

# UNITY CONTACT CENTER HELP GUIDE - AGENT

---

## Contents

<b>1. Unity Contact Center</b> .....	<b>2</b>
<b>2. End User Experience</b> .....	<b>2</b>
2.1 New Conversation Alert .....	2
2.2 Conversation .....	3
2.2.1 When Showing Unreserved Conversations .....	4
2.2.2 Transferring & Closing Conversations .....	5
2.3 Managing Web Chat .....	6
2.3.1 History .....	10
2.3.2 CRM Contacts & Leads .....	11
2.4 Managing Callbacks .....	11
2.4.1 Reason for call back .....	13
2.4.2 Agent Notes .....	13
2.4.3 Schedule Callback .....	13
2.4.4 Close Callback .....	14
3.1 Managing Email .....	14
4.1 Managing Twitter .....	16
5.1 Managing SMS .....	17
5.1.1 Delivered/Undelivered receipts .....	20
5.1.2 Sending attachments .....	20
5.1.3 Ending an SMS conversation .....	21
5.1.4 Blocking an SMS phone number .....	21
6.1 CRM automatic contact pop .....	21
7.1 Viewing Historical Conversations .....	22
<b>8 Desktop Functionality</b> .....	<b>23</b>
8.1 Joining or Leaving Queues .....	23
8.2 ACD State Information .....	24

9	Agent Functionality.....	24
9.1	Joining or Leaving Queues .....	24
9.2	Adding/Removing Contact Center Statistics .....	25

## 1. UNITY CONTACT CENTER

---

The Unity Contact Center platform allows users to manage omni-channel conversations through the Unity client, in addition to telephony functionality. This is achieved through several Contact Center components which are outlined below. Unity Contact Center functionality does not rely on BroadWorks Call Center services being assigned, or even that a Unity Call Center client be used. Contact Center functionality can be provided through any Unity client, for any channel type.

**Queue:** A Contact Center Queue is similar to a Call Center. It is a logical Group of Media Streams that are presented to the Agent as a single entity.

**Media Stream:** A Media Stream is the channel to the public, it represents a Web Chat or Callback client, an Email address, a Twitter handle or a Facebook login.

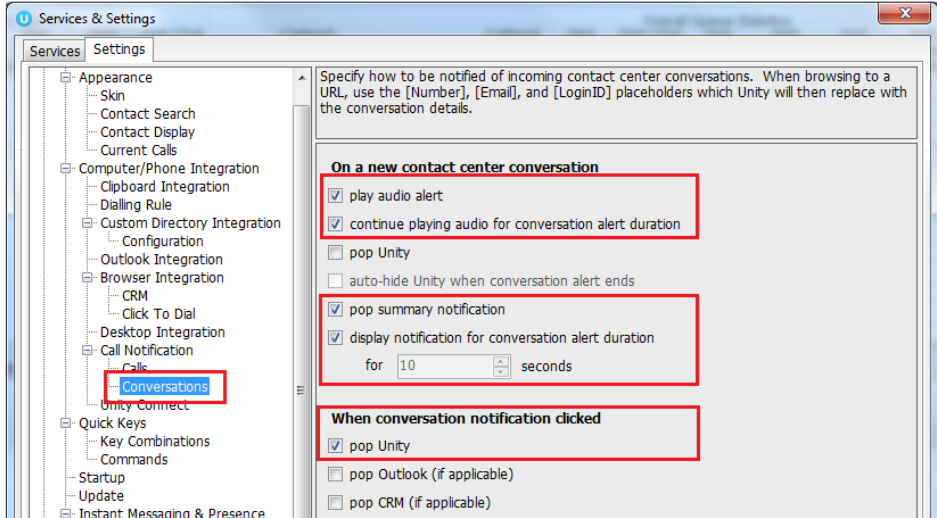
## 2. END USER EXPERIENCE

---

You have now completed configuring the Unity Contact Center platform, including Queues, Media Streams and Agents. This section describes how the Agent performs Contact Center actions within their Unity client.

### 2.1 New Conversation Alert

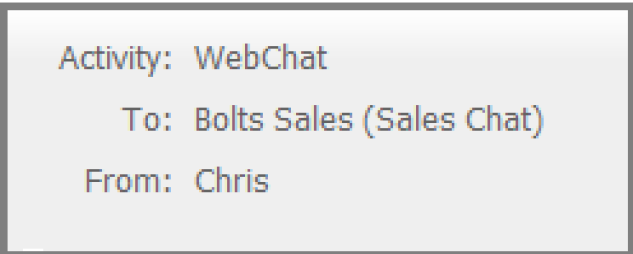
When a new conversation is received, Unity can be configured to show a toast notification and or play an audio alert, as shown below.



At present the alert is just the IM audio alert played in a loop if playing for the alert duration, the ability to change the audio file shortly.

If it's not configured to continue playing then it will just be played once, the same as when you receive an IM.

The summary notification:



## 2.2 Conversation

When an Agent is joined to the Contact Center Queue and available [although we know that the Agent may be available when the ACD state is unavailable, for example unavailable (Web Chat) all conversation alerts will be presented in the Activity List, as shown below.

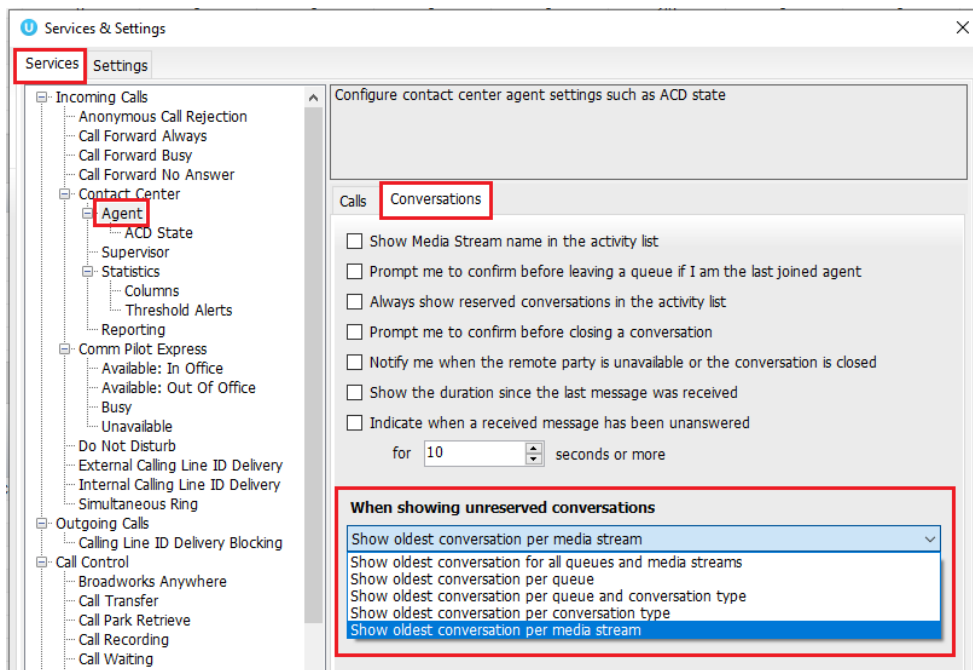
Activity	From	To	Duration	Status
<b>Default</b>				
WebChat	Jenna (Zendesk user)	Kakapo Systems (Kakapo Systems)	00:05	Unreserved

The Activity column in the Activity Window informs the user what type of conversation it is and the From column will populate with the customer's name, Unity will integrate with a CRM platform to show the contact details based on the Email address or number if configured in Settings. The duration shows the time since the conversation alert was received, and the status will always be "Unreserved" at first.

Click the Duration heading in the Activity Window to sort the conversations by duration.

### 2.2.1 When Showing Unreserved Conversations

Users can show specific queued conversations according to preference. This is configured in Agent>services> Agent>Conversations, as shown below.



#### Show oldest conversation for all queues and media streams

This will show the oldest unreserved conversation within all Queues and regardless of the Media Stream type.

#### Show oldest conversation per queue

This will only show the oldest conversation for each Queue. E.g. If the Agent is a member of 3 Queues and there are 4 unreserved conversations in each Queue, the Agent will only see the oldest for each Queue so will have a total of 3 unreserved conversations in the Activity Window.

If there are multiple Media Streams under the same Queue and there are unreserved conversations for each Queue, then only the oldest conversation will be shown - even if one stream is an email stream and the other is a Web Chat stream

#### Show oldest conversation per queue and conversation type

This will show the oldest conversation for each Media Stream in each Queue. E.g. If the Agent is a member of 2 Queues which have multiple unreserved Emails, Web Chats and SMS conversations then the Agent will see 6 unreserved conversations in total, 3 for each Queue displaying the oldest Email, Web Chat and SMS conversation.

#### Show oldest conversation per conversation type

This will show the oldest unreserved conversation for each Media Stream type regardless of which Queue it came from.

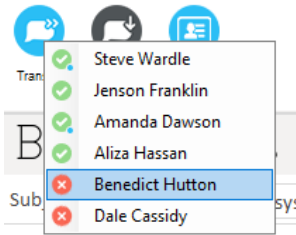
#### Show oldest conversation per media stream (default)

This will show unreserved conversations by Media Stream E.g. If there are two Web Chats Streams in the same Queue, then both will be displayed.

## 2.2.2 Transferring & Closing Conversations

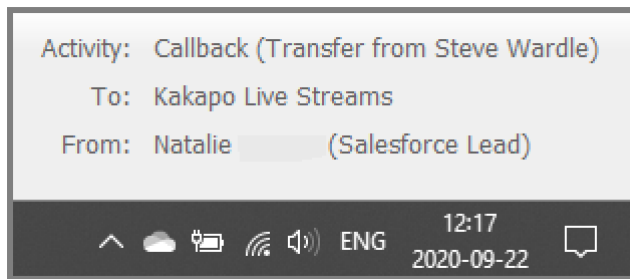
Agents can transfer all conversations (except Web Chats) to any other Agent regardless of their online status and the conversation will automatically be reserved by the new Agent.

Click the transfer icon within the conversation window to view the other Agent's joined status, as shown below.



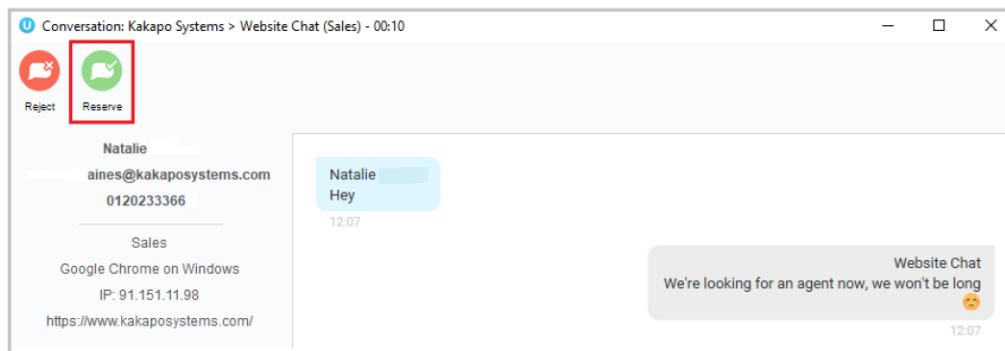
Please note: Agents can still transfer Web Chats to other Agents but they can only transfer to an online available Agent who will have to manually reserve the conversation before it is transferred.

When a conversation has been transferred the new recipient will receive a toast notification detailing the conversation type, who it was transferred from, which Queue it is from and the customer's details:



## 2.3 Managing Web Chat

When the Agent first sees the new Web Chat conversation in their Activity List they can either right click to reserve the chat or double click it and then click reserve, as shown below.



The difference is that by double-clicking the conversation first, the user can see any chat messages that have been entered by the visitor before reserving the conversation.

**Reserve:** To reserve a Web Chat conversation is to answer it. As soon as an Agent reserves the Web Chat then the routing phases will stop and the conversation will stay with that Agent. Any other Agents that have been alerted will be told that the conversation was reserved, so it will be removed from their Activity Window. The status of the conversation will change the “Reserved” and the duration will change to the time since the conversation was reserved. Unity will also change the ACD state of the Agent if set in the Agent Availability page in the portal.

**Reject:** Rejecting a conversation cancels the alert, so that the conversation will be removed from your Activity List. The Contact Center will act accordingly, by alerting another Agent if using circular of longest idle routing, or perhaps moving to the next phase. This will override the automatic bounce duration set in the routing phase, if the conversation is not reserved or rejected within the time stated in the “automatic bounce duration” for the routing phase, then the Unity client will automatically reject the conversation alert on behalf of the Agent.

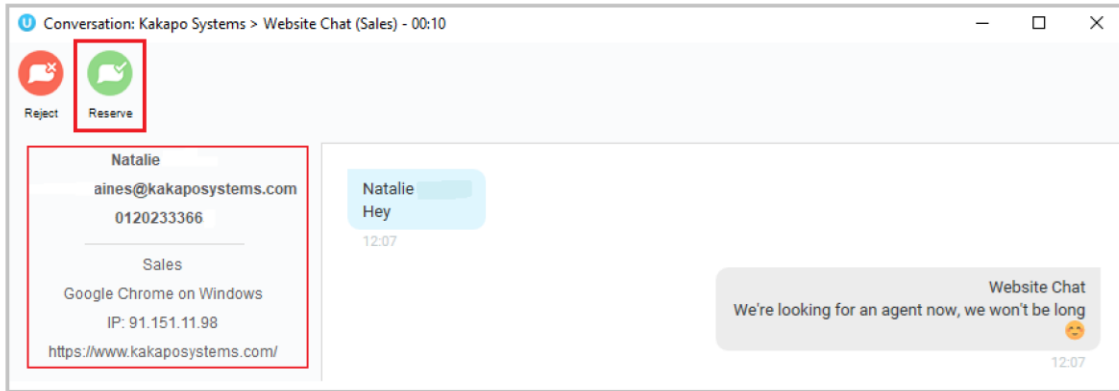
If reserved, the Web Chat will stay in the Activity List for the duration of the conversation. The duration time in the brackets is the amount of time passed since the customer last sent a message which has not yet been replied to. This is configured in Settings>Agent>Conversations.

When a new message is received the “1 new message” alert will appear in the Status field, as shown below.

Activity	From	To	Duration	Status
WebChat	Natalie	Kakapo Systems > Website Chat (Sales)	10:47 (00:36)	Reserved (1 new message)

At any time the Unity user can double-click the conversation from the Activity List to see the Web Chat window.

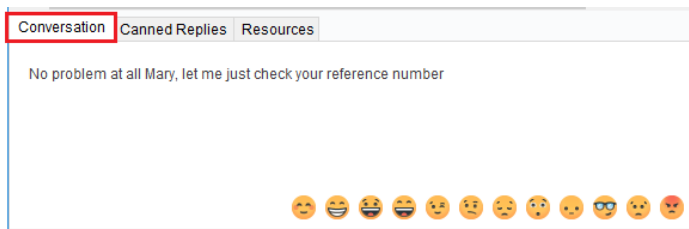
On the left of the Web Chat box is the customer’s name, and telephone number [if entered], along with the department chosen by the customer, the internet browser, their IP address and the website address that the Web Chat was started on.



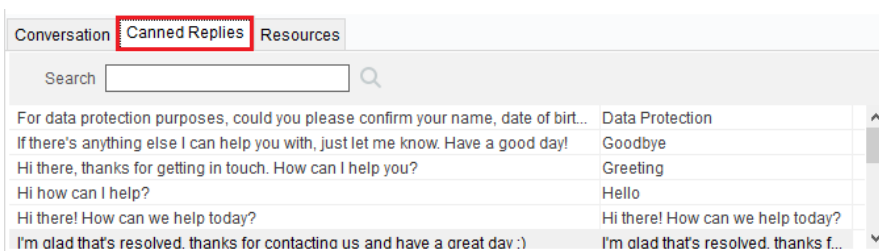
Simply click on the Email address to send an Email to the customer using the default Email program, or click on the number to immediately dial through Unity.

**Conversation:** This is where the user enters text to send to the customer. Simply type the message in the box and press enter to send.

Emojis can also be added to a message by left clicking the relevant image. Or right click on an emoji to send it immediately.



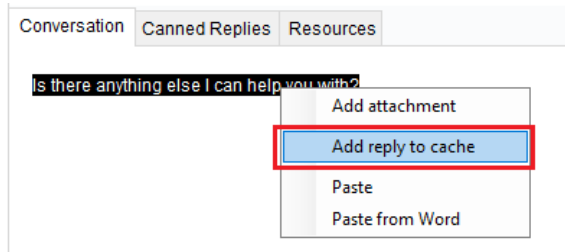
**Canned Replies:** This is where all canned replies entered at different levels in the portal are stored, the user simply double clicks on a reply to send it. The user can also use the search box to search for specific replies, based on the name or text entered in the portal.



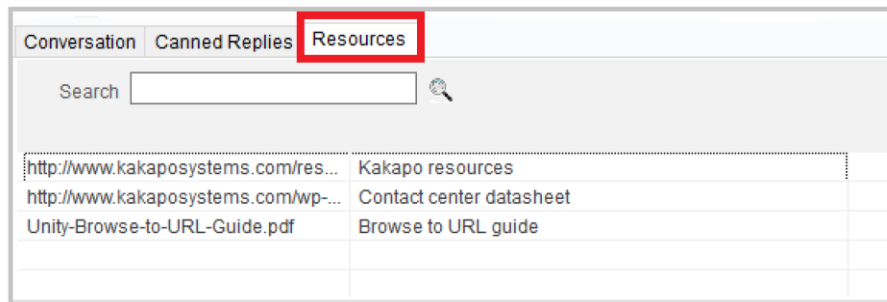


## Add Reply to Cache

If a user is frequently typing the same message they can add it to their reply cache which is stored locally on their machine. Simply type the message, highlight it, right click and select “add reply to cache”.

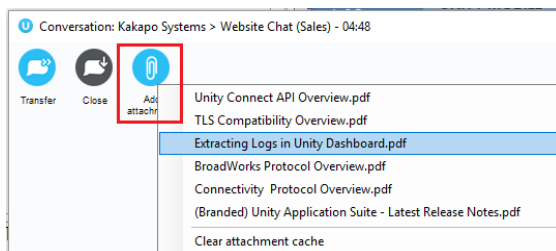


**Resources:** All URLs and uploaded resources created in the portal are available in this tab, the user simply double clicks on a resource to send it. The user can also use the search box to search for specific resources, based on the filename/URL or description.



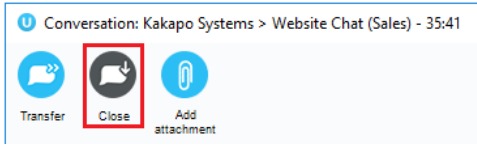
## Attachments

Right click to access the recent attachments (the cache saves the file path, if the file has moved folders then the add recent attachment button will not work)

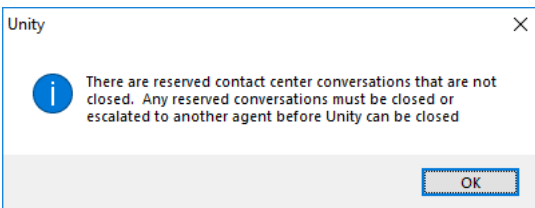


To end a Web Chat click the Close button on the top of the conversation box, as shown below.

Please note: Clicking the X will only close the Web Chat box, it will not end the Web Chat conversation.

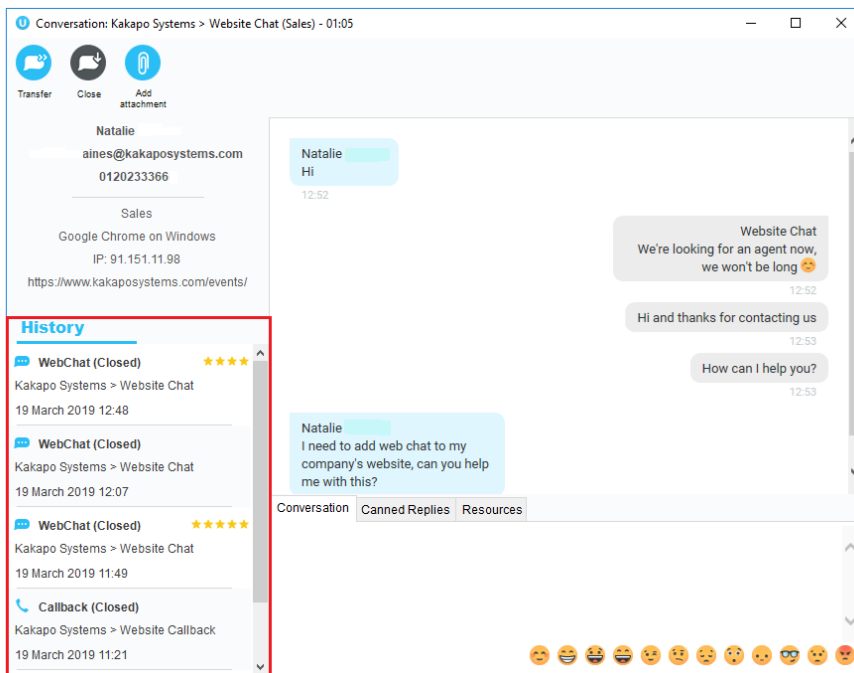


Unity will not allow an Agent to close Unity while there are one or more reserved and open Contact Center conversations in place, all conversations must be transferred or closed before closing Unity.



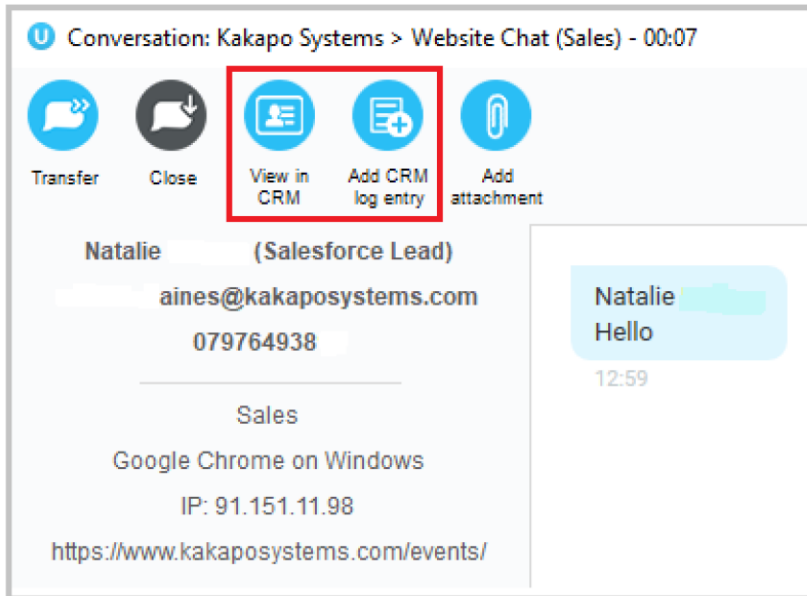
### 2.3.1 History

Users can view the last 10 conversations that has taken place with the customer, e.g. Web Chat, Twitter and Callback conversations.

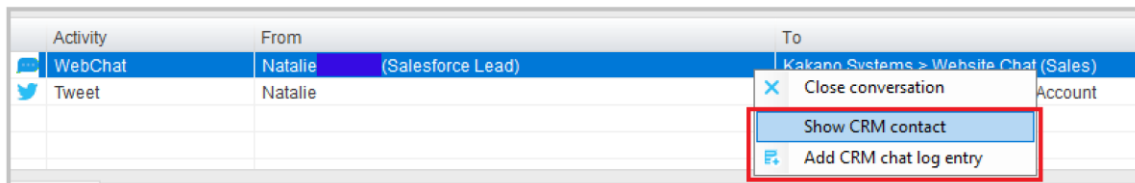


### 2.3.2 CRM Contacts & Leads

If the customer is in the integrated CRM platform then the Web Chat window will display two additional options at the top: “View contact in CRM” and “Add CRM call log entry”. Unity will automatically log a Web Chat entry against the contact or lead in the CRM platform. Click “Add CRM log entry” to manually add a custom entry.



Users can also right click the conversation in the Activity List to access the same options.



### 2.4 Managing Callbacks

Similar to a Web Chat conversation, when a new Callback request comes into the Queue it will appear in the Activity List.

Activity	From	To	Duration	Status
Callback	Natalie	Kakapo Systems > Website Callback	00:31	Unreserved

The Callback request will stay in the Activity List of all users in the routing phase until the Callback has been reserved. If the Agent leaves the Queue then any unreserved Callbacks for Media Streams within that Queue will be removed, and will be refreshed/displayed when the Agent next joins the Queue.

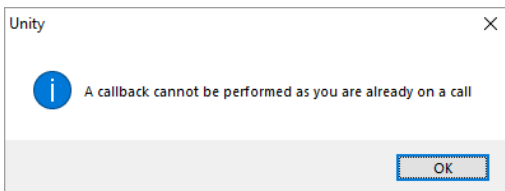
Once an Agent has reserved the Callback it will disappear for all other Agents and will remain in the reserved Agent’s Activity list, even in between Unity sessions in case the remote party needs to be called multiple times.

Activity	From	To	Duration	Status
Callback	Natalie (Salesforce Lead)	Kakapo Live Streams		Reserved

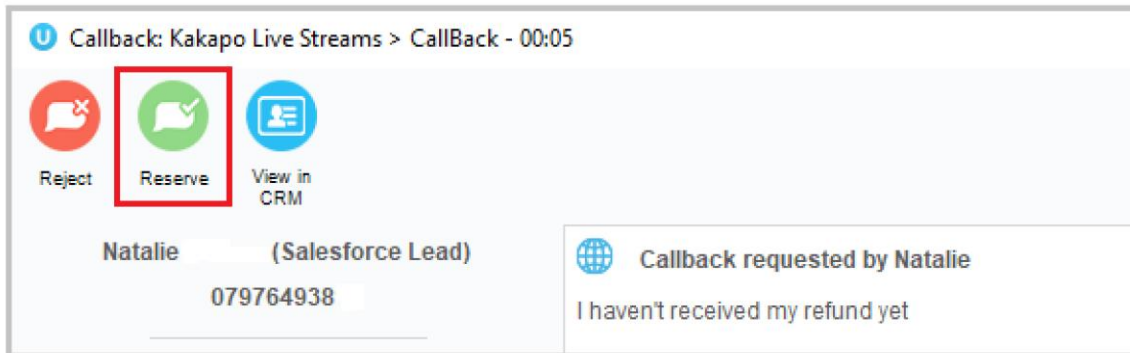
- Call number
- Copy number
- Close callback
- Show CRM contact

Please note the Callback will remain in the Activity List even if the Callback has been performed. The user needs to manually close the Callback for it to disappear. If the number provided is missing the area code, the Agent can select “copy number”, paste it into the dial pad and add the area code manually.

Unity will not allow a user to initiate a Callback when they are already on a call. If they try to initiate a Callback they will receive an error message.



Agents can either right click and reserve it, or they can double click the request to open the callback window to view more information and reserve the callback using the icons at the top.



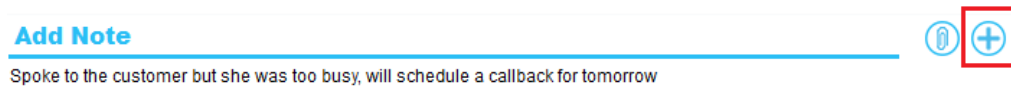
### 2.4.1 Reason for call back

Any information given by the customer in the “reason for request” box will appear at the top of the callback window, as shown below.



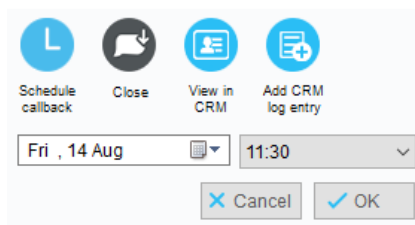
### 2.4.2 Agent Notes

Once reserved, the Agent can make additional notes to the callback request by typing in the text box and then clicking the plus icon to add it.



### 2.4.3 Schedule Callback

To schedule a callback click the clock icon and fill out the desired time.



The callback request will then be shown with the scheduled time slot in the active call window and will notify the Agent by turning red when it's time to perform the callback.

Activity	From	To	Duration	Status
Callback	Natalie (Salesforce Lead)	Kakapo Live Streams > Callback	18:32:00	Scheduled for today 11:30

Status  
Scheduled for today 11:30

### 2.4.4 Close Callback

When the user has finished dealing with the Callback, simply right click it and select “Close Callback” and it will disappear from the Activity List.

Activity	From	To	Duration	Status
Callback	Natalie	Kakapo Systems > Website Callback	03:07	Reserved

Call number  
 Close callback

### 3.1 Managing Email

When an Email comes into the Queue it will appear in the Activity List.

Activity	From	To	Duration	Status
Email	Jenna (Salesforce Contact)	Kakapo Live Streams	00:04	Unreserved

Please note: Email address starting with

- noreply@
- no-reply@
- no\_reply@
- donotreply@
- do-not-reply@
- do\_not\_reply@

Will be not be routed to Agents and are not stored in Database.

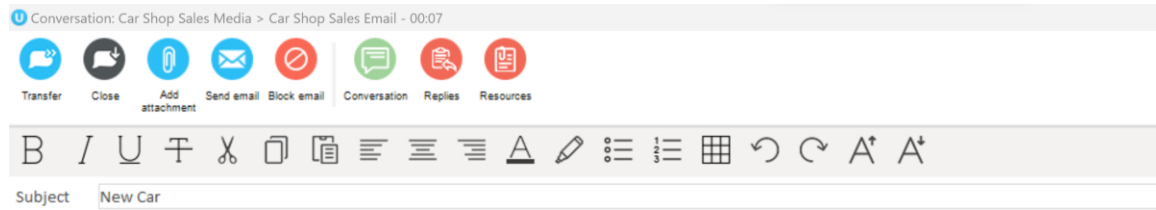
Agents can reserve the conversation, reject the conversation or show the CRM contact in the integrated CRM platform (if applicable).

Activity	From	To	Duration	Status
Email	Jenna (Salesforce Contact)	Kakapo Live Streams	00:55	Unreserved

Reserve conversation  
 Reject conversation  
 Show CRM contact

Once the Email conversation has been reserved the Agent opens the Email by double clicking it in the Activity List. The conversation window will then appear with the original Email from the customer at the bottom on the window, simply click at the top to start typing.

Any attachments sent from the customer will appear below the subject line. Please note that there is a blacklist for Email attachments, the list can be [found here](#). You can also block email addresses if the option is activated at the queue level

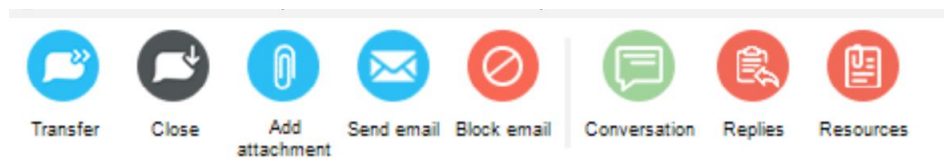


---

**From:** Peter Donnelly [peter.donnely673@gmail.com]  
**Sent:** 28 March 2023 16:28  
**To:** Car Shop Sales Email [kakaposystems@gmail.com]  
**Subject:** New Car

Hi, can I have a new car brochure please?  
Kind regards,  
Peter


Using the icons at the top of the Email window, Agents can transfer conversations, add attachments, add CRM log entries and access the reply and resource repositories. Once the Agent has finished replying simply click the “Send Email” icon.



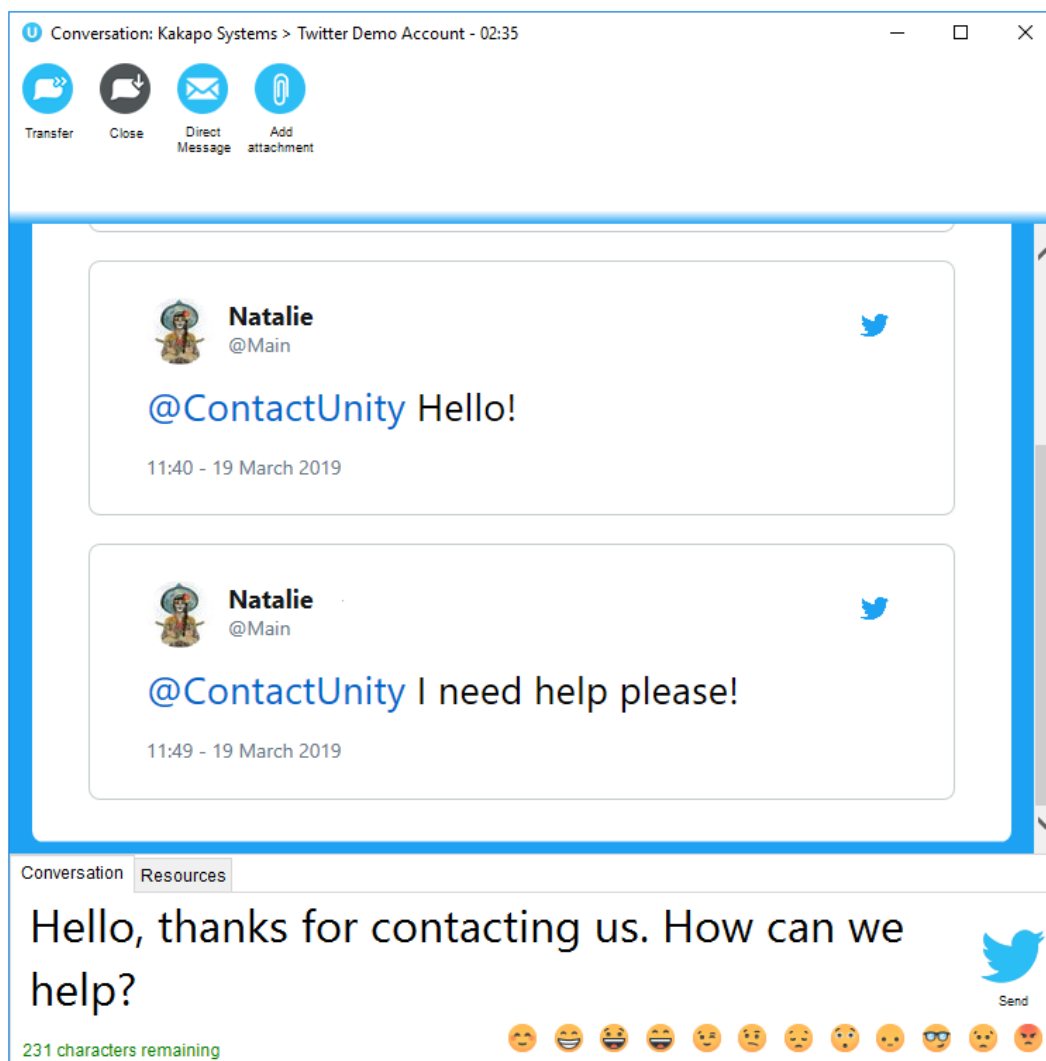
## 4.1 Managing Twitter

Twitter conversations are loaded within 3 minutes of the tweet being sent from the customer, so the longest duration a tweet can take to come into Unity is 3 minutes and the quickest is 1 second, depending on where the 3 minute cycle is when the tweet is sent.

Please note that tweets/replies sent from Unity are delivered immediately to the customer.

Activity	From	To	Duration	Status
 Tweet	Natalie	Kakapo Systems > Twitter Demo Account	00:47:20	Unread (2 new)

To reserve a Twitter conversation right click it and select Reserve.



Conversation: Kakapo Systems > Twitter Demo Account - 02:35

Transfer Close Direct Message Add attachment

**Natalie** @Main  
@ContactUnity Hello!  
11:40 - 19 March 2019

**Natalie** @Main  
@ContactUnity I need help please!  
11:49 - 19 March 2019

Conversation Resources

Hello, thanks for contacting us. How can we help?

231 characters remaining

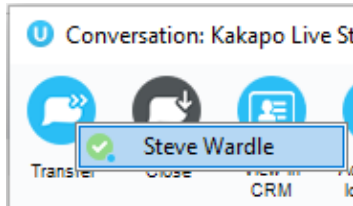
Send



## Transfer

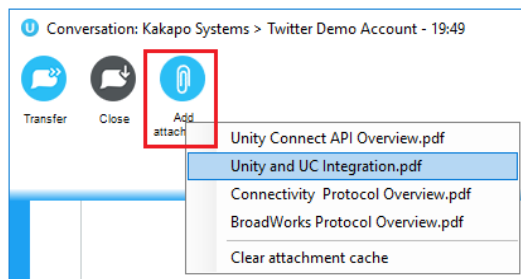
Click to transfer to a colleague, only those who are joined to the same Media Stream will be shown. Only the Agents that are online and joined to the Queue will be available to transfer to.

This transferred conversation will also need to be manually reserved by the new recipient.



## Attachments

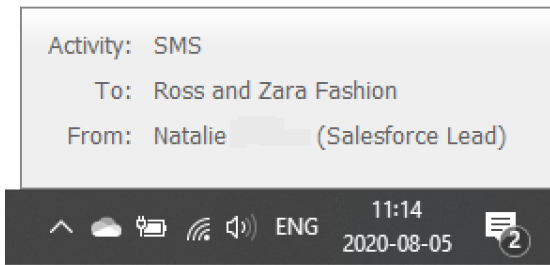
Right click to access the recent attachments (the cache saves the file path, if the file has moved folders then the add recent attachment button will not work)



Unity will show 20 cached replies and attachments in Contact Center, plus more when Unity is running, but when it's closing down only the latest 20 will be saved.

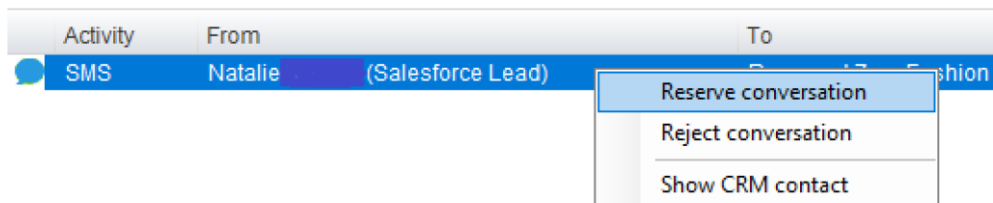
## 5.1 Managing SMS

SMS conversations are delivered to the Agent in the same way that Web Chats, Tweet, Emails and Callbacks are.



Activity	From	To	Duration	Status
SMS	Natalie (Salesforce Lead)	Ross and Zara Fashion	00:02	Unreserved

Simply right click to reserve the SMS conversation and then double click to open the conversation window.



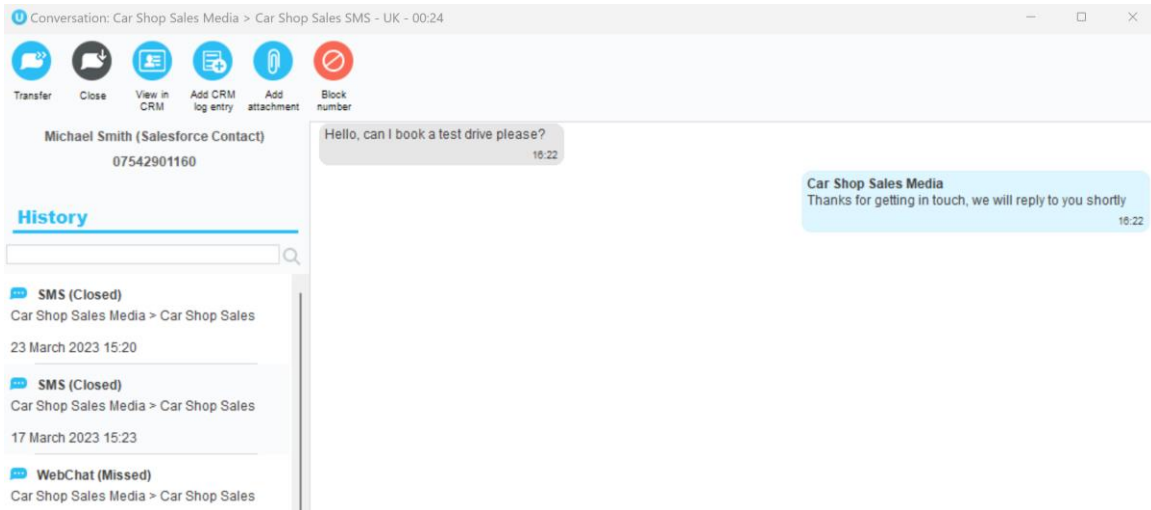
**Reserve:** To reserve an SMS conversation is to answer it. As soon as an Agent reserves the SMS conversation then the routing phases will stop and the conversation will stay with that Agent. Any other Agents that have been alerted will be told that the conversation was reserved, so it will be removed from their Activity Window. The status of the conversation will change the “Reserved” and the duration will change to the time since the conversation was reserved. Unity will also change the ACD state of the Agent if set in the Agent Availability page in the portal.

**Reject:** Rejecting a conversation cancels the alert, so that the conversation will be removed from your Activity List. The Contact Center will act accordingly, by alerting another Agent if using circular of longest idle routing, or perhaps moving to the next phase. This will override the automatic bounce duration set in the routing phase, if the conversation is not reserved or rejected within the time stated in the “automatic bounce duration” for the routing phase, then the Unity client will automatically reject the conversation alert on behalf of the Agent.

If reserved, the SMS conversation will stay in the Activity List for the duration of the conversation. The duration time in the brackets is the amount of time passed since the

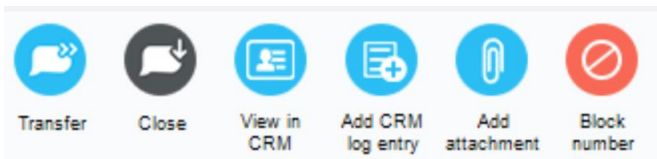
customer last sent a message which has not yet been replied to. This is configured in Settings>Agent>Conversations.

The conversation window will show the message sent from the customer and the automatic reply sent from the Contact Center which is set in the SMS Media Stream Profile page in the Kakapo portal:



On the left-hand side of the conversation window Unity will load the history of all conversations (of all types) from that customer. Agents can read the full transcripts of previous conversations by double clicking the entries.

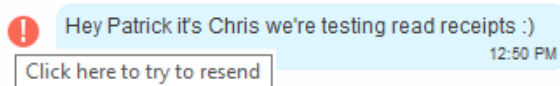
Unity will also perform a CRM lookup on the mobile/cell number allowing Agents to view the contact or lead in the CRM platform and add a CRM log entry.



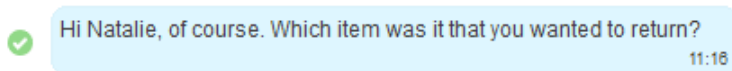
### 5.1.1 Delivered/Undelivered receipts

When the Kakapo cloud sends an outbound message, it provides a call-back URL to which all status updates (sent, delivered, failed etc) should be sent, these status updates are then delivered in real-time to Unity clients over the Kakapo IM&P backbone.

In this way Unity is able to display if an outbound SMS message was undelivered/failed, which would be shown as below. The user can click on the error image to attempt to resend the message.




As soon as a message is successfully delivered to the remote party cell phone, Unity will be updated with the delivery receipt.

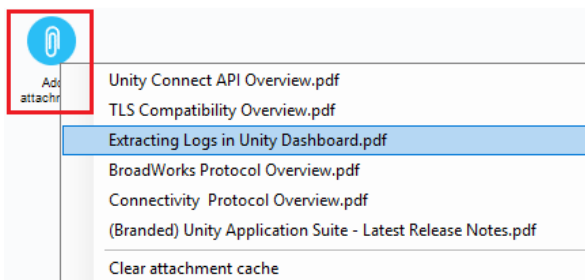


### 5.1.2 Sending attachments

Non-text media can be sent to customers as links, meaning that you can send images and PDFs within your text-only bundle.

To attach a document or image just click the attach icon  and double click on the file.

Right click the icon to access the recent attachments (the cache saves the file path, if the file has moved folders then the add recent attachment button will not work), as shown below.



### 5.1.3 Ending an SMS conversation

Unlike with a Web Chat, only Unity users can end an SMS conversation. However, the SMS profile settings can be configured so that if a reply is sent from the customer within a set period of time then the conversation is reopened.

Use Last Agent If Available

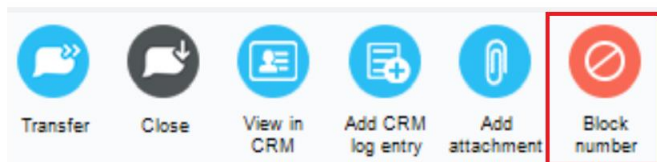
Reopen Conversation On Reply

Reopen Conversation If Reply Received Within

### 5.1.4 Blocking an SMS phone number

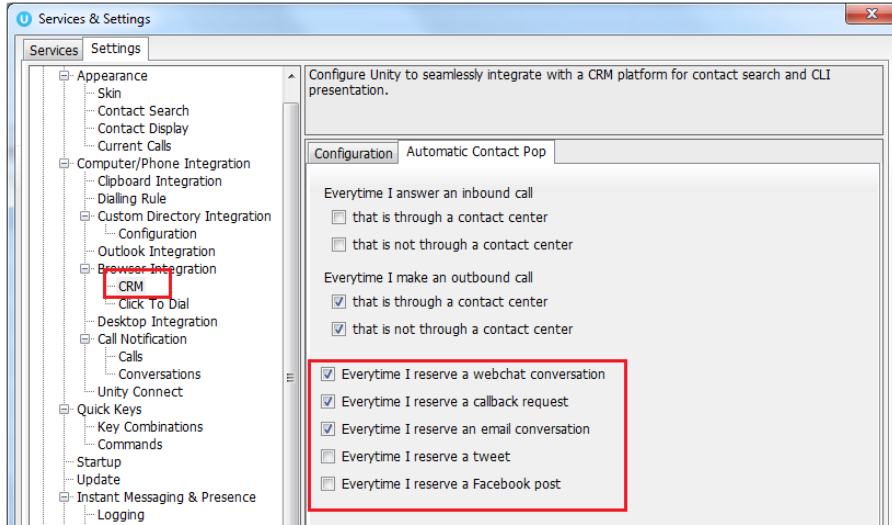
Supervisors and Agents are able to block the SMS phone number if the option to block is allowed by the portal Admin user when creating the queue.

This option will only show once the setting is activated at the queue level.

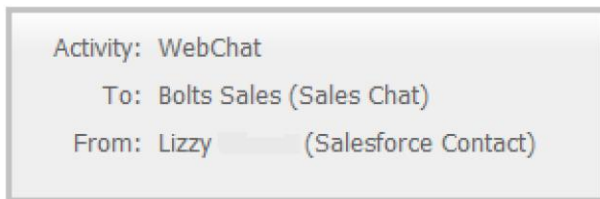


## 6.1 CRM automatic contact pop

Unity can now be configured to automatically pop a CRM contact (assuming a match was made on the CRM platform) when an Agent reserves a Contact Center conversation, as shown below.

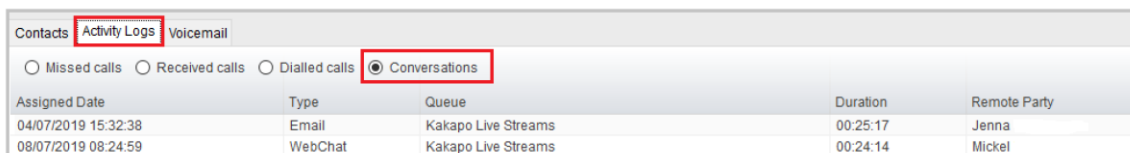


If Unity has performed a contact pop from a CRM platform then the notification will be displayed with the relevant information, as shown below.



## 7.1 Viewing Historical Conversations

To drill-in to historical Web Chats, Twitter and Email conversations simply click on the Activity Log and then click Conversations.



Double click the chosen conversation to show the entire conversation and any relevant rating, as shown below.

Performance Metrics	
First Assigned Time	08/07/2019 11:08:41
First Reply Time	08/07/2019 10:08:46
Closed Time	08/07/2019 11:14:15
Rating	★★★★★
Comment	The member of staff, Jenna was exceedingly helpful and truly exceeded my expectations

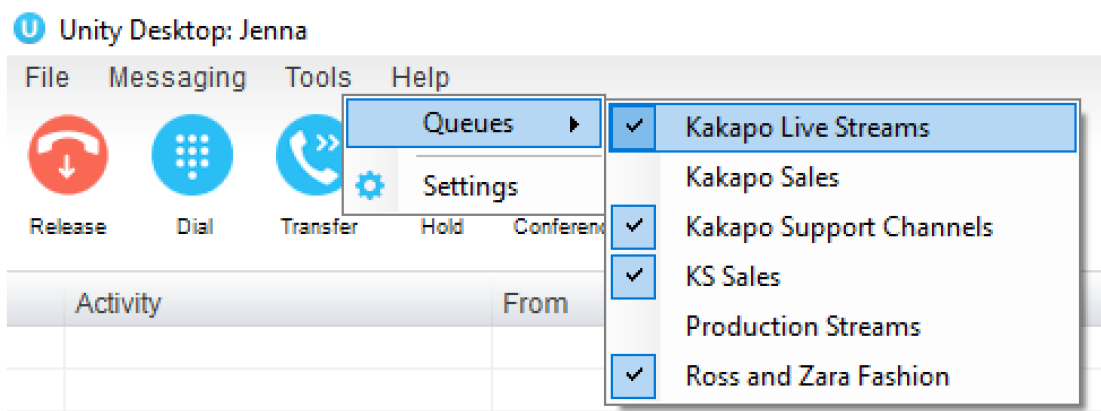
## 8 DESKTOP FUNCTIONALITY

As Unity Desktop does not feature the Personal Wallboard users cannot join and leave Contact Center Queues the same way that users do in Unity Agent and Supervisor.

### 8.1 Joining or Leaving Queues

Users join and leave Contact Center Queues by going to Tools > Queues and selecting or unselecting the relevant Queue.

A Queue with a tick next to it means that the User is joined to that Queue. A Queue without a tick next to it means that the User is not joined to that Queue.



## 8.2 ACD State Information

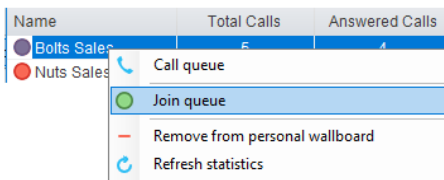
As Unity Desktop does not feature the ACD functionality of Unity Agent and Supervisor any restrictions set in the ACD State management section of the portal will not be applied.

Therefore, a User only has to be joined to a Queue in order to receive incoming conversations.

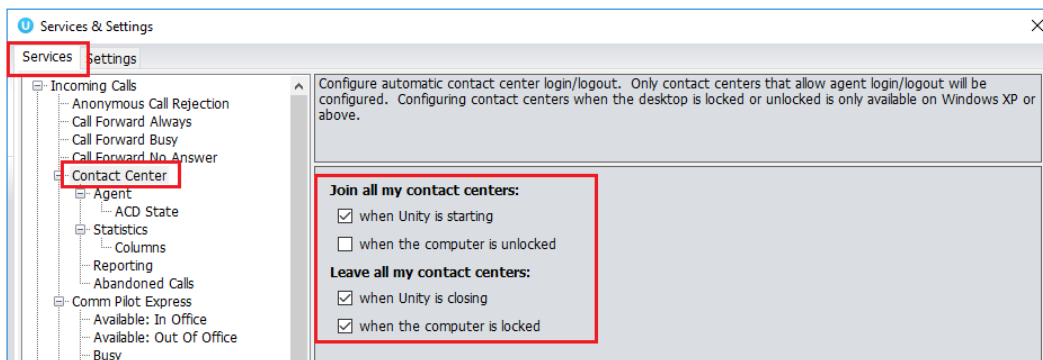
## 9 AGENT FUNCTIONALITY

### 9.1 Joining or Leaving Queues

Agents join and leave Contact Center Queues exactly the same way they would with a Call Center Queue. Simply right click on the Queue and select join or leave. If icon next to the Queue is green then they are joined to the Queue, if it is red then they are not joined to the Queue.

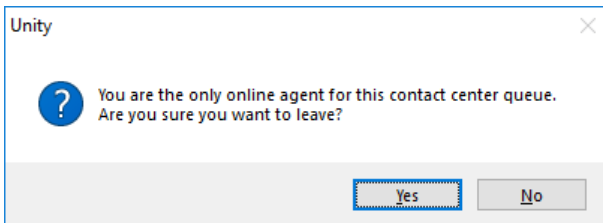
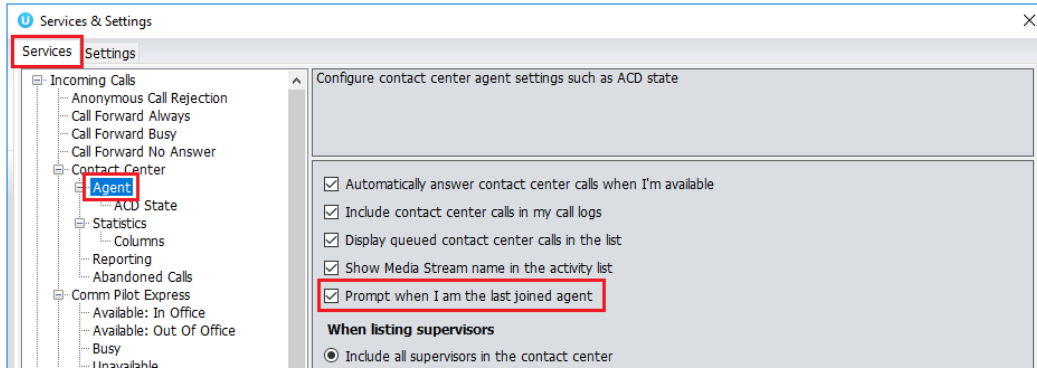


Unity can be configured to automatically join all Contact Center Queues on start-up, as shown below.



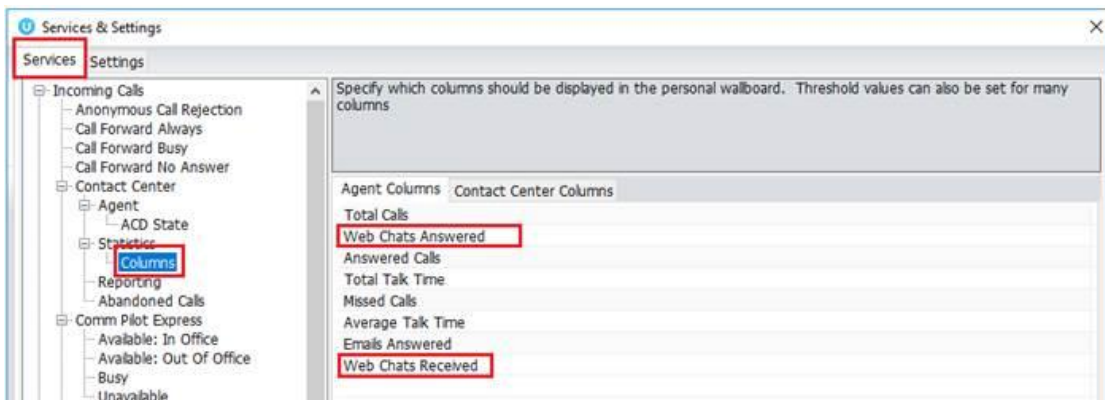
Unity can be configured to prompt the user that they are the last joined Agent when they attempt to leave a Queue, as shown below.





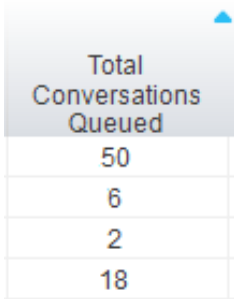
## 9.2 Adding/Removing Contact Center Statistics

To add Media Stream statistics to the Agent and Contact Center columns in the Personal Wallboard go to settings>services>columns and then add the available Contact Center stats using the green add icon at the bottom right.



To remove Media Stream statistics simply click on the desired statistic and click the red minus icon at the bottom. You can reorder the statistics by selecting the statistic and using the arrows to move it up and down the column.

The Total Queued Conversations statistic available in the Contact Center Columns is a key statistic that shows all conversations queued for all Contact Center Queues.



Total Conversations Queued
50
6
2
18