

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 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.

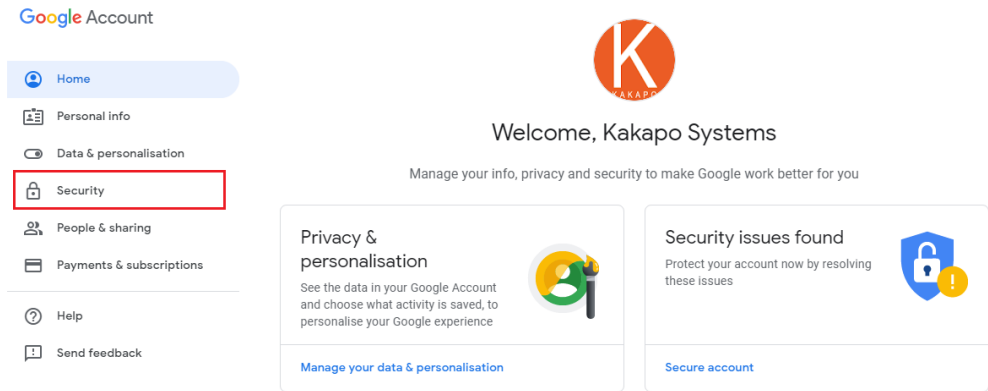
	Identifier	Name	Current State
<input type="button" value="View"/>	bolt.sales@unityclient.com	Bolt Sales	Online
<input type="button" value="View"/>	Website@kakaposystems.com	Kakapo Systems	Online

2 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.



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



← 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](#)



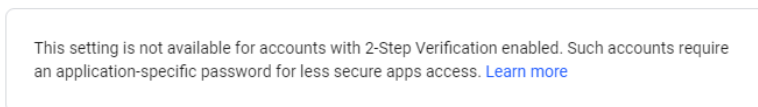
Please note, you may receive an email informing you that you have turned on access for less secure apps.

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](#)

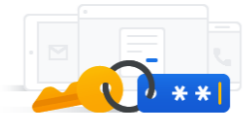


You will need to either turn it off and toggle the button to allow less secure apps. Or create an app password and use it instead of your original password in the Kakapo portal when adding the Email media stream.

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”

Signing in to Google



Password Last changed 23 Jul 2018 >

2-Step Verification On >

App passwords None >

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](#)

You don't have any app passwords.

Select the app and device for which you want to generate the app password.

Unity Contact Center X

GENERATE

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

Generated app password

Your app password for your device

ewgo dxt d xupp xlii

How to use it

Go to the settings for your Google Account in the application or device you are trying to set up. Replace your password with the 16-character password shown above. Just like your normal password, this app password grants complete access to your Google Account. You won't need to remember it, so don't write it down or share it with anyone.

DONE

Email
secoresally@gmail.com

Password
●●●●●●●●●●

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.

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

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: Support Email Queue **Media Stream name**

Language: English (United Kingdom)

Media Type: IMAP Mailbox

Conversation Can Be Transferred:

Conversation Can Be Escalated:

Availability

Timezone: (UTC+00:00) Dublin, Edinburgh, Lisbon, London Daylight savings from Sunday 31/03/2019 at 01:00 until Sunday 27/10/2019 at 02:00

In Office Profile: Always online

Use Last Agent If Available:

Reopen Conversation On Reply:

IMAP Configuration

IMAP Email Address: company.email@company.com

IMAP Platform: Office 365 **Select which email platform you use**

IMAP Server Address: outlook.office365.com

IMAP Server Port: 993

IMAP Password: **Email login details**

Confirm Password:

SMTP Server Address: outlook.office365.com

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

Email Signature

Service & Support Desk
www.kakaposystems.com

KAKAPO SYSTEMS

Agent Dashboard Mobile
Supervisor Reception Desktop UC

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please notify the system manager. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

Initial reply within business hours

Thanks very much for your email. We will reply within UK business hours, but if you are a customer and your issue is urgent then please raise a ticket through the [partner portal](#)

Thanks,

Service & Support Desk
www.kakaposystems.com

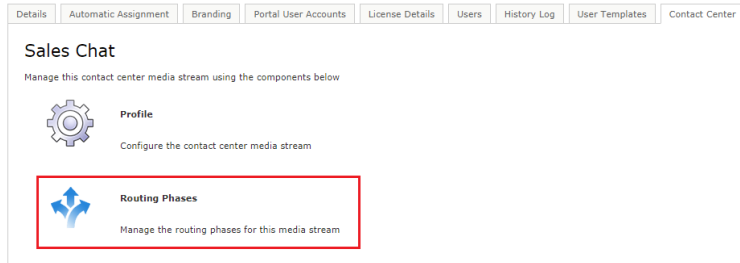
KAKAPO SYSTEMS

Agent Dashboard Mobile
Supervisor Reception Desktop UC

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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.

The screenshot shows the 'First Phase' configuration form. The form has several fields: Phase Number (1), Name (First Phase), Routing (Circular), Phase Duration (seconds), Automatic Bounce Duration (seconds), Include Agents From Previous Phases (checkbox), and Loop Through Agents Until Duration Elapsed (checkbox). A dropdown menu for Routing is open, showing options: Circular, Longest Idle at Agent, Longest Idle at Media Stream, Longest Idle at Queue, and Simultaneous. A red arrow points to the dropdown with the text 'Select the routing behaviour'. Below the dropdown, a note says 'Agents will be alerted based on the order specified in the below list, use the up/down buttons to change the order'. There are two 'Agents' sections. The left section has a search bar and a list of agents: All Agents (Staff Group), Arjun Harikumar (extn8004@kakaposystems.com), Athul PS (extn8005@kakaposystems.com), Bivas Babu (extn8007@kakaposystems.com), Chris Tutt (christutt@kakaposystems.com), Gopikrishnan V (extn8332@kakaposystems.com), Jaik George Joy (extn8008@kakaposystems.com), Kakapo Development Team (Staff Group), and Kakapo Support Team (Staff Group). The right section has a search bar and a list of agents: Jenna Wimshurst (jenna.wimshurst@kakaposystems.com), Steve Tutt (stevetutt@kakaposystems.com), and Steve Wardle (steve.wardle@kakaposystems.com). A red arrow points to this section with the text 'Agents that have been added to the routing phase'. Between the two agent lists are buttons: Add, Add All, Remove, Remove All, Move Up, and Move Down. At the bottom of the form are buttons: Cancel, Update Phase, and Delete Phase.

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.