to an agent. If no restrictions are present then agents are assumed to always be available. Unity will consider restrictions that allow the conversation to be presented to the agent before considering those that don't. If no restrictions meet the current agent state then the conversation will be presented to the agent, assuming the concurrent conversations threshold isn't breached. Please note any restrictions added at this level will override those created at higher levels

Creation Level	ACD State	Is Available For Conversations
Media Stream	Call	True
Queue	Call	False

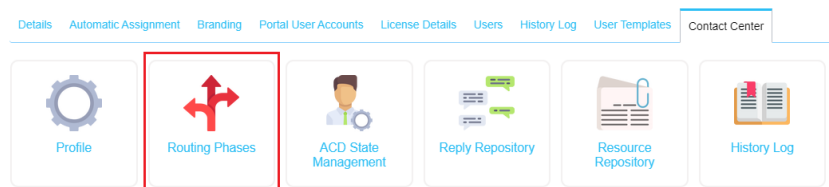
12 ROUTING PHASES

A Routing Phase is a rule that instructs the contact center who to alert (and in which order) when a new conversation is received 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.

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 missed and acting accordingly.

Routing Phases are managed through Media Stream Dashboard, as shown below.



If no phases currently exist for the Media Stream but do for other Media Streams within the Group or Reseller, then Routing Phases can be copied to this Media Stream rather than having to be manually recreated, as shown below.

Bolts Sales Routing Phases

Routing phases dictate how new conversations are routed to available agents

Copy phases from Kakapo Live Streams > CallBack Copy Phases

Cancel Add Phase

To add a new Routing Phase click “Add Phase”.

New Phase

Phases are used to configure routing rules for a media stream when a new message is received

Name Tier 1 Agents

Entrance Message Please wait while we look for the best agent

Routing Circular Agents will be alerted based on the order specified in the below list, use the up/down buttons to change the order

Phase Duration (seconds) 60

Automatic Bounce Duration (seconds) 10

Include Agents From Previous Phases OFF

Queue Conversations For Entire Phase Duration OFF

Agents

Q Add

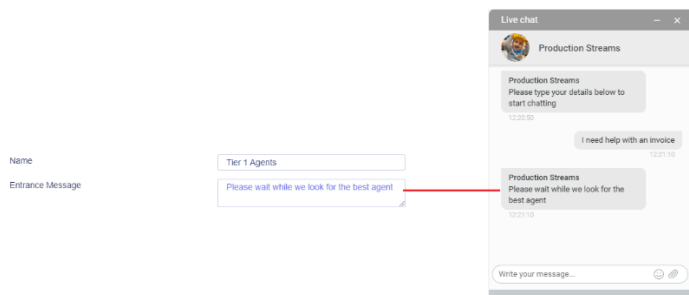
Add All Remove Remove All Move Up Move Down

Abin Joseph (extn6335@kakaposystems.com)
Aliza Hassan (A_Hassan@kakaposystems.com)
All Agents (Staff Group)
Amanda Dawson (A_Dawson@kakaposystems.com)
Arjun Hankumar (extn6004@kakaposystems.com)
Athul PS (extn6005@kakaposystems.com)
Benedict Hutton (B_Hutton@kakaposystems.com)
Bifm Jose (extn6006@kakaposystems.com)
Dale Cassidy (D_Cassidy@kakaposystems.com)
dashboard support team (Staff Group)
Gidda (giddakid@kakaposystems.com)
Gopika G (extn6014@kakaposystems.com)
Gopikrishnan V (extn6332@kakaposystems.com)
Jenson Franklin (jenson.franklin@kakaposystems.com)
Kakapo Development Team (Staff Group)
Kakapo Support Team (Staff Group)

Charles Berry (C_Berry@kakaposystems.com)
Chris Tutt (christutt@kakaposystems.com)
Jenna Wimshurst (jenna.wimshurst@kakaposystems.com)

Cancel Add Phase

Enter a name and optional entrance message (web chat only) which will be displayed when the conversation enters that Routing Phase. This can be used to provide feedback to the visitor.



A routing phase must have a routing policy, the following policies are supported:

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. If the list contains a Staff Group then the order specified in that Staff Group will be used.

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 that the Agent belongs to.

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, considering all Media Streams [of all types] for that Queue.

Simultaneous: Unity will send the conversation request to all joined Agents at the same time, the Unity client may then reject/bounce the conversation based on concurrent conversations and restrictions etc, or the Agent may explicitly reject the conversation alert.

Loop Through Agents Until Duration Elapsed: Toggle this switch if the conversation alert should loop back round to the first Agent after it has finished alerting the list of Agents and is still unanswered. If this toggle is switched off then once it has bounced from the last Agent in the list then it will move to the next phase, or if this is the last phase then the conversation will be treated as “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 the contact center will perform the routing in this phase before moving on to the next phase. If this is the last phase then once it has elapsed the conversation will be treated as “missed”.

Automatic Bounce Duration: How long the conversation alert stays unanswered with one Agent before it bounces to another. This is required for all policies except simultaneous routing.

The interface shows two columns for managing agents. The left column has a search bar and a list of agents: All Agents (Staff Group), Amanda Dawson (A_Dawson@kakaposystems.com), Dale Cassidy (D_Cassidy@kakaposystems.com), dashboard support team (Staff Group), Steve Tutt (stevetutt@kakaposystems.com), Steve Wardle (steve.wardle@kakaposystems.com), and Supervisors (Staff Group). The right column has a search bar and a list of agents: Charles Berry (C_Berry@kakaposystems.com), Chris Tutt (christutt@kakaposystems.com), and Jenna Wimshurst (jenna.wimshurst@kakaposystems.com). Between the columns are buttons: Add, Add All, Remove, Remove All, Move Up, and Move Down.

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. Please note Supervisors and Supervisor Staff Groups will also appear in the Agent list, because Supervisors can also act as an agent for a Media Stream.

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.

The screen shows a toggle for "Use Departments to route conversations and callbacks" which is currently OFF. Below it is a table of routing phases:

	Phase	Name	Routing	Duration
View Move Up Move Down	1	Tier 1 Agents	Circular	01:00
View Move Up Move Down	2	All Agents	Simultaneous	02:00
View Move Up Move Down	3	All Supervisors & Agents	Simultaneous	02:00

At the bottom are buttons for [Cancel](#) and [Add Phase](#).

If a conversation still hasn’t been answered after all Routing 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. Any email addresses specified to receive “missed” or “unstaffed” notifications for the Media Stream [as outlined in section 3] will also be alerted.

12.1 Routing by Department (Web Chat & Callback Only)

Give customers the option to choose which department they wish to chat to by ticking the “Use Departments to route conversations and Callbacks” box in the Routing Phases section:

Kakapo Chat Routing Phases

Routing phases dictate how new conversations are routed to available agents

☒ ON

 Use Departments to route conversations and callbacks

In this case the “Name” field in the Routing Phase becomes the name of the department and is presented to the customers in the drop-down list.

R & D Routing Phases

Routing phases dictate how new conversations are routed to available agents

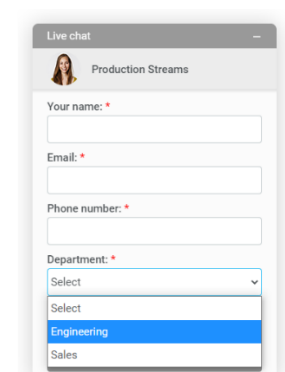
☒ ON

 Use Departments to route conversations and callbacks

	Department & Phase	Routing	Duration
View Move Up Move Down	Engineering > 1	Circular	01:00
View Move Up Move Down	Engineering > 2	Simultaneous	01:00
View Move Up Move Down	Sales > 1	Simultaneous	02:00
View Move Up Move Down	Sales > 2	Simultaneous	02:00
View Move Up Move Down	Sales > 3	Simultaneous	01:00

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

These departments are shown in the Web Chat or Call-back widget as shown below. If departments are specified then this is a mandatory field when starting a conversation or requesting a call-back



In the Unity client the Agent will be presented with the Callback request/Web Chat along with the department name in the Activity Window, as shown below.

Activity	From	To	Duration	Status
Callback	Natalie Maines	Website (Kakapo Systems Callback) > Sales	00:32	Unreserved

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 Callbacks” box.

You may 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”

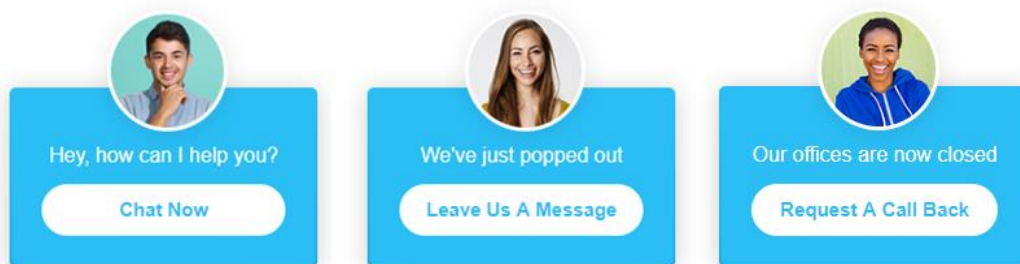
To correct this you will need to delete any Routing Phases with a duplicated phase number. For example it's not permitted to have Sales > 1 and Engineering > 1 as these are both set as phase one. Once these phases are deleted uncheck the toggle again.

13 PRESENCE-BASED SCRIPTING

Presence-Based Scripting uses a combination of the time-zone, In-Office Profile and Visibility settings for different Media Streams to dynamically change which Media Stream should be shown at any one time, allowing you to add multiple Media Streams to one web page using just one HTML script block.

Here is an example:

- Show Web Chat A within office hours when one or more Agents are joined
- Show Web Chat B within office hours when no Agents are joined
- 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 in the presence-based scripting list must not clash.*

If you select two Media Streams: Media Stream A is set to “show during office hours” and Media Stream B is set to “show during office hours when Agent is joined” then the portal will present you with an error, similar to the one below.

Production Streams Presence-Based Scripting

Web chat and callback media streams can be managed as a single entity in a webpage, so that the correct web chat or callback client is dynamically displayed based on in-office profile and/or agent availability

Media streams 'Callback' and 'Sales' cannot both be included as they share the same visibility setting and use in-office profiles with overlapping hours, meaning they could both be shown at the same time

Include	Name	Type	In-Office Profile	Visibility
<input checked="" type="checkbox"/>	Callback	Callback	Standard Hours	Only show during office hours when an agent is not joined
<input checked="" type="checkbox"/>	Sales	Web Chat	Standard Hours	Only show during office hours

Cancel

Save Streams

The portal will ensure that only one Media Stream can be shown at any one time, only Media Streams that don’t have their Visibility set to “Always show” can be included in Presence-Based Scripting.

Production Streams Presence-Based Scripting

Web chat and callback media streams can be managed as a single entity in a webpage, so that the correct web chat or callback client is dynamically displayed based on in-office profile and/or agent availability

Media streams 'Callback' and 'Sales' cannot both be included because one is set to always show

Include	Name	Type	In-Office Profile	Visibility
<input checked="" type="checkbox"/>	Callback	Callback	Standard Hours	Only show during office hours when an agent is not joined
<input checked="" type="checkbox"/>	Sales	Web Chat	Standard Hours	Always show

Cancel

Save Streams

To configure Presence-Based Scripting go to the Media Streams list and click Presence-Based Scripting. You can also quickly change the Visibility setting for Media Streams using the list, rather than having to click into the Media Stream profile.

Production Streams Media Streams

A contact center queue consists of one or more media streams, each representing a link to the cloud (for example through email, webchat, or Twitter)

Type	Name	Visibility	In-Office Profile	Live Now
Callback	Callback	Always show	Standard Hours	<div></div>
Web Chat	Sales	Always show	Standard Hours	<div></div>
SMS	Sales SMS		Always online	<div></div>
Email	Unity Connect Email		Always online	<div></div>

Cancel

Presence-Based Scripting

Add Media Stream

You will then be able to select the desired Media Streams that you want to include. As previously mentioned only Web Chat and Call-back Media Streams are available for Presence-Based Scripting.

Include	Name	Type	In-Office Profile	Visibility
<input type="checkbox"/> OFF	Bolts Sales	Web Chat	Always online	Always show
<input type="checkbox"/> OFF	CallBack	Callback	Always online	Always show
<input checked="" type="checkbox"/>	Kakapo Chat	Web Chat	Extended Hours	Only show during office hours when an agent is joined
<input checked="" type="checkbox"/>	Kakapo Chat	Web Chat	Always online	Never show
<input checked="" type="checkbox"/>	Kakapo Chat	Web Chat	Extended Hours	Never show

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

Production Streams Presence-Based Scripting

Web chat and callback media streams can be managed as a single entity in a webpage, so that the correct web chat or callback client is dynamically displayed based on in-office profile and/or agent availability

[Details saved](#)

Include	Name	Type	In-Office Profile	Visibility
<input checked="" type="checkbox"/>	Callback	Callback	Standard Hours	Only show during office hours when an agent is not joined
<input checked="" type="checkbox"/>	Sales	Web Chat	Standard Hours	Only show during office hours when an agent is joined

The portal will then show you how the widget will behave and provide you with the HTML script block that you need to copy and paste into the webpage where you want the widget[s] to be displayed.

Copy the below text and paste it into your HTML page.

```
<script type="text/javascript" src="https://portal.unityclient.com/webchat/js/webchat.js" id="WebChatClient" queueId="Website@kakaposystems.com"></script>
```

Please note that this HTML script block will not change even if the Media Streams are modified, or if Media Streams are added or removed from Presence-Based Scripting. Therefore it is recommended that Presence-Based Scripting is used even if there is only a single Media Stream, in order to make it easier to add additional streams without having to change the HTML script block in all web pages.