

# UNITY CONTACT CENTER – EMAIL SETUP

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#### **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.

ils Automatic Assignment Branding Portal User Accounts Licens	e Details Users History Log User Templates Contact Center CPaaS Numbers	
kaposystems Contact Center Queues		
Iti-media queues currently used by this group.		
	Q 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 Slandard 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

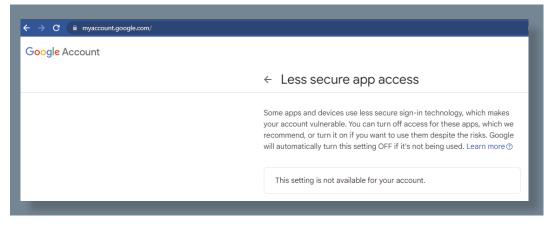
#### 2 ADDING AN EMAIL MEDIA STREAM

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 twostep 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.

Google Account Q Search Google Account	
Home     Bersonal info	Security Settings and recommendations to help you keep your account secure
Deta and privacy     Security     Pople and sharing	You have security tips Security tips found in the Security Check-up
Payments and subscriptions  About	Review security tips
	Recent security activity       New sign-in on Windows     26 Oct - United Kingdom
	Review security activity
	How you sign in to Google Make sure that you can always access your Google Account by keeping this information up to date
	⑦ 2-Step Verification 2-Step Verification is off >
	♣ Passkeys Start using passkeys >
	😐 Password Last changed 25 Oct 2022 >

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'.

2-Ste	ep Verification	
Protect	your account with 2-Step Verification	
	xers from accessing your account with an additional layer of security. When you ep Verification helps make sure that your personal information stays private, safe	
~	Security made easy	
	In addition to your password, 2-Step Verification adds a quick, second step to verify that it's you.	
6	Use 2-Step Verification for all your online accounts	
Ģ	<ol> <li>Step Verification is a proven way to prevent widespread cyber- attacks. Turn it on wherever it's offered to protect all your online accounts.</li> </ol>	
	C Safer with Google	
	Get started	

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

Google	•	
Steve Wa	rdle	
stevewardle.testing@	⊉gmail.com ∨	
To continue, first verify that it's you		
Enter your password		
Show password		
Forgot password?	Next	

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

← 2-Step Verification	
Use your phone as your second step to sign in	
After you enter your password, Google prompts are securely sent to every phone where you're signed in. Just tap the notification to review and sign in.	
These devices can get prompts	
Galaxy S22 Ultra	
Don't see your device?	
Show more options	
CONTINUE	

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

2-Step Verification	
Almost there! Add a backup option	
If you lose your phone or your second step is unavailable, you'll need a backup option to help you get in to your account.	
07720771	
Google will only use this number for account security. Don't use a Google Voice number. Message and data rates may apply.	
How do you want to get codes?	
Text message      Phone call	
USE ANOTHER BACKUP OPTION	

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		
	E C	
Confirm that it works Google just sent a text message with a verification code to 07720 77		
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 stevewardle.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.

	you sign in to your Google Account on older apps and upport modern security standards.
App passwords are I	ess secure than using up-to-date apps and services
	curity standards. Before you create an app password,
	see if your ann needs this in order to sign in
Learn more	Generated app password
Your app passwords	Your app password for your device
Unity Contact C	ktox snej xxiq qcai
To create a new app App name	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.

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	stevewardle.testing@gmail.com
App Password	
Confirm App Password	
Email Signature	5 ở   B I 및 abc X, X°   ∻   ※ lb 등 등 등 등 등 등 ▲· ở.

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

State	Connected	
ast Successful Connection	07/11/2023 13:12	
ast Unsuccessful Connection	07/11/2023 13:12	

### **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.

Details Automatic Assignment Branding Portal	Jser Accounts License Details Users	History Log	Contact Center
New Media Stream			
Add or update a media stream to the queue, each me	lia stream represents an entry point into the q	ueue through a	a media type
Name	Kakapo Sales		
Language	Default	~	
Media Type	Email	~	
Conversation Can Be Transferred	Callback Email Twitter		
Availability	Web Chat		
Timezone	(UTC+00:00) Dublin, Edinburgh, Lisbon,	<ul> <li>Daylight</li> </ul>	nt 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.

Email Configuration	
Please note, distribution lists are not supported. SMTP and IMA	P authorization must be enabled for the mailbox, find out how to enable these features here. Please note this make take up to 24 hours to update in Office365.
Email Platform	Office 365 / Outlook Live / Hotmall
Email Address	
Email Signature	5 ở   B I ⊻ ⇔ x, x²   🏕   & là ⊟ ⊟ ≪ K   ≅ ≅ ≅ ⊒ 🚣 ½- 🍓 🕫 ∰ 🖾 🗊 இ Source
	Format  Format
	A
Initial reply within business hours	5 ở   B I U ate x, x'   4   X   E ⊟   ⊂ + E   E ≡ ≡ A - Ž - ®, ℜ ∰ ⊡ III (B Source
	Pormat • Pont • Size •
Cancel Add Media Stream	

#### **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.

0	Profile Configure the contact center media stream	
÷	Routing Phases Manage the routing phases for this media stream	
2 <sup>dd</sup>	Supervisors Assign supervisors for this specific media stream	

To add a new routing phase, click 'Add Phase', fill in the required fields, add the desired users and then click Add Phase.

ases are used to configure routing rules for a media stream when a ne		
lase Number	1	
ame	Sales	
strance Message		
uting	Simultaneous	۲
ase Duration (seconds)	Circular Longest Idle at Agent	
clude Agents From Previous Phases	Longest tille at Media Stream Longest tille at Media Stream Longest tille at Queue Simultaneous	
gents		
٩	Add	٩
All Agents (Staff Group) Arjun Harikumar (extn8004@kakaposystems.com) Athul P S (extn8005@kakaposystems.com) Bifn Jose (extn8006@kakaposystems.com)	Add All	Steve Tutt (stevetutt@kakaposystems.com) Jenna Wimshurst (jenna.wimshurst@kakaposystems.com) Steve Wardle (steve.wardle@kakaposystems.com)
DeskTOP-EJM8E00 (080027D1A821-762)	Remove	
Gopikrishnan V (extn8332@kakaposystems.com) Jaik George Joy (extn8008@kakaposystems.com) Kakapo Development Team (Staff Group)	Remove All	
Kakapo Support Team (Staff Group) Vineeth K K (extn8007@kakaposystems.com)		
Cancel Update Phase Delete Phase		
Cancer Opulate 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.



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