

# UNITY CONTACT CENTER – EMAIL 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.

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 the queue name.

**kakaposystems Contact Center Queues**

Multi-media queues currently used by this group.

Q

Identifier	Name	Current State
boltsales@unity.com	Bolt Sales and Returns	Online
KakapoLiveStreams@KakapoSystems.com	Kakapo Live Streams	Online
contactmsq@kakaopindia	KakapoIndiaContact	Online
ProductionStreams@KakapoSystems.com	Production Streams	Online
steve@steve.com	Steve CC	Online

## 2 Setting up a Gmail Mailbox

If you are connecting to a Gmail mailbox (and do not have 2 step verification turned on) you will need to allow access to “Less secure apps”.

To do this either click this link: <https://myaccount.google.com/lesssecureapps>

Or go to your Google Account and click Security on the left hand menu.



## Welcome, Kakapo Systems

Manage your info, privacy and security to make Google work better for you

- Home
- Personal info
- Data & personalisation
- Security**
- People & sharing
- Payments & subscriptions
- Help
- Send feedback

### Privacy & personalisation

See the data in your Google Account and choose what activity is saved, to personalise your Google experience

[Manage your data & personalisation](#)

### Security issues found

Protect your account now by resolving these issues

[Secure account](#)

Scroll down, click “Turn on access” and then slide the toggle to ON.

### Less secure app access

To protect your account, apps and devices that use less secure sign-in technology are blocked. [Find out more](#)

off

[Turn on access \(not recommended\)](#)

## ← Less secure app access

Some apps and devices use less secure sign-in technology, which makes your account more vulnerable. You can **turn off** access for these apps, which we recommend, or **turn on** access if you want to use them despite the risks. [Learn more](#)

Allow less secure apps: ON



Please note, you may receive an email informing you that you have turned on access for less secure apps.

## Two Step verification

If you have the 2 step verification turned on for the Google account, then you will not be able to allow access to less secure apps.

## ← Less secure app access

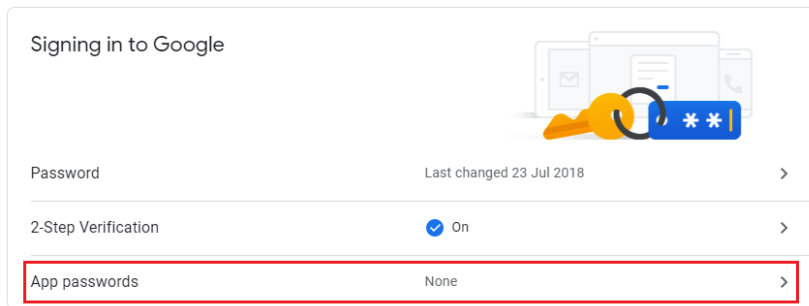
Some apps and devices use less secure sign-in technology, which makes your account more vulnerable. You can **turn off** access for these apps, which we recommend, or **turn on** access if you want to use them despite the risks. [Learn more](#)

This setting is not available for accounts with 2-Step Verification enabled. Such accounts require an application-specific password for less secure apps access. [Learn more](#)

You will need to either turn it off and toggle the button to allow less secure apps. Or create an app password and use it instead of your original password in the Kakapo portal when adding the Email media stream.

Steps to generate app password for Unity:

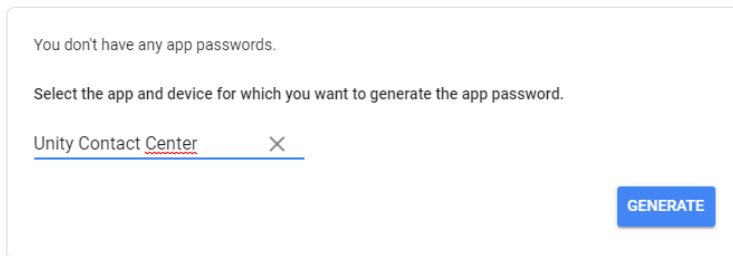
- 1) Go to Google Account, click on security
- 2) Scroll down to “Signing in to Google” and click “App passwords”



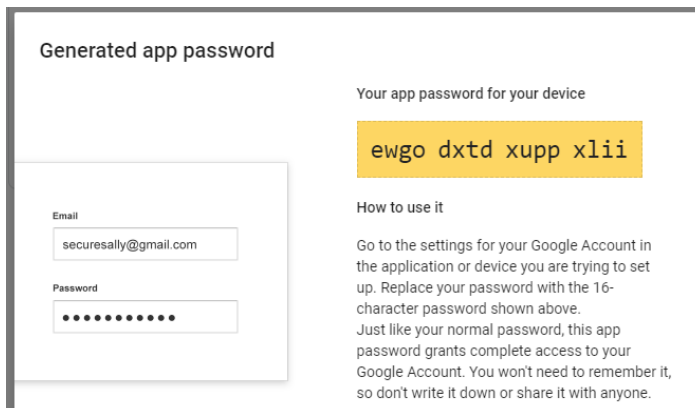
- 3) Select “Custom” from the drop down menu and label the app “Unity Contact Center”

← App passwords

App passwords let you sign in to your Google Account from apps on devices that don't support 2-Step Verification. You'll only need to enter it once so you don't need to remember it. [Learn more](#)



- 4) Click “Generate” and copy the app password shown, then use this password instead of your normal Gmail password when creating the media stream.



### 3 Adding an Email Media Stream

To set up an Email click Media Streams in the Queue section and then click Add Media Stream. Select IMAP Mailbox from the drop down menu, then enter the relevant Email configuration and any automatic responses.

#### 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

Name	<input type="text" value="Kakapo Sales and Returns"/>
Language	<input type="text" value="English (United Kingdom)"/>
Media Type	<input type="text" value="Email"/>
Conversation Can Be Transferred	<input checked="" type="checkbox"/>
Conversation Can Be Escalated	<input checked="" type="checkbox"/>

#### Availability

Timezone	<input type="text" value="(UTC+00:00) Dublin, Edinburgh, Lisbon, London"/>
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

#### Email Configuration

Email Platform	<input type="text" value="Office 365"/>
Email Address	<input type="text"/>
Password	<input type="text"/>
Confirm Password	<input type="text"/>

If one or more email addresses has been entered in the Administration section (See section 3.1 of the main Unity Contact Center user guide) then when creating an email Media Stream, you only need to provide a name – you won't need to provide an email address or password.

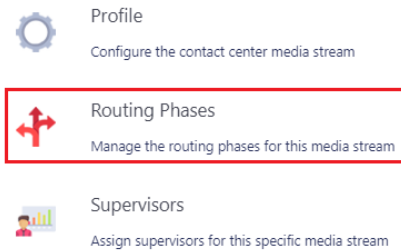
You can set these of course, in which case they will be saved, but the portal will not stop you from creating the Media Stream if these details are missing, instead it will send an email to the email addresses in the Admin section alerting them that the Media Stream needs to be authorized.

At the bottom of the media stream profile page you can brand the Email signature and out of office replies, as shown below.



## 4 Adding a Routing Phase

A routing phase is a rule that instructs the contact center who to alert when a new Email conversation 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”, fill in the required fields, add the desired users and then click Add Phase.

**Sales**

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

Phase Number:

Name:

Entrance Message:

Routing:  (Dropdown menu options: Simultaneous, Circular, Longest Idle at Agent, Longest Idle at Media Stream, Longest Idle at Queue, Simultaneous)

Phase Duration (seconds):

Include Agents From Previous Phases:

**Agents**

You have now successfully created an Email 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/Email 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.