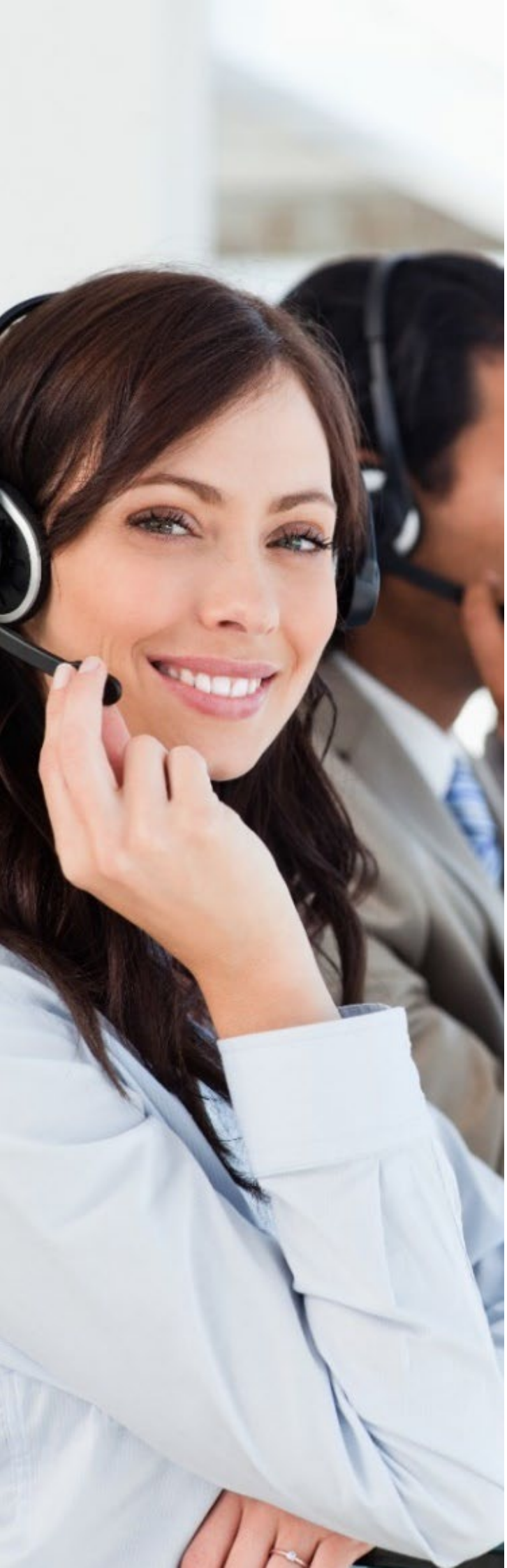


UNITY

Callback Queue

(Keep My Place In Queue Media Stream)

User Quick Reference

MOMENTUM

25Q4E

This document outlines the basics of the new Keep My Place In Queue (KMPIQ) Callback request feature and related add-on functionality that can be configured and made available (when purchased) for specific Unity users that have a current Unity Agent, Unity Reception/ Agent, or Unity Supervisor/Agent license running version 8.6.3+ and are associated to a Call Center that is configured with appropriate ACD and media stream queues by their Admin.

This document has been prepared as a helpful overview to introduce the new features and settings, and provide examples that highlight how these features behave in Unity for users.

Note: Experience working with the general setup and usage of call center functionality settings and configuration in BroadWorks, Unity, and the Kakapo Partner Portal (including queued calls, ACD states, hunt groups, DNIS, and disposition codes) is assumed in some areas of this document (where administration is mentioned).

1 ABOUT KEEP MY PLACE IN QUEUE (KMPIQ)

Keep My Place in Queue (KMPIQ) is an add-on media-stream (omnichannel) feature for Unity Agent, Supervisor, and Reception license holders that allows queued ACD calls to be kept in queue if a request for callback is made by the caller before the remote party has released the call, and then based on configuration either prompts the Agent to make the callback or initiates the callback to the party when that call becomes the next call to be "answered" in the queue.

Unity will keep an internal virtual list of queued calls along with the calls where the caller has requested a callback (referred to as a “KMPIQ Callback Request”). Every time the Agent is ready to accept a new call center call (when they are joined to the call center, not on Do Not Disturb, their ACD state is “Available”, and they are not already involved in a call), then Unity will check this virtual list to determine if the next call to be processed is a currently queued call or a "KMPIQ Callback Request" call.

- If the next call to be answered is a normal queued call (not a KMPIQ Callback Request) then it will be passed from the call center to the Agent, where it can be answered normally.

- If the next call in queue is a KMPIQ Callback Request, then depending on the configuration for KMPIQ that the organization implemented, Unity will either prompt the Agent to make the outbound call to the number or will make the call automatically. Before prompting the Agent or automatically performing the callback, Unity will also change their ACD State to “Unavailable”, thereby ensuring that other queued calls in BroadWorks won't presented to the Agent through the call center and they are free to return the call as the caller requested.

All Unity clients/license types communicate with each other in order to support different KMPIQ features.

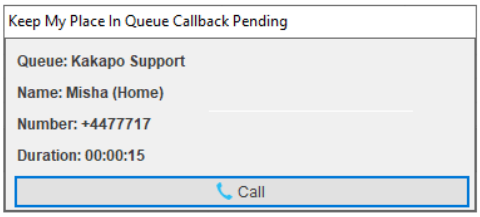
Real-time updates are sent between Unity clients as KMPIQ Callback Requests are processed by an Agent, so that they are removed from the virtual queue in all other Unity clients. This will ensure a KMPIQ Callback Request isn’t processed twice by different agents.

Supervisors are provided with a complete view of the KMPIQ performance in their queues just like any other queue to which they are assigned.

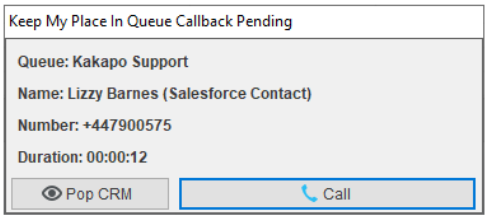
2 KMPIQ - AGENT

This functionality is available in Unity Agent, Reception, and Supervisor, assuming the logged-in user is **also** an Agent for one or more call centers that offer one or more KMPIQ callback queues.

When the next call to be processed is a KMPIQ Callback Request, Unity may be configured to show a prompt to the Agent, as illustrated below. Unity will perform a contact lookup based on the phone number used to call the call center, which includes all BroadWorks directories, Outlook (if configured) and any integrated CRM platforms.

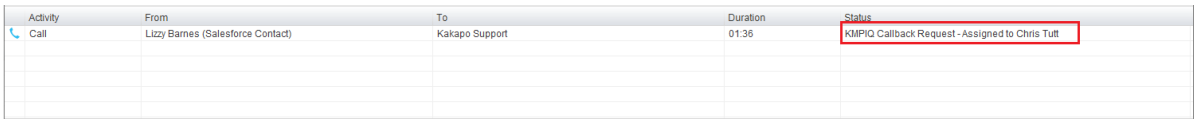


If the contact was found in an *integrated CRM platform*, the Agent will also be able to pop the contact in the CRM platform, which will open as a new tab in their default browser.



- The prompt shows the name of the call center that the KMPIQ Callback Request is for, as well as the caller name (if successfully found) and number.
- If the call routed through a DNIS that will also be shown with the call center name.
- The duration shows the time since the callback was requested.
  For example if a caller calls into a queue and waits for five minutes before requesting a callback, then the duration shown in the prompt will not include that first five minutes.
- The KMPIQ callback prompt will display on top of all windows and applications, so although applications (including Unity) can be activated and used, the prompt will continue to be shown until the KMPIQ Callback has been made, either by this Agent or another Agent, or if the Agent is no longer available to process call center calls either through ACD state, joined state, or hook-state.
- If multiple agents are prompted to perform the same KMPIQ callback, the first Agent to click the Call button will be assigned the callback [and make the outbound call] and it will be removed from the virtual queue for other agents, including closing the prompt. Those Unity clients will then look for the next call to be processed, which may be a KMPIQ Call-back Request or a normal queued call.
- Unity may also be configured to change the ACD state of the Agent to “Unavailable” to ensure queued call center calls aren’t routed to the Agent. This is defined in Unity Settings (as outlined in future sections below), and is strongly recommended as it ensures queued calls won’t be presented to the Agent while they are currently processing a KMPIQ Call-back.
- Unity will check for the next call in the virtual queue even when the ACD state is set to this ACD state, if the next call to be processed is a normal queued call Unity will automatically change the ACD state to “Available” so that the call can be routed to the Agent by the call center.
- Once the user presses the Call button in the pop-up dialog, KMPIQ Call-back Request will be assigned to that Agent and Unity will perform the callback. It will then be removed from the virtual queue for all other Unity clients.
- If Unity is configured not to show the prompt this will occur immediately rather than the prompt being displayed.

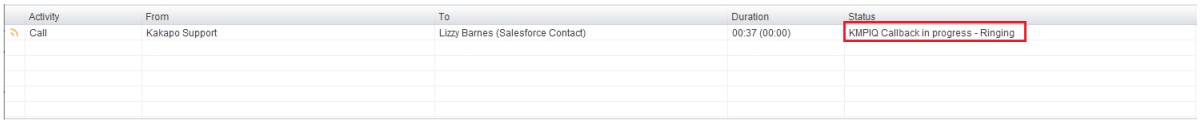
When the callback has been assigned to an Agent it will appear in the Activity list, as shown here:



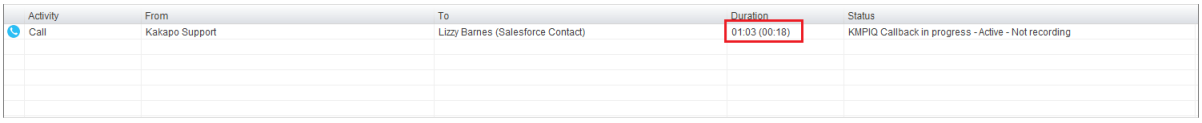
The KMPIQ call displays in the activity view very much as an inbound call would, where the “From” party is the caller who called into the call center, and the “To” party is the call center.

- If the call was received through a DNIS that isn’t the primary DNIS for the call center then this will also be shown in the “To” column.
- The duration is the amount of time that has passed since the caller requested a call-back (by escaping) while in the call center queue.
- When the call-back is in progress the display updates to show the call as an outbound call and the status will also be updated to show the call-back is in progress including the state of the call.

Please note that the call status information will immediately update when it is first reserved by an Agent, whether that is after the prompt for the call has been accepted, or automatically when the Agent is available (depending on the configured behavior in Unity Settings).

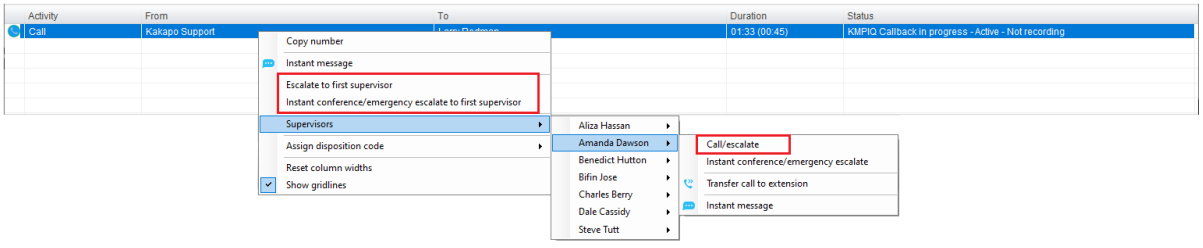


The duration column initially displays the duration since the original call was escaped from the call center queue, and then once the callback call is active that column will also display the duration of the current callback call until completion.

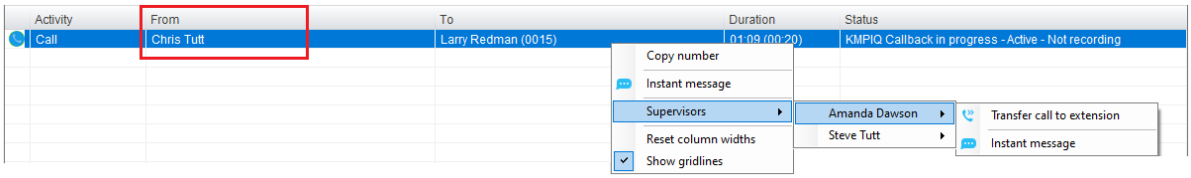


Once the call is active, it can be controlled the same way as any other call in Unity, including assigning a disposition or account code, or for performing call control actions (like hold, retrieve, and transfer (blind or announced).

If the initial queued call was made to a DNIS that supports outbound dialing, then when the KMPIQ Call-back call is made, Unity will first configure BroadWorks so that the call is made from the outbound DNIS rather than the agent’s CLI. And, in this case it is an ACD call in BroadWorks, which means additional features are supported such as escalation to supervisors and disposition codes.



If an outbound DNIS is not used to make the call-back then escalation is not available, however the call can still be blind transferred to a Supervisor. The example below shows a KMPIQ call-back that does not use an outbound DNIS. If configured in this way, Unity will show that the call is being made from the Agent rather than from the call center.

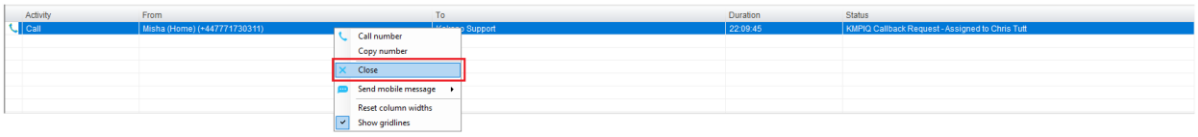


Please note that if the KMPIQ Call-back Request needs to be made through an outbound DNIS, then there may be a short delay to perform the callback. This is because Unity must make a request to BroadWorks to use the outbound DNIS for this Agent and wait for the response.

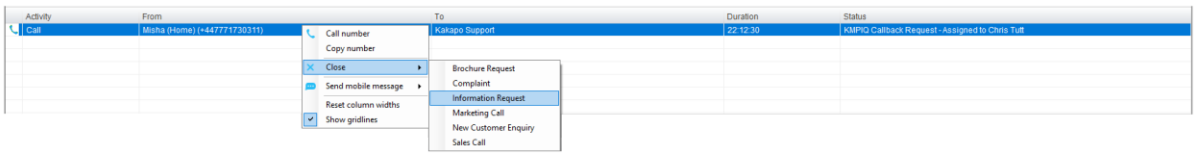
- Unity won't dial the remote party until a successful response is received from BroadWorks.
- As soon as the call-back is alerting (ringing) the Agent, Unity will clear the outbound DNIS for the Agent - and if a previous outbound DNIS was in use this will also be cleared.
- When the outbound call is released by the Agent, it may be automatically closed, if configured in Unity settings.
- When a KMPIQ call-back is closed it is removed from the display of the assigned Agent and any supervisors that have been configured to include assigned KMPIQ Call-backs (see section 3).

The remote party *can* be re-dialed (for example through the Call Logs tab), however calls initiated outside the KMPIQ will not be recorded as part of the KMPIQ Call-back - including any disposition codes that are assigned.

Regardless of whether the auto-close setting is configured to be active, Unity will not close the KMPIQ call-back request if the outbound call was not answered. The assumption is that the Agent will attempt to contact the customer again. That said, an assigned KMPIQ Call-back can be always be manually closed.

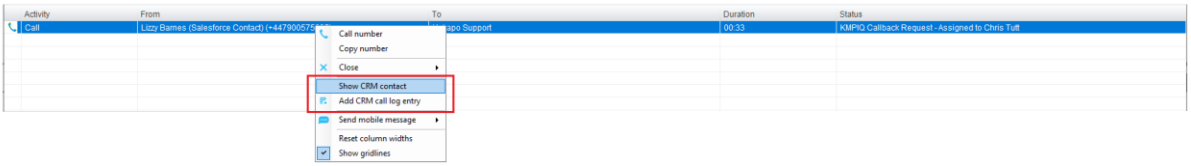


If Unity is forcing disposition codes to be assigned to call center calls, then one must be assigned when closing the KMPIQ Call-back, if a code has not already been assigned.

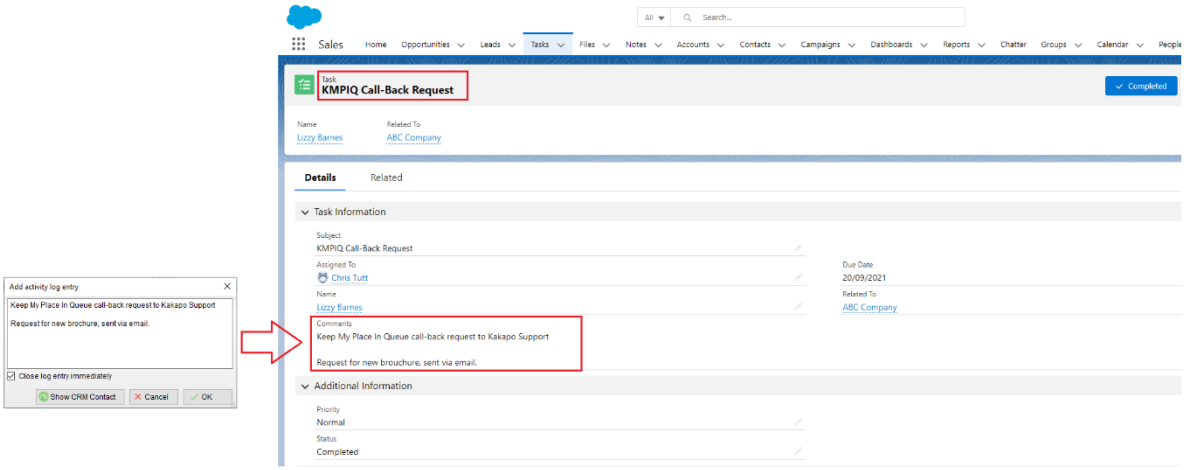


If a KMPIQ Call-back has not been closed, then a call-back can be manually initiated either by double-clicking on the entry in the Current Calls view list, or by right-clicking and selecting the Call Number option.

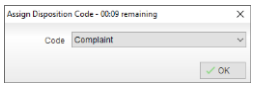
If a CRM contact was matched to the KMPIQ Call-back, then additional options related to CRM integrations are available when right-clicking the KMPIQ Call-back request.



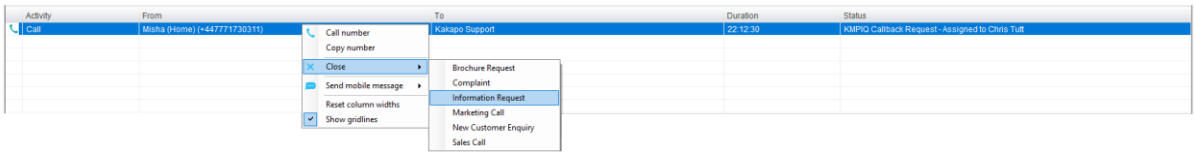
The user can open the record for the CRM contact in a new tab in the default browser, or add a call log entry which will be logged against that CRM contact.



If Unity is configured to force agents to assign a disposition code to a call center call, this will also apply to KMPIQ Call-back Requests. In this case when the KMPIQ call-back ends and Unity is configured to auto-close, then the Agent will be prompted to assign a disposition code.



Please note this only applies if the call-back was answered by the remote party and if Unity is configured to automatically close KMPIQ call-backs. Otherwise the disposition code must be assigned by the agent when closing the callback call.



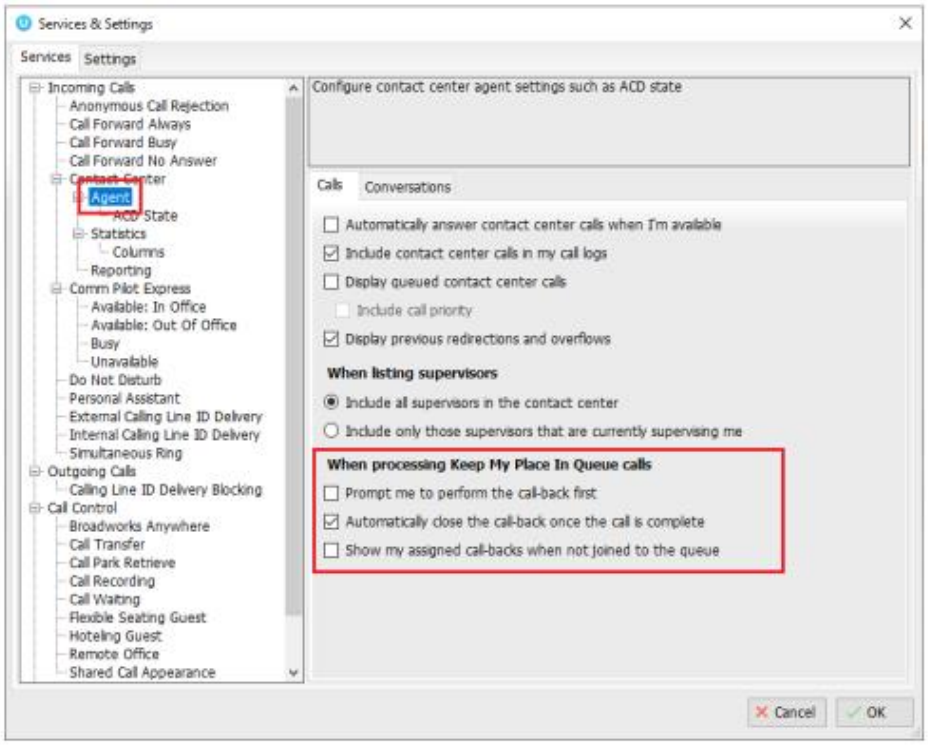
Whenever a KMPIQ call-back is released, Unity will perform any configured post-call actions and check the virtual queue for the next call - performing as usual/normal for the call queues' configurations.

Unity will check the virtual queue when these events occur:

- The Agent joins a call center
- The Agent's ACD state is changed
- A call is released by the Agent
- Do Not Disturb is deactivated by/for the Agent

2.1 KMPIQ AGENT CONFIGURATION/SETTINGS

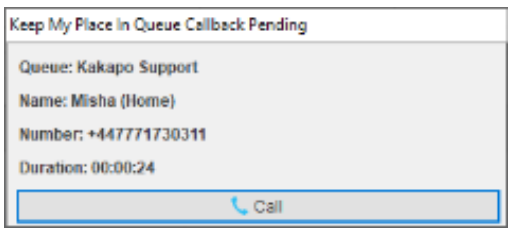
The default KMPIQ Callback request settings for Agents are shown here:

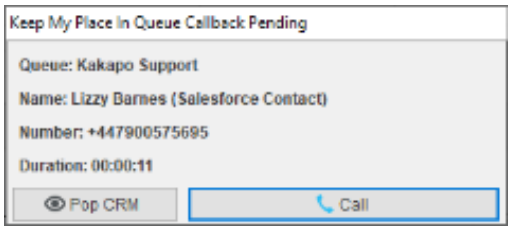


Note: *These settings are available to pre-define in User Templates as well if the customer uses those.*

2.1.1 Automatic Callback on Assignment

If the **Prompt me to perform the callback first** setting is activated, then when the next call to be answered is a KMPIQ Callback request, Unity will change the ACD state to Unavailable and show a prompt to the user, as shown below. This window will be shown on top of all windows and applications, so although other applications (and Unity) can be used, the prompt will always be available to the Agent.





The prompt is just an offer to initiate call-back. The call-back is not assigned to the Agent until they click the Call button.

If another Agent is being prompted to perform the same call-back and they are first to click Call, then this agent's Unity will look for the next call in the virtual queue and either show a new prompt for the next KMPIQ Call-back, or set the ACD state to Available so the next queued call center call can be routed to them.

If this setting is not checked then Unity will still change the ACD state, but rather than prompting the Agent the KMPIQ call-back will automatically be assigned and the call-back will be initiated immediately.

2.1.2 Automatic Closure of KMPIQ Callbacks

If the "Automatically close the call-back once the call is complete" setting is checked then once the call has been released Unity will close the callback request and it will be removed from the agent's activity list, as well as the lists of any Supervisor clients showing the call-back. Once a KMPIQ call-back has been closed no additional disposition codes can be assigned.

Please Note: If the outbound call is not answered, then Unity will not automatically close the KMPIQ call-back, as it is assumed the organization will want their agents to try to perform the call-back at a later time.

If the outbound call was transferred to another party (either using blind or announced transfer) then it is assumed that the call-back is complete so it will be closed, even if Unity is not configured to automatically close KMPIQ callbacks. The assumption is that if the call-back has been answered and transferred then it is no longer current/active.

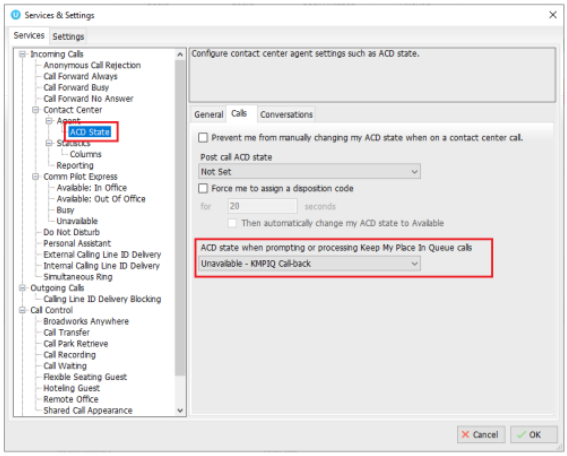
2.1.3 Show Assigned Callbacks when not joined to the call center

Unity can be configured so that any open/assigned KMPIQ call-backs can be managed even when the Agent is not joined to the call center. Any call-backs will still be made through the outbound DNIS (if applicable) but the Agent will not receive any new KMPIQ call-backs or queued calls for that call center. This is a useful tool to ensure an Agent can close all KMPIQ call-backs at the end of their shift without being alerted of any new calls.

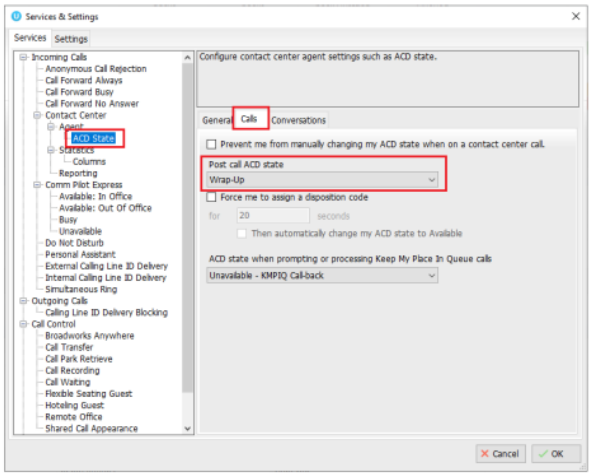
KMPIQ Call-back Requests are stored in the Unity cloud, meaning if an Agent is unable to close a call-back when their shift ends, they will be able to continue processing the call-backs in queue in their next Unity session.

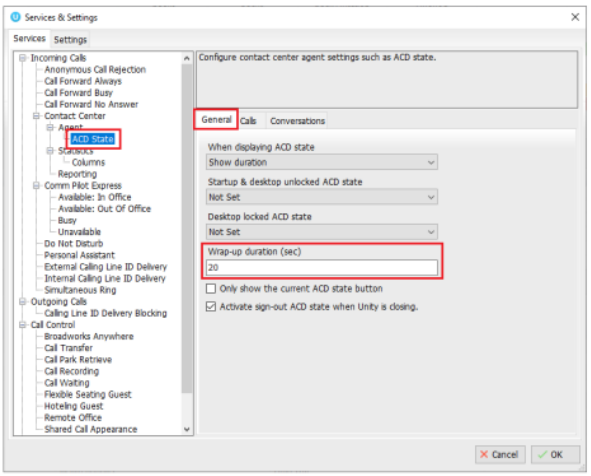
2.1.4 KMPIQ ACD States

As previously mentioned, when Unity is prompting the agent to perform a KMPIQ call-back or automatically makes the outbound call, it's important that their ACD state is set to Unavailable, thereby ensuring that no queued calls are routed to the agent. This is configured as shown below



- Only Unavailable ACD states can be selected from the above drop-down.
- Unity will automatically change the agent's ACD state to that set when prompting the agent or automatically making the KMPIQ callback.
- It is strongly recommended that a separate Unavailable Reason Code is created for this specific purpose.
- Unity will continue to prompt the agent to perform the callback while their ACD state is Available or the ACD state selected here, effectively meaning this ACD state will be similar in use to the "Available" ACD state.
- If the agent is in this ACD state and the next call is a queued call then Unity will change the ACD state to "Available" in order for the next queued call to be routed. Therefore if this ACD state is also used for another purpose (for example "Unavailable – Lunch") the agent will be prompted to perform a callback [or a queued call will be routed] when they shouldn't be.
- The agent's ACD state will not be changed while the callback is in progress, but once released the normal post-call ACD state will be used.
- If the post-call ACD state is set to "Wrap-Up", a Wrap-Up timer may be used to automatically change the agent's ACD state to Available, as is the case with inbound call center calls.

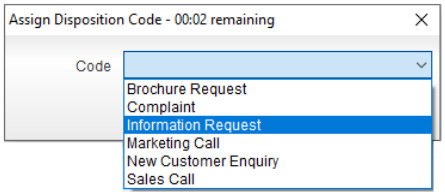




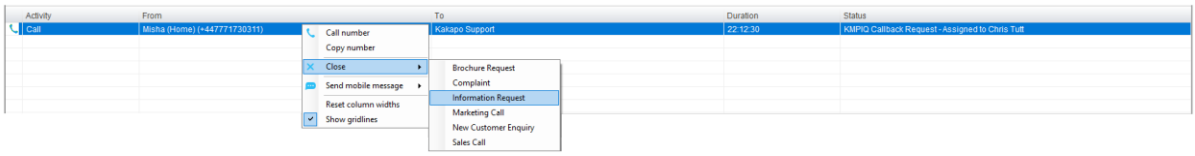
BroadWorks/call logger reports will provide information on the total duration that the agent spent in this ACD state, which can be combined with the number of KMPIQ call-backs made to indicate agent efficiency.

2.1.5 Forced Disposition Codes

The KMPIQ feature works seamlessly with the feature to force the agent to enter a disposition code for all call center calls. If forced disposition codes are enabled and KMPIQ call-backs are configured to be automatically closed [or are transferred] then Unity will prompt the agent to enter a disposition code when the call ends, similar to when releasing an inbound call center call.



- If KMPIQ call-backs are not automatically closed then when manually closing the KMPIQ call-back, Unity will force the agent to assign a disposition code if one hasn't already been assigned.

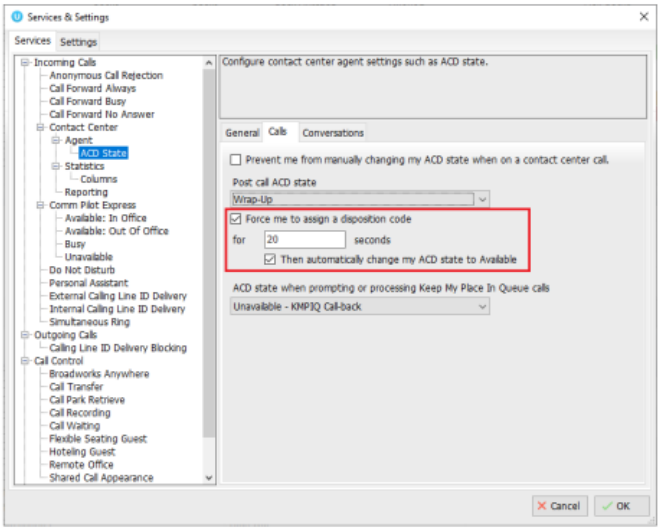


- When assigning a disposition code to an active call-back it will also be recorded in BroadWorks.
- If the call-back is no longer in place when a disposition code is assigned then it will be recorded in Broadworks if the KMPIQ call-back was the last ACD call for the agent.
- In all cases it will be assigned to the KMPIQ call-back in the Unity cloud.

Please Note: If multiple callbacks are performed for the same KMPIQ Call-back Request and disposition codes are assigned during each call, they will be assigned to different calls in BroadWorks and any call logging platforms being used. This is because they are separate calls in BroadWorks. However they will be recorded against the same KMPIQ Call-back Request in Unity and will be shown for the same call in the KMPIQ reports (as outlined below), this is the case even if the KMPIQ Call-back Request was processed over several Unity sessions or days.

If the call-back was not made through an outbound DNIS then if a disposition code is assigned it will not be recorded in BroadWorks, because the call is not treated as an ACD call. However it will be associated to the KMPIQ Call-back Request in Unity and will be shown in the KMPIQ reports.

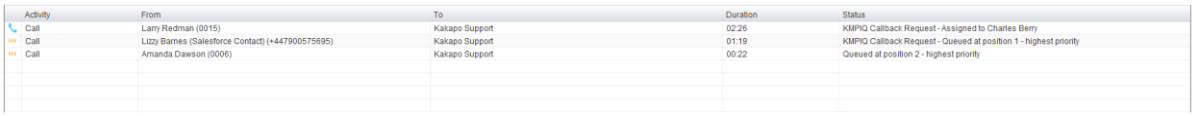
When forcing the agent to assign a disposition code, the post-call ACD state will only be set once the disposition code prompt has been closed [either because the agent has assigned a code or the alert duration has elapsed] and Unity isn't configured to change the ACD state to Available.



3 KMPIQ - Supervisor

Like agents, Supervisors must have the appropriate license and their agent settings configured to work with KMPIQ.

Unlike agents, Supervisors are also able to see any unassigned KMPIQ call-backs, as well as those currently open and assigned to an agent

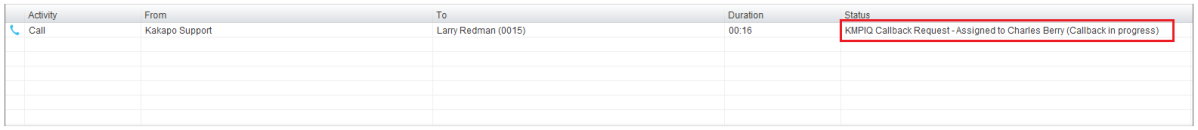


In the example above, Unity shows three calls:

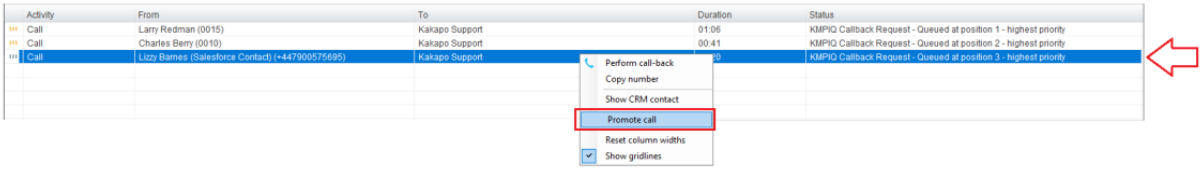
- The first on the list is a KMPIQ Call-back Request that has been assigned to an agent. The Supervisor can see the duration since the callback was requested by the caller.
- The second call is an unassigned KMPIQ call-back request, the Supervisor can see that this is the next call to be processed.
- The third call is a queued call to the call center where the remote party is waiting on the phone. Unity shows this call as queued at position two, even though it's actually queued at position one in BroadWorks. Queue position is calculated by Unity based on call priority and entry time into the queue, *or* the time that the call was promoted by a Supervisor (see below).

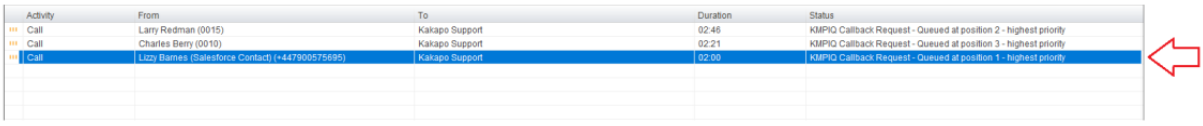
As KMPIQ callbacks are assigned to agents they will no longer be considered queued, and the queue position will be updated for any unassigned KMPIQ call-backs and any normal queuing calls.

The Supervisor can also see when an assigned KMPIQ call-back is in progress. Here's an example:



The Supervisor can promote queued calls before they are escaped, and the same applies for KMPIQ Call-back Requests. If an agent is being prompted to perform a KMPIQ call-back and the Supervisor promotes a different KMPIQ call-back to them, then the agent's KMPIQ prompt will immediately be updated with the newly promoted call-back because it was given priority by the Supervisor.

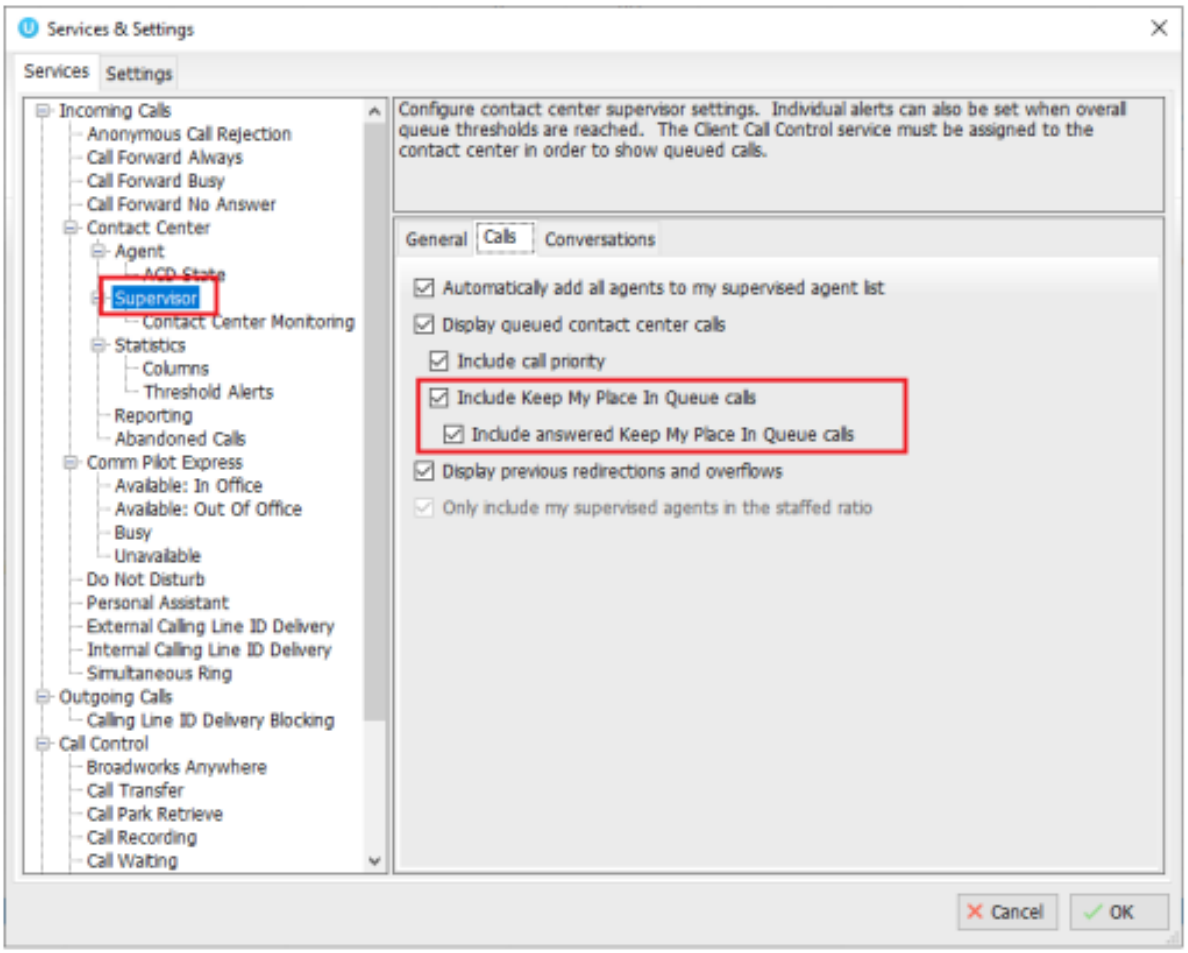




KMPIQ Call-back Requests cannot be closed by a Supervisor or transferred to an agent. This feature works on a first-in/first-out queuing policy that cannot be overridden.

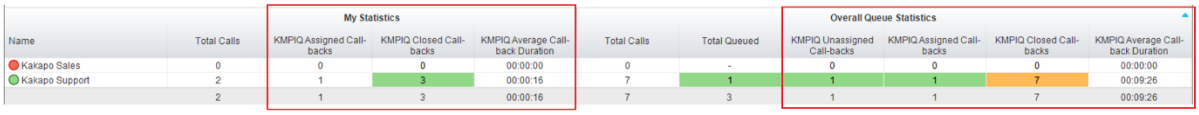
3.1 KMPIQ Supervisor Configuration

The settings that determine whether KMPIQ Call-back Requests are shown in the Activity list. If configured to display, then Supervisor functionality such as call promotion and visibility of active call-backs is available by default.

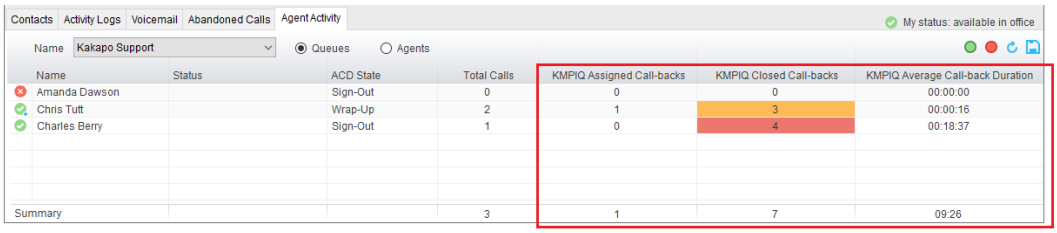


4 KMPIQ and Personal Wallboards

All Unity clients can offer KMPIQ statistics in the Personal Wallboard that are updated in real-time. These statistics are available for personal metrics, overall call center metrics, or through the Agent Activity tab in Unity Supervisor. As is the case with all statistics that can be displayed in Unity, threshold values can be defined to easily indicate key performance milestones or alerts.



Name	My Statistics: Total Calls	My Statistics: KMPIQ Assigned Call-backs	My Statistics: KMPIQ Closed Call-backs	My Statistics: KMPIQ Average Call-back Duration	Overall Queue Statistics: Total Calls	Overall Queue Statistics: Total Queued	Overall Queue Statistics: KMPIQ Unassigned Call-backs	Overall Queue Statistics: KMPIQ Assigned Call-backs	Overall Queue Statistics: KMPIQ Closed Call-backs	Overall Queue Statistics: KMPIQ Average Call-back Duration
Kakapo Sales	0	0	0	00:00:00	0	-	0	0	0	00:00:00
Kakapo Support	2	1	3	00:00:16	7	1	1	1	7	00:09:26
	2	1	3	00:00:16	7	3	1	1	7	00:09:26



Name	Status	ACD State	Total Calls	KMPIQ Assigned Call-backs	KMPIQ Closed Call-backs	KMPIQ Average Call-back Duration
Amanda Dawson		Sign-Out	0	0	0	00:00:00
Chris Tutt		Wrap-Up	2	1	3	00:00:16
Charles Berry		Sign-Out	1	0	4	00:18:37
Summary			3	1	7	09:26

Please Note:

The “Abandoned Calls” statistic in the Personal Wallboard will be incremented as queued calls are escaped (the caller hangs up to exit the queue rather than taking advantage of KMPIQ). This is because BroadWorks treats these calls as abandoned calls, and that behavior is outside the control of Unity.

5 KMPIQ Reporting

The following KMPIQ reports are available in Unity Supervisor only. They can be generated through the Report window and can be exported as PDF or CSV file. Note: *Reports section visibility is generally disabled by default. Discuss whether this access would be useful with your Service Provider Account Manager.*

5.1 KMPIQ – Performance – Agent

This report shows all KMPIQ Call-back Requests for one or more selected agents.
The Wait Duration column shows the amount of time between the the time the KMPIQ call-back was requested and the time that the first callback was placed.

Queue	Caller Name	Caller Number	Escaped Date Time	Wait Duration	Closed Duration	Disposition Codes
Charles Berry						
Kakapo Support	Lizzy Barnes (Salesforce Contact) (+447900575)	+447900575	10/10/2021 11:51:05	00:23:42	00:24:06	Marketing Call
Kakapo Support	Larry Redman (0015)	0015	10/10/2021 11:50:15	00:25:07	00:25:20	Marketing Call
Kakapo Support	Charles Berry (0010)	0010	10/10/2021 11:50:40	00:25:35	00:25:43	Complaint
Kakapo Support	Larry Redman	0015	10/10/2021 12:16:35	00:00:08	00:00:26	Marketing Call
Charles Berry: 4 Call-backs				00:18:38	00:18:53	
Chris Tutt						
Kakapo Support	Larry Redman	0015	10/10/2021 07:36:53	00:00:38	00:05:17	Marketing Call
Kakapo Support	Larry Redman	0015	10/10/2021 07:43:56	00:00:08	00:09:00	
Kakapo Support	Larry Redman	0015	10/10/2021 11:19:27	00:00:06	00:13:54	Marketing Call
Kakapo Support	Larry Redman (0015)	0015	10/10/2021 12:35:03	00:00:12	00:33:01	Marketing Call Brochure Request Information Request
Chris Tutt: 4 Call-backs				00:00:16	00:15:18	
Steve Tutt						
Kakapo Support	Larry Redman	0015	08/10/2021 12:10:46	00:00:12	01:05:02	Marketing Call
Steve Tutt: 1 Call-backs				00:00:12	01:05:02	

5.2 KMPIQ – Performance – Queue

The KMPIQ - Performance - Queue report is grouped by the call center(s) selected. Each record includes the Agent that performed the KMPIQ call-back, times, and codes where applied.

Agent Name	Caller Name	Caller Number	Escaped Date Time	Wait Duration	Closed Duration	Disposition Codes
Kakapo Support						
Chris Tutt	Larry Redman	0015	10/10/2021 07:36:53	00:00:38	00:05:17	Marketing Call
Chris Tutt	Larry Redman	0015	10/10/2021 07:43:56	00:00:08	00:09:00	
Chris Tutt	Larry Redman	0015	10/10/2021 11:19:27	00:00:06	00:13:54	Marketing Call
Charles Berry	Lizzy Barnes (Salesforce Contact) (+447900575)	+447900575	10/10/2021 11:51:05	00:23:42	00:24:06	Marketing Call
Charles Berry	Larry Redman (0015)	0015	10/10/2021 11:50:15	00:25:07	00:25:20	Marketing Call
Charles Berry	Charles Berry (0010)	0010	10/10/2021 11:50:40	00:25:35	00:25:43	Complaint
Charles Berry	Larry Redman	0015	10/10/2021 12:16:35	00:00:08	00:00:26	Marketing Call
Chris Tutt	Larry Redman (0015)	0015	10/10/2021 12:35:03	00:00:12	00:33:01	Marketing Call Brochure Request Information Request
Kakapo Support: 8 Call-backs				00:09:27	00:17:05	
Total: 8 Call-backs				**00:09:27**	**00:17:05**	