UNITY

Media Streams 101

Quick Reference Guide

MOMENTUM

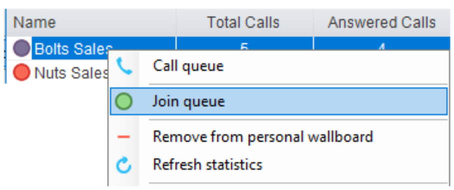
UC24Q1

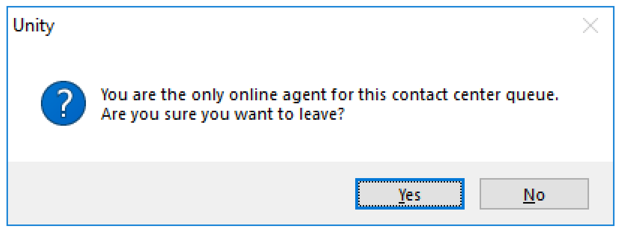
UNITY AGENT MEDIA STREAMS 101

Unity Agents assigned to media streams like Web Chat or SMS can perform tasks for conversations happening in their queue(s) and manage some helpful Unity Agent client settings to manage what they view when working in the application.

Joining or Leaving Queues

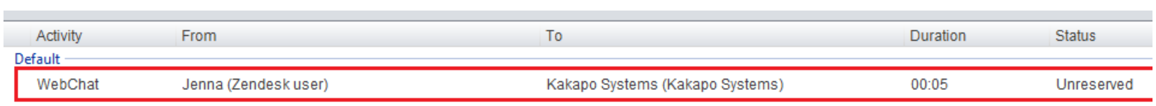
Agents join and leave Contact Center media stream queues exactly the same way they would with a Call Center (call) Queue. Simply right-click on the Queue and select join or leave. If the icon next to the Queue is green then they are joined to the Queue; if it is red then they are not joined to the Queue.





Conversations

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.



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. 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.

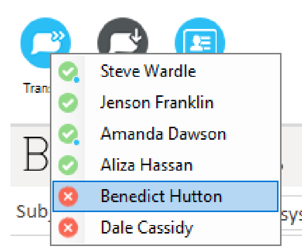
If purchased/implemented, Unity can also integrate with a CRM platform to show the contact details based on the Email address or number if configured in Settings.

Transferring and Closing Conversations

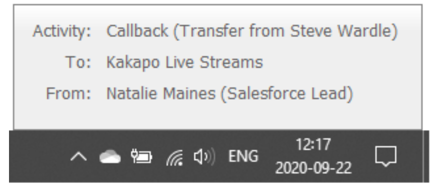
Agents can transfer all conversations (except Web Chats) to any other Agent regardless of their online status and the conversation will automatically be reserved by the new Agent to begin working.

Click the Transfer icon within the conversion window to view the other Agent's joined status, as shown here.

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

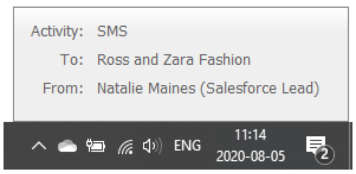


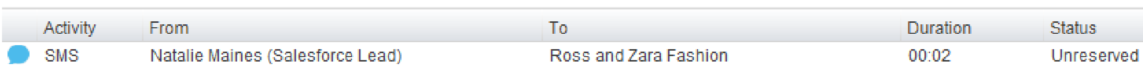
When a conversation has been transferred, the new recipient will receive a toast notification detailing the conversation type, who it was transferred from, which Queue it is from and the customer's details.



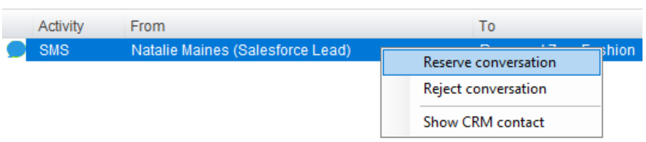
SMS Queue

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





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.

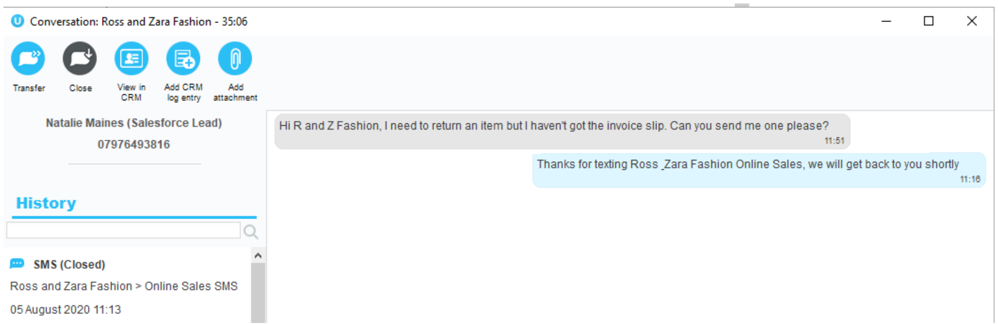
The status of the conversation will change the "Reserved" and the duration will change to the time since the conversation was reserved. Unity will also change the ACD state of the Agent if set in the Agent Availability page in the portal.

Reject

Rejecting a conversation cancels the alert, so that the conversation is removed from your Activity List. The Contact Center will act accordingly, by alerting another Agent if using circular of longest idle routing or 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.

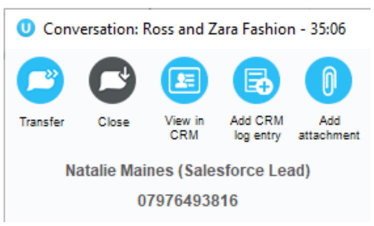
If reserved, the SMS conversation will stay in the Activity List for the duration of the conversation. The duration time in the brackets is the amount of time passed since the customer last sent a message which has not yet been replied to. This is configured in Settings>Agent>Conversations.

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 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.

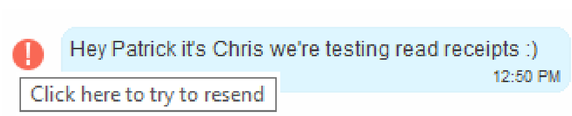
Unity will also perform a CRM lookup on the mobile/cell number allowing Agents to view the contact or lead in the CRM platform and add a CRM log entry.



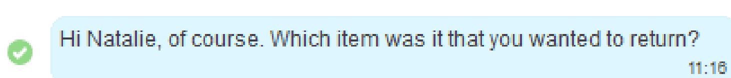
Delivered/Undelivered Receipts

When the system 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 system's 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 mobile phone, Unity will be updated with the delivery receipt.

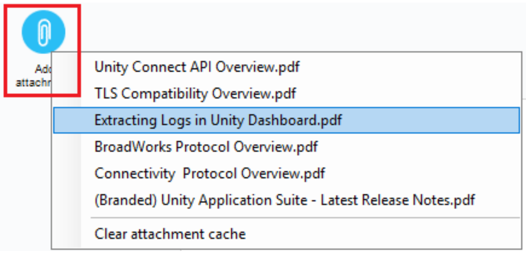


Sending Attachments

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.

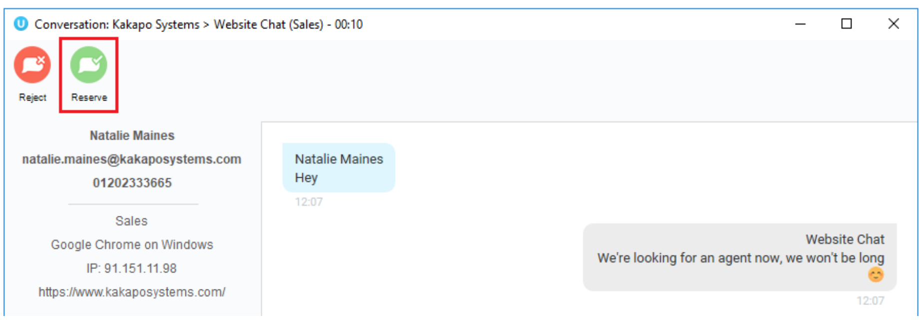


End an SMS Conversation

Unlike with a Web Chat, only Unity users can end an SMS conversation. Please note, the users' profile settings can be configured by the Service Provider or Admin so that if a reply is sent from the customer within a set period of time, then the conversation is reopened.

Web Chat Queue

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

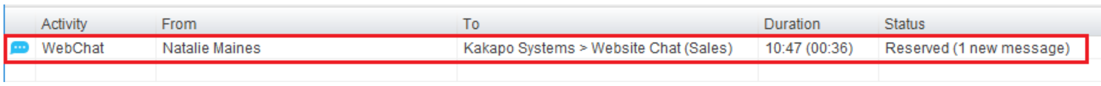
To reserve a Web Chat conversation is to answer it. As soon as an Agent reserves the Web Chat then the routing phases will stop, and the conversation will stay with that Agent. Any other Agents that have been alerted will be told that the conversation was reserved, so it will be removed from their Activity 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 is removed from your Activity List. The Contact Center will act accordingly by alerting another Agent if using Circular or longest idle routing or moving to the next call flow phase. This will override the automatic bounce duration set in the routing phase, if the conversation is not reserved or is rejected within the time defined for the “automatic bounce duration” of the routing phase, then the Unity client will automatically reject the conversation alert on behalf of the Agent.

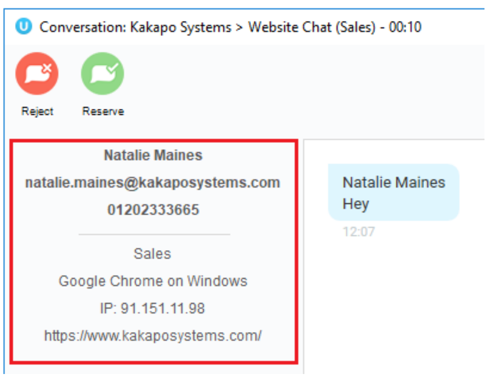
If reserved, the Web Chat will stay in the Activity List for the duration of the conversation. The duration time in the brackets is the amount of time passed since the customer last sent a message which has not yet been replied to. This is configured in Settings>Agent>Conversations.

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



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.

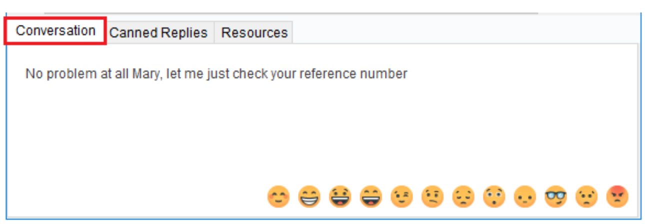


Simply click on the Email address to send an Email to the customer using the default Email program or click on the number to immediately dial through Unity.

Conversation Tab

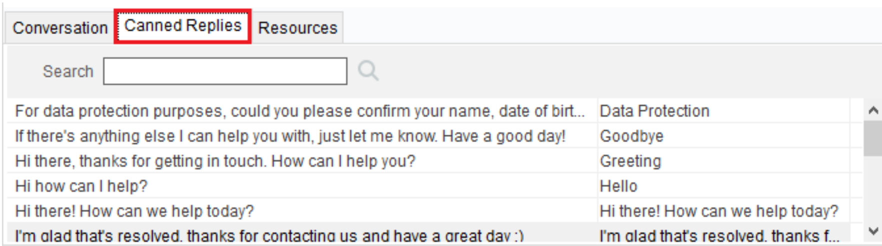
This is where the user enters text to send to the customer. Simply type the message in the box and press Enter to send.

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



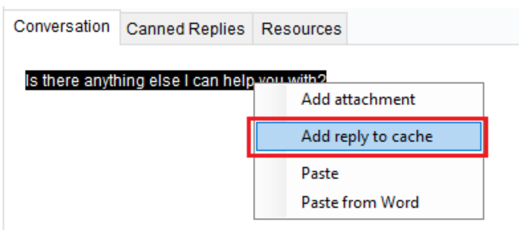
Canned Replies Tab

This is where all canned replies entered at various levels in the admin portal are stored, the user simply double-clicks on a reply listed in this tab 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.



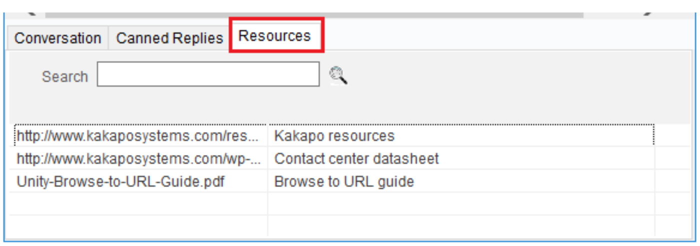
Add Reply to Cache

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.



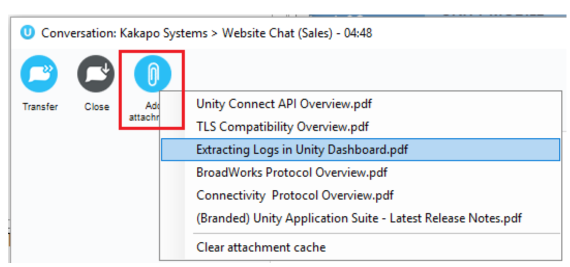
Resources Tab

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

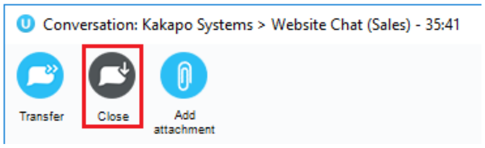
Right-click to access the recent attachments (the cache saves the file path, if the file has moved folders, then the add recent attachment button will not work)



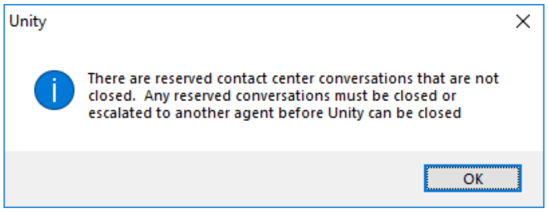
End Web Chat

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

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

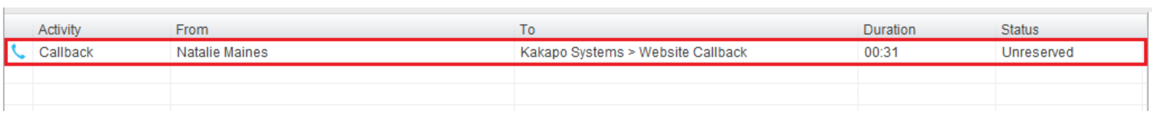


Unity will not allow an Agent to close Unity while there are one or more reserved and open Contact Center conversations in place, all conversations must be transferred or closed before closing Unity.



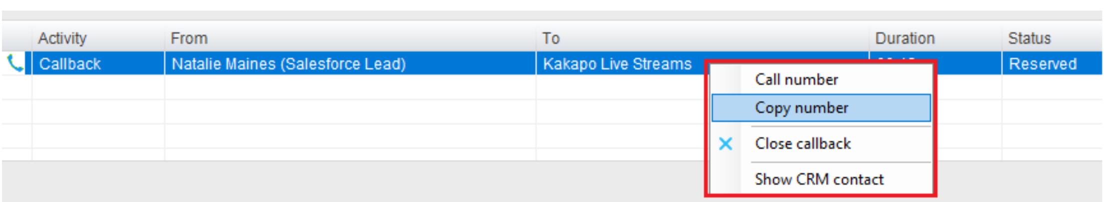
Callback Queue

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



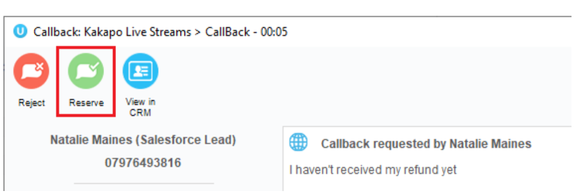
The Callback request will stay in the Activity List of all users in the routing phase until the Callback has been reserved. If the Agent leaves the Queue, then any unreserved Callbacks for Media Streams within that Queue will be removed and will be refreshed/displayed when the Agent next joins the Queue.

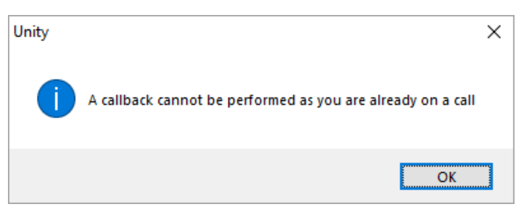
Once an Agent has reserved the Callback it will disappear for all other Agents and will remain in the reserved Agent's Activity list, even in between Unity sessions in case the remote party needs to be called multiple times.



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 then are already on a call. If they try to initiate a Callback, they will receive an error message.

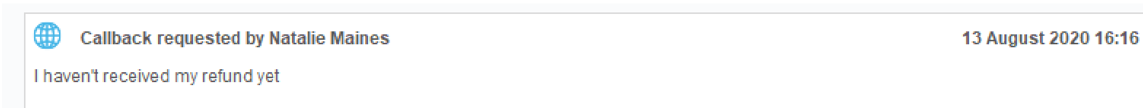
Agents can either right-click and reserve it, or they can double-click the request to open the callback window to view more information and reserve the callback using the icons at the top.





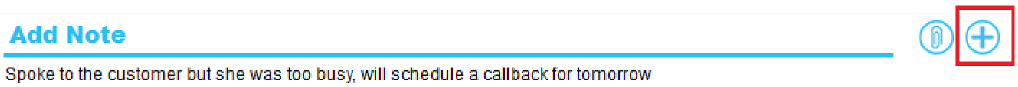
Reason for Callback

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



Agent Callback Notes

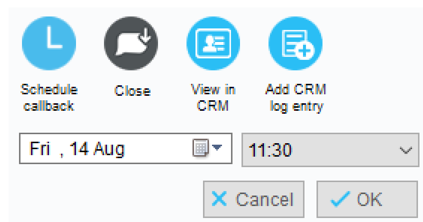
Once reserved, the Agent can make additional notes to the callback request by typing in the text box and then clicking the plus icon to add it.

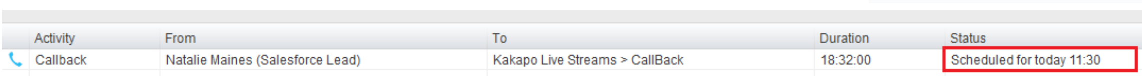


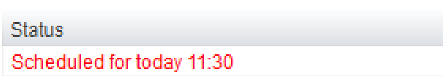
Schedule Callback

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.

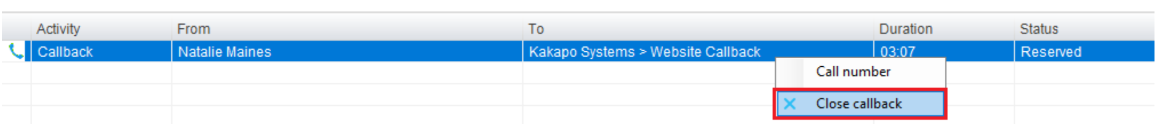






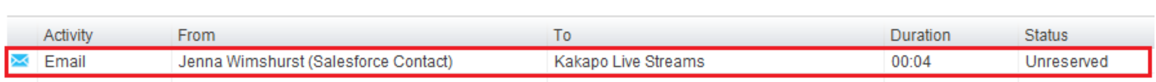
Close Callback

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.



Email Queue

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



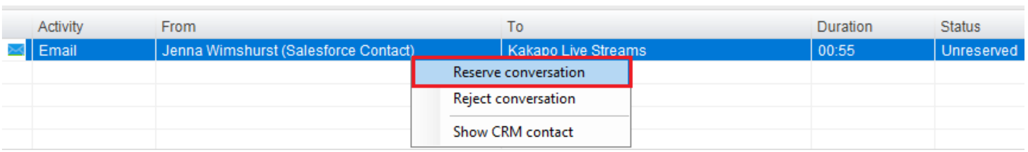
<u>Please note:</u> Email address starting with

- noreply@

- no-reply@
- no_reply@
- donotreply@
- do-not-reply@
- do_not_reply@

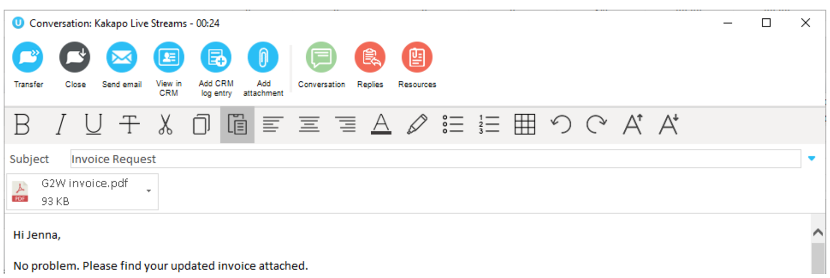
Emails will not be routed to Agents and are not stored in Database.

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



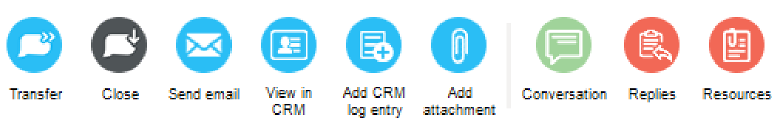
Once the Email conversation is reserved, the Agent opens the Email by double-clicking on it within the Activity List. The conversation window will then appear with the original Email from the customer at the bottom on the window, simply click at the top to start typing.

Any attachments sent from the customer will appear below the subject line. Please note that there is a blacklist for Email attachments, the list from the 3rd-party vendor can be [found here].



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.

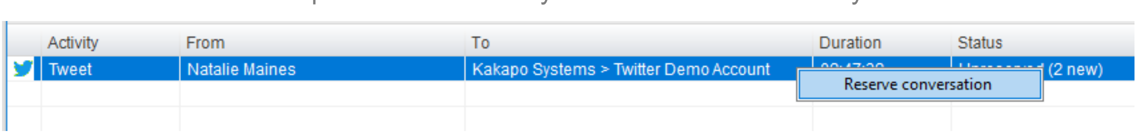
Once the Agent has finished replying simply click the **Send Email** icon.



Twitter Queue

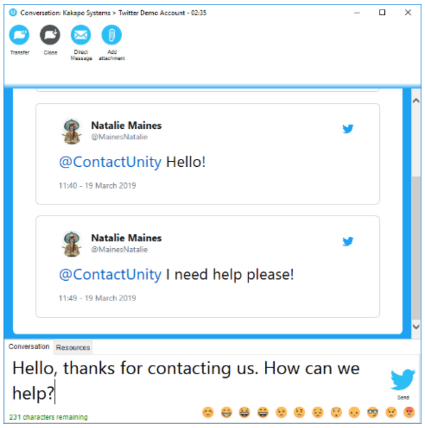
Twitter conversations are loaded within 3 minutes of the tweet being sent from the customer, so the longest duration a tweet can take to come into Unity is 3 minutes and the quickest is 1 second, depending on where the 3-minute cycle is when the tweet is sent.

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



Reserve

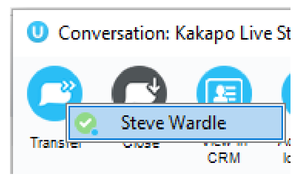
To reserve a Twitter conversation right-click it and select Reserve.



Transfer

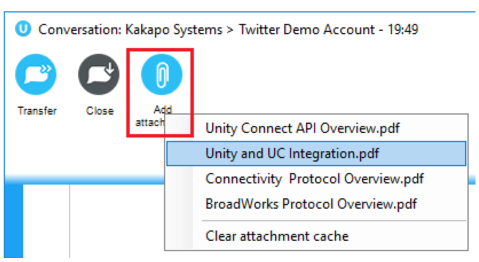
Click to transfer to a colleague, only those who are joined to the same Media Stream will be shown. Only the Agents that are online and joined to the Queue will be available to transfer to.

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)



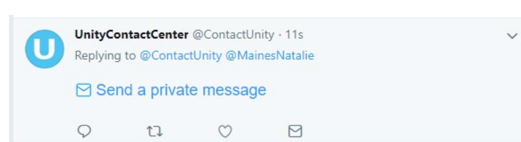
Unity will show 20 cached replies and attachments in Contact Center, plus more when Unity is running, but when it's closing down only the latest 20 will be saved.

Direct Message Request

Click the **Direct Message** icon to send a direct message request to the customer. This will then send the customer a link, which when clicked, will open up a Direct Message conversation.

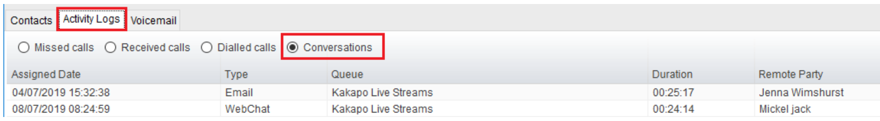
Please note that the Media Stream Twitter settings must be pre-configured by the service provider or Admin to allow anyone to send Direct Messages.

Once a Direct Message request has been sent to a customer the icon will disappear from the Twitter conversation window as the user cannot send the request twice. The DM/Private Message invitation will be displayed to the customer, as shown below.

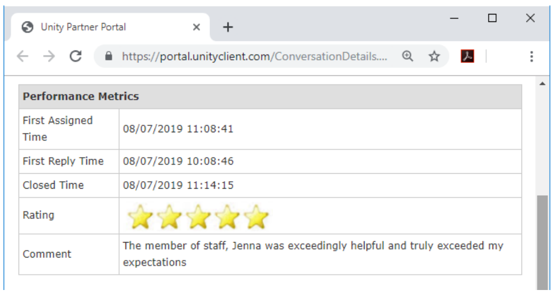


View Historical Conversations

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

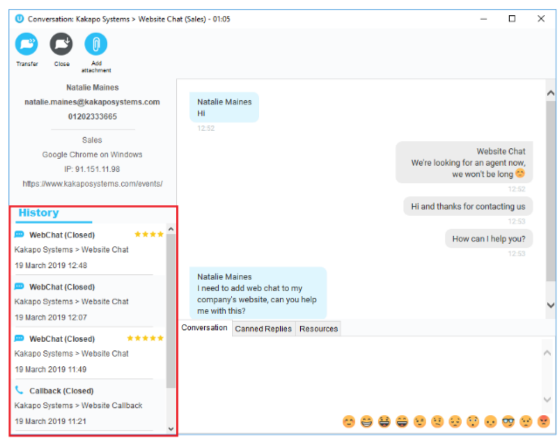


Double-click the chosen conversation to show the entire conversation and any relevant rating, as shown below.



History

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

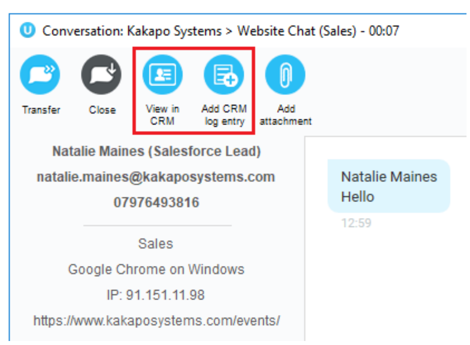


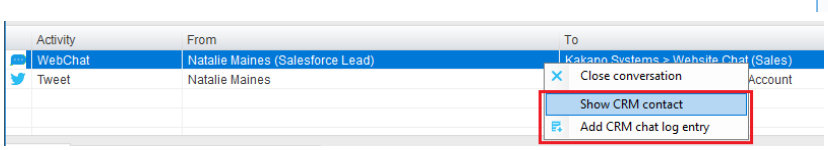
CRM Contacts & Leads

If the system has an integrated CRM platform (add-on$), then the **Web Chat** window can display two additional options at the top:

View contact in CRM and Add CRM call log entry. Unity can be set up to 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.



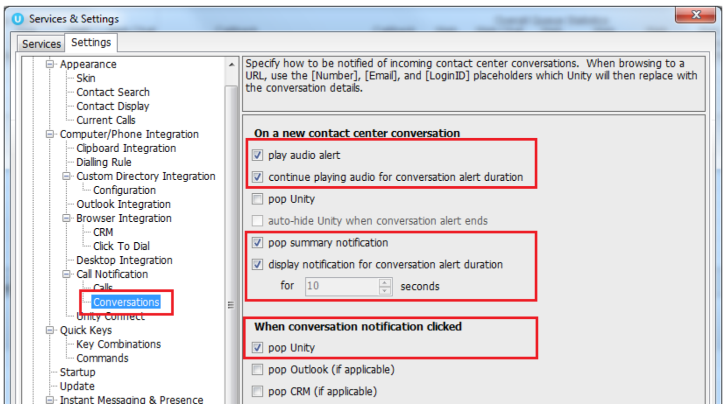


HELPFUL RELATED SETTINGS FOR AGENTS

The following sections offer helpful information about a few useful media stream-related settings.

New Conversation Alert

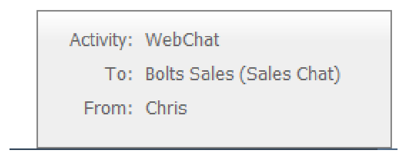
When a new conversation is received, Unity Agent can be configured to show a toast notification and or play an audio alert, as shown below.



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.

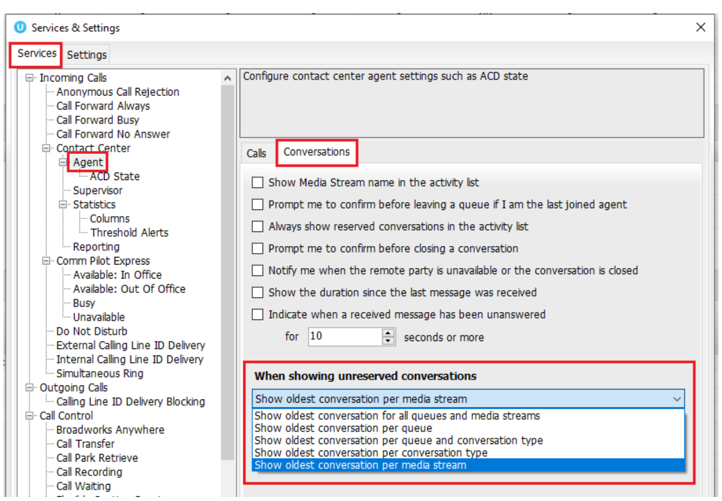
If it's not configured to continue playing then it will just be played once, the same as when you receive an IM.

Example Summary Notification pop:



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 display - 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

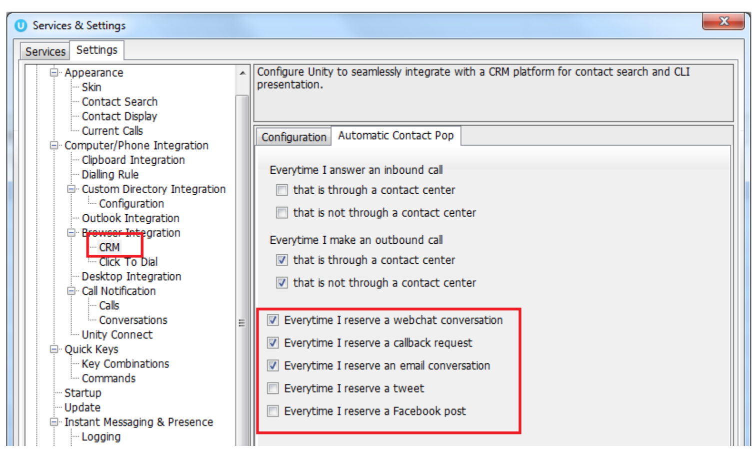
This will show the oldest unreserved conversation for each Media Stream type regardless of which Queue it came from.

Show oldest conversation per media stream (*default*)

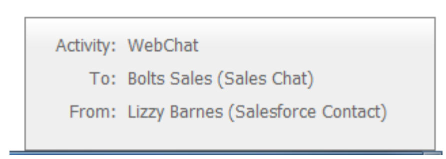
This will show unreserved conversations by Media Stream E.g. If there are two Web Chats Streams in the same Queue, then both will be displayed.

CRM Automatic Contact Pop

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

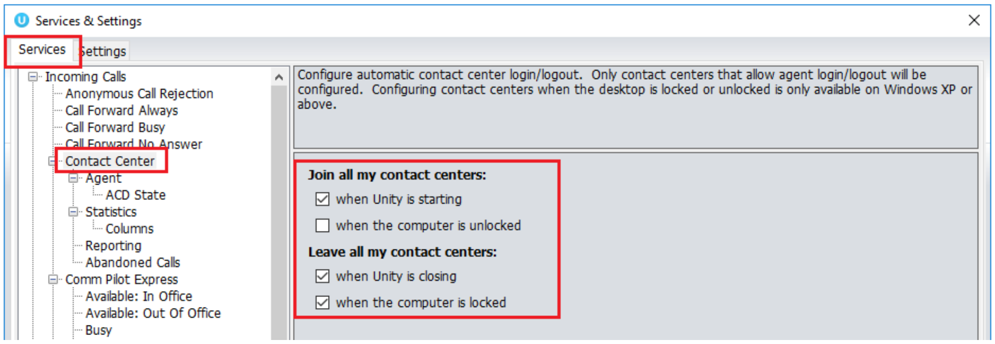


If Unity has performed a contact pop from a CRM platform, then the notification will be displayed with the relevant information, as shown here:

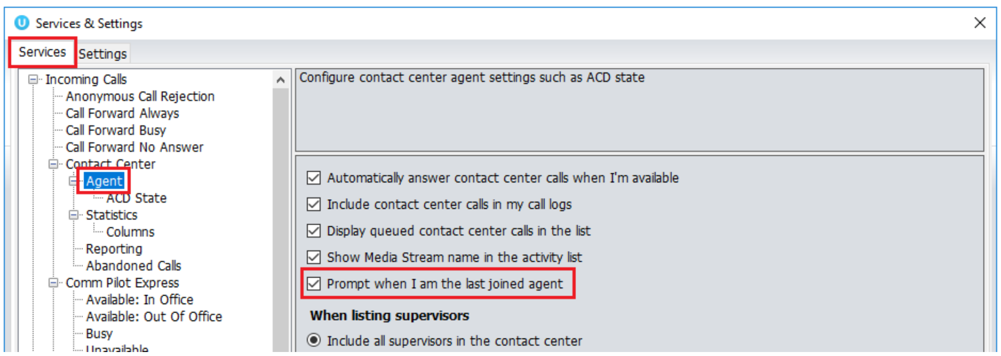


Join / Leave Queue

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

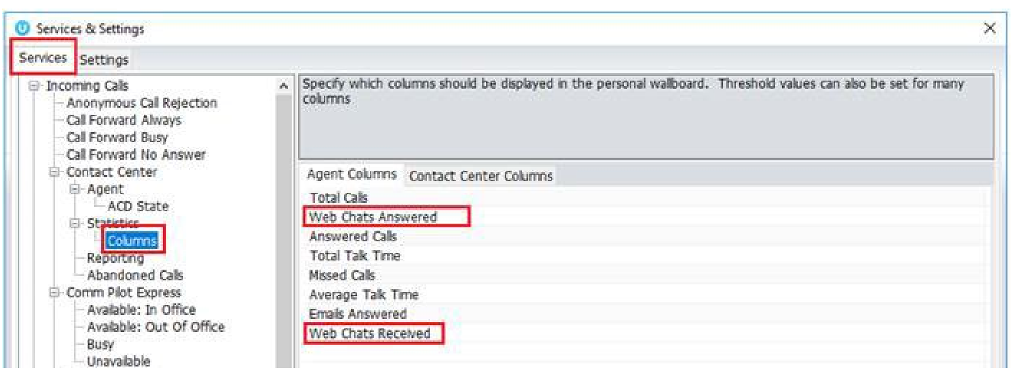


Unity can be configured to prompt the user that they are the last joined Agent when they attempt to leave a Queue, as shown below.



Add/Remove 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.



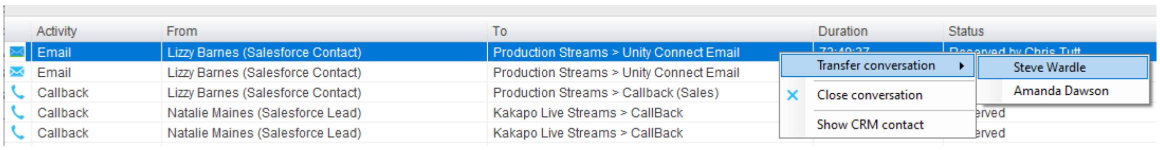
To remove Media Stream statistics from view, simply click on the desired statistic and click the red minus icon at the bottom. You can reorder the statistics by selecting the statistic and using the arrows to move it up and down the column.

UNITY SUPERVISOR MEDIA STREAMS 101

Unity Supervisors can be set up to perform the same actions as Agents if they monitor or are are part of a queue - and can also be set up to review more detailed agent and queue information, monitor activity, and manage Agents and queues assigned to them in the Unity Supervisor views. Please review the Unity Agent Media Streams 101 sections above for more information about how Agents work with these queues in Unity.

Transferring & Closing Conversations

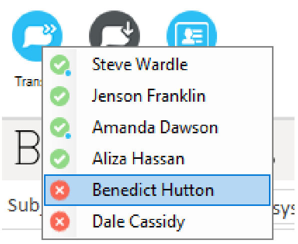
Supervisors can transfer and close media stream conversations by right-clicking them and selecting the relevant right-click menu option.



Web Chats cannot be transferred or closed by the Supervisor because it's a live “real time” conversation.

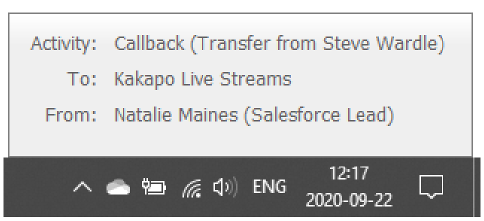
Agents and Supervisors can transfer all conversations (except Web Chats) to any other Agent regardless of their online status and the conversation will automatically be reserved by the new Agent.

Click the transfer icon within the conversion window to view the other Agents' joined status, as shown below.



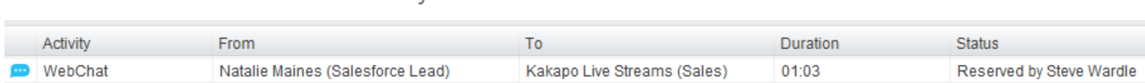
Please note: Agents can still transfer Web Chats to other Agents, but they can only transfer to an online available Agent who will have to manually reserve the conversation before it is transferred.

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:

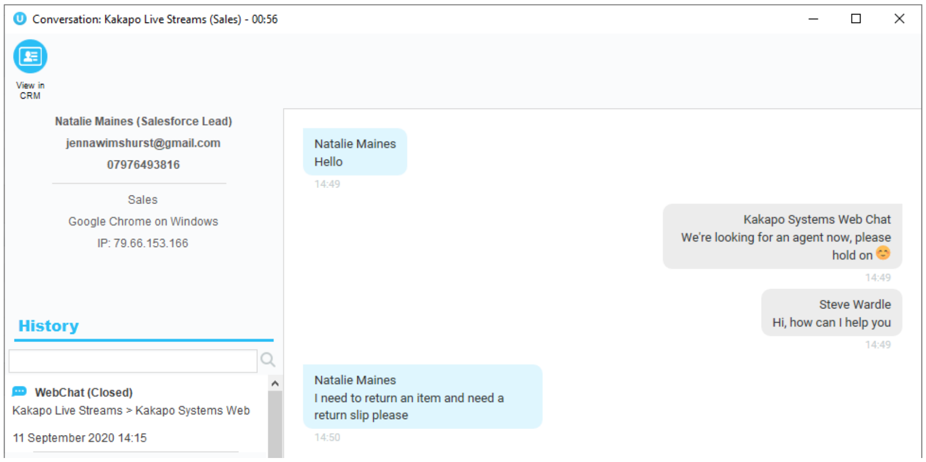


Silent Monitoring Conversations

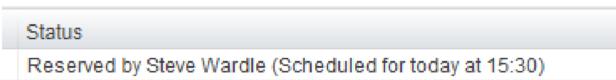
Supervisors with this feature enabled can Silent Monitor all conversations by simply double-clicking on the reserved conversation in the Activity Window.

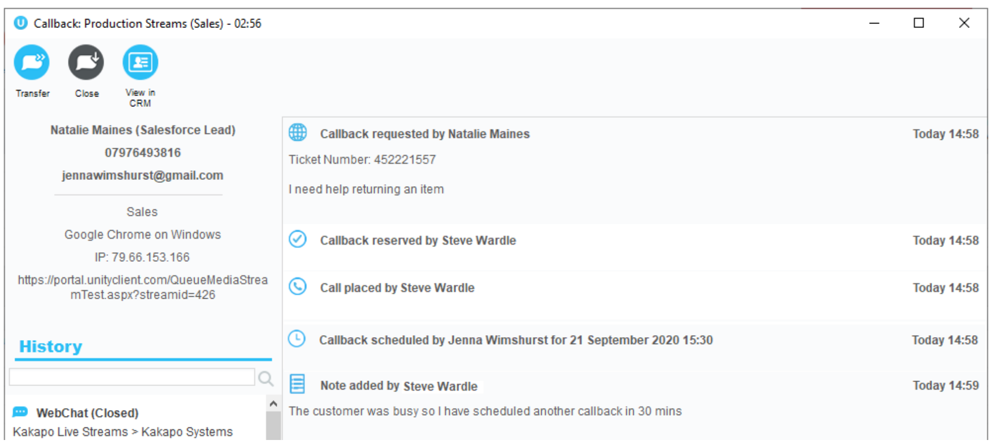


The Supervisor will be able to view the entire conversation.



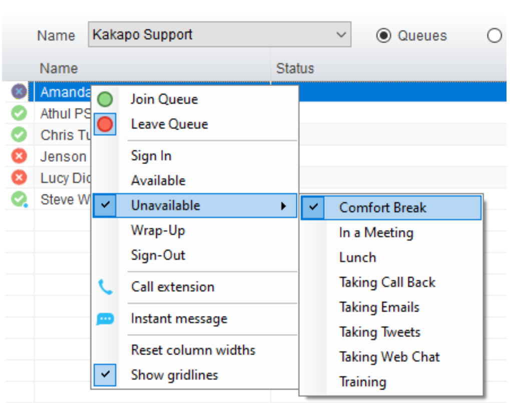
For Callback conversations Supervisors will be able to see the time that a Callback has been scheduled for and any notes added to the Callback.



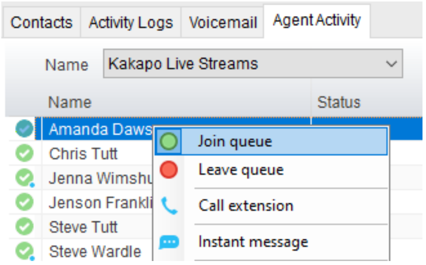


Agent Activity Tab

If a single Queue is both a Call and Contact Center Queue, then you can click on the Queue in the Activity Tab and change both the Join and Leave state and the ACD Status of all Agents within that Queue.

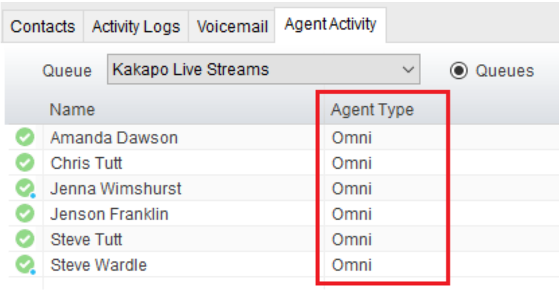


However, if the Queue is only a Contact Center Queue, then the Supervisor will only be able to change the Agent's Join and Leave State.



View Agent Type

The Agent type column shows the type of Agent the Agent is within the Queue. E.g. Omni means they are only an Agent for Contact Center conversations, Voice means they are only an Agent for VoIP calls and Both means the Agent can take all conversation types from the Queue.

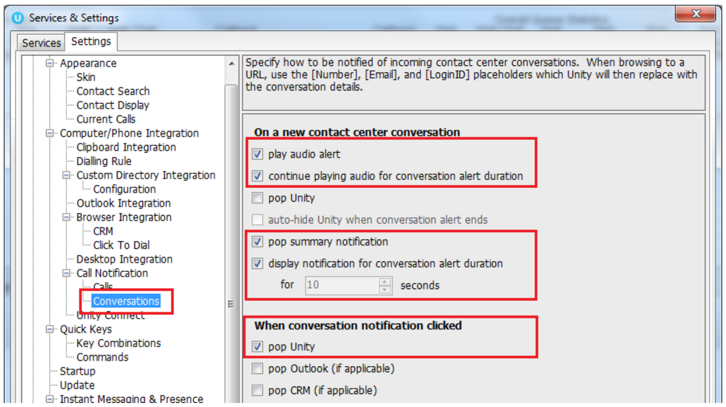


HELPFUL SETTINGS FOR SUPERVISORS

The following sections offer helpful information about a few useful media stream-related settings within the Unity Supervisor application.

New Conversation Alert

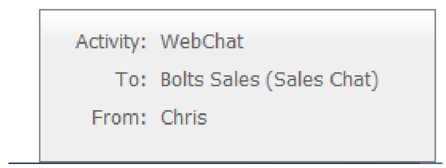
When a new conversation is received, Unity Agent can be configured to show a toast notification and or play an audio alert, as shown below.



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.

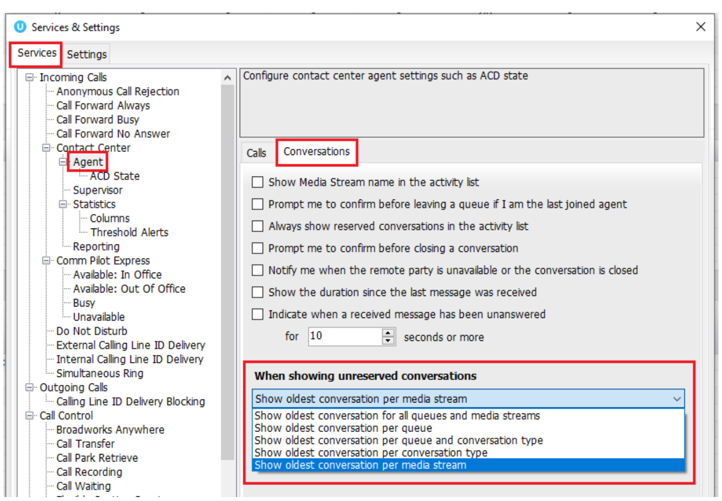
If it's not configured to continue playing then it will just be played once, the same as when you receive an IM.

Example Summary Notification pop:



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 display - 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

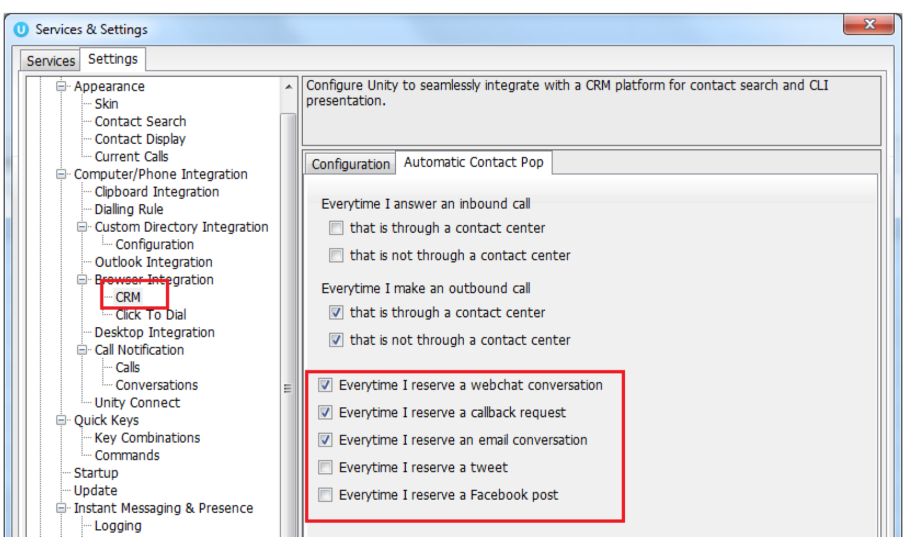
This will show the oldest unreserved conversation for each Media Stream type regardless of which Queue it came from.

Show oldest conversation per media stream (*default*)

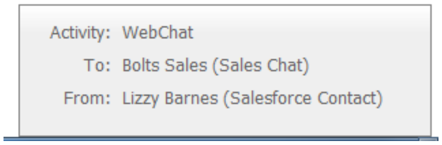
This will show unreserved conversations by Media Stream E.g. If there are two Web Chats Streams in the same Queue, then both will be displayed.

CRM Automatic Contact Pop

Where integrated (Add-On$), Unity can be configured to automatically pop a CRM contact (assuming a match was made on the integrated CRM platform) when an Agent or Supervisor/Agent reserves a Contact Center conversation, as shown below.

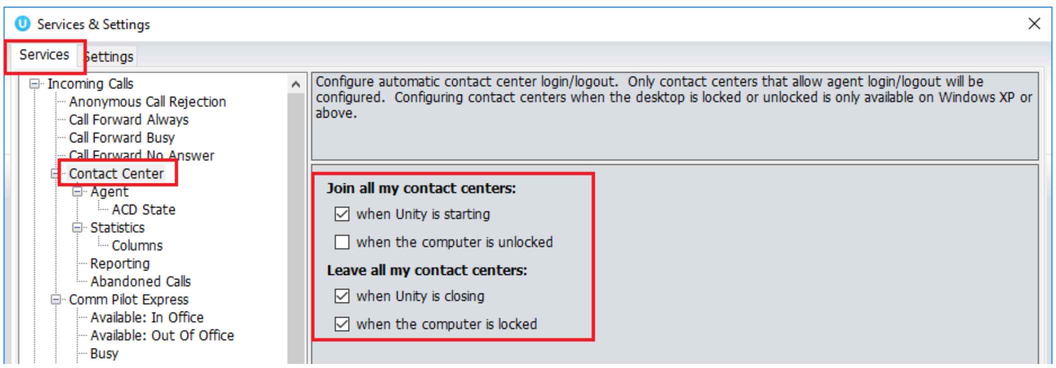


If Unity has performed a contact pop from a CRM platform, then the notification will be displayed with the relevant information, as shown below.

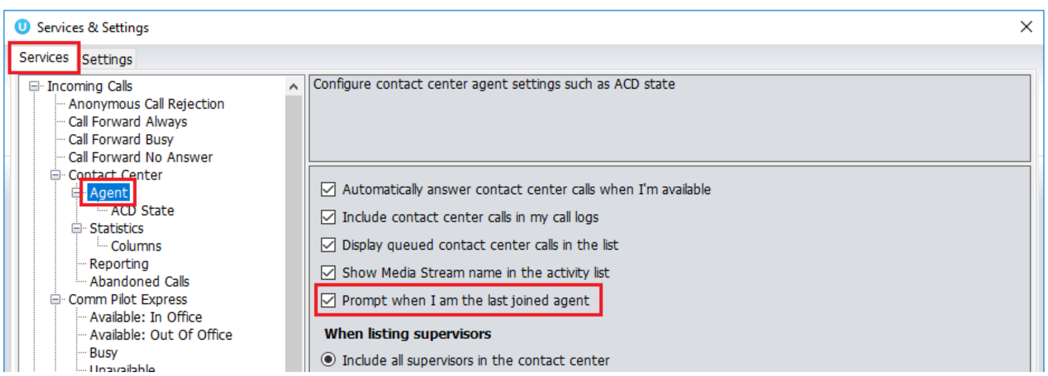


Join / Leave Queue

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

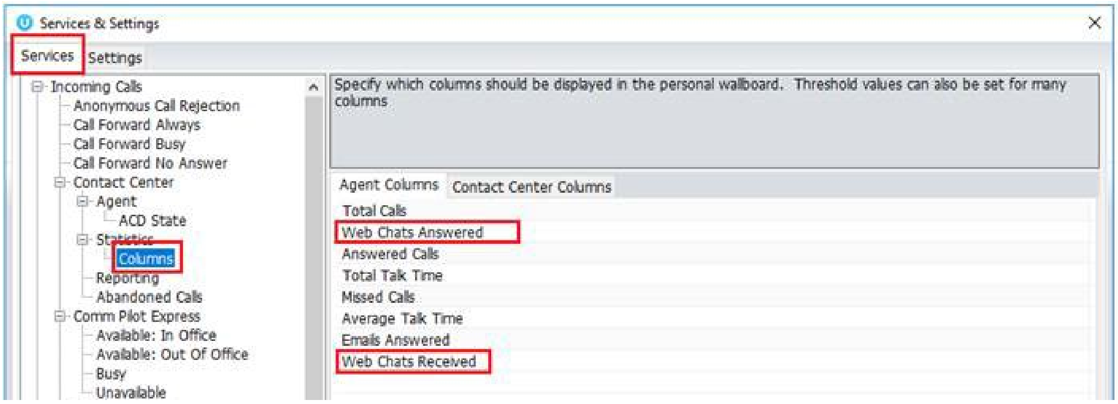


Unity can be configured to prompt the user that they are the last joined Agent when they attempt to leave a Queue, as shown below.



Adding/Removing Contact Center Statistics

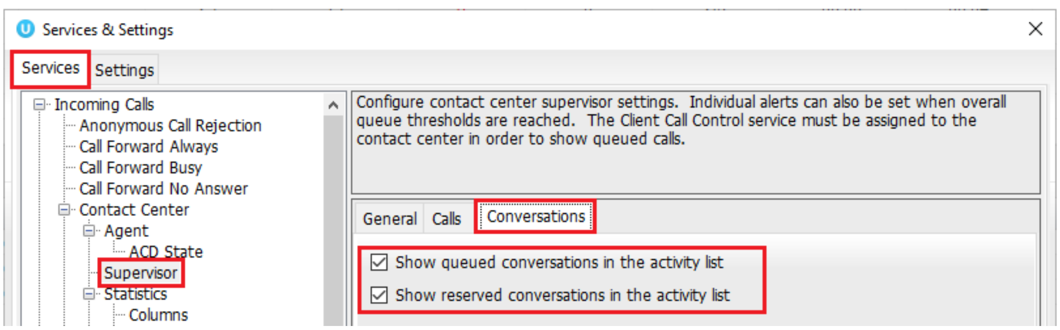
To add Media Stream statistics to the Agent and Contact Center columns in the Personal Wallboard, go to settings>services>columns and then add the available Contact Center stats using the green Add icon at the bottom right.

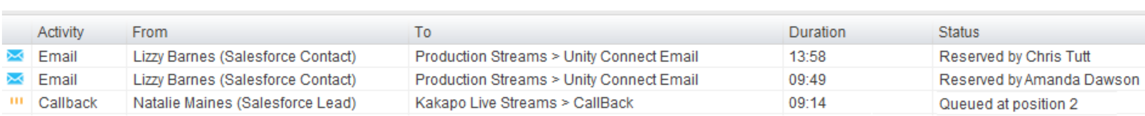


To remove Media Stream statistics simply click on the desired statistic and click the red minus icon at the bottom. You can reorder the statistics by selecting the statistic and using the arrows to move it up and down the column.

Show Queued / Reserved Conversations (Supervisor)

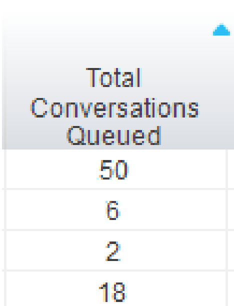
Supervisors can view all queued and reserved conversations for all Queues by selecting the relevant boxes in Settings>Services>Supervisor>Conversations, as shown below.





Activity	From	To	Duration	Status
Email	Lizzy Barnes (Salesforce Contact)	Production Streams > Unity Connect Email	13:58	Reserved by Chris Tutt
Email	Lizzy Barnes (Salesforce Contact)	Production Streams > Unity Connect Email	09:49	Reserved by Amanda Dawson
Callback	Natalie Maines (Salesforce Lead)	Kakapo Live Streams > CallBack	09:14	Queued at position 2

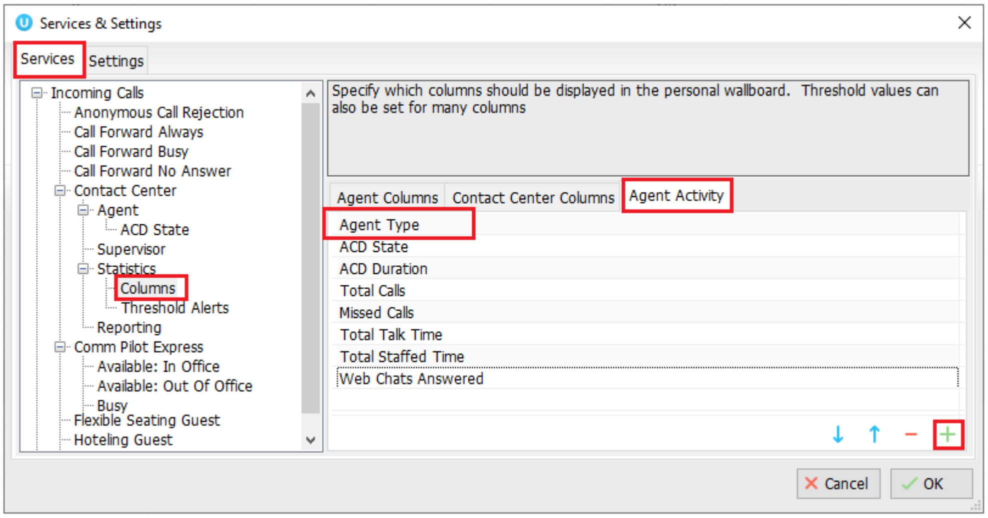
The Total Queued Conversations statistic available in the Contact Center Columns is a key statistic that shows all conversations queued for all Contact Center Queues.



Total Conversations Queued
50
6
2
18

Add Agent Type Column (Supervisor)

To add the Agent Type column to the Agent Activity Tab Go to Settings>Services>Columns>Agent Activity and select it using the green add icon.



UNITY DESKTOP MEDIA STREAMS 101

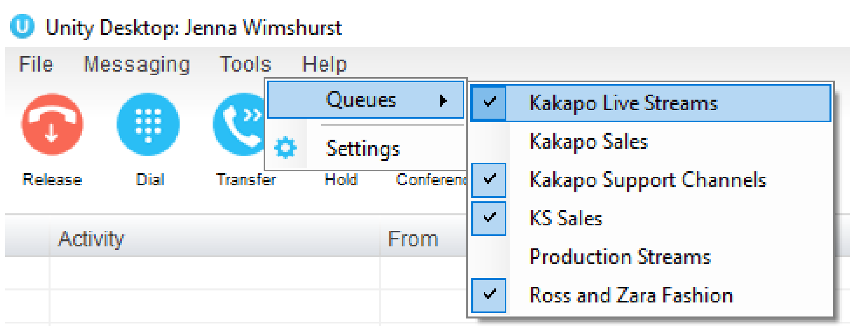
Special Note: Unity Desktop does not feature the Personal Wallboard, so Unity Desktop users cannot join and leave Queues the same way that users do in Unity Agent and Unity Supervisor.

Once joined to a queue, the tools and tasks for Unity Desktop Users are similar to those provided in Unity Agent and Supervisor.

Joining or Leaving Queues

Desktop Users join and leave Queues by going to **Tools** > **Queues** and selecting or deselecting the relevant Queue from the options displayed there.

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



ACD State Information

A Unity Desktop User only has to be joined to a Queue in order to receive incoming conversations as Unity Desktop does not feature the ACD functionality of Unity Agent and Supervisor. Any restrictions set in the ACD State management section for other Unity Agent or Supervisor users will not be applicable for Users in Unity Desktop.