# CONTACT CENTER DASHBOARD - USER GUIDE

## CONTENTS

# 1.    THE PORTAL

This document will give you an overview on how to use the Contact Center Dashboard in the Kakapo Portal.

When you are sent your portal login details go to https://portal.unityclient.com/ to login. You will need to have the permission "contact center admin" enabled in order to view and configure the Contact Center Dashboard.

In the portal the end-user customer admins can configure Unity Contact Center and immediately see key statistics in the Contact Center Dashboard.

Key functionality:

1. Display headline statistics for the overall Contact Center, Queues or Media Streams and to be able to toggle these by Today, Week, Month  Today Week Month
2. Easily identify problems, like a Media Stream not working, multiple conversations queued or Missed conversations
3. Improve navigation by reducing the clicks required to get to Media Streams

The Dashboard is made up of a bar chart, two pie charts and two tables, as shown below. The tables, charts and statistics will change depending on whether you are viewing the overall Contact Center, an individual Queue or an individual Media Stream.

## 2. USER PERMISSION REQUIREMENTS

The Dashboards will be visible to any portal user that is configured at the Group or Enterprise as "Is Contact Center Viewer".

| Details | Automatic Assignment | Branding | Portal User Accounts | License Details | Users | History Log | User Templates | Contact Center | CPaaS Numbers |

**New Portal User Account**

| | |
|---|---|
| Email Address | Adminuser@admin.com |
| Timezone | (UTC+00:00) Dublin, Edinburgh, Li ⌄   Daylight savings from Sunday 27/03/2022 at 01:00 until Sunday 30/10/2022 at 02:00 |
| Password | •••••••••••••••••• |
| Confirm Password | |
| Is Call Center Event Viewer | ON |

Cancel    Add

This permission is required when creating media streams and assigning CPaaS numbers, as well as user licenses because these are billable actions:

Can Assign & Unassign Licenses        ON

Users need the below settings toggled on in order to create, update and delete objects in the Contact Center, e.g. Staff Groups, Queues, Supervisors etc.

| | |
|---|---|
| Can Create Objects | ON |
| Can Update Objects | ON |
| Can Delete Objects | ON |
| Can Reactivate Objects | ON |

## 3.    BAR CHARTS

On the top left of the Dashboard is the bar chart which, depending on which level of the hierarchy you are viewing (overall Contact Center, Queue etc), will display the total number of conversations received by type.

If viewed at the individual Media Stream level the bar chart will display the conversations' outcomes e.g. how many have been missed, answered and unstaffed.
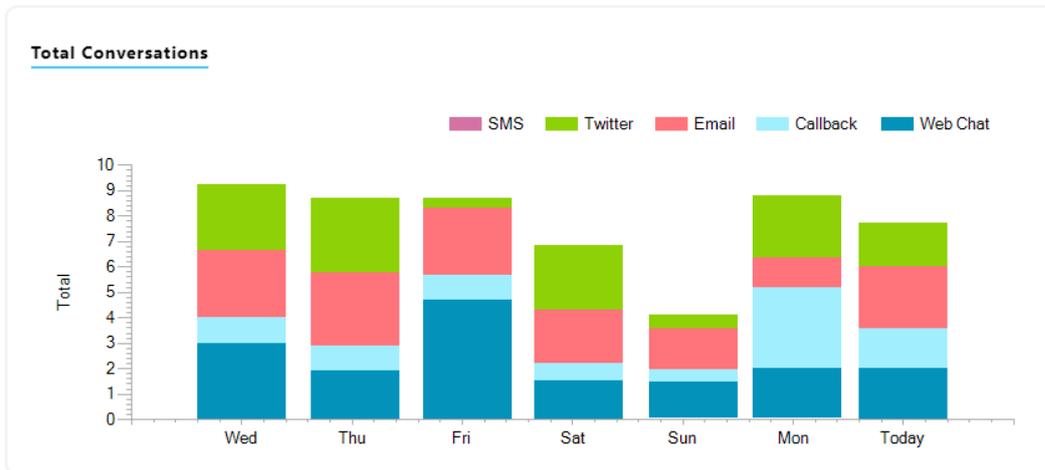


By default, the numbers on the bars will be hidden, but if the user hovers over the bar chart then the numbers for all Media Stream types for all columns are inserted.

## Bar Chart Behaviour with Today, Week, Month Toggle

Today – View the number of conversations received today. Configure the start and end time and preferred intervals by clicking the cog and inputting the desired times.

If not specified, the default time will be 9am until 6pm and the default interval will be 30 mins.
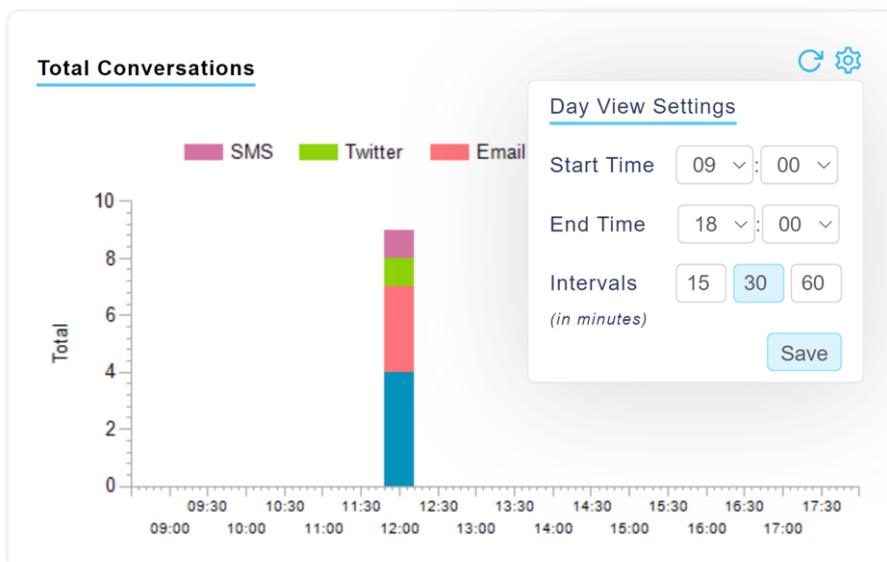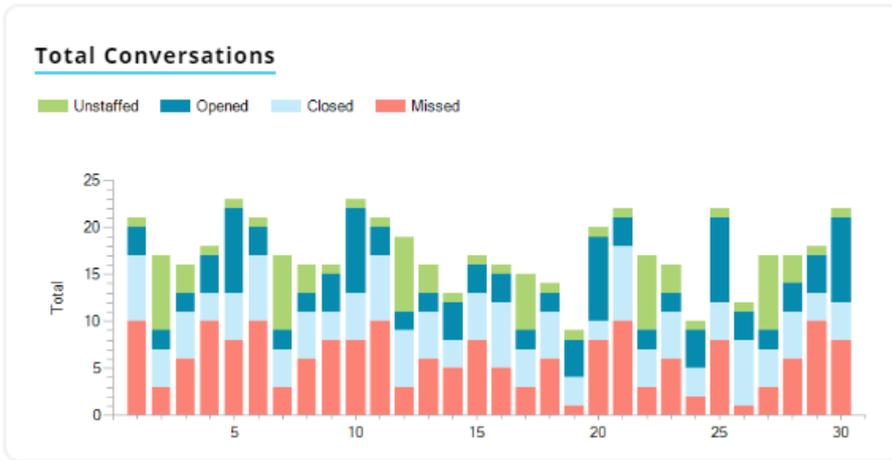
Week – For the week view the bar chart will display 7 bars, with the current day at the far right and the 6 proceeding bars for the days before.
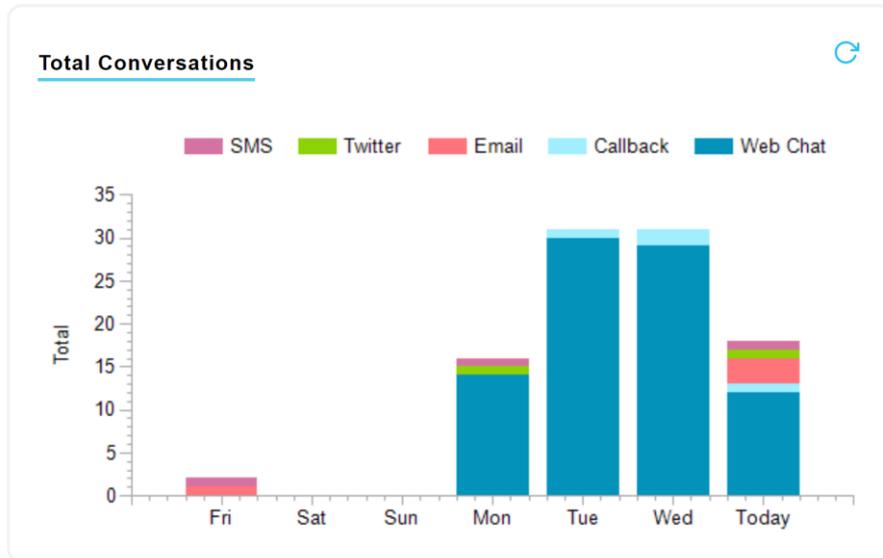


Month – The month view will only show a bar for each day of the current month. So, on the 15th there will be 15 bars, as shown below.
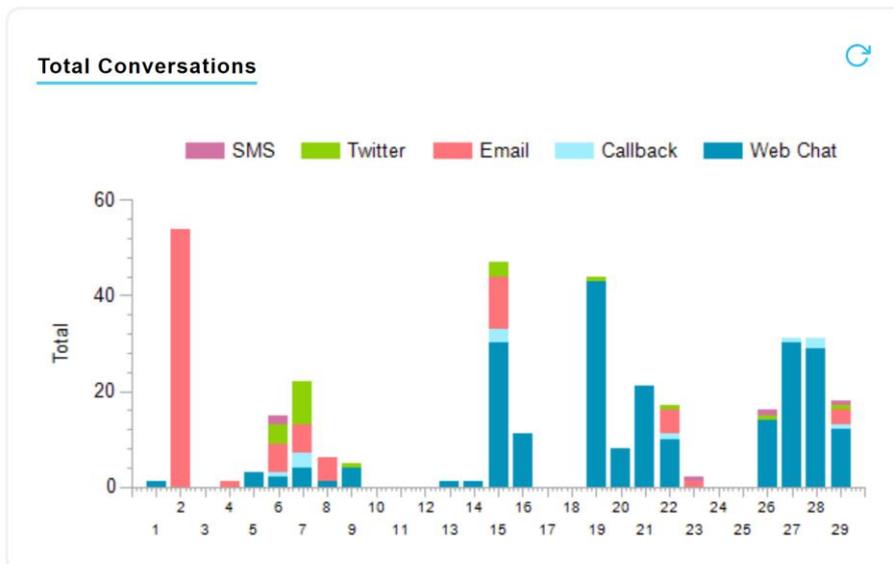


Viewing the bar chart on the 30th day of the month:

## 4. PIE CHARTS

At the bottom right of the Dashboard there are two pie charts, depending on which level of the hierarchy you are viewing, they will display different statistics.

If viewing the overall Contact Center, Queues or Media Streams the number of conversations by type will be displayed, along with either the number of Agents joined or the outcome of the conversations. E.g. Missed, answered or unstaffed.
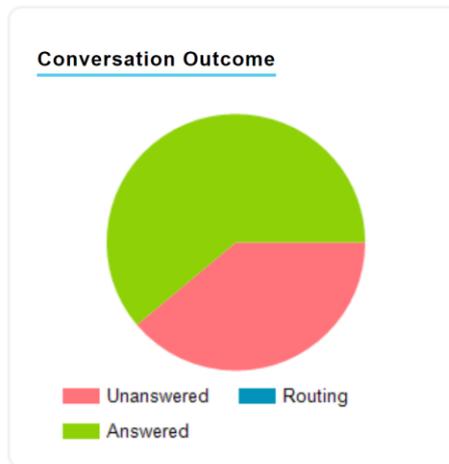


When viewing the Dashboard for an individual Media Stream the pie charts will display the number of conversations currently in progress vs the number of queued conversations and the number of Agents online and joined.
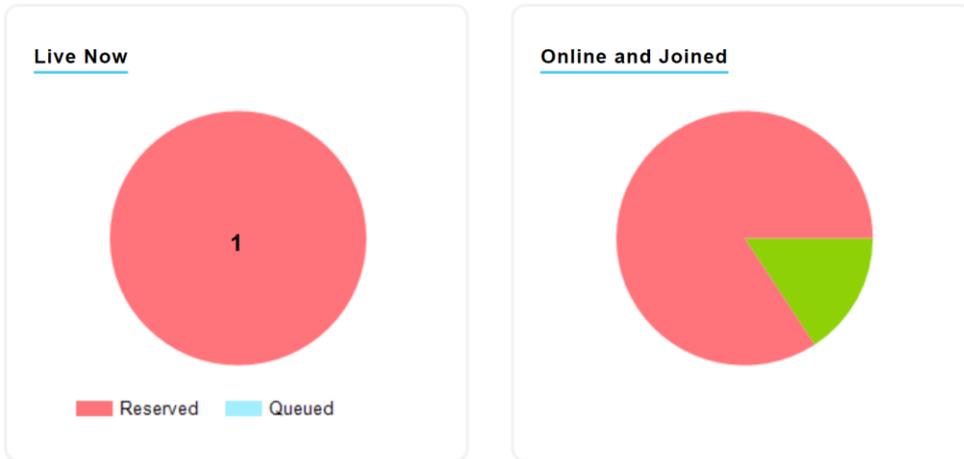
When there are no live conversations, the Live Now pie chart will be greyed out. This will also be the case for the Conversations pie chart is nothing has been received yet.
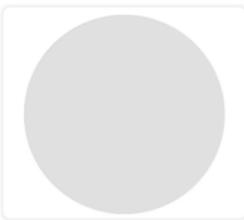


## Pie Chart Behaviour with Today, Week, Month Toggle

The only pie chart that can be toggled to Day, Week and Month is the Conversation Outcome chart as the other pie charts feature live statistics. E.g. Agents Joined and Unjoined.
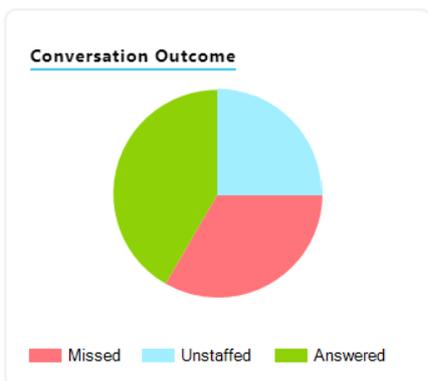


## 5.    TABLES

Please note the "Missed" statistic will show Web Chats that have abandoned and Tweets, Emails and SMS that have exhausted the routing phase(s) for those Media Streams. This distinction is because Web Chat is a real-time communication channel, much like a phone call. If the Web Chat is not

answered within the routing phase, then the visitor sees a prompt apologising and the web chat is closed.

If Emails, Tweets and SMS are not answered within the routing phase they will drop into the "Always On Queue". When this happens, those conversations will be delivered to all users assigned to the Media Stream. In this way it is possible for an Email to be counted as "Missed", in that it has missed the original routing, but in fact was answered subsequently within the Always On queue.

## Overall Contact Center Level

This table will display all the Media Streams in all Queues with the Average Answer, Routing, Answered and Unanswered. The statistics can also be toggled for the Day, Week and Month.

| kakaposystems Contact Center | | | | Today \| Week \| Month |
|---|---|---|---|---|
| **Media Streams** | **Average Answer** | **Routing** | **Answered** | **Unanswered** |
| Web Chat | 00:00:00 | 0 | 0 | 0 |
| Callback | 00:00:00 | 0 | 0 | 0 |
| Email | 00:00:00 | 0 | 0 | 0 |
| Twitter | 00:00:00 | 0 | 0 | 0 |
| SMS | 00:00:00 | 0 | 0 | 0 |

| Media Stream | Average Answer | Routing | Answered | Unanswered |
|---|---|---|---|---|
| **Web Chat** | • Total wait time of all answered conversations divided by Answered conversations | Conversations that are in the initial Routing Phase(s) and therefore In Queue | • Conversations that have been Answered<br>• Transferred conversations count at the Queue level once but both or all Agents that receive a transferred conversation will also increment their Answered count<br>• Excludes conversations that were closed by the Supervisor | Conversations that have abandoned |
| **Call-back** | • Excludes secondary wait time when conversations are transferred | Will always be zero as there are no Routing Phases for Call-back | | • Conversations that have breached the initial Routing Phase(s) and dropped into the Always On Queue.<br>• Will decrease as conversations are reserved and the Answered count will increment accordingly |
| **Email** | • Excludes conversations closed from the queue by the Supervisor | Conversations that are in the initial Routing Phase(s) and therefore In Queue | | |
| **Twitter** | | | | |
| **SMS** | | | | |

The bottom table displays the top performing Media Streams and Agents across all Queues in the entire Contact Center.

All statistics will change when the Day, Week and Month toggle is changed apart from Agents Joined as it is a live statistic which will only shows what's happening right now.

| Top Performing Media Streams | Top Performing Agents |
|---|---|

| Media Streams | Answered | Unanswered | Agents Joined |
|---|---|---|---|
| 💬 Chat2me | 2 | 7 | 0/17 |
| 💬 Webchat Test | 2 | 9 | 2/2 |
| 📞 Callback Test | 1 | 0 | 2/4 |
| 💬 AASAD | 0 | 0 | 0/0 |
| ✉ Bike Sales | 0 | 0 | 0/1 |
| 🐦 Bike Sales | 0 | 0 | 0/1 |
| 💬 Bolts Sales | 0 | 0 | 1/3 |
| 📞 Call Back | 0 | 0 | 1/1 |
| 📞 Call Back Testing | 0 | 0 | 1/3 |
| 📞 Callback | 0 | 0 | 0/26 |
| 📞 CallBack | 0 | 0 | 1/6 |
| 📞 Callback 2 Android | 0 | 0 | 0/3 |
| 📞 CallBack 2 Dashboard | 0 | 0 | 0/14 |

Click the Media Stream name to open the profile for that Media Stream.

## Queue Level

This table will display all the Media Streams within this Queue with the Average Answer and Longest Wait statistics which can be toggled for the Day, Week and Month.

### Unity Connect Email

Today | Week | Month

| Joined/Total | Average Answer | Routing | Answered | Unanswered |
|---|---|---|---|---|
| 0/2 | 00:00:00 | 0 | 0 | 1 |

### Top Performing Agents

| Agent | Conversations Answered |
|---|---|
| ● Gopikrishnan V | 0 |
| ● Chris Tutt | 0 |
|  |  |

The bottom table will display the top performing Media Streams and Agents in this Queue. The top performing Agents will also show the Join state of the Agents, an Agent with a red dot is not joined to the Queue and the green dot means they are joined to the Queue.

| | Top Performing Media Streams | Top Performing Agents | |
|---|---|---|---|

| Agent | Conversations Answered | Joined State |
|---|---|---|
| Athul PS | 3 | 2/6 |
| Abin Joseph | 2 | 2/4 |
| Alina Buzdygan | 0 | 2/3 |
| Anandu Prasad | 0 | 1/4 |
| Arjun Harikumar | 0 | 2/6 |
| Benedict Hutton | 0 | 2/4 |
| Charles Berry | 0 | 1/4 |
| Chris Tutt | 0 | 4/8 |
| Emma Hills | 0 | 0/5 |
| Gopika G | 0 | 0/1 |
| Gopikrishnan V | 0 | 5/5 |
| Jenna Wimshurst | 0 | 0/5 |
| Jenson Franklin | 0 | 2/3 |

Click the Media Stream name to open the profile for that Media Stream.

Top Performing Media Streams | Top Performing Agents

| Media Streams | Answered | Unanswered | Agents Joined |
|---|---|---|---|
| 💬 Chat2me | 2 | 7 | 0/17 |
| 💬 Webchat Test | 2 | 9 | 2/2 |
| 📞 Callback Test | 1 | 0 | 2/4 |
| 💬 AASAD | 0 | 0 | 0/0 |
| ✉ Bike Sales | 0 | 0 | 0/1 |
| 🐦 Bike Sales | 0 | 0 | 0/1 |
| 💬 Bolts Sales | 0 | 0 | 1/3 |
| 📞 Call Back | 0 | 0 | 1/1 |
| 📞 Call Back Testing | 0 | 0 | 1/3 |
| 📞 Callback | 0 | 0 | 0/26 |
| 📞 CallBack | 0 | 0 | 1/6 |
| 📞 Callback 2 Android | 0 | 0 | 0/3 |
| 📞 CallBack 2 Dashboard | 0 | 0 | 0/14 |

## Media Stream Level

This table will display the key statistics for this Media Stream. All statistics will change when the Day, Week and Month toggle is changed, but Agents Joined/Total is a live statistic which will only show what's happening right now.

**Chat2me**  Today | Week | Month

| Joined/Total | Average Answer | Queued | Answered | Unanswered |
|---|---|---|---|---|
| 0/17 | 00:00:54 | 0 | 2 | 7 |

The bottom table displays the top performing Agents for that Media Stream along with the Average Rating statistic if the Media Stream is a Web Chat.

**Top Performing Agents**

| Agent | Conversations Answered | Average Rating |
|---|---|---|
| ● Lee Fallon | 6 | ★★★★⯪ |
| ● Steve Tutt | 4 | ★★★⯪ |
| ● Aaron Parsons | 3 | ★★★★⯪ |
| ● Lucy Dickens | 2 | ★★★★ |
| ● Chris Tutt | 1 | |
| ● Bifin Jose | 0 | |
| ● Athul PS | 0 | |
| ● Arjun Harikumar | 0 | |
| ● Jenna Wimshurst | 0 | |
| ● Steve Wardle | 0 | |
| ● Amanda Dawson | 0 | |
| ● Benedict Hutton | 0 | |
| ● Charles Berry | 0 | |
| ● Emma Hills | 0 | |
| ● Sajith K | 0 | |
| ● Sebin Joseph | 0 | |
| ● Sreyon Jose | 0 | |

## Table Behaviour with Today, Week, Month Toggle

Most statistics and data in the tables will change when the user toggles between Today, Week and Month, however Agents Joined will remain the same as this is a live statistic.

## 6. QUEUES

Click the Queue icon to view all the Queues in the Contact Center:

Queues
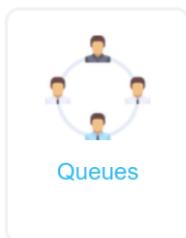
| Name | Timezone | Agents joined |
|---|---|---|
| Holidays | GMT Standard Time | 1/1 |
| Kakapo Live Streams | GMT Standard Time | 4/6 |
| Kakapo Sales | GMT Standard Time | 2/3 |
| Kakapo Support Channels | GMT Standard Time | 3/8 |
| KakapoIndiaContact | India Standard Time | 7/9 |
| KS Sales | Greenwich Standard Time | 1/2 |
| Production Streams | GMT Standard Time | 9/18 |
| Ross and Zara Fashion | GMT Standard Time | 1/3 |

If the Queue text is red then there is a problem and the Queue is not online.

Simply click the Queue to open the Dashboard and settings for that Queue.

# 7.    MEDIA STREAMS

Click the Media Streams icon to view all the Media Streams in the current Queue:
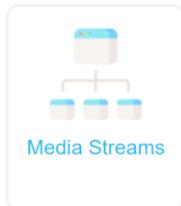
Media Streams

**Kakapo Live Streams Media Streams**

A contact center queue consists of one or more media streams, each representing a link to the cloud (for example through email, webchat, or Twitter)

| Type | Name | Visibility | In-Office Profile | Connected |
|---|---|---|---|---|
| Web Chat | Bolts Sales | Never show | Always online | 🟢 |
| Callback | CallBack | Always show | Always online | 🟢 |
| Web Chat | Kakapo Chat Unjoined | Never show | Always online | 🟢 |
| Email | Kakapo Gmail Test Account | - | Always online | 🟢 |
| Web Chat | Kakapo Systems Web Chat | Only show when an agent is joined | Always online | 🟢 |
| Web Chat | Kakapo Web Chat Outside Office Hours | Never show | Extended Hours | 🔴 |
| Web Chat | Lebara Sales | Never show | Always Offline | 🔴 |
| Twitter | Twitter Support | - | Always online | 🟢 |

Cancel    Presence-Based Scripting    Add Media Stream

Displayed next to the Media Stream type and name is the visibility of the Media Stream, the In-office Profile and answered and missed statistics.

Connected – This displays whether the Media Stream is active. Active means connected to the Contact Center server, authenticated OK and able to take new conversations.

E.g. A Web Chat that was set to only display after hours will be red during the day. Or if there are no Agents Joined and the Visibility is set to only show when Agents are joined, then it will be red.