

Unity Contact Center WEB Chat Setup User Manual

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Unity Contact Center WEB Chat Setup

Primary Colour: Custom #c7270e

Web Chat Window Header: Use Media Stream Name

Use Agent Name & Avatar When Reserved: OFF

Web Chat Start Image: Box design with custom image and text

Web Chat Avatar: [Avatar Selection]

Invert Start Image: OFF

Web Chat Window Type: Window

Start Text: Can I Help You?

Button Text: Chat Now!

Web Chat Widget Location: Bottom Right

Web Chat Widget Delay: 4

Preview: Can I Help You? Chat Now!

Product Information

Specifications

- **Product Name:** Unity Contact Center
- **Feature:** Web Chat Media Stream

Product Usage Instructions

Media Streams are created within Queues. From within the portal, select the Queue where you want to create the Media Stream.

To set up a Web Chat, follow these steps:

1. Click on Media Streams in the Queue section.
2. Click Add Media Stream.
3. Enter the relevant Web Chat configuration and any automatic responses.

At the bottom of the Media Stream profile page, you can customize the Web Chat using different colors, avatars, text, and locations.

After configuring the Web Chat, click Add Media Stream and then go back to the Media Stream profile by clicking View. Click Test Stream at the bottom of the page to preview how the Web Chat will behave and get the HTML code needed to embed it on a webpage.

A routing phase is a rule that determines who should be alerted when a new Web Chat conversation comes in. Follow these steps to add a routing phase:

1. Go to the Contact Center Media Stream menu.
2. Click Add Phase.
3. Fill in the required fields and add desired users.
4. Click Add Phase to save.

Once you have created a Web Chat Media Stream and added routing phases, agents assigned to the Queue should restart their Unity client. The new Queue/Web Chat Media Stream will then be available on the Personal Wallboard.

For more detailed instructions, refer to the full-length user guide.

FAQ

- **Q:** How do I brand the Web Chat using different colors and avatars?
- **A:** You can brand the Web Chat at the bottom of the Media Stream profile page by customizing colors, avatars, text, and locations.

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.

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

Multi-media queues currently used by this group.

Wildcards are automatically added when searching.

Name	Timezone	Agents joined
Android Support	India Standard Time	4/5
Charter Test	Eastern Standard Time	2/2
Chris Lab	GMT Standard Time	14/24
Dashboard Support	India Standard Time	9/14
Development Queue	GMT Standard Time	5/19
Dynamic Sales	GMT Standard Time	1/1
Holidays	GMT Standard Time	1/1
Identifier Test One	GMT Standard Time	0/0
Identifier Test Two	GMT Standard Time	0/0
Kakapo IndiaContact	India Standard Time	9/19
Kakapo Live Streams	GMT Standard Time	6/17
Kakapo Sales	GMT Standard Time	5/9
Kakapo Support Channels	GMT Standard Time	8/17
Kakapomarketing@kakaposystems.com	GMT Standard Time	0/0

Adding a Web Chat Media Stream

- To set up a Web Chat click Media Streams in the Queue section and then click Add Media Stream. Enter the relevant Web Chat configuration and any automatic responses.

Cancel

Presence-Based Scripting

Add Media Stream

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

New Media Stream

Add or update a media stream to the queue, each media stream represents an entry point into the queue through a media type

Name: Kakapo Marketing Chat

Language: English (United Kingdom)

Media Type: Web Chat

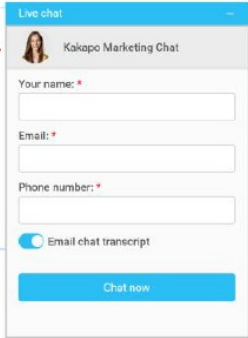
Conversation Can Be Transferred: ☒

Availability

Timezone: (UTC+00:00) Dublin, Edinburgh, Lisbon, London Daylight savings from Sunday 27/03/2022 at 01:00 until Sunday 30/10/2022 at 02:00

In Office Profile: Always online

Use Last Agent If Available: ☒



Live chat

Kakapo Marketing Chat

Your name: *

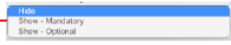
Email: *

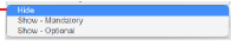
Phone number: *

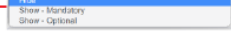
☐ Email chat transcript

Chat now

Identifier: If left blank this will be automatically generated

Remote Party Name: Show - Mandatory 

Remote Party Phone: Show - Mandatory 

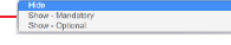
Remote Party Email: Show - Mandatory 

Email Transcript Available: ☐ OFF

Attachments Allowed: ☐ OFF

Conversation Can Be Rated: ☐ OFF

Record Visitor Journey: ☐ OFF

External Reference: Show - Optional 

External Reference Label: Account Number

Welcome Message: Hello! How can we help you?

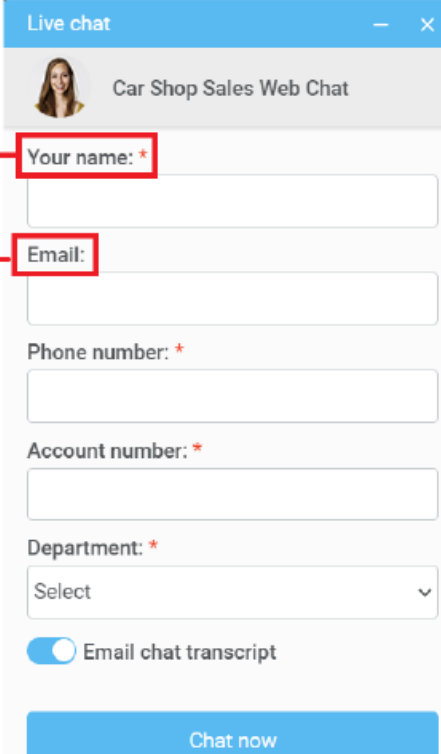
Unstaffed Message: Sorry we missed you, we will call you back.

Missed Message: Sorry, we are closed. We have recorded your details and will contact you in hours.

When Unstaffed Or Missed Send A Notification To These Addresses (One Email Address Per Line): Admin@kakaposystems.com

Mandatory

Optional



Live chat

Car Shop Sales Web Chat

Your name: *

Email: *

Phone number: *

Account number: *

Department: *

Select

☒ Email chat transcript

Chat now

- At the bottom of the Media Stream profile page, you can brand the Web Chat using different colors, avatars, text, and locations, as shown below.

Primary Colour: Custom #c7270e

Web Chat Window Header: Use Media Stream Name

Use Agent Name & Avatar When Reserved: OFF

Web Chat Start Image: Box design with custom image and text

Web Chat Avatar: [Avatar 1] [Avatar 2] [Avatar 3] [Avatar 4] [Avatar 5] [Avatar 6] [Upload Image]

Invert Start Image: OFF

Web Chat Window Type: Window

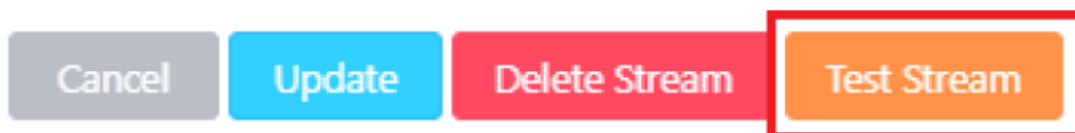
Start Text: Can I Help You?

Button Text: Chat Now!

Web Chat Widget Location: Bottom Right

Web Chat Widget Delay: 4

- Click Add Media Stream and then go back to into the Media Stream profile by clicking View. Click Test Stream at the bottom of the Media Stream profile page, as shown below.



- The portal will then show you how the icon will behave and provide you with the HTML code that you need to copy and paste into any webpage where you want to Web Chat to appear on.

Copy the below text and paste it into your HTML page.

Please ensure it is pasted at the bottom body section of the webpage, rather than the head section. This is because the client may need to manipulate other components in the web page depending on display settings, for example if the conversation window should be shown as a docked panel

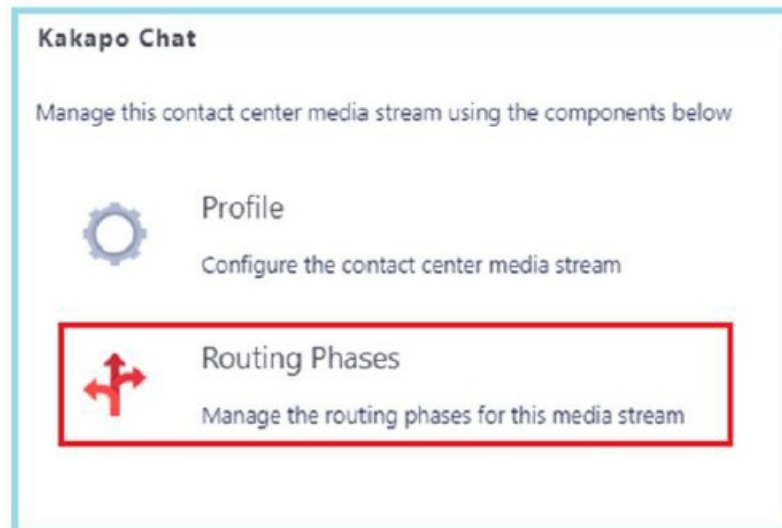
```
<script type="text/javascript" src="https://portal.unityclient.com/webchat/js/webchat.js" id="WebChatClient" queueId="KakapoLiveStreams@KakapoSystems.com" StreamIdentifier="webchat.Joined@KakapoSystems.com">
</script>
```

Create Test HTML File

Adding a Routing Phase

- A routing phase is a rule that instructs the Contact Center who to alert when a new Web Chat 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.

The screenshot shows the 'Sales' phase configuration page. It has a title 'Sales' and a subtitle 'Phases are used to configure routing rules for a media stream when a new message is received'. The form includes fields for 'Phase Number' (1), 'Name' (Sales), 'Entrance Message' (We're looking for an agent now, please hold on :)), 'Routing' (Simultaneous), 'Phase Duration (seconds)' (120), and 'Include Agents From Previous Phases' (OFF). There is a red arrow pointing from the 'Entrance Message' field to a 'Live chat' window on the right. The 'Live chat' window shows a chat history with a message from 'Kakapo Chat' saying 'Please type your details below to start chatting' and a response from 'Hello'. Below the chat window, there is a list of agents assigned to the phase, including Steve Tutt, Jenna Wimshurst, and Steve Wardle. The agents are listed in a box with a search bar and buttons for 'Add', 'Add All', 'Remove', and 'Remove All'. At the bottom of the page, there are buttons for 'Cancel', 'Update Phase', and 'Delete Phase'.

- You have now successfully created a Web Chat Media Stream, the Agents assigned to the Queue in the routing phase should restart their Unity client. Once they have done that the new Queue/Web Chat 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 the Unity Contact Center.

Documents / Resources

	<p>Unity Contact Center WEB Chat Setup [pdf] User Manual Contact Center WEB Chat Setup, Center WEB Chat Setup, WEB Chat Setup, Chat Setup, Setup</p>
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References

- [User Manual](#)

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