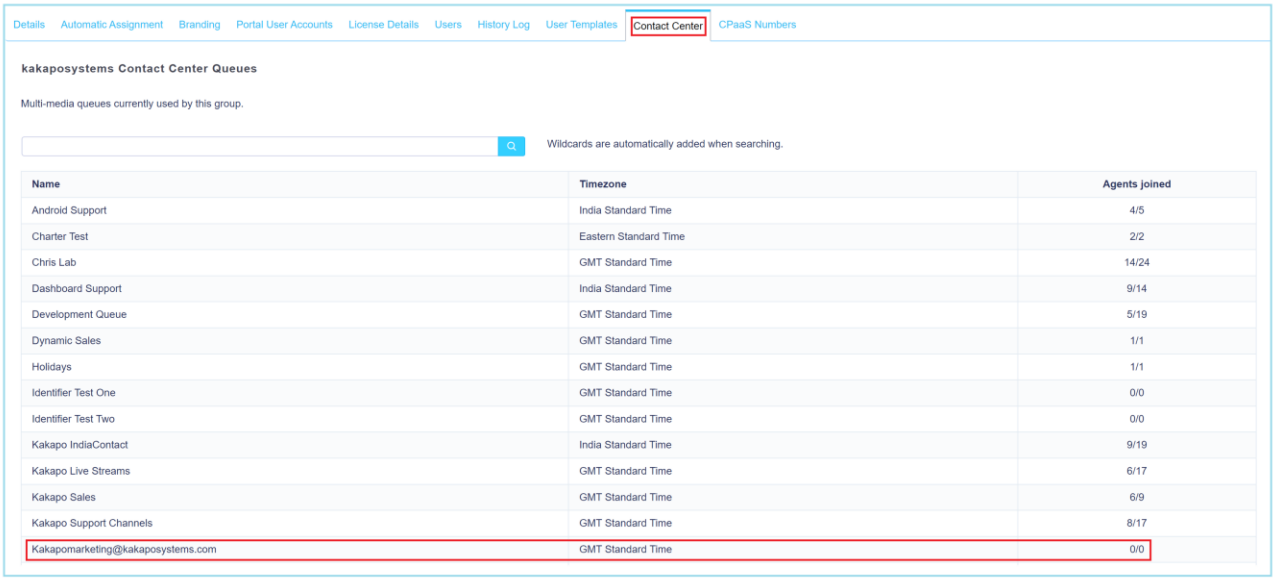
UNITY CONTACT CENTER – EMAIL SETUP

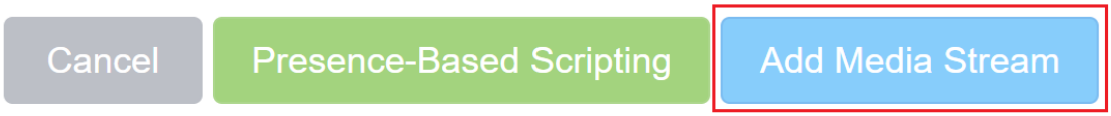
1 Choose a Queue

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



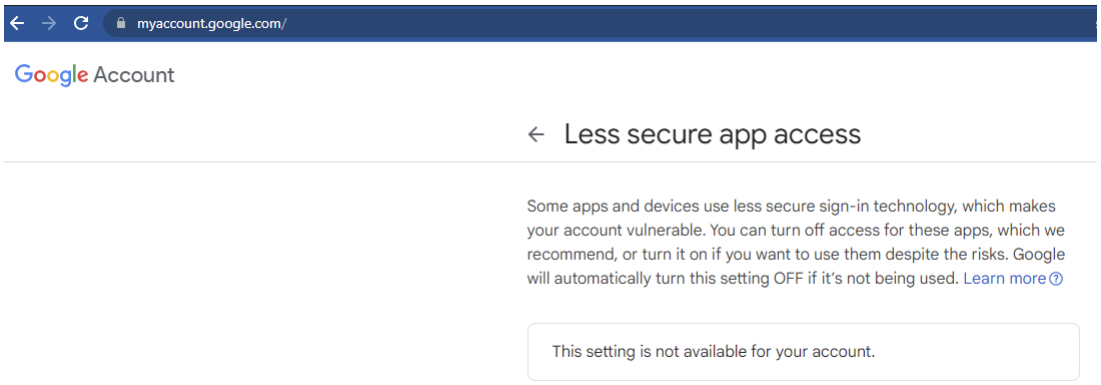
2 Adding an Email Media Stream

From within the Queue click “Add Media Stream”



3 Setting up a Gmail Mailbox

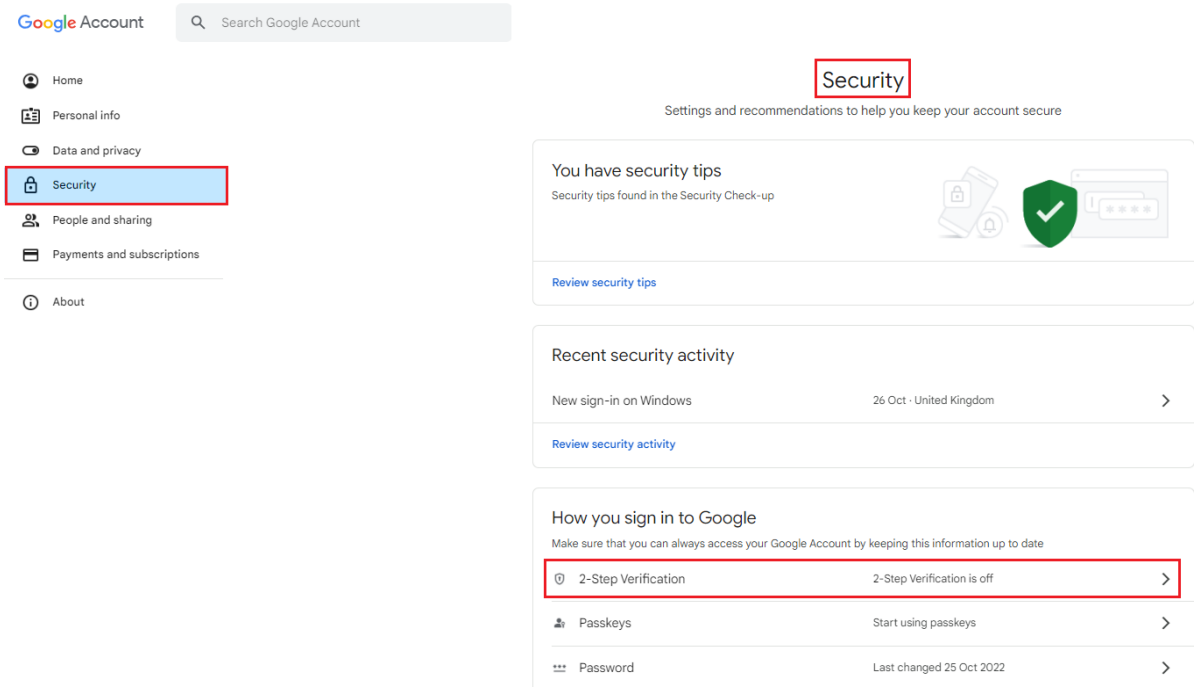
To help keep your account secure, from May 30, 2022, Google no longer supports the use of third-party apps or devices which ask you to sign into your Google Account using only your username and password.



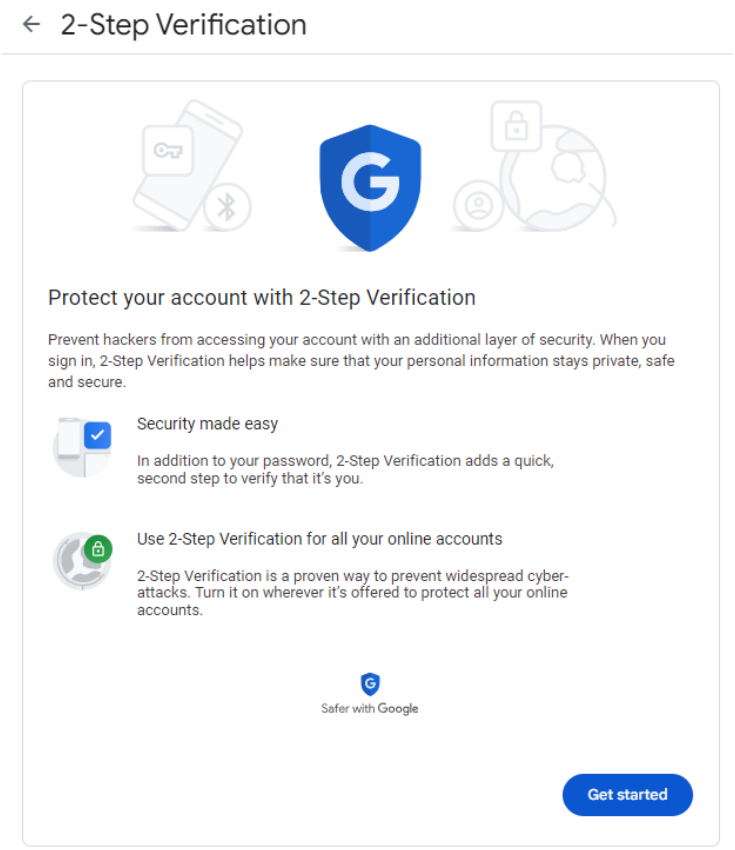
As there is no option to use the "Less secure app access" the process will be to enable two-step verification and create an App Password that will be used to authentic the new Gmail Media Stream.

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.

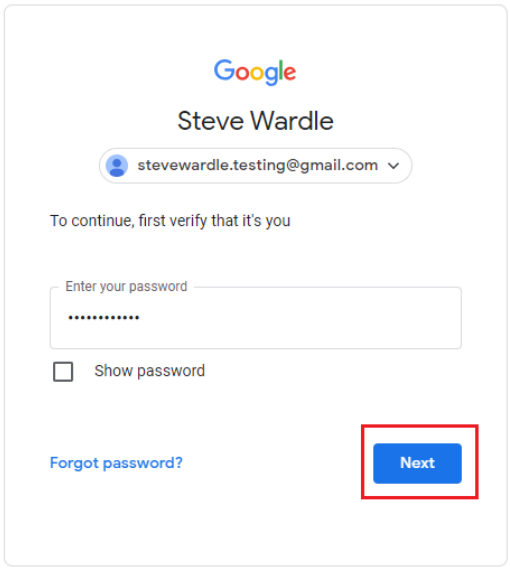
Go to the Gmail account settings and click on the "2 – Step Verification", as below.



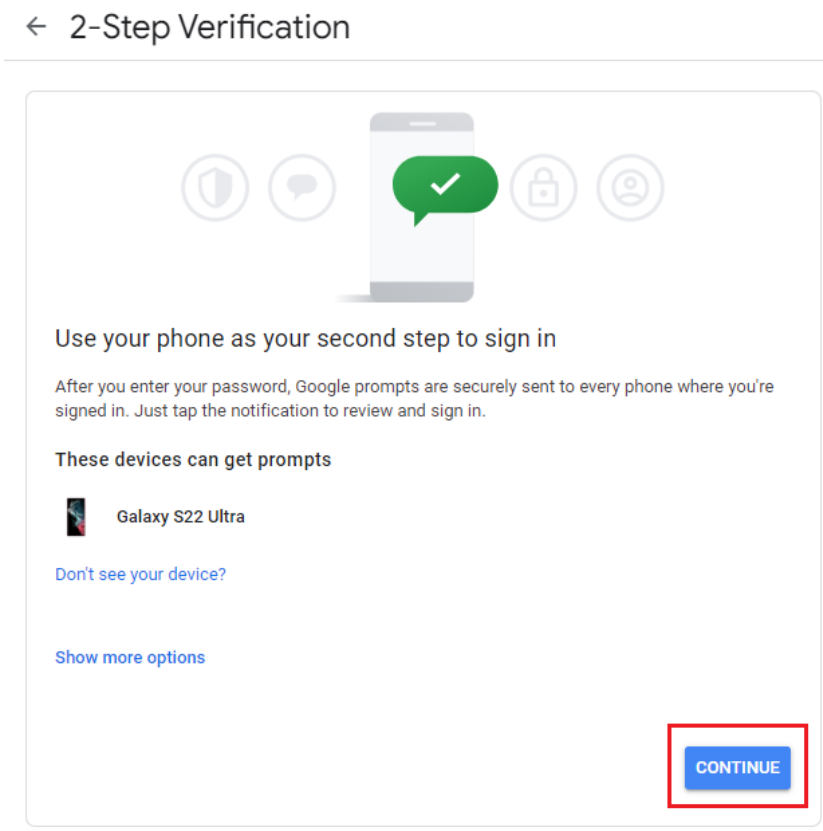
You will see the below screen where you can start the "2 - Step Verification" process. Click on "Get Started"



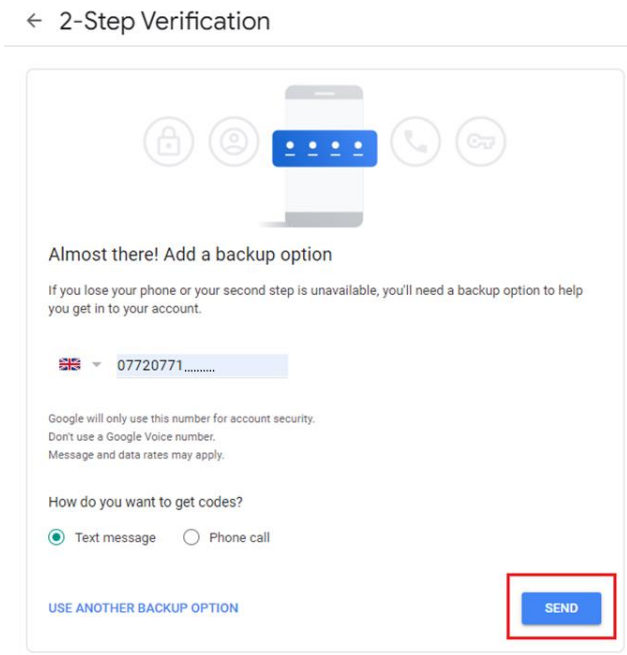
Type in the password for the Gmail account and click next.



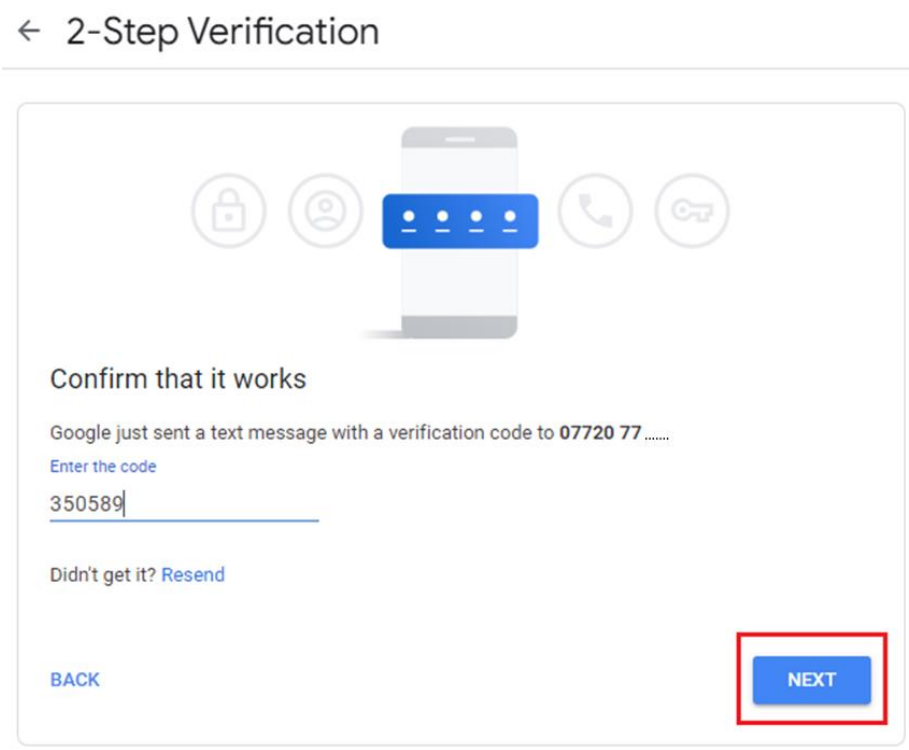
In this example, I we are using a mobile device to authenticate, as below.



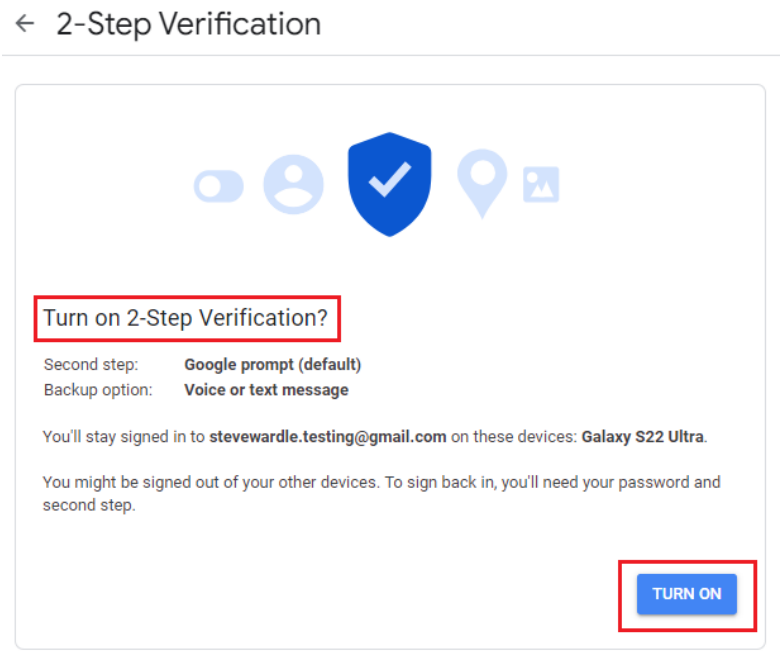
Type in your mobile number to complete the process, as below.



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

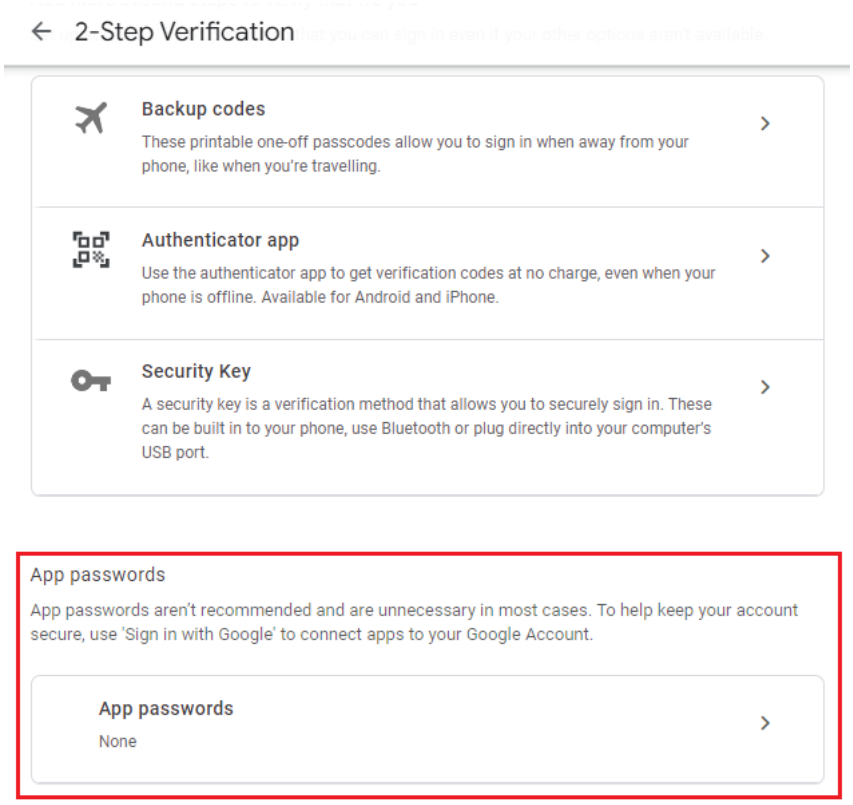


Turn on the 2 - Step Verification, as below.

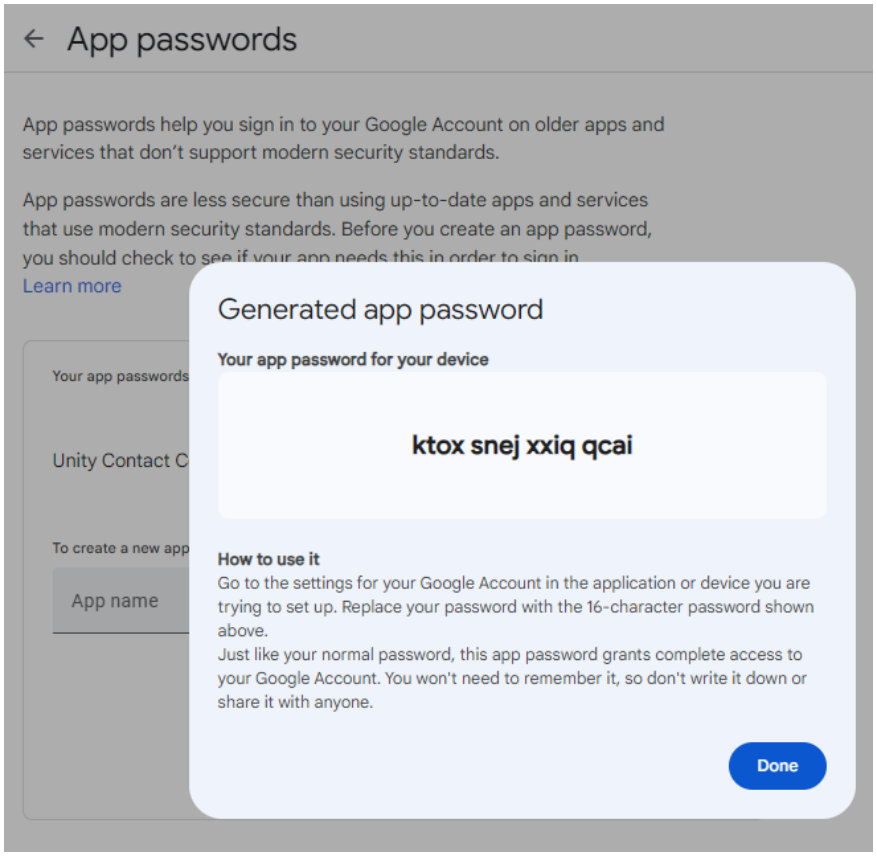


Now you will need to set up the App Password, this is the password that you will use to authenticate the new Gmail Media Stream you are creating on the Contact Center Portal.

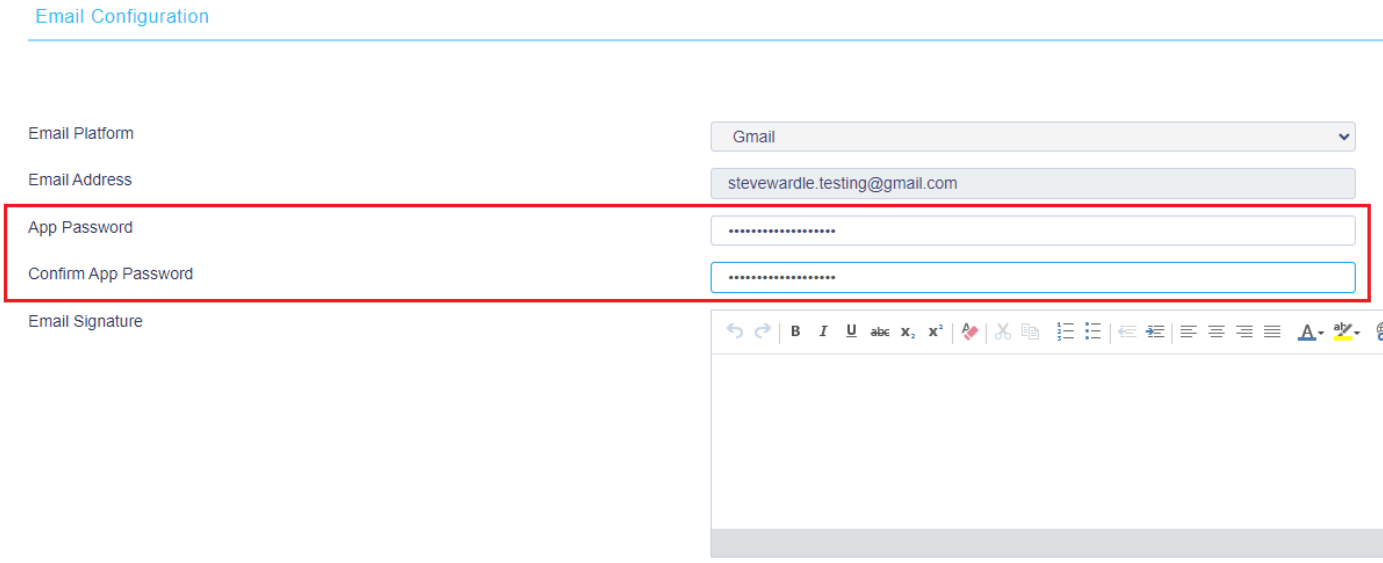
Click on “App Password” and create a new one, I have called it “Unity Contact Center”.



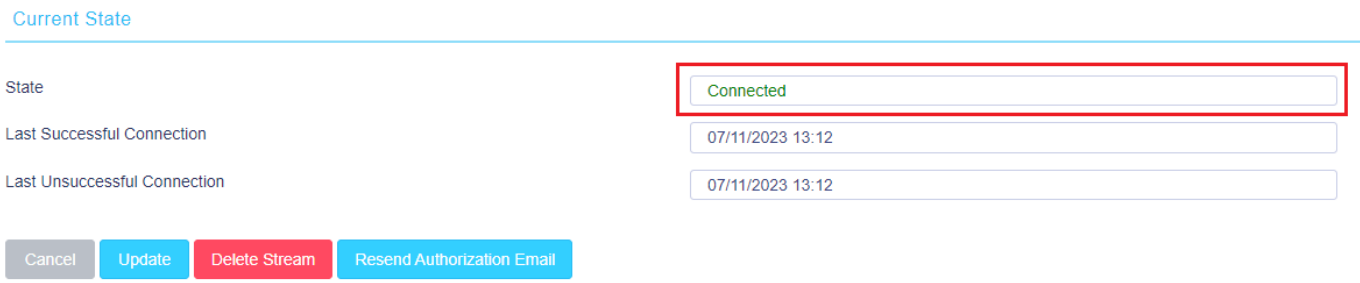
Once you have created the new App Password "Unity Contact Center" it will present you with a unique password as below.



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

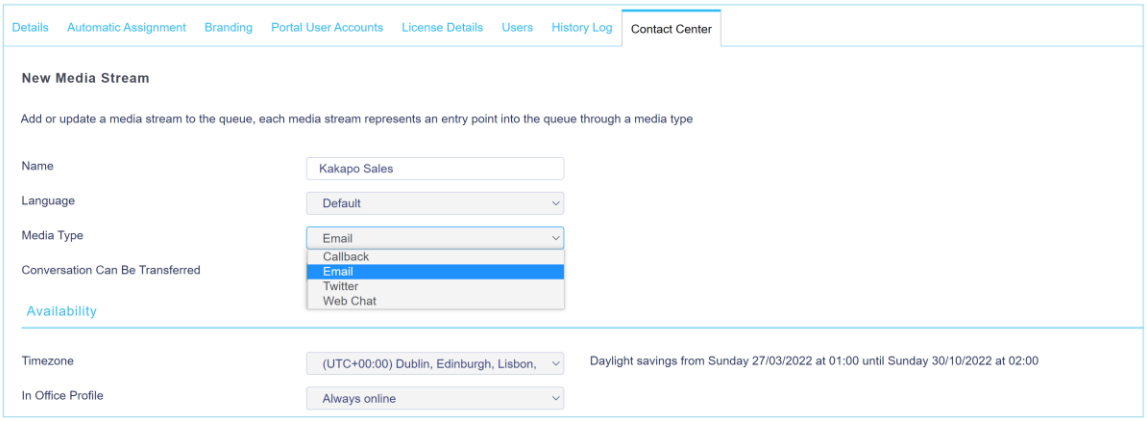


You should then see that the Gmail Media Stream is connected as below in the Profile.



4 Adding an Email Media Stream

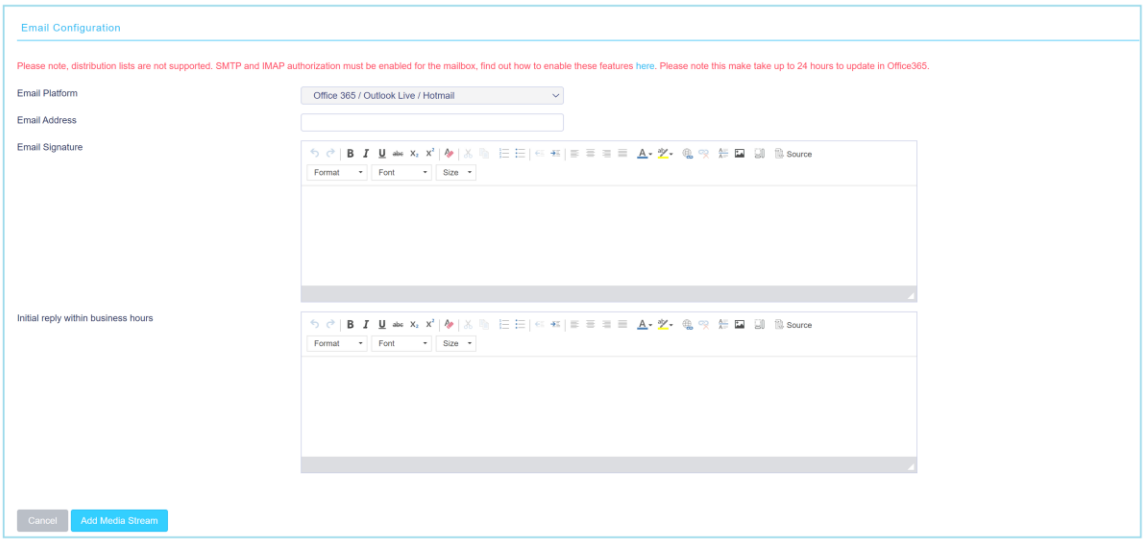
To set up an Email click Media Streams in the Queue section and then click Add Media Stream. Select IMAP Mailbox from the drop-down menu, then enter the relevant Email configuration and any automatic responses.



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.

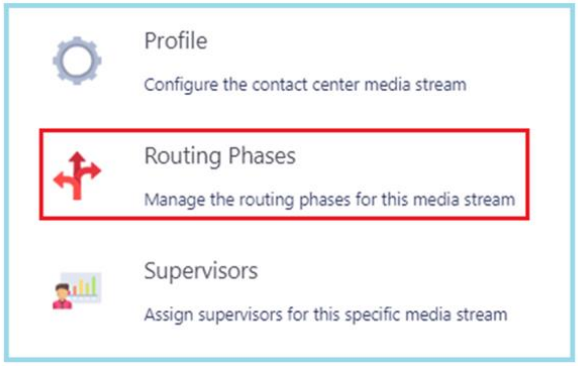
You can set these of course, in which case they will be saved, but the portal will not stop you from creating the Media Stream if these details are missing, instead it will send an email to the email addresses in the Admin section alerting them that the Media Stream needs to be authorized.

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

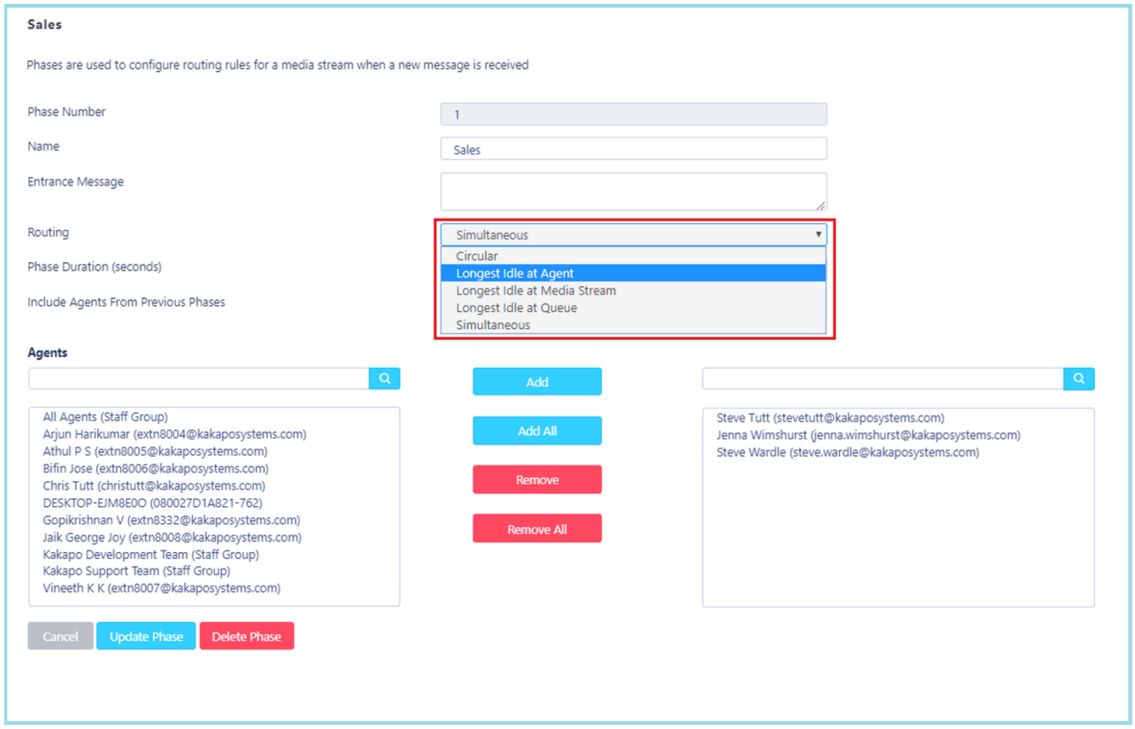


5 Adding a Routing Phase

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.



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.