

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 not seen by customers and cannot be modified so please make sure the correct identifier is used.

Select from the list of restrictions and set the time zone for that queue. Click “Add Queue”. To then make changes in that queue select “View” against the queue name.

	Identifier	Name	Current State
<input type="button" value="View"/>	bolt.sales@unityclient.com	Bolt Sales	Online
<input type="button" value="View"/>	Website@kakaposystems.com	Kakapo Systems	Online

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.

Details Automatic Assignment Branding Portal User Accounts License Details Users History Log User Templates

Kakapo Systems 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

Media Type

Availability

Timezone

Callback Configuration

Identifier

Require Name

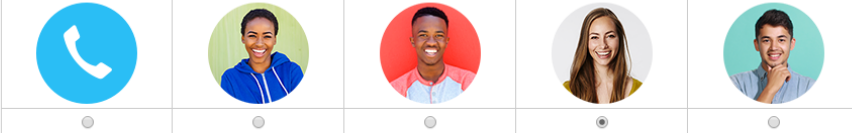
Require Email

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

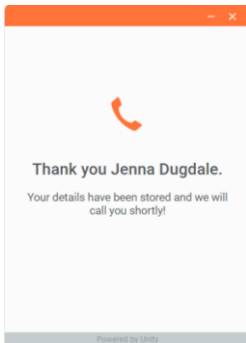
Use the [EstimatedWaitMinutes] and [EstimatedWaitSeconds] delimiters in the start or end text to insert the average response time for this media stream, based on the last 10 conversations

Visibility	<input type="text" value="Always show"/>
Hide Callback when close button clicked	<input type="checkbox"/>
Primary Colour	<input type="text" value="Orange"/> ■
Callback Start Text	<input type="text" value="Please enter your contact details and we will call you back as soon as possible"/>
Callback End Text	<input type="text" value="Your details have been stored and we will call you shortly!"/>
Unreserved Sender Name	<input type="text" value="Use Media Stream Name"/>
Callback Start Image	<input type="text" value="Bubble design with custom image and text"/>
Callback Avatar	
Start Text	<input type="text" value="Hello, how can I help?"/>
Button Text	<input type="text"/>
Callback Location	<input type="text" value="Bottom Right"/>
Callback Delay	<input type="text" value="0"/>

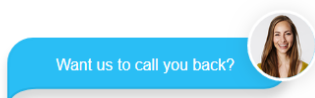
Hide Callback when close button clicked: This will hide the Callback icon for the user for the rest of that session once the close button has been clicked.

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.



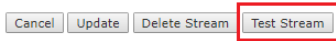
Start Text: The message that appears next to the avatar, as shown below. This setting will not always be available, for example the “circular fixed image without text” doesn’t accept start text.



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.



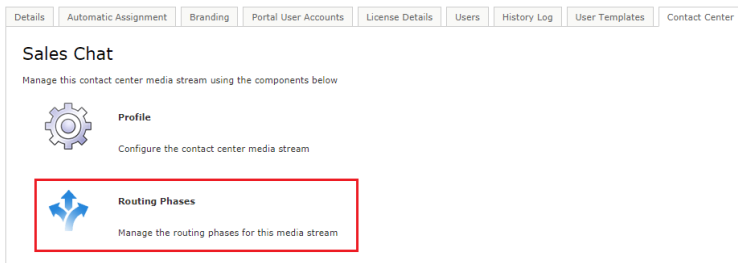
The portal will then show you how the icon will behave and provide you with the HTML code that you need to copy and paste into any webpage where you want to Callback widget to appear on.

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@drt.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.



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

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

Callback Routing Phase

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

Agents

Search

- All Agents (Staff Group)
- Arjun Harikumar (extn8004@kakaposystems.com)
- Athul PS (extn8005@kakaposystems.com)
- Chris Tutt (christutt@kakaposystems.com)
- Gopikrishnan V (extn8332@kakaposystems.com)
- Jaik George Joy (extn8008@kakaposystems.com)
- Kakapo Development Team (Staff Group)
- Kakapo Support Team (Staff Group)
- Steve Tutt (stevetutt@kakaposystems.com)
- Steve Wardle (steve.wardle@kakaposystems.com)
- Vineeth K K (extn8007@kakaposystems.com)

Search

- Jenna Wimshurst (jenna.wimshurst@kakaposystems.com)

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.