

## UNITY CONTACT CENTER – CALLBACK SETUP

### 1 Setting up a Queue

In the Kakapo Portal go to Contact Center and then click Queues and Add Queue then enter an identifier and a name for the Queue. The identifier is seen by customers and cannot be modified so please make sure the correct identifier is used. 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.

Select from the list of restrictions and set the time zone for that Queue. Click “Add Queue”. To then make changes in that Queue and then select the Queue name to add Media Streams.

#### 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	Identifier	Name	Connected
Web Chat	bolt.sales@kakapo.com	Bolts Sales	Yes
Callback	callback.Live@KakapoSystems.com	CallBack	Yes
Web Chat	webchat.Joined@KakapoSystems.com	Kakapo Chat	Yes
Web Chat	WebChat.OutSideOH@Kakaposystems.com	Kakapo Chat	Yes
Web Chat	WebChat.Unjoined@kakaposystems.com	Kakapo Chat	Yes
IMAP Mailbox	kakaposystems@gmail.com	Kakapo Gmail Test Account	Yes
Twitter	ContactUnity	Twitter Support	Yes

Cancel Presence-Based Scripting Add Media Stream

### 2 Adding a Callback Media Stream

To add a Callback Media Stream enter the Callback 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 Callback is accepted.

A free text box allowing the customer to enter a reason for the Callback request is always present in the widget but is not a mandatory field.

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

### Callback 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

### Availability

Timezone

In Office Profile

### Callback Configuration

Identifier

Require Name

Require Email

Require Phone

### Callback Client Branding

The callback client can be branded using the below properties, default values will be used where no property value is set  
Use the {EstimatedWaitTime} delimiter in the start or end text to insert text describing the average response time for this media stream, based on the last 10 callbacks.

Visibility

Hide callback when close button clicked

Primary Colour

External Reference Label ⓘ

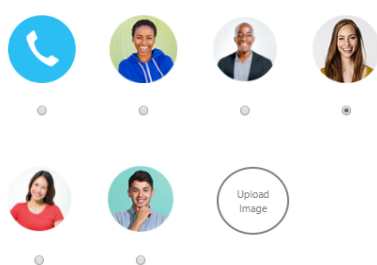
Callback Start Text

Callback End Text

Unreserved Sender Name

Callback Start Image

Callback Avatar



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

External Reference Label ⓘ

Ticket Number: \*

Department: \*

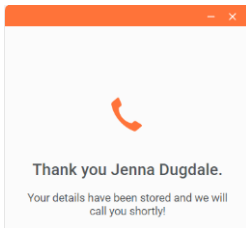
Select

Chat Now!

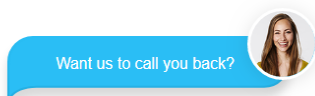
**Hide Callback when close button clicked:** This will hide the Callback icon for the user for the rest of that session once the close button has been clicked.

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

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



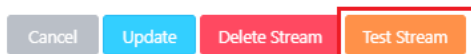
**Start Text:** The message that appears next to the avatar, as shown below. This setting will not always be available, for example the "circular fixed image without text" doesn't accept start text.



**Delay:** Delay the Callback icon appearing on the webpage. E.g. if you only want to offer a Callback 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 Callback.

Click Add Media Stream and then go back to into the Media Stream profile by clicking View. Click Test Stream at the bottom of 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 Callback widget to appear on.




```
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="BoltsSales@drd.co.uk" StreamIdentifier="SalesChat@BoltsSales"></script>
```

### 3 Adding a Routing Phase

A routing phase is a rule that instructs the Contact Center who to alert when a new Callback request comes in. Routing phases are managed through the Contact Center Media Stream menu, as shown below.

**CallBack**

Manage this contact center media stream using the components below

-  Profile  
Configure the contact center media stream
-  **Routing Phases**  
Manage the routing phases for this media stream
-  Supervisors  
Assign supervisors for this specific media stream

To add a new routing phase click “Add Phase”, add the desired users to the right hand column and then click Add Phase.

**Callback Routing Phase**

This is a callback queue so only a single phase is permitted, which must use simultaneous routing

**Agents**

<input type="text" value=""/>	<input type="button" value="Add"/>	<input type="text" value=""/>
<input type="button" value="Add All"/>	<input type="button" value="Remove"/>	<input type="button" value="Add All"/>
<input type="button" value="Remove All"/>		

You have now successfully created a Callback Media Stream, the Agents assigned to the Queue in the routing phase should now restart their Unity client. Once they have done that the new Queue/Media Stream will be available in the Personal Wallboard.

Please refer to the full-length user guide for more information and in-depth instructions on setting up and using Unity Contact Center.