

KAKAPO

SYSTEMS

# UNITY CONTACT CENTER – EMAIL SETUP

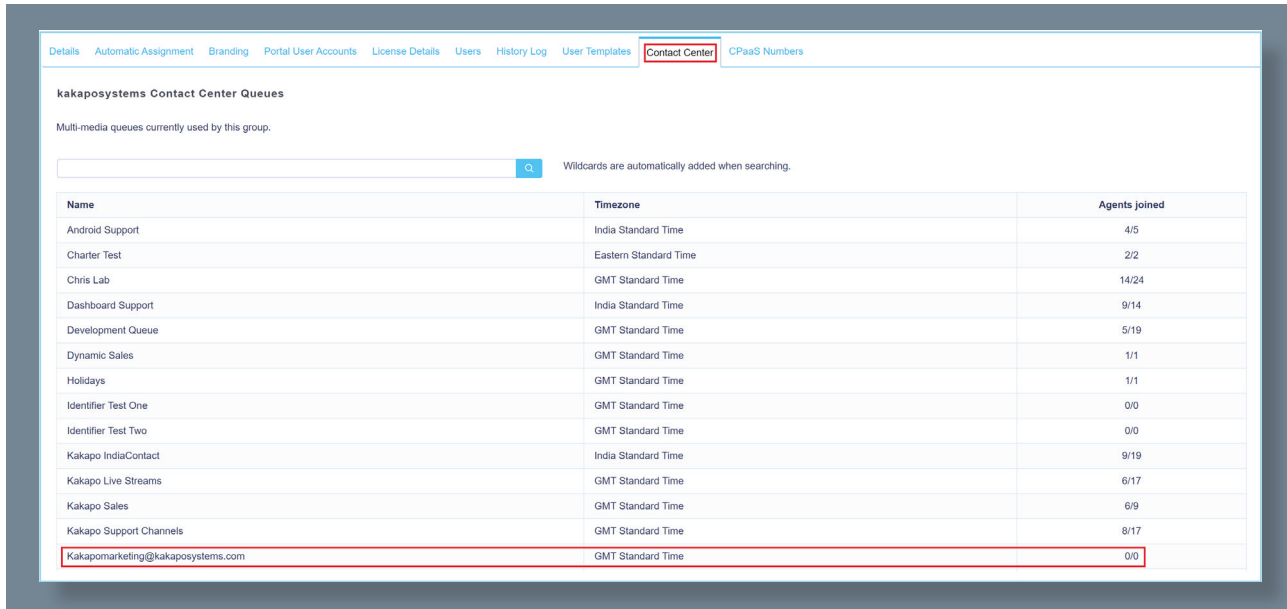
# CONTENTS

---

1	CHOOSE A QUEUE.....	1
2	ADDING AN EMAIL MEDIA STREAM.....	1
3	SETTING UP A GMAIL MAILBOX.....	1
4	ADDING AN EMAIL MEDIA STREAM.....	7
5	ADDING A ROUTING PHASE .....	8

# 1 CHOOSE A QUEUE

Media Streams are created within Queues. From within the portal select the Queue that you want this Media Stream to be created within.



**kakaposystems Contact Center Queues**

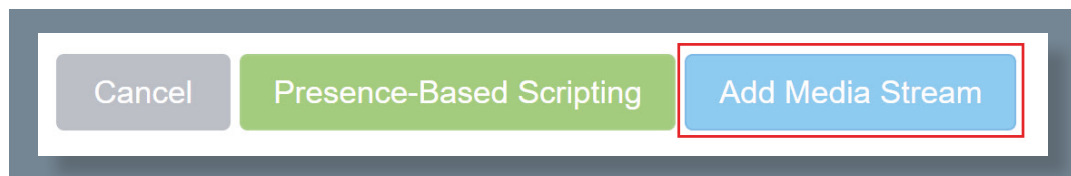
Multi-media queues currently used by this group.

Search:  Wildcards are automatically added when searching.

Name	Timezone	Agents joined
Android Support	India Standard Time	4/5
Charter Test	Eastern Standard Time	2/2
Chris Lab	GMT Standard Time	14/24
Dashboard Support	India Standard Time	9/14
Development Queue	GMT Standard Time	5/19
Dynamic Sales	GMT Standard Time	1/1
Holidays	GMT Standard Time	1/1
Identifier Test One	GMT Standard Time	0/0
Identifier Test Two	GMT Standard Time	0/0
Kakapo IndiaContact	India Standard Time	9/19
Kakapo Live Streams	GMT Standard Time	6/17
Kakapo Sales	GMT Standard Time	6/9
Kakapo Support Channels	GMT Standard Time	8/17
Kakapomarketing@kakaposystems.com	GMT Standard Time	0/0

## 2 ADDING AN EMAIL MEDIA STREAM

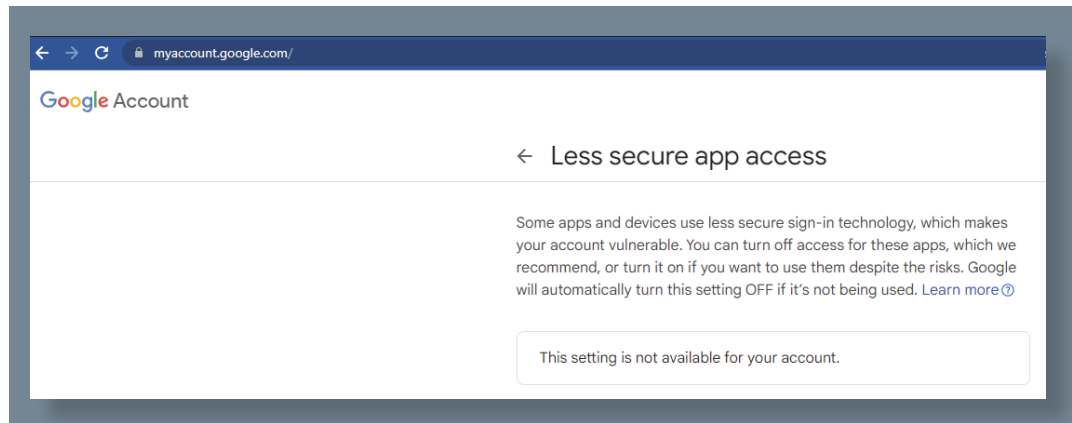
From within the Queue click 'Add Media Stream'.



Cancel Presence-Based Scripting **Add Media Stream**

## 3 SETTING UP A GMAIL MAILBOX

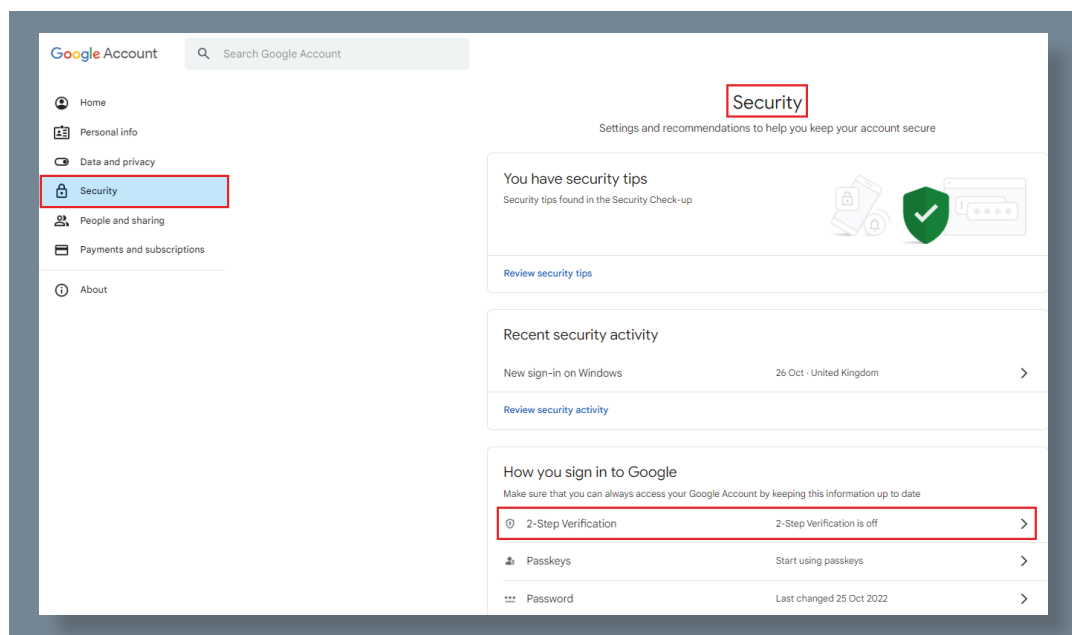
To help keep your account secure, from May 30, 2022, Google no longer supports the use of third-party apps or devices which ask you to sign into your Google Account using only your username and password.



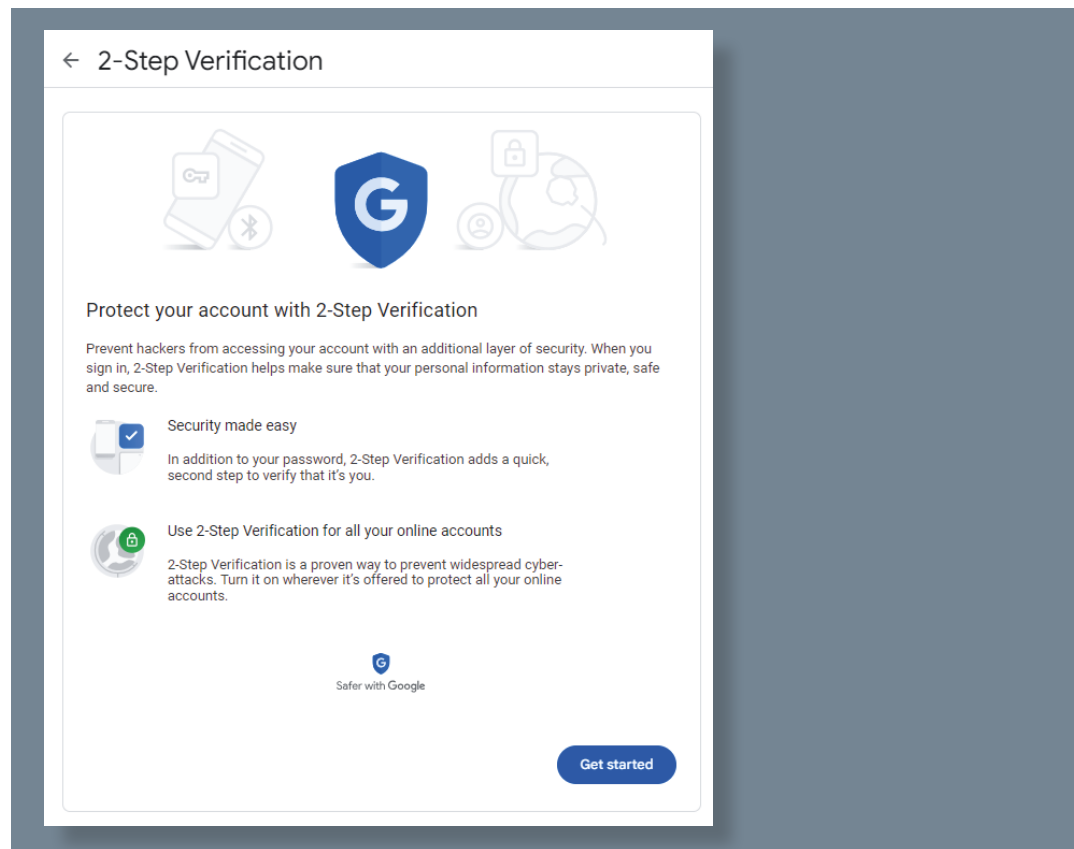
As there is no option to use the 'Less secure app access' the process will be to enable two-step verification and create an App Password that will be used to authentic the new Gmail Media Stream.

Process to create the '2 – Step Verification' and generate an App Password for creating a new Gmail Google Account Media Stream on the Contact Center Portal platform.

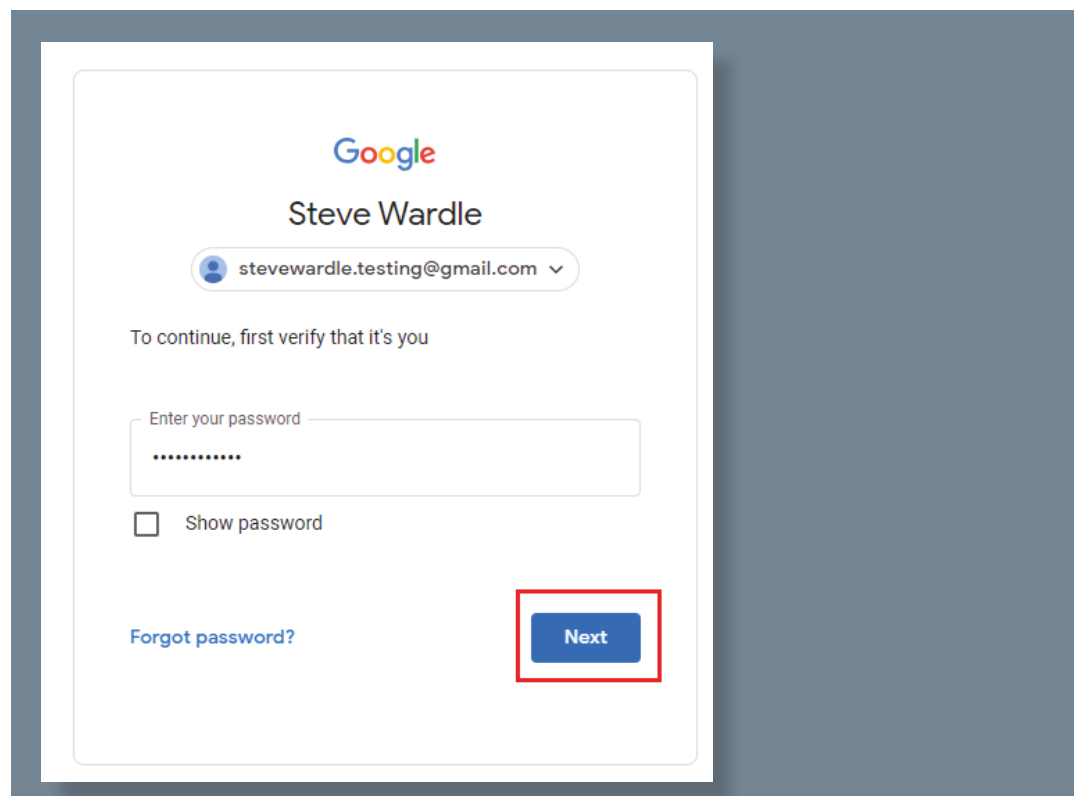
Go to the Gmail account settings and click on the '2 – Step Verification', as below.



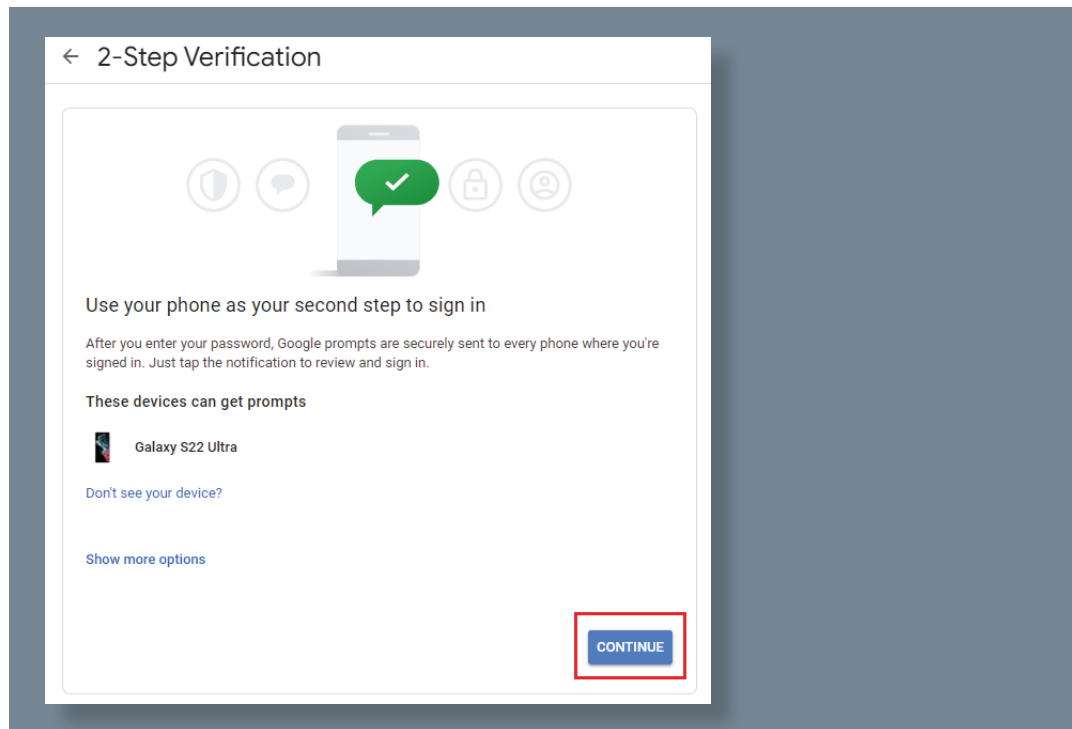
You will see the below screen where you can start the '2 – Step Verification' process. Click on 'Get Started'.



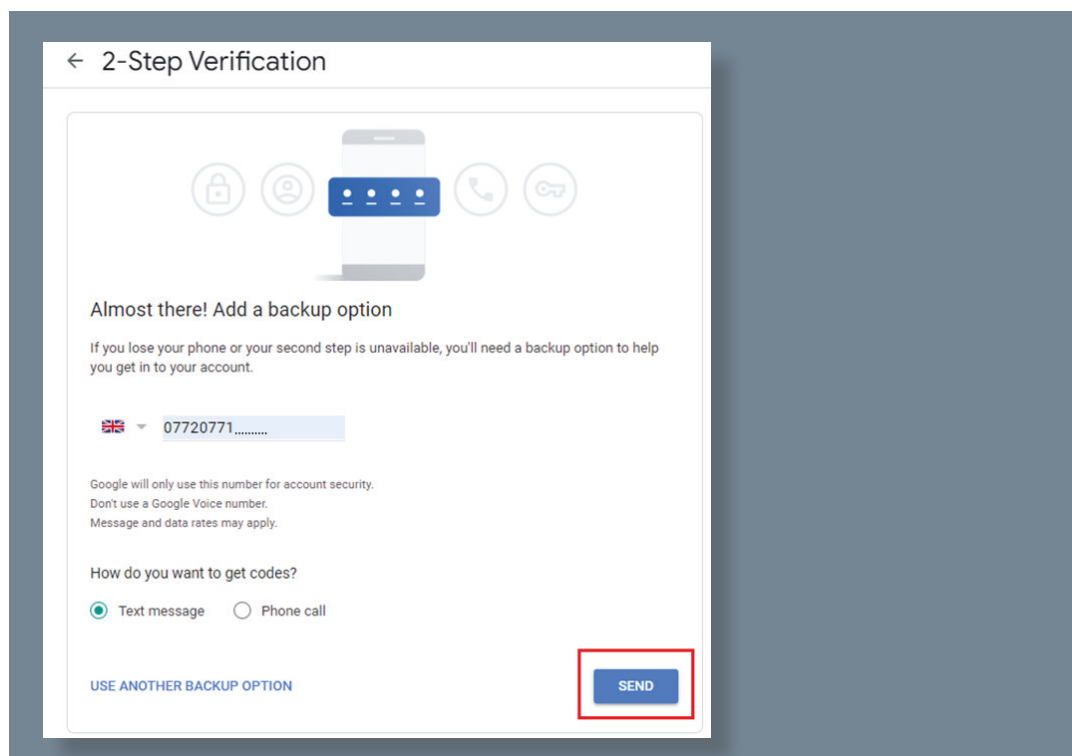
Type in the password for the Gmail account and click next.



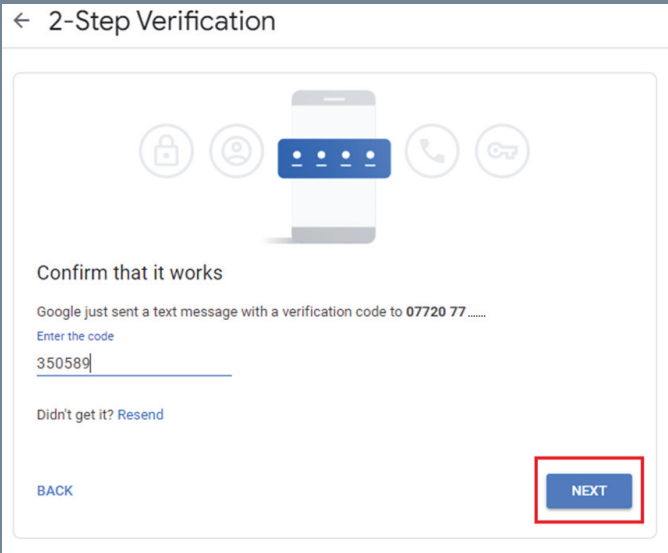
In this example, we are using a mobile device to authenticate, as below.



Type in your mobile number to complete the process, as below.



You will be sent a code to the new mobile number; you will need to enter this code in the step below to authenticate.



← 2-Step Verification

Confirm that it works

Google just sent a text message with a verification code to 07720 77 .....

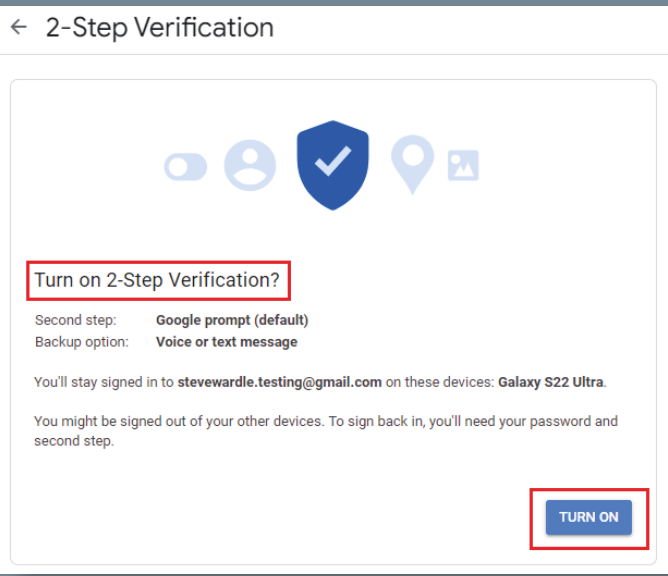
Enter the code

350589

Didn't get it? [Resend](#)

[BACK](#) [NEXT](#)

Turn on the 2 – Step Verification, as below.



← 2-Step Verification

Turn on 2-Step Verification?

Second step: **Google prompt (default)**

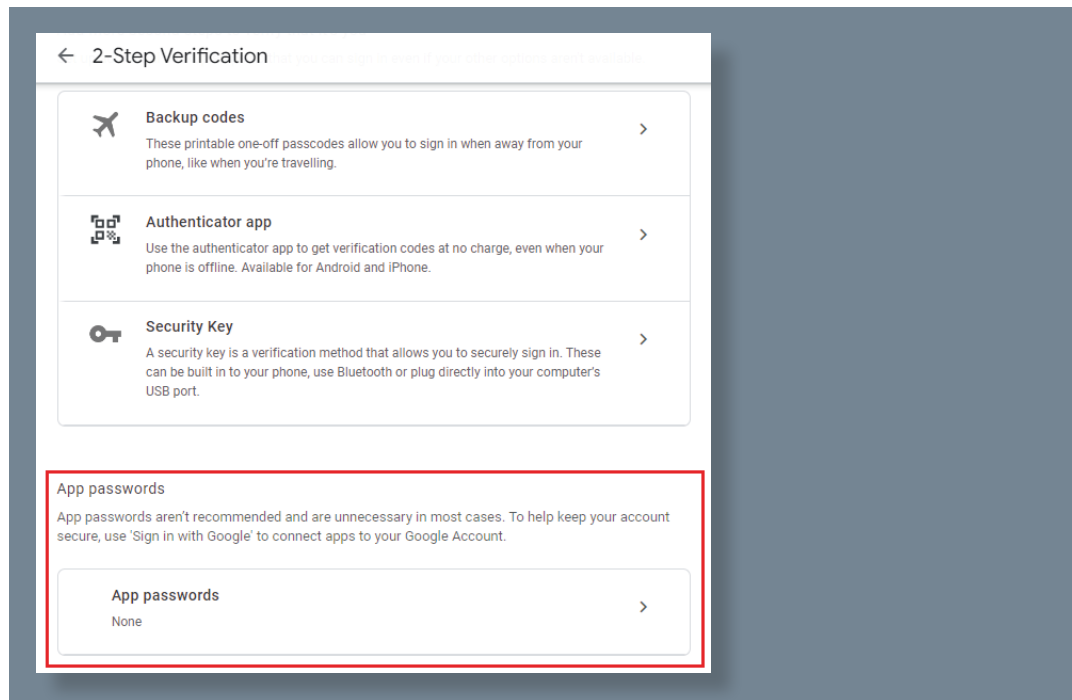
Backup option: **Voice or text message**

You'll stay signed in to **steveardle.testing@gmail.com** on these devices: **Galaxy S22 Ultra**.

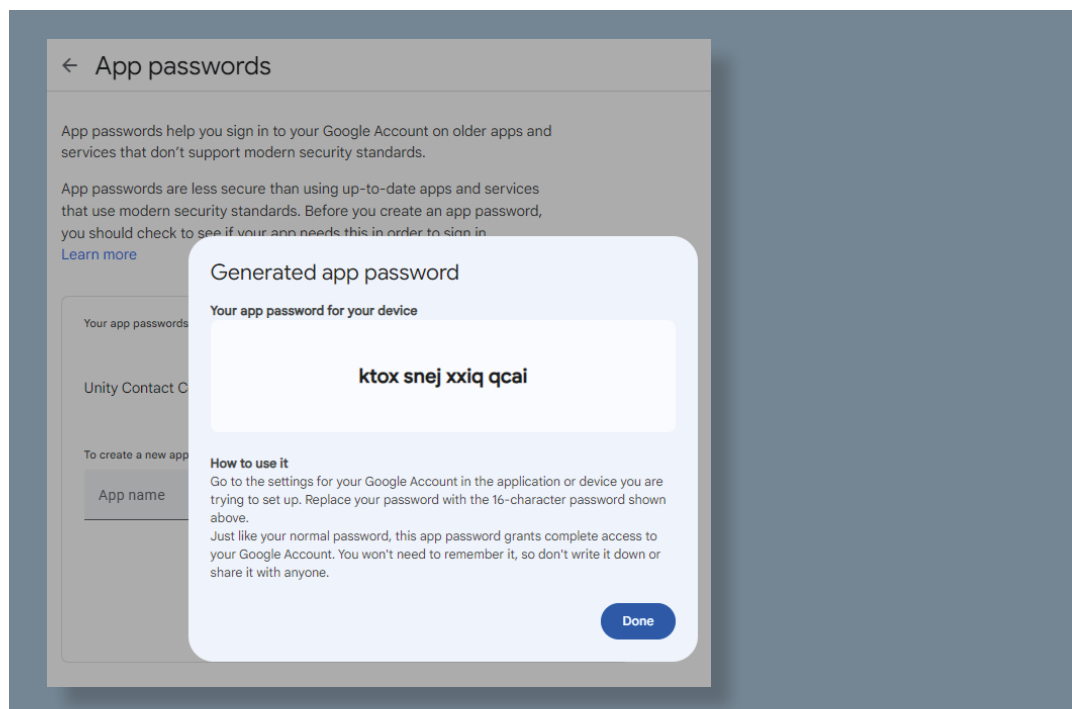
You might be signed out of your other devices. To sign back in, you'll need your password and second step.

[TURN ON](#)

Now you will need to set up the App Password, this is the password that you will use to authenticate the new Gmail Media Stream you are creating on the Contact Center Portal. Click on 'App Password' and create a new one, I have called it 'Unity Contact Center'.

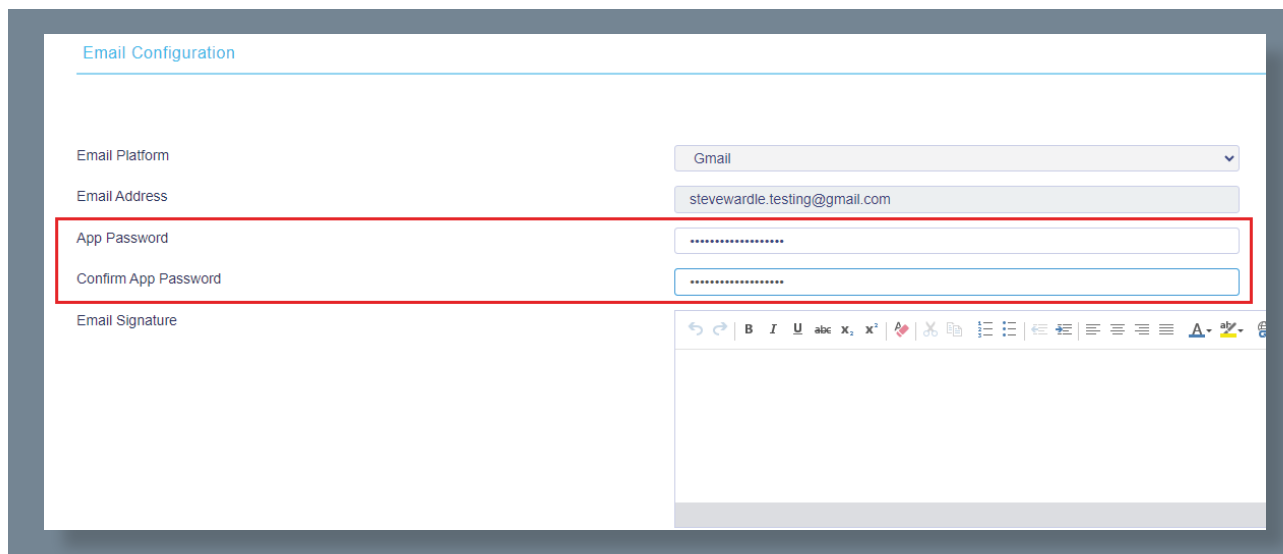


Once you have created the new App Password 'Unity Contact Center' it will present you with a unique password as below.



Use this password when you are setting up the new Gmail Media Stream, as below, then click the update button.





**Email Configuration**

Email Platform: Gmail

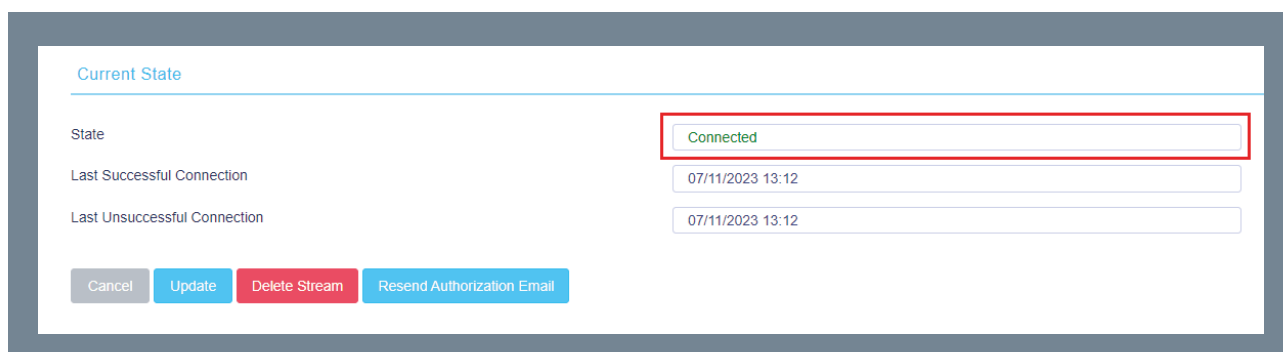
Email Address: stewewardle.testing@gmail.com

App Password: [Redacted]

Confirm App Password: [Redacted]

Email Signature: [Rich text editor]

You should then see that the Gmail Media Stream is connected as below in the Profile.



**Current State**

State: Connected

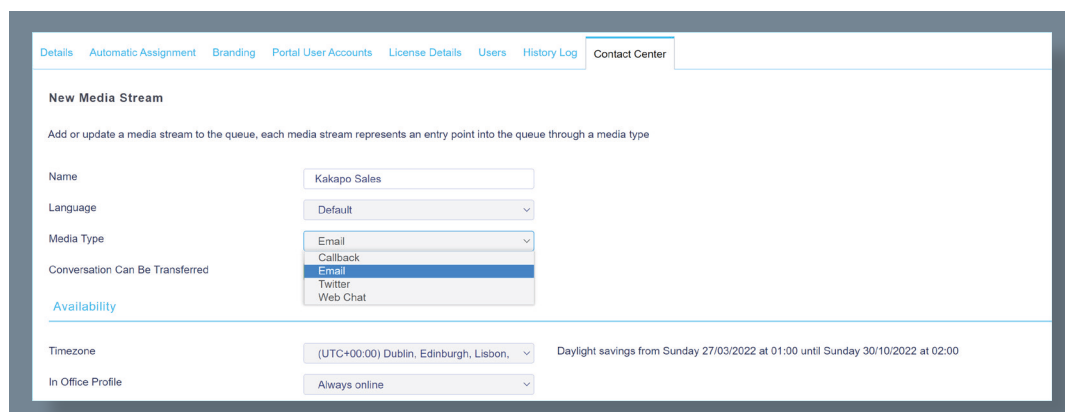
Last Successful Connection: 07/11/2023 13:12

Last Unsuccessful Connection: 07/11/2023 13:12

Buttons: Cancel, Update, Delete Stream, Resend Authorization Email

## 4 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: Kakapo Sales

Language: Default

Media Type: Email

Conversation Can Be Transferred: Email

Availability: [Link]

Timezone: (UTC+00:00) Dublin, Edinburgh, Lisbon, Daylight savings from Sunday 27/03/2022 at 01:00 until Sunday 30/10/2022 at 02:00

In Office Profile: Always online

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.

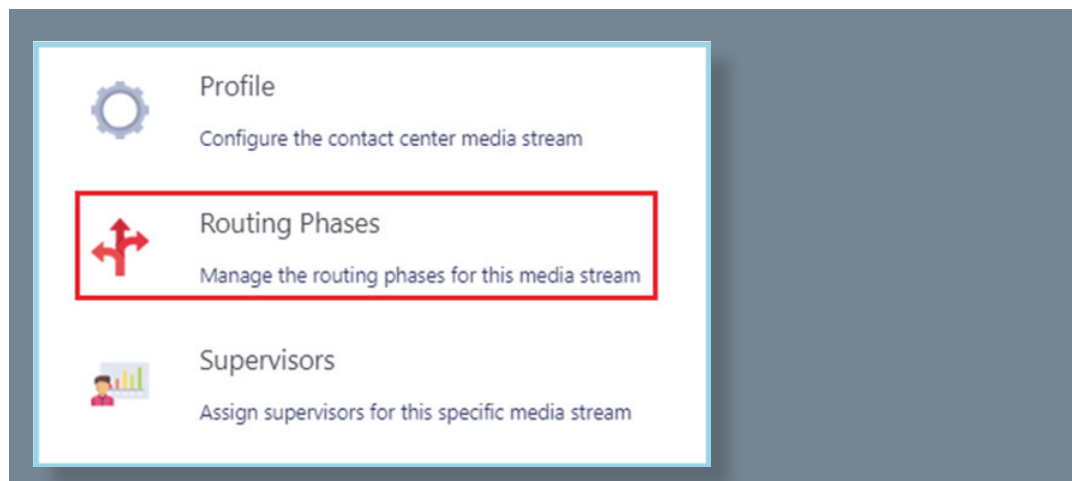
You can set these of course, in which case they will be saved, but the portal will not stop you from creating the Media Stream if these details are missing, instead it will send an email to the email addresses in the Admin section alerting them that the Media Stream needs to be authorized.

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

The screenshot shows the 'Email Configuration' page. At the top, a red note states: 'Please note, distribution lists are not supported. SMTP and IMAP authorization must be enabled for the mailbox, find out how to enable these features [here](#). Please note this may take up to 24 hours to update in Office365.' Below this, there are three main sections: 'Email Platform' with a dropdown menu set to 'Office 365 / Outlook Live / Hotmail', 'Email Address' with an empty text field, and 'Email Signature' with a rich text editor. The rich text editor has a toolbar with options for bold, italic, underline, text color, background color, font face, font size, bulleted list, numbered list, link, unlink, insert image, and source. Below the signature editor, there is a section for 'Initial reply within business hours' with another rich text editor. At the bottom left, there are 'Cancel' and 'Add Media Stream' buttons.

## 5 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: 1

Name: Sales

Entrance Message:

Routing: Simultaneous (dropdown menu open showing: 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**

Search: [ ]

**Left Agent List:**

- All Agents (Staff Group)
- Arjun Harikumar (extrn8004@kakaposystems.com)
- Athul P S (extrn8005@kakaposystems.com)
- Bifin Jose (extrn8006@kakaposystems.com)
- Chris Tutt (christutt@kakaposystems.com)
- DESKTOP-EJH8ED0 (080027D1A821-762)
- Gopikrishnan V (extrn8332@kakaposystems.com)
- Jaik George Joy (extrn8008@kakaposystems.com)
- Kakapo Development Team (Staff Group)
- Kakapo Support Team (Staff Group)
- Vineeth K K (extrn8007@kakaposystems.com)

**Right Agent List:**

- Steve Tutt (stevetutt@kakaposystems.com)
- Jenna Wimshurst (jenna.wimshurst@kakaposystems.com)
- Steve Wardle (steve.wardle@kakaposystems.com)

Buttons: Add, Add All, Remove, Remove All

Buttons: Cancel, Update Phase, 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.



© Kakapo Systems 2023

T +44 (0)207 084 6845

E [tellmemore@kakaposystems.com](mailto:tellmemore@kakaposystems.com)

W [www.kakaposystems.com](http://www.kakaposystems.com)

International House | 36-38 Cornhill | London | EC3V 3NG

FIND US ON  