

**Unity Agent Help Guide** 



# UNITY AGENT HELP GUIDE

## CONTENTS

1	L About Unity Agent		
	1.1	Naming Conventions for this Help7	
	1.2	System Requirements7	
	1.2.1	Windows PC Requirements7	
	1.2.2	Internet & Firewall8	
2	I	nitial Setup8	
	2.1	Call Center Login Details9	
	2.2	Call Center Login Default Password10	
	2.3	Selecting a Pre-Configured Template11	
	2.4	Manual and Auto Updates11	
	2.5	Rollback available12	
3	ι	Inity Agent Interface Overview12	
	3.1	Resizing Unity Agent13	
	3.2	Maximizing and Minimizing13	
	3.3	Using Unity Agent from the System Tray14	
	3.4	Call Notification Preferences14	
	3.4.1	Show Remote Party Phone Number15	
	3.4.2	Override Contact Name Using Number15	
	3.5	Summary Toast Notification15	
	3.6	Browser Screen-Pop15	
	3.7	Appearance16	
	3.8	Skins16	
4	I	Main Interface Elements16	
	4.1	ACD State Buttons16	
	4.2	Call Control16	
	4.3	Active Call Window17	
	4.4	Contacts [Busy Lamp Field]17	
	4.5	Call Logs17	
	4.6	Voicemail	

5	C	all Center Agent Functionality	18
	5.1	Changing ACD State	.18
	5.1.1	Only Show One ACD Button	.19
	5.1.2	Assigning Unavailable Codes	.19
	5.1.3	Force Disposition Code	.20
	5.1.4	Displaying ACD State Duration	.20
	5.2	Using Personal Wallboard	.21
	5.2.1	Locking in Minimized State	.21
	5.2.2	Configuring Statistics Columns in Personal Wallboard	.22
	5.2.3	Customizing Statistics Label	.22
	5.2.4	Configuring Alert Thresholds in Personal Wallboard	23
	5.3	Joining & Leaving Queues	.24
	5.4	Receiving ACD Calls	.24
	5.5	Using Disposition Codes	.24
	5.6	Auto Answer	.25
	5.7	Supervisor Escalation	.26
	5.7.1	Standard Escalation	.26
	5.7.2	Emergency Escalation	26
	5.7.3	Escalation via Active Call Window	.27
	5.7.4	Escalation via Personal Wallboard	.27
	5.8	Activating Outbound DNIS	.28
	5.9	Personal Statistical Reports	.28
	5.10	Pre-configuration of ACD State	.29
6	C	all Control	30
	6.1	Making a Call	.30
	6.1.1	Using the Dial Window	.30
	6.1.2	Using the Contacts Panel	.30
	6.1.3	Drag and Drop	.30
	6.1.4	Using Directory Search	.31
	6.1.4	Dialing from the clipboard	.31
	6.2	Answer a Call	.31
	6.3	End a Call	.31
	6.3	Redial	.31
	6.4	Send Call to Voicemail	.32
	6.4.1	Retrieving Voicemail Messages via VoiceMail Button	.32
	6.4.2	Retrieving Voicemail Messages via Voicemail tab	.32
	6.5	Transferring a Call	.32
	6.5.1	Announced Transfer	.33

	6.5.1.1	Warm Transfer	.33
	6.5.2	Blind Transfer	.34
	6.5.2.1	Using Contacts Panel Drag and Drop	.34
	6.5.2.2	Using Transfer Button	.34
	6.5.2.3	Using Right Click	.34
	6.5.3	Transfer to Voicemail	.35
	6.5.3.1	Using Contacts Panel Right Click - Voicemail	.35
	6.5.3.2	Using Drag and Drop	.35
	6.5.4	Transfer to Mobile	.35
	6.5.4.1	Using Contacts Panel Right Click - Mobile	.36
	6.5.4.2	Using Drag and Drop	.36
	6.6	Call Hold/Retrieve	.36
	6.6.1	Placing a Call on Hold	.36
	6.6.2	Retrieving a Held Call	.36
	6.7	Conference Calling	.36
	6.7.1	Starting a Conference Call	.37
	6.7.2	Ending a Conference Call	.37
7	Ac	tive Call Window	.37
	7.1	Window Layout	.38
	Calls In	Queue	.38
	7.2	Managing Multiple Calls	.38
	7.3	Resizing the Active Call Window	.38
	7.4 Ass	igning an Account Code	.39
8	D	rag and Drop	.39
	8.1	Make a Call to a User or Number	.40
	8.2	Transferring a Call to a User	.40
	8.3	Make a Call to a Call Center Queue	.40
	8.4	Transferring a Call to a Call Center Queue	.40
	8.5	Send to Voicemail	.40
	8.6	Call Control	.40
	8.7	Send New Instant Message	.40
	8.7.1	Add Participant to Existing IM Session	.41
	8.7.2	Transfer Call to IM Participant	.42
9	Co	ntacts Panel [Busy Lamp Field]	.42
	9.1	Contact Panel Display Options	.42
	9.1.1	Details View	.43
	9.1.2	List View	.43
	9.1.3	Small Icon View	.44

9.1.4	Tile View	44
9.2 L	Jser Icons	44
9.2.1	User Icon Engaged Tool Tip	45
9.2.2	Instant Messaging Availability	45
9.3 N	Managing Monitored Users in the Contacts Panel	45
9.5 P	Performing Call Control Actions in the Contacts Panel	46
9.5.1	Call Extension	46
9.5.2	Answer This Call [Call Pick-Up]	46
9.5.3	Park Call on Extension	47
9.5.3.1	Retrieving Parked Calls	47
9.5.4	Camp Call on Extension	47
9.5.6	Call Mobile	48
9.5.7	Transfer Call to Mobile	48
9.5.8	Transfer Call to VoiceMail	48
9.5.9	Barge into This Call	48
9.5.10	Call Extension When Available	49
9.5.11	View User Details	49
9.5.11.1	Adding Audio Alerts to Monitored Users	50
9.5.12	Send Email	50
9.5.13	Answer This Call [Call Pick-Up]	50
). Ins	tant Messaging	51
10.1	Online/Offline Indicator	51
10.2	Docking the IM Window	51
10.3	Undocking and Redocking IM sessions	52
10.4	Sending an Instant Message	53
10.5	Overview of IM Window	53
10.6	Adding Participants to an Existing IM Session	54
10.7	Sending Contact Directory Numbers	54
10.8	IM Notification Settings	55
10.9	Send IMs to Offline Users	55
10.9.1	Logging IM Sessions	55
10.10	XMPP Integration	56
10.10.1	XMPP Authentication	56
10.10.2	Managing XMPP Subscriptions	57
10.10.3	Instant Message Priority	59
10.10.4	Configuration	59
10.10.4		
	sonal Directory	60

11.2	Edit Entry	61
11.3	Remove Entry	61
11.4	Dialing Directory Entry	61
11.5	Import Personal Directory	62
11.6	Export Personal Directory	62
12 Con	tact Search Directories	63
12.1	Loading Directories	63
12.2	Contact Search Results Layout	63
12.3	Contact Search Settings	64
12.3.1	Listing Directories	64
12.4	Configuring Outlook Contacts Preferences	65
12.5	Third Party Directories	65
12.6 Des	ktop Integration	66
13 Call	Logs	66

## 1 ABOUT UNITY AGENT

Unity Agent is a Microsoft® Windows® based application that provides a fully integrated hosted telephony environment, including allowing the user to join/leave call center queues to which they are assigned, change their ACD state and view personal and overall call center statistics and queue conditions.

## 1.1 Naming Conventions for this Help

- a. Call Center instances are also referred to as Queues in this guide
- b. ACD calls mean incoming calls into the call center/queue
- c. BWKS means the BroadSoft BroadWorks platform

## 1.2 System Requirements

## 1.2.1 Windows PC Requirements

- a. Unity will require approx 20MB of hard drive space on the local machine
- b. By default the install directory is C:\Program Files (x86)\Unity Client
- c. Minimum computer spec: CPU: dual core 3Ghz. Ram: 4GB. Video Card: 256MB onboard RAM. As a general note, the requirements to run Unity Agent are considerably less than

those required to run Windows

d. Unity can be rolled out as an MSI file, which supports Active Directory group profiles

- e. Unity is only supported on Windows 7, Windows 8.1 and Windows 10
- f. Both 32 and 64-bit versions of Windows are supported. There are no special permissions required to install Unity

#### 1.2.2 Internet & Firewall

Unity requires high-speed internet connectivity and access to the below locations, which may require firewall rules to be added on the customer premises:

- a. TCP port 2208 to im.unityclient.com
- b. TCP port 2208 to the VoIP platform OCI server
- c. HTTP/HTTPS access to portal.unityclient.com
- d. HTTP/HTTPS access to the VoIP platform XSI server [if call recording, visual voicemail or enhanced call center reports are used]

## 2 INITIAL SETUP

The first-time Unity is started you will be prompted to enter the configuration details, as shown below. Unity can then retain the connection and authentication details for later use. The Login ID and Password will be assigned from your Service Provider.

Broadworks Login Details		
Login ID		
Password		
✓ Remember my login ID		
<ul> <li>Remember my password</li> </ul>		

Next you will be prompted for the server address for your Service Provider. If this field is already populated do not change it. In most cases you can leave the Server Port as 2208 Leave the Unity Server Connection Details as those prefilled.

Broadworks Server Connection Details			
Server address			
Server port			
2208			
Unity Server Connection Details			
Unity Server Connection Details Server address:			
•			
Server address:			
Server address: im.unityclient.com			

Restart Unity Agent to begin.

#### 2.1 Call Center Login Details

Once Unity has been restarted it will connect to the host BroadWorks system and populate all the Call Center Instance IDs for the call centers that the agent is a member of as shown below.

O Services & Settings		×
Services Settings		
Appearance     Skin     Contact Search     Contact Display     Current Cals	Specify contact center authentication details. All login ids and passwords are case sensitive and each login id must include the domain.	
Computer/Phone Integration     Composed Integration		
- Dialling Rule	Default password	
- Custom Directory Integration	×	
Configuration	Contact Center Login Details	
Outlook Integration     Outlook     Outlook Integration     Outlook Integration     Outlook Integ	✓ Polts Sales ✓ Kakapo Systems ✓ Nuts Sales	
- Language		
Network		
Authentication     Contact Centers	Alert me when a contact center login fails	
	X Cancel V OK	

The password for each call center must be added in order to populate the call centers in the Personal Wallboard. Double click a call center to add the password. Where the password is the same for each call center click the "Apply to all queues without a password" box and restart. Unity will now login as the call center queues and you will see these begin to populate the Personal Wallboard.

Call Center Login Details		
Service ID		
boltssales@drd.co.uk		
Password		
Login status		
The password has not been entered.		
Apply to all queues without a password		

Ticking "Alert me when a call center login fails" will pop this dialogue box when Agent starts and cannot login successfully to a call center.

Bolts Sales	×
1	Either the password entered for the call center is not valid or has expired, or the account is disabled. Please check the details and try again, or consult with your system administrator.
	ОК

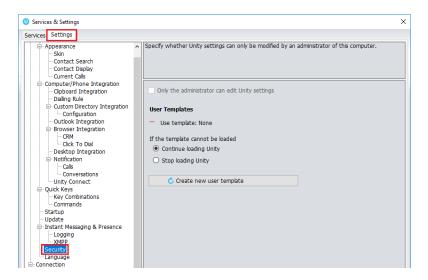
## 2.2 Call Center Login Default Password

If all call center passwords are the same, use the default password option. Enter the password for the call centers so that when a new call center is added in the future the agent doesn't have to enter the call center password as Unity will do this automatically. Please note that all call center passwords have to be the same for this option to work.

0 Services & Settings		×
Services Settings		
Appearance     Skin     Contact Search     Contact Display     Current Calls	Specify contact center authentication details. All login ids and passwords are case sensitive and each login id must include the domain.	
Computer/Phone Integration		
<ul> <li>Clipboard Integration</li> <li>Dialling Rule</li> </ul>	Default password	
Custom Directory Integration	×	
Configuration Outlook Integration	Contact Center Login Details	
Browser Integration	✓ Bolts Sales	
CRM	✓ Kakapo Systems	
Click To Dial	✓ Nuts Sales	
Desktop Integration     Notification		
Calls		
Conversations		
Unity Connect		
Quick Keys		
- Key Combinations		
Commands		
Startup		
Update     Instant Messaging & Presence		
- Logging		
XMPP		
Security		
Language		
Connection		
Network		
Proxy	Alert me when a contact center login fails	
Contact Centers	C Alercine when a contact center login rais	
	X Cancel V OK	
	× Cancel ✓ OK	

## 2.3 Selecting a Pre-Configured Template

User templates can only be created by an administrator to configure default settings for agents. ACD buttons, call center control, recording options and all other settings can be configured and saved as a template that can be easily assigned to all users. Please see your Administrator for a separate guide on using Unity Templates.



## 2.4 Manual and Auto Updates

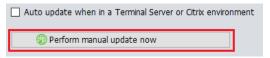
Unity can be configured to automatically update when a new version is available. Simply tick the box in settings>update as shown below.

U Services & Settings	X
Services Settings Appearance Skin Contact Display Current Cals Computer/Phone Integration Clipboard Integration Clipboard Integration Clipboard Integration Cutook Appearance Cutook Charge Cutook Appearance Cutook Appea	<ul> <li>Configure Unity to automatically update periodically.</li> <li>✓ Auto update Unity</li> <li>Check for updates every</li> <li>1</li></ul>

When a new version of Unity is available the user will be presented with a popup asking to restart Unity. Once Unity has restarted the latest version will be running. You can also configure how often Unity looks for updates under the auto update box.

To manually update Unity, click Perform manual update now and Unity will search for any new

updates.



## 2.5 Rollback available

If rollback available is ticked in the Unity portal, then users can rollback to previous versions of Unity. Go to settings>update and the choose the desired version from the drop-down menu.

Rollback	
Versions available	
~	Rollback

Once you've selected which version you want to rollback to click the green tick and the box below will appear.

Unity		$\times$
?	Are you sure you want to rollback to version 6.7.5.0?	
	<u>Y</u> es <u>N</u> o	

Click Yes and then click Ok.

# 3 UNITY AGENT INTERFACE OVERVIEW

Unity is split into six functional areas; ACD Buttons, Call Control buttons, Personal Wallboard, Active Call Window, Contacts [Busy Lamp Field and Instant Messages]. Contacts is a tab that can be toggled to display Call Logs, Abandoned Calls and the Voicemail tab.

	ACD State	Call Cor	ntrol Buttons		Compan	ny Logo
	🕛 Unity Agent: Jenna Wimshurst -	- Available (duration: 39:48)				- 🗆 ×
	File Messaging Tools Help	p				
	Unavailable Available Wrap-up Rele	esse Dial Transfer Hold	Conference Volcemail Recording Reports Se	3 Stras	Compa	ny Logo
		My Statistics		Overall Queue Statistics		
	Total Total		d Average Freedly Mich Total		19/10	
/allboard	Calls	Web Answere Total Misse Chats d'Calls Talk Calls Answere Time	ed Average Emails Web Total s Talk Answere Chats Calls A Time d Receive	Calls Total Calls In Longest Average Average Calls Web nswere Missed Queue Wait Wait Talk Abandon Chats d Calls Time Time Time ed Queuec	Web Chats I Answere	
aliboard	Kakapo Systems -	0	- 0 0 -	0	1	
	Bolts Sales 0	0 00:00 0	00:00 0 0 0	0 0 0 00:00 00:00 0 0	0	
	Nuts Sales 0	- 0 00:00 0	00:00 0	0 0 00:00 00:00 0 -		
	0	0 0 00:00:00 0	00:00 0 0 0	0 0 0 00:00 00:00 0 0	1	
	Activity From	То	Duration	Status		
	Current					
Window		nes (Salesforce Contact) Jenna	Wimshurst 00:14	Active/Not recording		
Window	Call Natalie Main		Wimshurst 00:14			
Window ——			Wimshurst 00:14	Active/Not recording	ble in office	
Window	Call Natalie Main		Wimshurst 00:14		Die in office	
Window ——	Call Natalie Main		ACD State		ble in office	
Window ———	Call Natalie Main	ned Calls Voicemail		⊂ Mystatus; avaita	Die in office	
Window ———	Call Natalie Main Contacts Activity Logs Abandor Search Name	ned Calls Voicemail	ACD State	Wy status: availa Status I am out to lunch from 17 September 23.2 until Jurther notice.	ble in office	
Window ——	Call Natalie Main Contacts Activity Logs Abandor Search Name Q Abin Joseph	ned Calls Voicemail	ACD State Sign-In Available	<ul> <li>My status: availa</li> <li>Status</li> </ul>	ble in office	
Window ———	Call Natalie Main Contacts Activity Logs Abandor Search Name O Abin Joseph O Abia Stair	ned Calls Voicemail Q Phone 8335 000228912	ACD State Sign-In	Wy status: availa Status I am out to lunch from 17 September 23.2 until Jurther notice.	ble in office	
Window ——	Call Natalie Main Contacts Activity Logs Abandor Search Name Alastair Alastair Any Earl	ned Calls Volcemail Q Phone 8335 02022812 02062812	ACD State Sign-In Available Sign-Out Sign-Out	Wy status: availa Status I am out to lunch from 17 September 23.2 until Jurther notice.	ble in office	
Window	Call Natalie Main Contacts Activity Logs Abandor Search Name Alastair Anio Joseph Alastair Charlote Thompson Charlote Thompson	ned Calls Voicemail Q Phone 8335 020628912 020628912 020628912	ACD State Sign-In Available Sign-Out	Wy status: availa Status I am out to lunch from 17 September 23.2 until Jurther notice.	ble in office	
	Call Natalie Main Contacts Activity Logs Abandor Search Mame Abin Joseph Abin Joseph Army Earl Charlote Thompson	ned Calis Voicemail Phone 8335 02082812 02082812 02082812 02082812 02082812 02082812	ACD State Sign-In Available Sign-Out Sign-Out Sign-Out	Wy status: availa Status I am out to lunch from 17 September 23.2 until Jurther notice.	Die in office	
Window ———	Call Natalie Main Contacts Activity Logs Abandor Search Mame Abin Joseph Any Earl Chastair Chris Tut Chris Tut Chris Tut	ned Calls Voicemail Phone 8335 020828912 020828912 020828912 020828912	ACD State Sign-In Available Sign-Out Sign-Out	Wy status: availa Status I am out to lunch from 17 September 23.2 until Jurther notice.	ble in office	
np Field/	Call Natalie Main Contacts Activity Logs Abandor Search Name Alastair Ani Joseph Alastair Charlote Thompson Charlote Thompson Charlote Thompson Charlote Thompson Charlote Thompson Charlote Thompson	ned Calls Voicemail Q Finne 8335 02942812 0294 000 000 000 000 000 000 000 000 000 0	ACD State Sign-In Available Sign-Out Sign-Out Sign-Out Unavailable - Paperwork	My status: availa Status I am out to lunch from 17 September 23.2 until further notice. Taking to James Turner (Customer Support) - 00.10	Die in office	
	Call Natalie Main Contacts Activity Logs Abandor Search Name Abin Joseph Abin Joseph Any Earl Char Suf Char	ned Calis Voicemail Phone 8335 020828912 0008 000 000 000 000 000 000 000 000 0	ACD State Sign-In Analable Sign-Out Sign-Out Sign-Out Sign-Out Unavailable - Pagerwork Sign-In	My status: availa Status I am out to lunch from 17 September 23.2 until further notice. Taking to James Turner (Customer Support) - 00.10		
np Field/	Call Natalie Main Contacts Activity Logs Abandor Search Name Abin Joseph Aix Jastair Chaf Star Chaf Star Chaf Star Call Houston Call Houston David Hig Dean	ned Calis Voicemail Phone 8335 20262812 2026812	ACD State Sign-In Available Sign-Out Sign-Out Sign-Out Unavailable - Papervork Sign-In Sign-In	<ul> <li>My status: availa</li> <li>Status</li> <li>I am out to lunch from 17 September 23.2 until lurther notice.</li> <li>Taiking to James Turner (Customer Support) - 00.10</li> <li>Do not disturb / In a meeting</li> </ul>	Sleve Wardie	- C X
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np Field/	Call Natalie Main Contacts Activity Logs Abandor Search Name Abin Joseph Aix Jastair Chaf Star Chaf Star Chaf Star Call Houston Call Houston David Hig Dean	ned Calis Voicemail Phone 8335 020828912 0208 00 00 00 00 00 00 00 00 00 00 00 00 0	ACD State Sign-In Available Sign-Out Sign-Out Sign-Out Unavailable - Papervork Sign-In Sign-In Sign-In Sign-In Available	<ul> <li>My status: availa</li> <li>Status</li> <li>I am out to lunch from 17 September 23.2 until further notice. Taiking to James Turner (Customer Support) - 00.10</li> <li>Do not disturb / In a meeting</li> <li>Currently away</li> </ul>	Sleve Wardie	s sales call to you please?
np Field/	Call Natalie Main Contacts Activity Logs Abandor Search Name Alastair Ani Joseph Alastair Charlote Thompson Charlote Thompson Charlote Thompson Charlote Thompson Charlote Thompson Call Activity Contact Dave Swidtek Dave Swidtek Dave Swidtek Call Activity Contact Call Activity Cont	eed Catis Voicemail Prinne 3335 202028112 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20208281 20208 2	ACD State Sign-In Arailable Sign-Out Sign-Out Sign-Out Unavailable - Papervork Sign-In Sign-In Sign-In Available Sign-Out	<ul> <li>My status: availa</li> <li>Status</li> <li>I am out to lunch from 17 September 23.2 until lurther notice.</li> <li>Taiking to James Turner (Customer Support) - 00.10</li> <li>Do not disturb / In a meeting</li> </ul>	Steve Warde Jenna Wimshurst. Her can I transfer thi	s sales call to you please?
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np Field/	Call Natalie Main Contacts Activity Logs Abandor Search Name Alastair Ani Joseph Alastair Charlote Thompson Charlote Thompson Charlote Thompson Charlote Thompson Charlote Thompson Call Activity Contact Dave Swidtek Dave Swidtek Dave Swidtek Call Activity Contact Call Activity Cont	eed Catis Voicemail Prinne 3335 202028112 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20202812 20208281 20208 2	ACD State Sign-In Arailable Sign-Out Sign-Out Sign-Out Unavailable - Papervork Sign-In Sign-In Sign-In Available Sign-Out	<ul> <li>My status: availa</li> <li>Status</li> <li>I am out to lunch from 17 September 23.2 until further notice. Taiking to James Turner (Customer Support) - 00.10</li> <li>Do not disturb / In a meeting</li> <li>Currently away</li> </ul>	Steve Warde Jenna Wimshurst. Her can I transfer thi	s sales call to you please?

## 3.1 Resizing Unity Agent

Unity can be dragged from any corner to the required size. The Active Call Window resizes independently by dragging the border at the bottom of the list [where the lower red line is in the illustration above]. When Unity is closed, all current dimensions will be saved.

## 3.2 Maximizing and Minimizing

Unity can be maximized and minimized using the standard buttons in the top right-hand corner of the application. When minimized, Unity appears in the system tray in the bottom right hand corner

of the desktop where the Unity icon <sup>1</sup> will be displayed. To re-open Unity simply double click this icon, or right click and select Restore from the menu, as shown below.

	Close	
	Restart	
	Restore	
٥	Settings	
	Contacts	
	Call Logs	
C	Call number	•
	Change my status	•
	ACD State	•
		$\sim$

## 3.3 Using Unity Agent from the System Tray

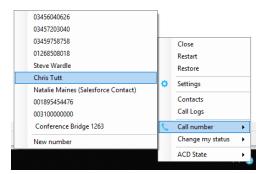
In its minimized state, Unity Agent can be configured to sit in the System Tray. This is in Settings [button] > Settings [tab] Appearance.



Right clicking the Unity icon **o** in the system tray allows the user to dial or redial, configure settings such as CommPilot Express Profiles, DND, Call Forward Always or Remote Office, or change their ACD state. Note: Only those services that are assigned to the user in BroadWorks will be displayed.

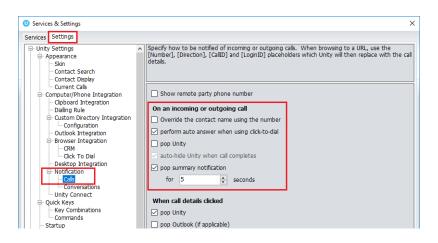
			0	Available: in office
	Close		0	Available: out of office
	Restart		0	Busy
	Restore		Θ	Unavailable
۰	Settings		0	None
	Contacts		•	Do not disturb
	Call Logs		2	Call forward always
S.	Dial number	×	e	Connect to a device
1	Change my status	•	G→	Remote Office
	ACD State	F		15:47
		$\sim$	U U	) 🖳 🧖 ENG 27/09/2018

Selecting "Call number" will provide a list of the last 10 dialed numbers as illustrated below. "New number" will pop a call box where the user enters the desired number using their computer keyboard.



## 3.4 Call Notification Preferences

Unity Agent can be configured to pop when a call is presented or pop a "toast" summary notification above the system tray when a call is presented. Optionally, Agent can also perform auto-answer when using click-to-dial. If this is not selected, then the IP phone will ring and the user will have to lift the handset to initiate the outbound call.



## 3.4.1 Show Remote Party Phone Number

This setting will configure to show the remote party number [if available], as shown below. This applies to both internal and external parties.

From	То	Duration	Status	
Chris Tutt	Andrew Smith (0002)	00:00	Ringing	

#### 3.4.2 Override Contact Name Using Number

Unity can also perform a contact search based on the remote party number even if the name was provided by the Broadworks platform, this is especially useful when the name delivered through the PSTN is incorrect, for example in some cases this may always be "WIRELESS CALLER".

## 3.5 Summary Toast Notification

The summary notification is presented for hunt group, ACD and DID calls and can be used to route the call to voicemail or answer the call.

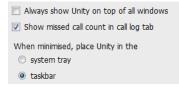


## 3.6 Browser Screen-Pop

The summary notification is also clickable and can be used to open the PC default browser to a preconfigured URL and append incoming call information, such as the phone number of the remote party. This feature can be used for screen popping CRM systems and other browser based applications. Further information on this feature is in a supplementary guide.

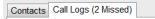
#### 3.7 Appearance

In Settings [button] > Settings [tab] > Appearance, the user can change the behavior of Unity.



Always show on top of all windows – Unity will always be on top

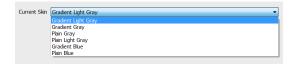
Show missed call count in the call log tab – When enabled Unity will provide a count of the number of missed calls as below



**Show remote party phone number** – This will show the phone number and the name [if matched] in the "From" field

#### 3.8 Skins

In Settings [button] > Settings [tab] > Appearance > Skin, the user can change the look of Unity with preset Skins.



## 4 MAIN INTERFACE ELEMENTS

#### 4.1 ACD State Buttons

ACD State buttons for setting the agent's availability to the call center. When clicking "Unavailable" the user will be presented a list of unavailable codes as configured in BroadWorks.

#### 4.2 Call Control

Call Control buttons provide quick access to common telephone handling commands. Only services that are assigned to the user are displayed. For example, if Call Recording and Voicemail are not assigned then the buttons will not be displayed.

## 4.3 Active Call Window

This provides a list of all current calls and their state. For example, Ringing, Active or On Hold. The duration of the call is also displayed. This is from the moment the call was first placed and does not reset when a call is Held or Retrieved. Unity will mirror any call handling made on the user's IP phone. For example, if the call is placed on Hold on the handset, the user will show as being on Hold in the Active Call Window.

## 4.4 Contacts [Busy Lamp Field]

This panel will display up to 30 monitored users, displaying their Do Not Disturb [grey], Available [green], Engaged [red] or Ringing [orange] state as icons.

## 4.5 Call Logs

Toggling the bottom Contacts panel to Call Logs will display Missed Calls, Received Calls and Dialed Calls. Missed Calls will include both direct inward DID calls, ACD and Hunt Group calls. 20 numbers can be stored unless the user has Enhanced Call Logs service assigned.

Call Logs can also be cleared, reloaded or exported with the icons at top right of the panel.

× 🖒 🗋

## 4.6 Voicemail

Clicking into the Voicemail tab will display a list of voice messages with the most recent at thetop. Double click an entry to play through the PC's default media player. Right click to save locally or delete.

O	Contacts Call Logs (1 Missed	) Voicemail				My	status: available in office	Refresh voicemail list, or save or
Search on name or	Search	٩					× C 🗋	delete selected items
	Call Date	Name	Phone Number			Duration		
	06/04/2016 18:47:05	James Smith	1312			00:00:43	*	
	03/04/2016 18:43:22	Lewis Marcantonio	1265					
	26/02/2016 10:35:42	INDIA Conference Room	8330		Play			
	26/02/2016 10:34:56	INDIA Conference Room	8330		Save			
	22/02/2016 18:31:43	Hannah Carpenter (Business)	+44797066303	×	Delete			
	15/02/2016 16:10:15	Unavailable	Unavailable					
	15/02/2016 11:39:50	Parvathi M	8322	C	Call Copy number			Options when
				~	Reset column width Show gridlines	hs		right-clicking

In order for the Voicemail tab to appear, Agent must be configured for "Use unified messaging" and "Show visual voicemail tab" in Voicemail settings as below.

U Services & Settings	×
Services Settings	
Call Center  Agent  ACD State  Statistics  Columns  Reporting  Abandoned Calls  Comm Plot Express  Available: In Office  Available: Out Of Office  Busy	Configure your personal voice messaging.          Image: Configure your personal voice messaging         Image: Configure your personal voice messaging         Image: Configure your personal voice mail voice mail voice mail voice mail tab
└─ Unavaiable ─ Do Not Disturb ─ External Calling Line ID Delivery └─ Simultaneous Ring ⊖ Outgoing Calls └─ Calling Line ID Delivery Blocking ⊖ Call Control	Forward the volcemail via email     Email notification of new volcemails     Email a copy of the volcemail
Broadworks Anywhere     Gall Transfer     Call Transfer     Call Park Retrieve     Call Recruing     Call Waiting     Directed Call Pickup With Barge-in     Hoteling Guest	Transfer from voicemail on zero  Send al calls to voicemail
- Retening deest - Remote Office - Shared Call Appearance - Messaging - Voicemail V	Send busy calls to voicemail  Send unanswered calls to voicemail

# 5 CALL CENTER AGENT FUNCTIONALITY

## 5.1 Changing ACD State

Clicking Unavailable, Available or Wrap-Up will change your availability for all queues you are a member of. This will not impact receiving inbound direct calls. The currently selected state will have the ACD state name in red text, as Available is in the below example.



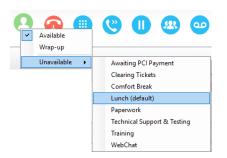
## 5.1.1 Only Show One ACD Button

Unity Agent can optionally be configured in Settings > Incoming Calls > Call Center > Agent > ACD State to only display one ACD button, which will be the currently selected state. Left clicking will provide the other ACD options.

^	Configure call center agent settings such as ACD state.
	Startup & desktop unlocked ACD state Not Set Vot Set V
	*

## 5.1.2 Assigning Unavailable Codes

When the agent selects unavailable, any unavailable codes that have been configured in BroadWorks will appear. Unavailable Code assignment with one ACD button:



Unavailable Code assignment with three ACD buttons:

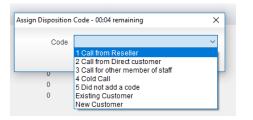


## 5.1.3 Force Disposition Code

To assign a Disposition Code the agent right clicks in the Active Call Window. Unity can force the agent to enter a disposition code by setting their ACD state post-call to Wrap-Up ACD state. When Unity is configured to force the agent to assign a disposition code through a popup window which is automatically displayed to the user when the call is released.

The Unity UI will be disabled and the popup window will appear over all applications on the user's desktop. A timer can be specified which will display a count-down to the user, and will automatically close once the timer duration has elapsed. When they click Available they get a drop list of Disposition Codes. They must choose one for the previous call before they can become Available. This feature is activated in Settings as below.

vices Settings	
Incoming Calls — Anonymous Call Rejection — Call Forward Always — Call Forward Busy — Call Forward No Answer — Call Forward No Answer — Call Formard	Configure call center agent settings such as ACD state.
Acent ACD State	Startup & desktop unlocked ACD state Not Set
Call Center Monitoring     Statistics     Columns     Threshold Alerts	Post cal ACD state
Reporting Abandoned Calls	Desktop locked ACD state
Comm Pilot Express     Available: In Office     Available: Out Of Office     Busy	Wrap-up duration (sec) 0 V Force me to assign a disposition code
Unavailable Do Not Disturb External Calling Line ID Delivery	for 20 seconds Prevent me from manually changing my ACD state when on a call center call.
Internal Calling Line ID Delivery Simultaneous Ring	Only show the current ACD state button
Outgoing Calls — Calling Line ID Delivery Blocking Call Control	<ul> <li>✓ Activate sign-out ACD state when Unity is closing.</li> <li>When displaying ACD state</li> </ul>
Broadworks Anywhere Call Transfer Call Park Retrieve Call Recording Call Waiting	Show duration ~



## 5.1.4 Displaying ACD State Duration

The top bar in Unity Agent will show the current ACD state as below.

Unity Agent: Jenna Wimshurst - Unavailable - Comfort Break (duration: 00:08)

This can optionally be configured to also display the ACD duration or the time that the ACD state was changed. This is configured in Settings > Agent > ACD State as below.

ervices Settings		
Incoming Calls     Anonymous Call Rejection     Call Forward Always     Call Forward Busy     Call Forward Busy     Call Forward No Answer     Call Center		Configure call center agent settings such as ACD state.
Agent ACD State		Startup & desktop unlocked ACD state
		Not Set
Columns Reporting		Post call ACD state
Abandoned Calls		Not Set 👻
Comm Pilot Express     Available: In Office     Available: Out Of Office     Busy	Е	Desktop locked ACD state Not Set Wrap-up duration (sec)
Unavailable Do Not Disturb		10
- External Calling Line ID Delivery - Internal Calling Line ID Delivery Simultaneous Ring		Don't change my ACD state to Available until I assign a disposition code Prevent me from manually changing my ACD state when on a call center call.
Outgoing Calls Calling Line ID Delivery Blocking		<ul> <li>Only show the current ACD state button</li> <li>Activate sign-out ACD state when Unity is closing.</li> </ul>
- Call Control Broadworks Anywhere		
Broadworks Mobility Call Transfer		When displaying ACD state Show duration
Call Park Retrieve Call Recording		

## 5.2 Using Personal Wallboard

The Personal Wallboard will show current performance metrics for the call centers the agent is assigned to. The stats are broken down by "My Statistics" which shows the agent's individual performance and "Overall Queue Statistics" which will show the current conditions across the entire call center[s]. The a icon at the upper right hand corner of Personal Wallboard toggles between showing all call centers individually [maximized view] or a summary of all call centers combined [minimized view].

#### Maximized View

My Statistics						Overall Queue Statistics												
Name	Total Calls	Web Chats Answere	Answere d Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answere d	Web Chats Receive	Total Calls	Calls Answere d	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Calls Abandon ed	Web Chats Queued	Web Chats Answere
Kakapo Systems	-	0	-	-	-	-	0	0		-	-	-	-	-	-	-	0	3
Bolts Sales	0	0	0	00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	0
Nuts Sales	0	-	0	00:00	0	00:00	-	-	0	0		0	00:00	00:00	00:00	0	-	-
	0	0	0	00:00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	3

#### Minimized View

My Statistics									Overall Queue Statistics							•		
Name	Total Calls	Web Chats Answere	Answere d Calls	Total Talk Time	Missed Calls		Emails Answere d	Web Chats Receive	Total Calls	Calls Answere d			Longest Wait Time	Average Wait Time		Calls Abandon ed		Web Chats Answere
Summary	0	0	0	00:00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	3

Note: Statistics shown in Personal Wallboard reset every 24 hours at midnight.

## 5.2.1 Locking in Minimized State

To disable the ability to maximize and minimize the Personal Wallboard, activate "Only display summary statistics" in Settings > Call Center > Statistics as below.

rvices Settings	
Incoming Calls     Anonymous Call Rejection     Call Forward Always     Call Forward Busy     Call Forward No Answer	<ul> <li>Configure call center statistics delivery. Call center passwords (required to gather statistics can be entered in the Authentication section. The Client Call Control service must be assigned to the call center if real-time statistics are required.</li> </ul>
Call Center  Agent  Agent  ACD State  -Statistics	Refresh frequency (seconds) 90 - 900
- Columns - Reporting - Abandoned Calls	Only display summary statistics Use scrollbars when the call center count equals
Comm Pilot Express     Available: In Office	E 20 V
- Available: Out Of Office Busy Unavailable	Process call centers in batches of
<ul> <li>Do Not Disturb</li> <li>External Caling Line ID Delivery</li> <li>Internal Caling Line ID Delivery</li> </ul>	
Simultaneous Ring	
Calling Line ID Delivery Blocking	
Broadworks Anywhere Broadworks Mobility	
Call Transfer Call Park Retrieve	
- Call Recording - Call Walting	

## 5.2.2 Configuring Statistics Columns in Personal Wallboard

The statistics shown in "My Statistics" and "Overall Queue Statistics" panels of the Personal Wallboard are configurable in Settings > Services > Call Center > Statistics > Columns. Statistics can be added or removed with the - + buttons and the order they are displayed, from left to right in the Personal Wallboard can be changed with the arrows. Topmost is to the left.

Services         Settings           Image: Construct on the personal wallboard. Threshold values can in the personal wallboard. Threshold values can interval in the personal wallboard. Threshold values can interval int		
Available: In Office     Available: Out Of Office     Busy     Unavailable     Do Not Disturb     External Caling Line ID Delivery     Internal Caling Line ID Delivery	Answered als ine	Anonymous Cal Rejecton     Cal Forward Aways     Cal Forward Aways     Cal Forward Buay     Cal Forward Buay     Cal Forward No Answer     Contact Center     Add Contact Center     Act State     Statistics     Keporting     Abandoned Cals
Outgoing Calls     Calling Line ID Delivery Blocking	ered	Avalable: In Office Avalable: Out Of Office Bury Unavalable Do Not Disturb External Caling Line ID Delvery Internal Caling Line ID Delvery Smultaneous Ring Outgoing Calis Caling Line ID Delvery Blocking
<ul> <li>Gal Control</li> <li>Broadworks Anywhere</li> <li>Broadworks Mobility</li> <li>Cal Transfer</li> <li>Cal Transfer</li> <li>Cal Park Retrieve</li> <li>Cal Recording</li> <li>Cal Wating</li> <li>Flexible Seating Guest</li> <li>Hoteling Guest</li> <li>Shared Cal Appearance</li> </ul>	↓ ↑ - +	Broadworks Anywhere Broadworks Mobility Call Transfer Call Park Retrieve Call Recording Call Waiting Flexble Sating Guest Hoteling Guest Remote Office

## 5.2.3 Customizing Statistics Label

Double click any statistic as displayed in the list above. From the below field you are able to customize the statistic label as required.

	Statistic to display NumberOfCallsAbandoned										
Column heading Abandoned											
Set threshold alert values     Highlight non-zero values     Increasing thresholds (calls)											
Green: >= Yellow: >= Red: >= Black: >=	1 2 5 10										

Selecting "Highlight non-zero values" will cause any value over 0 to be displayed in red. This has been activated for the "Total Calls" statistic below.

Overall Que	Overall Queue Statistics								
Total Calls	Calls Answered	Total Missed Calls							
0	0	0							
0	0	0							
6	6	0							
6	6	0							

#### 5.2.4 Configuring Alert Thresholds in Personal Wallboard

Double click any Statistic in Settings > Services > Call center > Statistics > Columns and tick "Set threshold alert values". This will display a table where corresponding values can be configured that will progressively change the statistic background color greed, yellow, red and black.

Some statistics allow a different threshold to be set per call center, for example important queues can have lower thresholds.

Services & Settings						<b>—</b> X
Services Settings						
Incoming Calls     Anonymous Call Rejection     Call Forward Always     Call Forward Busy     Call Forward No Answer	•	Specify which columns should be displayed in the also be set for many columns	e personal wallb	oard. Th	reshold v	alues can
- Call Center - Agent - Agent - ACD State		Statistic to display NumberOfCallsAbandoned	•			
Reporting Abandoned Calis		Column heading Abandoned				
<ul> <li>Comm Pilot Express</li> <li>Available: In Office</li> </ul>	н	Set threshold alert values     Call Center				
··· Available: Out Of Office		Al	5	10	15	20
Busy		All Bolts Sales	1	2	5	10
Do Not Disturb		Nuts Sales	1	2	5	10
<ul> <li>External Caling Line ID Delivery</li> <li>Internal Caling Line ID Delivery</li> <li>Simultaneous Ring</li> </ul>						
Outgoing Calls						
Calling Line ID Delivery Blocking						
Broadworks Anywhere						
Broadworks Mobility						
- Call Transfer						
Call Park Retrieve						
- Call Recording						
Call Waiting	-					

Double click an entry in the list to set overall threshold values or those for a specific call center. In the example below statistics columns have been added, some have been renamed from the default and threshold alerts have been configured.

Calls In Queue	Total Calls	Calls Answered	Total Missed Calls	Average Talk Time	Missed %	Busy Overflows
0	0	0	0	00:00	0.00	0
0	2	2	0	01:31	0.00	0
0	35	33	2	02:58	5.71	0
0	6	6	0	02:25	0.00	0
0	43	41	2	01:43	1.43	0

## 5.3 Joining & Leaving Queues

Right click any queue in the Personal Wallboard to toggle between Join and Leave queue. Queues that you are joined to have a green icon next to them. A red icon indicates that you are not joined to that queue.

Name		Total Calls Answered Call					
Bolts Sale: Nuts Sales	Cal	Call queue					
0	Joir	i queue					
-0	Remove from personal wallboard Refresh statistics						

## 5.4 Receiving ACD Calls

Inbound ACD calls will display the call center name, as configured in BroadWorks, in the "To" field. The "From" field will display the incoming CallerID [if not withheld] or the name of the caller if that can be matched from the Directory. Answer the call by lifting the IP phone handset, clicking Answer/Release call control button or double clicking the call in the Active Call Window.

File Messaging	Tools	Help											
<b>Q Q</b>	6	6		2		2	•	<b>%</b>		$\odot$			
Inavailable Available	Wrap-up	Answer	Dial	Transfer	Hold	Conference	Voicemail	Recording	Reports	Settings			
				My St	atistics							0	verall Queu
Name	Total Calls	Web Chats Answere	Answere d Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answere d		Total Calls	Calls Answere d	Total Missed Calls	Calls In Queue	Longest Wait Time
Kakapo Systems		0	-	-	-	-	0	0	-	-	-	-	-
Bolts Sales	0	0	0	00:00	0	00:00	0	0	0	0	0	1	00:00
Nuts Sales	0	-	0	00:00	0	00:00	-	-	0	0	0	0	00:00
	0	0	0	00:00:00	0	00:00	0	0	0	0	0	1	00:00
Activity	From				То				Durati	on	Status		
Queued													
Call	Natalie N	laines (Sale	sforce Co	intact)	Bolts S	ales			00:00		Ringing		

Hang up the IP phone handset or click Release 📀 to end the call.

## 5.5 Using Disposition Codes

Unity will expose ACD Disposition Codes as configured in BroadWorks, to agents within the Active Call Window. The user can enter one or more Disposition Codes by right clicking the active call and selecting from the context menu. Disposition Codes can be entered while the call is active, or immediately after, when the call has ended and before another call is answered. Only Disposition Codes configured for the queue that the agent has answered are displayed.

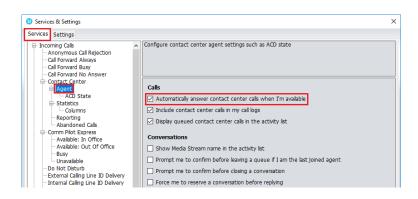
From		То	Duration			Status			Notes
Natalie Maines (Salesforce Contact	)	Bolts Sales	00:18			Active - Not re	cording		
		Assign call to account code		۲					
	+	Add number to personal dire	ectory						
		Add call note							
		Show CRM contact							
		Add CRM call log entry							
Contacts Call Logs Voicemail		Escalate to first supervisor							📀 My status: available i
Search		Instant conference/emergen	icy escalate to first supervisor		office	London (	Office	New York	Office
Name		Supervisors		۲		Status			
		Assign disposition code		•	S	elected call		1 Call from Re	eseller
		Reset column widths						2 Call from Di	rect customer
	~	Show gridlines						3 Call for othe	er member of staff
					1			4 Cold Call	
								5 Did not add	a code
								Existing Custo	omer
								New Custom	er

Disposition Codes can be assigned to the previous call either by selecting Assign disposition code > Last call as above, or by right clicking in the Active Call Window post ACD call as below.

From		То		Duration	Status			Notes
	Assign disposition co	ode 🕨	Last call between B	olts Sales Natalie Maines (Sale	sforce Contact) 🔹 🕨		1 Call from Res	seller
	Reset column widths Show gridlines						2 Call from Dir	ect customer
							3 Call for other	r member of staff
							4 Cold Call	
						-	5 Did not add a	a code
							Existing Custor	mer
							New Custome	r

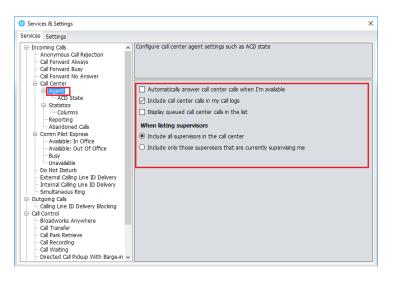
#### 5.6 Auto Answer

Unity Agent optionally allows ACD calls to auto-answer when the agent is in the "Available" state. This is toggled on/off in Settings > Incoming Calls > Agent.



## 5.7 Supervisor Escalation

Unity Call Center Agent facilitates the BroadWorks call center escalation feature by allowing both standard and emergency call escalation. Both types of escalation can only be performed on call center calls and both inbound and outbound [DNIS] calls are supported. In either case, an agent can only escalate a call to a supervisor if that supervisor is currently supervising the agent in BroadWorks. If this is not the case the agent will be told [through the phone] that the supervisor is not a valid supervisor. However, Unity can be configured to display either only the supervisors that are supervising the agent, or all supervisors, as illustrated in the screenshot below.



## 5.7.1 Standard Escalation

Standard escalation is used when the agent needs to be given information or instruction from the supervisor without conferencing in the remote party. Typically, the agent will release the call to the supervisor and replay the information to the remote party. Unity allows the call to be escalated to a specific supervisor or to the first supervisor that is available. The agent's Unity client will automatically place the ACD call on hold, then dial the extension of the supervisor as an escalated call. This call will then appear as an escalated call in all center reports. Standard call policy/routing rules will be used when calling the supervisor, such as DND, call forwarding and hoteling guest etc. At any time, the agent can release the escalated call, or can transfer or conference both calls together if required.

## 5.7.2 Emergency Escalation

Emergency escalation is used to immediately conference a supervisor into the call with the remote party, therefore it relies on either the 3-Way Calling user service being assigned to the agent. When performing an emergency escalation, Unity will place any active calls on hold then dial the selected supervisor, or the first supervisor that is available.

## 5.7.3 Escalation via Active Call Window

To perform escalation, the agent right-clicks the call in the active call window, then either chooses the supervisor to escalate the call to:

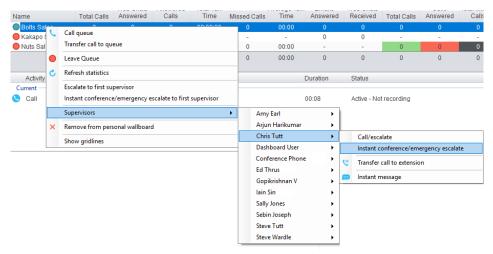
From		То	Duration		Status		Notes
Natalie Maines (	8	Assign call to account code	•		Active - N	lot recording	
	+	Add number to personal directory					
		Add call note					
		Show CRM contact Add CRM call log entry					
Contacts Call Logs		Escalate to first supervisor Instant conference/emergency escalate to		Office     A office		don Office I New Y	My status: availab (val) Q <sup>6</sup> availab
Search		Supervisors	• ar	Amy Earl	n	don Office   New Y	/ork Office
Name		Assign disposition code	•	Chris Tutt	•	Call/escalate	
		Reset column widths		Dashboard User	•	Instant conference	e/emergency escalate
	~	Show gridlines		Conference Phone Ed		😍 Transfer call to ext	tension
				Gopikrishnan V		👝 Instant message	
				lain Sin	•		
				Sally Jones	•		
				Sebin Joseph	•		
				Steve Tutt	+		
				Steve Wardle	•		

#### Or escalates the call to the first available supervisor.

From		То
Natalie Maines (Salesfor	<u> </u>	ntest) Dalta Colos
		Assign call to account code
	+	Add number to personal directory
		Show CRM contact
Ourteste e un luci		Add CRM call log entry
Contacts Call Logs Voicer		
Search		Escalate to first supervisor
		Instant conference/emergency escalate to first supervisor
Name		Supervisors +
		Assign disposition code
		Reset column widths
	~	Show gridlines

#### 5.7.4 Escalation via Personal Wallboard

The agent can escalate a call center call by using the context menu displayed when right-clicking on the call center in the personal wallboard, as shown below. This assumes that Unity has logged in as the call center and is displaying statistics in the personal wallboard.

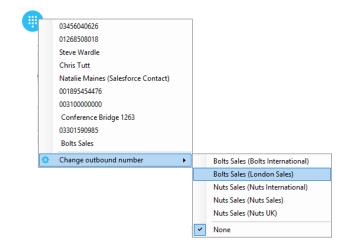


Please note that if the agent right-clicks on a different call center in the personal wallboard [to the one that the call was routed through] then the call escalation options will not be displayed.

## 5.8 Activating Outbound DNIS

If the agent is a member of BroadWorks call center premium queues, and the DNIS capability has been configured, then the user can select an outbound DNIS which will determine which outbound CallerID is presented when the agent makes external outbound calls. Right click the Dial icon and mouse over "Change Outbound Number" at the bottom [the numbers above are a clickable list of last 10 numbers for redial]. The outbound DNIS that are available are

presented. The currently selected outbound DNIS is ticked. This will affect all outbound calls until the outbound DNIS setting is changed, or set to none.



## 5.9 Personal Statistical Reports

Unity Agent provides access to the following agent reports:

- 1. Agent Activity Detail Report
- 2. Agent Activity Report
- 3. Agent Call By Skill report
- 4. Agent Call Detail Report
- 5. Agent Call Report
- 6. Agent Duration by Skill Report
- 7. Agent Duration Report
- 8. Agent Sign-In/Sign-Out Report

To access these reports, click the Reports button 🕕 or select Tools > Call Centers > Report Viewer from the menu. Specify the reporting period, click Tools > Call Centre > Report Viewer. From the Report Viewer interface [shown below] select the desired report and reporting period.

Report Viewer		× U Report Viewer	– 🗆 X
Report	Agent Activity Detail Report	✓ Report	Agent Activity Detail Report 🗸 🗸
Start Period	Thu, 13 Sep 🛛 🗸 00:00	✓ Start Period	Agent Activity Detail Report Agent Activity Report
End Period	Thu, 20 Sep 🛛 🗸 12:00	End Period	Agent Call By Skill Report
Output Type	PDF	✓ Output Type	Agent Call Detail Report Agent Call Report Agent Duration By Skill Report
	× Cancel ✓	Run	Agent Duration Report Agent Sign In Sign Out Report CC - Agent Activity - Agent
			CC - Agent Activity - Media Stream CC - Agent Activity - Queue CC - Conversation Detail - Agent CC - Conversation Detail - Media Stream
			CC - Conversation Detail - Media Stream CC - Conversation Detail - Queue CC - Conversation Summary - Agent CC - Conversation Summary - Media Stream
			CC - Conversation Summary - Media Stream CC - Conversation Summary - Queue CC - Performance - Media Stream

#### 5.10 Pre-configuration of ACD State

Unity Agent offers a cascading hierarchy of agent availability settings that control the agent's join and ACD status depending on the status of the host computer. This is in Settings > Services > Incoming Calls > Agent.

Services Settings		
Incoming Calls     Anonymous Call Rejection     Call Forward Always     Call Forward Busy     Call Forward No Answer	<ul> <li>Configure automatic call center login/logout. Only call cent will be configured. Configuring call centers when the desk available on Windows XP or above.</li> </ul>	
Cal Center CAD State CAD State Calmas About Columns Calmas Calma	Join all my call centers: when Unity is starting when the computer is unlocked Leave all my call centers: when Unity is closing when the computer is locked	

In addition, the ACD state can be configured for computer startup and unlock state, postcall state and desktop locked state.

Services Settings	
Incoming Calls     Anonymous Call Rejection     Call Forward Always     Call Forward Busy     Call Forward No Answer	Configure call center agent settings such as ACD state.
Call Center     Call Center     Statistics     Common Calls     Common Calls     Comm Niot Express     Comm Niot Express     Call Center     Comm Niot Express     Call Center     Calll	Startup & desktop unlocked ACD state Not Set Post call ACD state Not Set Desktop locked ACD state Not Set Understand Second Seco

## 6 CALL CONTROL

All calls are managed through the call control buttons at the top of the application. These buttons will change depending on the state of the selected call, or the only call if there is only one call in

the Active Call Window. For example, the Release and Hold/Retrieve buttons toggle as only one of these options will be valid at any time. When an inbound call is ringing Answer becomes the valid option. Once the call is active the icon will toggle to Release as hanging up is the only valid option.

## 6.1 Making a Call

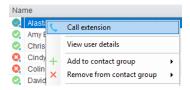
#### 6.1.1 Using the Dial Window

Click the Dial button to bring up the Dial dialogue box, as shown below. Using the computer keypad enter the desired number and press Enter or click OK to make the call. The desk telephone will default to using hands-free speakerphone. If the telephone does not support speakerphone, you will need to lift the handset when the call is answered.

Dial			×
Number			
	× Cancel	🗸 ОК	

## 6.1.2 Using the Contacts Panel

Double click a user icon or right click and select "Call extension"



#### 6.1.3 Drag and Drop

Right click a user icon on the Contacts panel and drag the icon up to the Active Call Window. This will open a call to that user. Calls can also be dragged from the Active Call Window onto a call center to perform a blind transfer. Calls dragged onto a monitored user will either be blind transferred or present options depending on the user preferences in Settings and whether the monitored user is engaged or not. For engaged contacts, park, camp-on and transfer to voicemail are available. For available contacts transfer to extension, transfer to mobile, transfer to voicemail or present call hold, camp on and transfer are available.

## 6.1.4 Using Directory Search

Enter the search field in the Contacts panel to dynamically search all internal users and speed dials. Either right click and select "Call extension" or right-click and drag the icon into the Active Call Window to make the call.

#### 6.1.4 Dialing from the clipboard

Any number that is copied to the Windows clipboard, (highlight the telephone number, right click, then clicking copy) this will cause a popup toast above the system tray with the option to call the number. Click the toast notification to make the call. This feature can be enabled/disabled in Settings. When a number is copied to the clipboard, Unity can show a prompt to the user which appears over all applications, rather than show a toast notification. This can be configured through Settings>Settings tab>Clipboard Integration.

#### 6.2 Answer a Call

When Unity displays an inbound call, click the Answer icon or double click the call in the Active Call Window to answer the call. Your desk telephone will now be on hands-free speakerphone, if it supports this feature with Unity. If there is an active call in progress, you will need to click the new inbound call in the Active Call Window before clicking Answer, this will automatically place the first call on Hold. Please note that answering a call by lifting the handset on the desk phone will have the same effect as clicking Answer in Unity.

## 6.3 End a Call

Click the Release button togend the currently selected call. If there are multiple calls in the Active Call Window, make sure you select the right call before clicking Release.

Note: Replacing the telephone handset will also end the call, which will then be removed from the Active Call Window.

#### 6.3 Redial

You can also right-click the Dial button to see a list of the last 10 dialed numbers. Simply click on an entry to dial the party, as shown below.

Natalie Maines (Salesforce Contact)
001895454476
Chris Tutt
00310000000
Conference Bridge 1263
03301590985
Bolts Sales
02086879234
01892512909
01444414002

## 6.4 Send Call to Voicemail

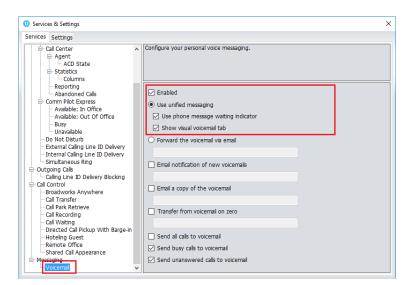
To send an inbound caller directly to your voicemail click the Voicemail button . Please note that if voicemail is not assigned or is disabled, the button will still be visible but inactive.

#### 6.4.1 Retrieving Voicemail Messages via VoiceMail Button

When no calls are currently selected, clicking the Voicemail button will dial the user into their voicemail. The phone will default to hands-free speaker phone if it has this capability

#### 6.4.2 Retrieving Voicemail Messages via Voicemail tab

Clicking into the Voicemail tab will display a list of voice messages with the most recent at thetop. Double click an entry to play through the PC's default media player. Right click to save locally or delete. In order for the Voicemail tab to appear, Agent must be configured for "Use unified messaging" and "Show visual voicemail tab" in Voicemail settings as below.



## 6.5 Transferring a Call

There are two ways to transfer a call; Announced Transfer, where you introduce the call to the receiving party before putting the call through, and Blind Transfer, where you transfer the caller

directly to a recipient without introducing the call. Please note that calls can be transferred both to internal users and external contacts.

## 6.5.1 Announced Transfer

Receive and answer an inbound call. Make a new call to the desired destination extension or number as described Make a Call above. This will automatically place the first caller on Hold and

will open a new call in the Active Call Window. Once the called party answers, click Transfer and select the context menu option to transfer both calling parties together. Both calls will now disappear from the Active Call Window.

Note: The user is not limiting to transferring received calls. They can make two outbound calls and then use transfer to "bridge" them together.

Calls can also be transferred together by dragging one call on top of another within the Active Call List

C3 😈		Tra	nsfer 034560406	26 🕨	to 01268508	018	
		Tra	nsfer 012685080	18 🔸	to number		
			nsfer calls toget		Augusta and Tally		
Name	Total Calls	Calls	Missed Calls	Time	Average Talk Time	Total Calls	
🔵 Nuts Sales	0	0	0	00:00:00	00:00	0	
<ul> <li>Bolts Sales</li> </ul>	4	4	0	00:01:09	00:18	4	
	4	4	0	00:01:09	00:09	4	
From		То		Du	ration		
🕕 🛛 Jenna Wim		03456040	03456040626 00:1				
Jenna Wimshurst			01268508	00	00:05		

Example 1 – Transfer with two live calls

Example 2 – Transfer with four live calls

2		( <sup>a</sup>	Transfer	034560406	000 i26 →		Ų (		e	3	
		_	Transfer	012685080	)18 🕨		to 03456	040626		-	
			Transfer	034597587	758 🕨		to 03459	758758			
Name	Total Calls	1		034572030	)40 ▶		to 03457	203040		alls	A
Nuts Sales	0	0		0	00:00		to numb	er			
Bolts Sales	4	4		0	00:01	09	00:1	8	4		
	4	4		0	00:01	09	00:09	9	4		
From				То				Durati	on		
🕕 Jenna Wim	shurst			0345604	40626			01:37			
🕕 Jenna Wimshurst				0126850	01268508018			01:24			
🕕 🛛 Jenna Wim	shurst			0345975	58758			00:17			
🕓 Jenna Wim	shurst			0345720	03040			00:02			

## 6.5.1.1 Warm Transfer

Unity Agent allows you to warm transfer a call by right clicking the user you want to transfer the call to and selecting "warm transfer" from the context menu. This will then put the original caller

on hold and dial the selected number. When ready, click the transfer button in the call center control options panel and the two calls will be transferred, automatically disappearing from your active call window.

Tracey	Call extension
📀 Steve V 🔪	Call extension
📀 Steve T 🙄	Transfer call to extension
🕓 Peter L	Warm transfer call to extension
Paul D	Transfer to series with
💂 Lewis	Transfer to voicemail

## 6.5.2 Blind Transfer

## 6.5.2.1 Using Contacts Panel Drag and Drop

Unity Agent can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel, or dropping it onto a call center queue [if agent is configured as an agent with call center queues]. Note: Unity can be configured to display a menu when dropping a call onto a user icon. If no menu options are selected the blind transfer is performed. If menu options are selected, click "Transfer call to extension" to also perform blind transfer. For more information on Drag & drop refer to section 8.

	Call extension
📀 s 🔍	Transfer call to extension
🜔 Р	Warm transfer call to extension
O P	Transfer to voicemail
0 L	Park call on extension

## 6.5.2.2 Using Transfer Button

Once on a call click the Transfer call control button <sup>(2)</sup>. In the Transfer window enter the destination and click OK.

$\bigcirc$		(2)		<u>®</u>	00		0
Release	Dial	Transfer	Hold	Conference	Voicemail	Recording	Settings
From	1					То	
Jenn	a Wimsl	hurst				Sasha 0	Gorb (+447976493816)
		Transfer				×	
		Numb	er				
			×	Cancel	🗸 ОК		

#### 6.5.2.3 Using Right Click

While on an active call right click the recipient icon or number in the Contacts panel or Search. Select "Transfer call to extension" to blind transfer the call.

Nar	ne		Phone
0	Ala: Ami	C	Call extension
0	Chr	e	Transfer call to extension
0	Cin		Warm transfer call to extension
0	Col		Transfer to voicemail
õ	Dea		Park call on extension
0	Ed		View user details
0	Lee		view user details

## 6.5.3 Transfer to Voicemail

The option to Transfer to voicemail is valid only for internal company users that have Voicemail assigned and activated.

## 6.5.3.1 Using Contacts Panel Right Click - Voicemail

While on an active call, right click a user in the User Status list and select "Transfer to voicemail". This will send the selected call directly to the destination extension voicemail without introducing ringing.

0	Trace	•	Call extension
0	Steve	~	
0	Steve	(C)	Transfer call to extension
Q,	Peter		Warm transfer call to extension
$\bigcirc$	Paul C		Transfer to voicemail
0	Lewis		Transfer to voicemail
0	Lee H		Park call on extension

## 6.5.3.2 Using Drag and Drop

If configured, Unity will display "Transfer to voicemail" in the list when an active call is dragged onto the destination user icon in the Contacts panel. For more information, refer to section 8.

0	Tracey Scoate	02082881262		
0	Steve W: 😤	Transfer call to extension		
0	Steve Tu	Transfer to voicemail		
Q.	Peter La			
0	Paul Dev	Park call on extension		

## 6.5.4 Transfer to Mobile

If the destination user has a mobile number entered as part of their profile in BroadWorks, you have the option to right click and select either Dial Mobile [to perform an announced transfer] or Transfer Call to Mobile [to perform blind transfer].

#### 6.5.4.1 Using Contacts Panel Right Click - Mobile

Right click the desired user in the Contacts panel. To announce the call, click Dial Mobile. Once

the recipient answers click Transfer (C) and select the context menu option to transfer the calls together.

To blind transfer the call without introduction click Transfer call to mobile.

#### 6.5.4.2 Using Drag and Drop

If configured, Unity will display "Transfer to mobile" in the list when an active call is dragged onto the destination user icon in the Contacts panel. For more information refer to section 8.

## 6.6 Call Hold/Retrieve

The Hold/Retrieve **(I) (C)** function toggles depending on the status of the currently selected call. Hold is only available for an active call while Retrieve is only a valid option for a call currently on Hold. When a call is on Hold, the blue Hold icon is shown in miniature to the left of the call in the Active Call Window and the status is On Hold, as shown below.

	From	То	Duration	Status
0	Jenna Wimshurst	Sasha Gorb	00:04	On hold

## 6.6.1 Placing a Call on Hold

To place a current active call on Hold, press the red Hold button . The call status will now show as on hold in the Active Call Window and there will be an On Hold icon alongside the call.

## 6.6.2 Retrieving a Held Call

Click the held call in the Active Call Window to select it. Click the Retrieve button to take the call off hold, you can also double click the call to retrieve it. Please note that any other active calls will be placed on hold before the selected call is retrieved, meaning you can toggle between call by double-clicking them in the Active Call Window.

## 6.7 Conference Calling

A conference call can be established with any combination of internal and external numbers. The total number of parties that can be supported is determined by service assignment. The Three-Way Calling user service supports conference calls with two other parties only while the ayW Calling user service supports conference calls with more participants.

# 6.7.1 Starting a Conference Call

Once an active call is established [that you have either made or received] call a second person.

You can do this by clicking the Dial button or double clicking a user in the Contacts panel or Search, or Call Log lists. Making this call will automatically place the first caller on Hold.

Once the second party has answered the call, click the Conference button and a new conference will be created between you and the other two parties. This is represented in the Active Call Window as shown below:

	From	То	Duration	Status
.523.	Sasha Gorb	Jenna Wimshurst	00:15	Active (conference)/Not recording
.523.	Jenna Wimshurst	01268508018	00:02	Active (conference)/Not recording

Selecting either call and clicking Hold will place the conference call on hold, during which time the other callers can still talk to each other.

From	То	Duration	Status
Sasha Gorb	Jenna Wimshurst	00:36	On hold (conference)
Jenna Wimshurst	01268508018	00:23	On hold (conference)

# 6.7.2 Ending a Conference Call

To remove a caller from the conference call but continue speaking to the other caller[s], simply

select the call to release in the Active Call Window and click the Release button as you would normally. This will release the selected party and will show only the remaining party[s] in the Active Call Window.

To end a conference call but leave the two remote parties in conversation with each other, click the Transfer button and select the "leave conference" menu option, as shown below.



# 7 ACTIVE CALL WINDOW

The Active Call Window gives visual representation of the status of all calls the user receives or is currently managing.

# 7.1 Window Layout

	From	То	Duration	Status
0	Jenna Wimshurst	03456040626	00:18	On hold
	Jenna Wimshurst	Sasha Gorb	00:00	Ringing

**From** – This field will display the incoming CallerID or the name if it is matched in the Group/Enterprise directory, Personal Contacts or Outlook Contacts.

**To** – This field displays the name of the user, hunt group or call center that has been called ensuring the call can be answered appropriately.

**Duration** – This displays the total time elapsed since the call was first answered. The timer does not restart when the call is placed on hold.

Status - This shows the Ringing/Active on On Hold status of each call.

## **Calls In Queue**

Agents can optionally see all calls in queue for the Call Centers they are joined to, as shown below.

From	То	Duration	Status
Hot Desk 3 - 9103	Bolts Sales	01:48	Queued at position 1
Charlotte Quartly	Bolts Sales	01:25	Queued at position 2

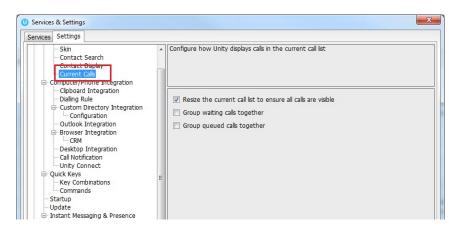
# 7.2 Managing Multiple Calls

To manage a particular call, first select it by clicking it in the Active Call Window. If there is only one call in the list it will be selected automatically. You can then use the call control buttons to perform different actions on the call. There is no limit to the number of calls that can be displayed in the Active Call Window, this is limited by the number of simultaneous calls allowed and if the Call Waiting user service is assigned and active.

You can also double-click an incoming [unanswered] call to answer it, or to retrieve it if currently on hold.

# 7.3 Resizing the Active Call Window

The bottom border of the Active Call Window can be dragged down to display as many or as few calls as necessary. Unity will save these dimensions when closed. Unity can automatically resize itself to include all calls, as well as group waiting and queued [if applicable] calls together, as shown below.



# 7.4 Assigning an Account Code

Account codes can be assigned to a call through the Active Call Window as shown below, please note that Unity must place the call on hold in order to assign the account code, then will attempt to retrieve the call although this isn't always possible in which case the user must retrieve the call using the phone.

From	То			Du	ration	Status
Natalie Maines (Salesforce Contact)	Jenna Wimshurst			00	10	Active -
			Assign call to account code	•	Company B	
		+	Add number to personal directory		Company A	
			Show CRM contact			
Contacts Call Logs Voicemail Abandoned Calls A	Agent Activity		Add CRM call log entry			
Search			Assign disposition code	•		
Name	Phone		Reset column widths			
Hume	THONG	~	Show gridlines			

Unity will display a notification to indicate that the call was successfully assigned to the account code:



# 8 DRAG AND DROP

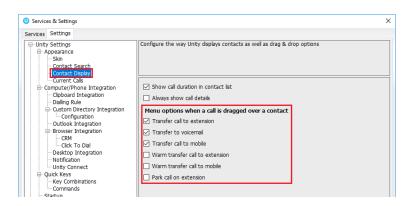
Many common call handling actions can be performed with drag and drop, as well as right click and call control buttons.

# 8.1 Make a Call to a User or Number

Drag a user icon or a speed dial shortcut icon from the Contacts panel up into the Active Call Window to make a new call to the selected user or number.

# 8.2 Transferring a Call to a User

Drag a live call onto a user to either perform blind transfer, or to populate a drop list with call handling options. The drag and drop behavior for this action is configured in Settings as shown below.



# 8.3 Make a Call to a Call Center Queue

When agent is configured as an agent, drag a call center queue from the Personal Wallboard to the Active Call Window to make a call to that call center.

# 8.4 Transferring a Call to a Call Center Queue

If agent is configured as an agent, you can drag a current call in the Active Call Window up and drop it on a Call Center in the Personal Wallboard. This will blind transfer the call to the call center.

# 8.5 Send to Voicemail

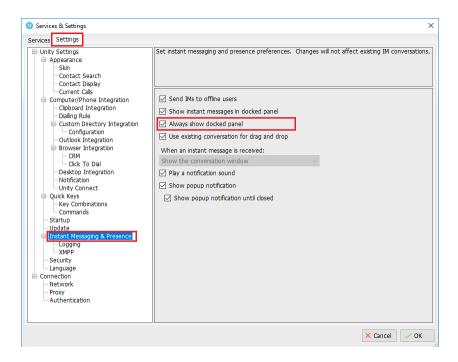
Dragging an unanswered call from the Active Call Window onto the Voicemail button <sup>99</sup> will blind transfer the incoming call to your voicemail.

# 8.6 Call Control

Dragging a call over the Hold/Retrieve, Answer/Release, Transfer or park buttons will perform that action on the selected call.

## 8.7 Send New Instant Message

Drag a user to the docked IM window to the right of the Contacts panel to send an IM to that user. This requires that the "Always show docked panel" field is ticked in Settings > Instant Messaging and Presence.



1010 14	tt: yes no problem	
(°	Transfer call to extension	
	Transfer to voicemail	ø
	Park call on extension	
c		- ( X
		m
Charlotte	e Quartly, Amy Earl	<u>م</u> • ( ×
Jenna W Charlotte	'imshurst: Hey! Just doing a live demo e Quartly: Hey	<u>ب</u> م ر x
Jenna W Charlotte	imshurst: Hey! Just doing a live demo	<u>م</u> ب ر x
Jenna W Charlotte	'imshurst: Hey! Just doing a live demo e Quartly: Hey	₩ • \ X
Jenna W Charlotte	'imshurst: Hey! Just doing a live demo e Quartly: Hey	₩ • ( X

See also section 10 on Instant Messaging.

# 8.7.1 Add Participant to Existing IM Session

Drag a user icon onto an existing IM and choose "Add to the conversation"

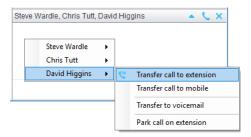
Chris Tutt	×
Add to the conversation	
Start a new conversation	

# 8.7.2 Transfer Call to IM Participant

Drag a call from the Active Call Window onto an IM session in the Docked IM Window and you will see a prompt to transfer the call. This is particularly useful if you want to check the recipient's availability before you transfer.

Davi	id Hig	ıgins	≜ € ×
	C.	Transfer call to extension	
		Transfer call to mobile	
		Transfer to voicemail	
		Park call on extension	<b></b>

When dropping a call onto a multi-party IM session you will be prompted where to transfer the call.



# 9 CONTACTS PANEL [BUSY LAMP FIELD]

The Contacts tab gives a visual indication of the status of users [within the group/enterprise] that are currently being monitoring. A maximum of 30 users can be displayed. Double clicking a monitored user will call them and right clicking will bring up a dynamic options menu.

# 9.1 Contact Panel Display Options

There are three different views available, as outlined below. Right-click anywhere in the Contacts panel and select Appearance list to change the view.

	Service Configuration	•		
	Copy number	-[	4	Details
	Personal directory		_	List
		_		Small icon
•	Manage user list			Tile
	Appearance	•		Show extension
		_	_	Show department
			~	Show ACD state

## 9.1.1 Details View

This view provides by far the greatest amount of detail, but requires more space [although the list can be shortened in which case scrollbars will automatically appear].

Contacts Activity Logs Abandoned Call	s Voicemail		📀 My status: available in	offic
Search	۹			
Name	Phone	ACD State	Status	
Ohris Tutt	020828812	Sign-Out		
Oindy Baker	020828812			
Olin Wardle	020828812	Sign-Out		
8 Dave Baker	020828812	Available	Talking to +447717580512 - 20:22 / In a meeting	
Ø David Higgins	020828812	Sign-In		
Dean Thompson	020828812	Sign-In		
8 Ed Thrus	020828812	Sign-In	Currently away	
Opikrishnan V	8332	Available		
📀 lain Sin	020828812	Sign-Out		
Krysia Swiatek	020828812	Available		
📀 Lee Hous	020828812	Sign-In		
8 Lewis Marcan	020828812	Available	Talking to Conference Bridge - 18:35 / Currently busy	
8 Paul Farrant	020828812	Available	Talking to Alastair Brown - 02:00	
Steve Tutt	020828812	Unavailable - WebChat		
Steve Wardle	020828812	Unavailable - Comfort Break	In a meeting until 3pm	
📀 Vas Koria	020828812	Available		

With this view the sort order for each column can be set, which is saved when Unity is closed. You can also configure Unity to display or hide the extension, department, ACD state and call duration columns.

	Service Configuration		Details
	Copy number		List
	Personal directory		Small icon
٥	Manage user list		Tile
	Appearance •		Show extension
			Show department
		~	Show ACD state
		~	Show call duration

## 9.1.2 List View

This option will display all users in a list.

Contacts	Call Logs	Voicemail	
Search			Q
📀 Alastair	Farrant		
📀 Amy Ba	iker		
📀 Charlot	te Houston		
🕄 Chris T	utt		
📀 Cindy H	liggins		
📀 Colin E	arl		
📀 David T	hompson		
📀 Dean D	)ewey		
📀 Ed Sinr	nott		
🙁 Harry B	rown		
📀 lain Ma	rcantonio		
🙁 Krysia (			
📀 Lee Ko	ria		
🙁 Lewis S	Swiatek		
📀 Paul Th	nrussell		
📀 Steve T	utt		
Steve W	/ardle		
📀 Vas Da	dds		

## 9.1.3 Small Icon View

This view combines a simplified look and space reduction.

Contacts Call Logs	Voicemail	
Search	Q	
Alastair Farrant	Amy Baker	Charlotte Houston
	G Ed Sinnott	8 Harry Brown
Dean Dewey		-
Lewis Swiatek	Paul Thrussell	Steve Tutt
Cindy Higgins	📀 Colin Earl	🛽 Chris Tutt
Krysia Quartly	📀 Lee Koria	📀 lain Marcantonio
Vas Dadds	David Thompson	Steve Wardle

## 9.1.4 Tile View

This view is similar to Icon view but uses more white space to provide a cleaner look.

Contacts Call Logs	Voicemail				Ø My status: available in office
Search	Q				
Alastair Farrant	Amy Baker	📀 Charlotte Houston	🕴 Chris Tutt	Cindy Higgins	📀 Colin Earl
📀 Dean Dewey	Sinnott	😣 Harry Brown	📀 lain Marcantonio	🙁 Krysia Quartly	📀 Lee Koria
🔕 Lewis Swiatek	📀 Paul Thrussell	Steve Tutt	Steve Wardle	📀 Vas Dadds	🕏 David Thompson

In both the Icon and Tile views, hovering the mouse over the image will provide more information about the monitored user, for example their service configuration:

Chris Tutt
Do not disturb

#### 9.2 User Icons

There are four main user icons states shown in the Contacts panel, regardless of the view chosen.

0	Available	The monitored user extension is on hook
2	Ringing	The monitored user extension is ringing
8	Engaged	The user is on the phone
•	Do Not Disturb	The user has selected DND or Unavailable profile

# 9.2.1 User Icon Engaged Tool Tip

Hovering your mouse over an engaged or DND icon will reveal more information about their current state, if available. For engaged users this will include the name or number of the party they are engaged to and the duration off the current call as below [this feature can be disable for privacy reasons].

😢 Paul Brown Talking to +4475344 (Partner Support) - 08:45

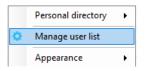
# 9.2.2 Instant Messaging Availability

Regardless of a user's Available/Ringing/Engaged/DND state, if they currently have any version of Unity open they will be available for instant messaging. This is shown by the envelope at bottom right of the user icon, as per the following examples.

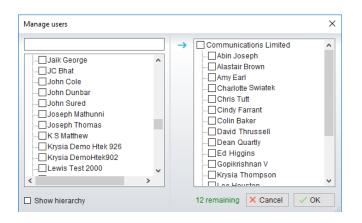
20	Ringing. Unity open and available for IM
Ο.	DND/Unavailable profile. Unity open and available for IM
0	Engaged. Unity open and available for IM
0	Available/on-hook. Unity open and available for IM

# 9.3 Managing Monitored Users in the Contacts Panel

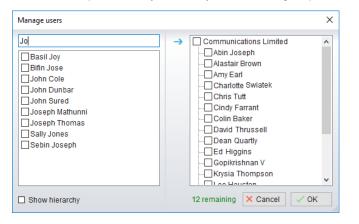
The Contacts panel will display 30 users. In the Contacts panel right click anywhere and click "Manage user list". This will allow you to choose which users to display.



You will then be able to move users or departments between the lists either by double-clicking them or using the arrow button. All users in the right-side list will be monitored in the Contacts panel. This list is saved when Unity is closed.



The box at top left will dynamically search the group directory.



# 9.5 Performing Call Control Actions in the Contacts Panel

There are many call control functions that can be performed by right-clicking a monitored user in the main Contacts panel or Search. The menu options displayed will dynamically change to only show those available depending on the state of the monitored user and/or the state of the selected call in the Active Call Window [if there is one]. For example, "Transfer to voicemail" will not be available if the user does not have the voicemail service assigned and "Camp call on extension" will not be available unless there is a live call selected in the Active Call Window.

## 9.5.1 Call Extension

Selecting "Call extension" will open a new call to that user in the same way that double clicking the user icon would. Any current call will automatically be placed on hold. This can be used to make an announced transfer as opposed to a blind transfer using the "Transfer call" commands further down the menu.

# 9.5.2 Answer This Call [Call Pick-Up]

This will perform call pick-up and will pull the call to the ringing Agent user.

#### Feature Dependency:

- I. Monitored user must be ringing [orange icon]
- II. Agent and monitored users must be in the same pick-up group

## 9.5.3 Park Call on Extension

Will park the call on the monitored user's extension park slot.

#### Feature Dependency

I. Must have a live call

# 9.5.3.1 Retrieving Parked Calls

Once a call has been parked onto a user's extension, their Unity will display a "Pickup Call" icon and a toast pop up window will appear. In order for the user to retrieve the parked call they simply need to click either the "P" or the toast pop up. If the call is not retrieved it will be redirected back

to the original user who parked the call.

Unity Desktop: Jenna Wimshurst File Messaging Tools Help П 00 Release Dial Transfer Hold Conference Voicemail Recordin Pickup Cal Setting From То Natalie Maines (Salesforce Contact) Jenna Wimshurst Call parked from George Orwell (Salesforce Contact) Click here to pickup the call

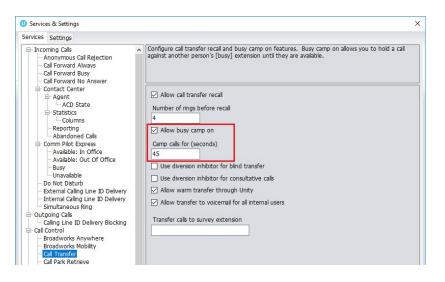
# 9.5.4 Camp Call on Extension

Will camp the call onto the engaged monitored user. When the user goes back on-hook the camped call will be delivered and their phone will start ringing. If the user does not go back on-hook before the camp timer expires the call will return to the Agent user.

#### Feature Dependency

- I. Must have a live call in the Active Call Window
- II. Must be enabled in Settings > Call Transfer as below

The Camp Call option will only be available if activated in Settings > Call Control > Call Transfer as below.



# 9.5.6 Call Mobile

Places call to mobile. Any live call placed on hold.

#### Feature Dependency:

The monitored user must have their mobile number entered in BWKS

## 9.5.7 Transfer Call to Mobile

Performs blind transfer call to monitored users mobile.

Feature Dependency:

- I. The destination user must have their mobile number entered in BWKS
- II. Must have a live call

## 9.5.8 Transfer Call to VoiceMail

Performs blind transfer to the destination user's voicemail.

Feature Dependency:

- I. The destination user must have voicemail service assigned
- II. Must have a live call

## 9.5.9 Barge into This Call

Makes an immediate three-way conference call with the Agent user, the monitored user and the third party the monitored user is talking to. All parties will be able to talk and hear each other. When attempting to barge into a call, if the phone plays a "number doesn't exist" tone then this means the monitored user cannot be barged into, because they have the Barge-In Exempt service assigned and activated. Only users without this service active can be barged into.

The Active Call Window will display like a normal conference call, as below, and the Agent user can Hold/Retrieve the same as for a conference call.

00:15	Active (conference)/Not recording
00:02	Active (conference)/Not recording

Please note that when leaving a call that you barged into, you must transfer the call parties together in order to leave the conference without ending the original call. To do this either drag one call on

top of the other in the Active Call List, or press Transfer <sup>(C)</sup> then select the option to leave the conference, as shown below.



#### Feature Dependency:

- I. The Agent user must have directed call pick-up with barge-in service assigned
- II. Monitored user must be engaged on a call
- III. The monitored user must not have the barge in Exempt service active

# 9.5.10 Call Extension When Available

Places an alert on the engaged monitored user. When they become free a dialogue box prompts the Agent user and allows them to open the call back.

Unity		$\times$
?	Harry Dadds is now available, would you like to call this extension? If you click 'no' you will not be prompted to call again.	
	<u>Y</u> es <u>N</u> o	

Feature Dependency:

I. Monitored user must be engaged on a call

# 9.5.11 View User Details

Performs a lookup on the user's details as entered in BWKS. This includes their phone number, mobile and email address.

Steve Wardle	×
Title:	
Email:	steve.wardle@kakaposystems.co
Phone:	02082881245
Mobile:	
WAV File:	
	✓ ОК

# 9.5.11.1 Adding Audio Alerts to Monitored Users

The "View user details" box also allows a wav file to be specified that will be played when the monitored user receives a call. Click the icon to select the wav file then click OK. This feature is useful in Manager/Secretary scenarios where the Agent user is screening calls. When the audio alert plays that is the reminder for the user to perform call pick-up.

# 9.5.12 Send Email

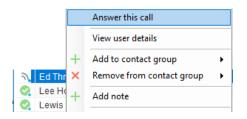
This will open a new email window in the default Email application. The user must have the email filed populated against their name in BWKS.

#### Feature Dependency:

I. The recipient user must have their email address entered in the system

# 9.5.13 Answer This Call [Call Pick-Up]

When monitored users are ringing their icon in Contacts becomes orange . To perform pick-up and answer the call right click the icon and select "Answer this call". This option is only displayed when right clicking a ringing user.



Feature Dependency:

I. The Agent user and the monitored user must be the same pickup group or the Agent user must have the "Directed Call Pick-Up" service assigned.

# 10. INSTANT MESSAGING

Instant messages can be sent and received between any Unity app [Reception, Desktop, Agent, or Supervisor]. Messages sent to offline user [those that do not have an instance of Unity open] can be stored and delivered when the recipient next opens Unity.

# 10.1 Online/Offline Indicator

A person that is running an instance of Unity, and therefore available to send an online IM to is indicated with a small envelope on their user icon. This applies across all the available, engaged, ringing and DND states as shown below.

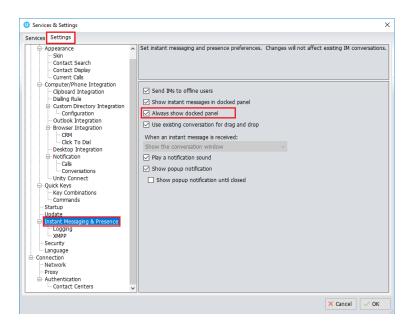
State	Online [Unity Open]	Offline [Unity Closed]
Available	0	0
Ringing	30	2
Engaged	8.	8
DND/unavailable profile	ο.	•

## 10.2 Docking the IM Window

Instant Messages can be displayed in the Docked IM Window or as separate dialogue boxes for each individual IM thread. If the docked window is used IMs can be initiated via drag and drop and new IM windows will not pop over other applications.



Docking the IM window is specified in Settings > Settings > Instant Messaging and Presence > "Show instant messages in docked panel". Individual IM messages can still be undocked and redocked as required.



## 10.3 Undocking and Redocking IM sessions

You can undock an IM message by clicking the A "Expand conversation to separate window" button. The IM session will now be a standalone window.

#### Docked IM



Click the The More than the main window button to pull the IM session back into the docked panel in the main Agent interface.

#### Undocked IM

Onversation: Steve Wardle	-		)	×
Steve Wardle: yep Jenna Wimshurst: sweet thanks Steve Wardle: its parking				^
				¥
Last message received at 10:48		• )	× ¢	

# 10.4 Sending an Instant Message

Send an instant message either by right clicking a user icon in Contacts panel or Search and selecting "Instant Message" from the drop list, or by dragging a user icon into the docked IM panel. Alternatively, you can select Messaging > Start Conversation from the top menu bar.



You can then select the users to include in the IM conversation. Please note that only online users will be displayed in the lists. The left list contains all online users, to include them in the IM conversation move them into the right list either by double-clicking the entry or using the arrow button.

Conversation members	×
Peter Law     Prathap MK     Sally Jones     Subha T     Tracey Scoates     Vas Koria	<ul> <li>Communications Limited</li> <li>Abin Joseph</li> <li>Steve Tutt</li> <li>Steve Wardle</li> </ul>
Show hierarchy	× Cancel V OK

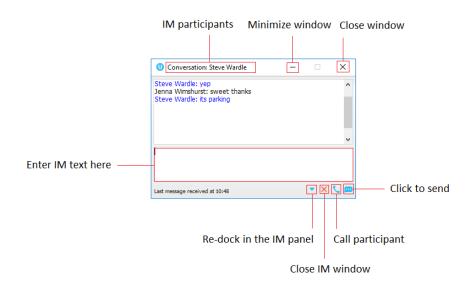
## 10.5 Overview of IM Window

The upper part of the IM window will scroll to display the most recent comment. Type your comment in the bottom window and press Enter or click the 😐 envelope at bottom right.

#### IM Window - Docked



#### IM Window – Undocked



### 10.6 Adding Participants to an Existing IM Session

When an IM conversation is in the Docked IM panel you can drag a user icon from the Contacts Panel or Search and drop them on the IM window to add them to the conversation. When the IM Window is undocked you click the Search icon and select participants to add to the conversation, as below.

Conversation members	×
Peter Law     Prathap MK     Sally Jones     Subha T     Tracey Scoates     Vas Koria	<ul> <li>Communications Limited</li> <li>Abin Joseph</li> <li>Steve Tutt</li> <li>Steve Wardle</li> </ul>
Show hierarchy	× Cancel V OK

# 10.7 Sending Contact Directory Numbers

To send another user a number from your Directory right click in the bottom panel where you enter text. Mouse over to see your Directory entries and select the appropriate number.

Feature Dependency:

- II. The recipient user must have their email address entered in the system
- III. The Agent user must have their outlook client open and they must have full sharing Permissions to see the monitored user's Calendar in Outlook

# 10.8 IM Notification Settings

All notification options for IMs, including sound and popup notifications can be found in the settings under Instant messaging & Presence.

es Settings		
es Settings	Set instant messaging and presence preferences. Changes will not conversations.         Send IMs to offline users         Show instant messages in docked panel         Lise existing conversation for drag and drop         When an instant message is received:         Show the conversation window         Play a notification sound         Show popup notification until closed	affect existing IM
- Logging - XMPP		
Change Password		
Security		
Language		
onnection		
Network		
Proxy		
Authentication		
Call Centers		

Selecting the 'Show popup notification until closed' will keep the IM popup on the screen until it has been closed or clicked.



# 10.9 Send IMs to Offline Users

Even when a user is offline, Unity will allow you to send them an instant message which will then be queued and will appear the next time the user is online.

# 10.9.1 Logging IM Sessions

You will find the Instant Messaging and presence logging options in the Settings tab. Here you will be able to configure how IMs are saved, what file type they are (CSV or HTML) and where they are saved, for example, you may want to save IM conversations on your server rather than on the agent's local computer.

ices Settings	
Appearance     Appearance     Skin     Contact Search     Contact Display     Current Calls     Computer/Phone Integration     Dialing Rule     Computer/Integration     Configuration     Deling Rule     Cattor Directory Integration     Configuration     Configuration     Configuration     Configuration     Conversations     Cutch To Dial     Desktop Integration     Conversations     Conversations	Set instant messaging and presence logging preferences. Log files can be saved in a central location for security purposes.

#### 10.10 XMPP Integration

Unity provides seamless integration with XMPP in order for Unity users to share instant messaging and presence (IM&P) functionality with UC-One clients. All instant messages are displayed and managed to the user as a docked or undocked IM conversation, regardless of the IM&P platform being used. Only online users in Unity can participate in group chats, group chat is not currently supported with XMPP.

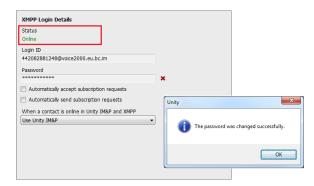
## 10.10.1 XMPP Authentication

Unity is unable to extract the XMPP password from the VoIP platform, meaning it must be reset from within Unity. This functionality relies on the Integrated IM&P service being assigned to the Agent, although no other UC-One related service need be assigned.

In order to set the XMPP password go into Settings and click on the "XMPP > Change Password" item as shown below. You can see the current XMPP status is offline.

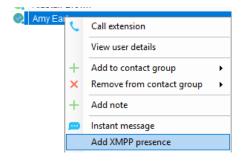
🕛 Services & Settings	×	Services & Settings	
Services Settings		Services Settings	
Unity Settings     Appearance     Sen     Sonarce Search     Contact Deplay     Contact Deplay     Contact Deplay     Contact Object     Contact Deplay     Cont	Configure XMPP details from the XMPP server will be assumed from the domain entered as          XMPP Login Details         Status         Offine         Login ID         Login ID         Pastored         Automatically accept subscription requests         Automatical years only in the years         Use XMPP	Unity Settings     -Skn     -Skn     -Contact Dealer     -Contact Obleve     -Contact     -Contact Obleve     -Contact Ob	Change the Integrated Reason password. Please note that UC-One will need to be restarted after changing the password in Unity.
	× Cancel ✓ OK		× Cancel ✓ OK

Once the password has been entered you must click the OK button to save the password, before moving to any other panels in settings. Please note that the XMPP password <u>should not</u> be the same as the password used to first log into Unity. You will be notified once the password has been changed and the XMPP status changed to online, as shown below.



#### 10.10.2 Managing XMPP Subscriptions

To subscribe to XMPP presence for a monitored user (meaning the Agent will receive real-time updates as the monitored user changes their presence in UC-One) simply right-click the user and select "Add XMPP presence", as shown here. If already subscribed, then right-click the user to remove XMPP presence.



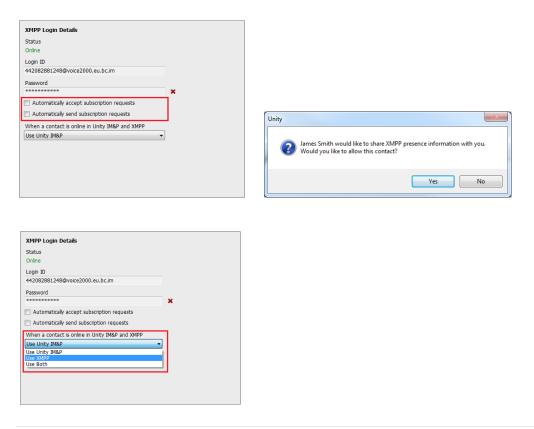
Unity will show the unavailable, busy etc status of the user, as well as any status message manually entered in UC-One, as illustrated below.

			😚 Smart UC-One — 🗆 🗙
			<u>File</u> <u>Edit</u> <u>Contacts</u> Calls Conversations $\gg$
			Wimshurst, Jenna
0	Steve Tutt	02082881251	
0	Steve Wardle	02082881245	In a meeting until 3pm / Currently away

Please note that at present XMPP is only used by Unity to communicate with UC-One clients.

Unity can be configured to automatically subscribe to all monitored user's XMPP presence, as shown here. However, this may result in the buddy/contact list in UC-One becoming very large so should only be activated if the Agent doesn't often refer to the buddy list.

Unity can also be configured to automatically accept subscription requests from other users, if this setting is not activated then whenever a user subscribes to the Agent's XMPP presence a prompt will be displayed, as below.



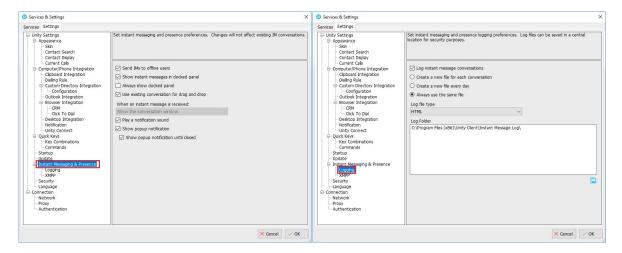
Unity can be configured to automatically generate an XMPP password the first time it is loaded, this is a branding property that is set in the Unity Client branding portal. In this case Unity will save the randomly generated password in Broadworks and also in the registry, from where it will be used whenever Unity is next started. When the password is reset in Broadworks it will automatically be updated in the device configuration file for UC-One, if in use. Furthermore, if UC-One is currently in use this will not impact the existing XMPP registration, therefore there is no impact on UC-One.

#### 10.10.3 Instant Message Priority

Because a monitored user could be running Unity and UC-One, that user could be available to receive instant messages using either client, or both. In these situations, Unity can be configured to prioritized one IM platform over the other, as shown below.

Options are to only send the instant message using only Unity IM&P meaning the instant message will not be received by UC-One, to only send using XMPP meaning the monitored user's Unity client will not receive the message, or to send through both messaging protocols meaning both clients will receive any instant messages sent from Unity. The last option is the default and is recommended in most scenarios.

## 10.10.4 Configuration



# 11 PERSONAL DIRECTORY

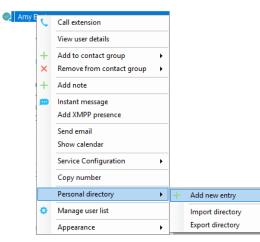
The Personal Directory is a repository on BroadWorks for each user to store personal speed dials. Using this feature in Unity will populate the directory on the host BroadWorks platform. Once numbers have been entered they are available in the Search panel or can be pinned to the main

Contacts Panel. A Personal Directory entry is shown by a  $\leq$  icon. Double clicking the icon will make a call to the Directory number. The Personal Directory menu is available when right clicking a monitored user or in the Contacts panel.

#### Personal Directory – Right click in Contacts

	Personal directory	•	+	Add new entry
۰	Manage user list			Import directory
	Appearance	•		Export directory

#### Personal Directory – Right click on monitored user

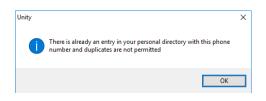


## 11.1 Add New Entry

Enter the Name and Number and click Ok

Add Personal Directory Entry				
Name	Derek Lynch			
Phone	07976			
	× Cancel ✓ OK			

If the number specified is already in the Directory the user will be alerted as below.



## 11.2 Edit Entry

Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select "Edit".

Cerek Lynch	C	Call number			
		Add to contact group	•		
	×	Remove from contact group	+		
	+	Add to default list			
		Copy number			
		Personal directory	•		Edit Derek Lynch
	٠	Manage user list		×	Remove Derek Lynch
		Appearance	•	+	Add new entry
					Import directory
					Export directory

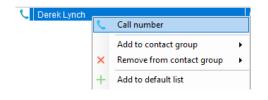
## 11.3 Remove Entry

Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select "Remove".

📞 Derek Lynch	¢	Call number			
	×	Add to contact group Remove from contact group	* *		
	+	Add to default list			
		Copy number			
		Personal directory	•		Edit Derek Lynch
	٥	Manage user list		×	Remove Derek Lynch
		Appearance	•	+	Add new entry
					Import directory
					Export directory

# 11.4 Dialing Directory Entry

Locate the entry either on the Contacts panel or Search. Drag the entry into the Active Call Window or double click to make a call, or right click the entry and click "Call number".



# 11.5 Import Personal Directory

Agent will allow the user to import a .csv file of directory entries, provided they are in "name, number" format. Right click in the Contacts panel, select "Personal directory > "Import" and then browse to the location of the csv.

	Personal directory	•	+	Add new entry
٥	Manage user list			Import directory
	Appearance	•		Export directory

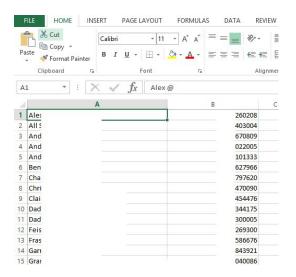
## 11.6 Export Personal Directory

To export Personal Directory entries right click in Contacts and select Personal directory > "export". You will be prompted to save the file locally. The format is csv and the default file name is PersonalDirectory.csv

	Personal directory		+	Add new entry
۰	Manage user list			Import directory
	Appearance	•		Export directory

Choose save location on local PC.

The format of the csv is Name and then Number. Note the example below is edited for privacy.



# 12 CONTACT SEARCH DIRECTORIES

The Contact Search field combines all BroadWorks and Outlook Contacts directories to create a central search repository. The BroadWorks directories include the Common Phone List [system speed dials], the Agent user's own Personal Directory entries, and the Group Directory which includes all the other users in the group as well as hunt groups, auto attendants and call centers. Unity can also integrate with third party LDAP [including Microsoft Active Directory] and SQL directories as well as integrating with CRM systems.

Please see your Administrator for a separate guide on using CRM integration.

Directory Owner	Directory Type	Entry Type
BroadSoft	Group Directory	All other users for BLF presence as well as hunt groups and auto attendants
BroadSoft	Common Phone List	Speed dials entries at the Group level
BroadSoft	Personal Directory	The user's own personal speed dial entries
Outlook	Personal Contacts [private folder]	The user's own Outlook Contacts
Outlook	Group Contacts [public folder]	The shared Outlook Contacts at the Outlook group level
Third Party	SQL	External SQL Directory
Third Party	LDAP	External LDAP Directory

## 12.1 Loading Directories

Unity will load all directory entries into Contact Search on start. If users are added to the BroadWorks Group Directory while Unity is running, they will not be visible until Unity has restarted. Personal directory entries the user adds will be available to use immediately without restarting.

# 12.2 Contact Search Results Layout

To perform a search type characters or numbers in the Search field and Agent will start dynamically populating a list of matching entries across all directories. The list will narrow as more characters or numbers are entered. Clearing the Search box and returning to the main Contacts panel can be achieved by clicking again in the Search filed [provided "Clear the search box when activated" is enabled in Settings as outlined in the section below.

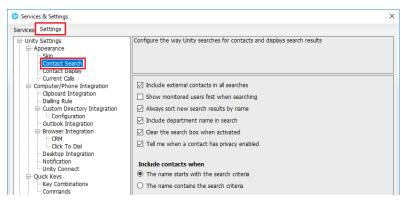
Cor	ntacts Call Logs Voicemail	
s	earch joh Q	
Nai	me	Phone
C	Camron Johnson (Salesforce Contact)	00180
C	Glenn Johnstone (Salesforce Contact)	64214
C.	Johan Bergin (Salesforce Contact)	46850
C	Johan Klaus (Salesforce Contact)	00313
C	Jóhannes Guðmundsson (Salesforce C	00354
C	John Cole	01173
C	John Daniels (Salesforce Contact)	07956

Search results will display each number for a contact as a separate line. Drag or double click the entry to make a call or right click to select a call action from the context menu.

icons represent external numbers or system resources such as hunt groups for which presence information cannot be displayed. It is also possible to search on department name to list all users of matching departments.

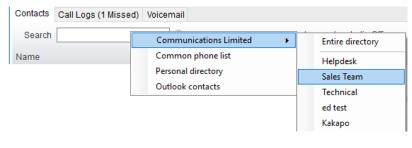
## 12.3 Contact Search Settings

Preferences for Search can be configured in Settings > Unity Settings > Contact Search. The order of search results can also be changed to display internal extension users first and the "Include department name in search" as shown above, can be toggled.



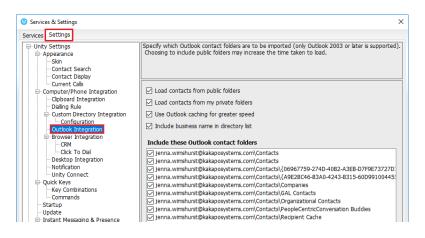
# 12.3.1 Listing Directories

Right-click the search box in the Contact list to view all directories available in Unity, then select the directory to load those contacts in the list, as below.



# 12.4 Configuring Outlook Contacts Preferences

The Outlook directories are both public and private folders and is configurable in Settings > Outlook Integration as below.



# 12.5 Third Party Directories

When searching BroadWorks and Outlook directories, Unity will dynamically match entries as keys are typed. For third party LDAP and SQL directories, because these are not loaded into Unity but polled each time a search request is made, search results are not listed until the Agent user has entered three characters and hit enter or clicked Search

Unity includes a wizard to connect to third party SQL and LDAP directories. Go to Settings to add, edit and remove custom directories, as shown below.

O Services & Settings		×
Services Settings		
Unity Settings     Appearance     Skin     Contact Search     Contact Display	Specify which custom directories to use when searching contacts and phone numbers. Unity w search directories in the order listed below.	il
Current Calls	Custom Directories	
Clipboard Integration     Dialing Rule     Custom Directory Integration     Configuration     Outlook Integration     Outlook Reys     Outlook     Outlook Reys     Outlook Reys     Ou	Name Type	
	C ↓ ↑ - <u>-</u>	F
	X Cancel 🗸 O	<

# 12.6 Desktop Integration

Go into Settings > Settings tab > Desktop Integration, as below.

Unity must be configured with the folder location where the file is to be written, you can also specify whether to use the remote number as the filename (for example 02082881248.txt) or to include the remote number in a text file with whatever naming convention you require. Lastly you should instruct Unity when to create the file, for example only when receiving [call center] calls. Please note that Unity will only create the file for an inbound call when the user has answered it.

When you click OK to save, Unity will attempt to create a file called test.txt in the specified folder, then to delete it, which is to test that appropriate folder permissions have been applied. If this fails, Unity will alert the user and the settings will not be saved.

# 13 CALL LOGS

The Call Logs tab displays Missed, Received and Dialed Calls with a date and time stamp showing the most recent call at the top. Up to 20 numbers are listed unless the Enhanced Call logs service is assigned to the Agent user in BroadWorks. Calls to the Agent user DID as well as hunt group and call center calls that have reached the Agent user are shown.

Contacts Call Logs Voicemail Abandoned Calls		
Missed calls     O Received calls     O Dialled calls		
Call Date	Phone Number	Name
11/08/2016 16:01:38	1248	Chris Tutt
11/08/2016 12:37:31	0139:	01392
08/08/2016 16:30:58	0208	02086
07/08/2016 18:34:40	0002	Andrew Smith
07/08/2016 18:34:20	0002	Andrew Smith

Drag or double click an entry to make a call to that number. Call logs can be exported as a csv file,

either individually or together, but clicked the 📮 Export button.