Unity Agent

MOMENTUM
T E L E C O M

Initial Access

The first time Unity is started you will be prompted to login. *Contact the service provider to receive your credentials, or for assistance with server connection details, as needed.*

1. Enter the Login ID and Password credentials you received from the Service Provider. (*see Fig. 1*)

2. Click to remember ID and password for future login, as desired, and click OK.

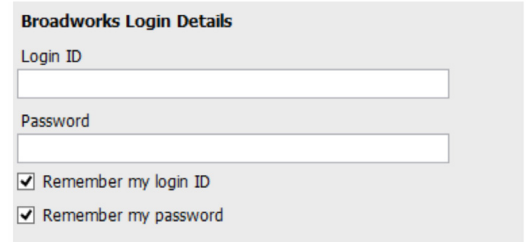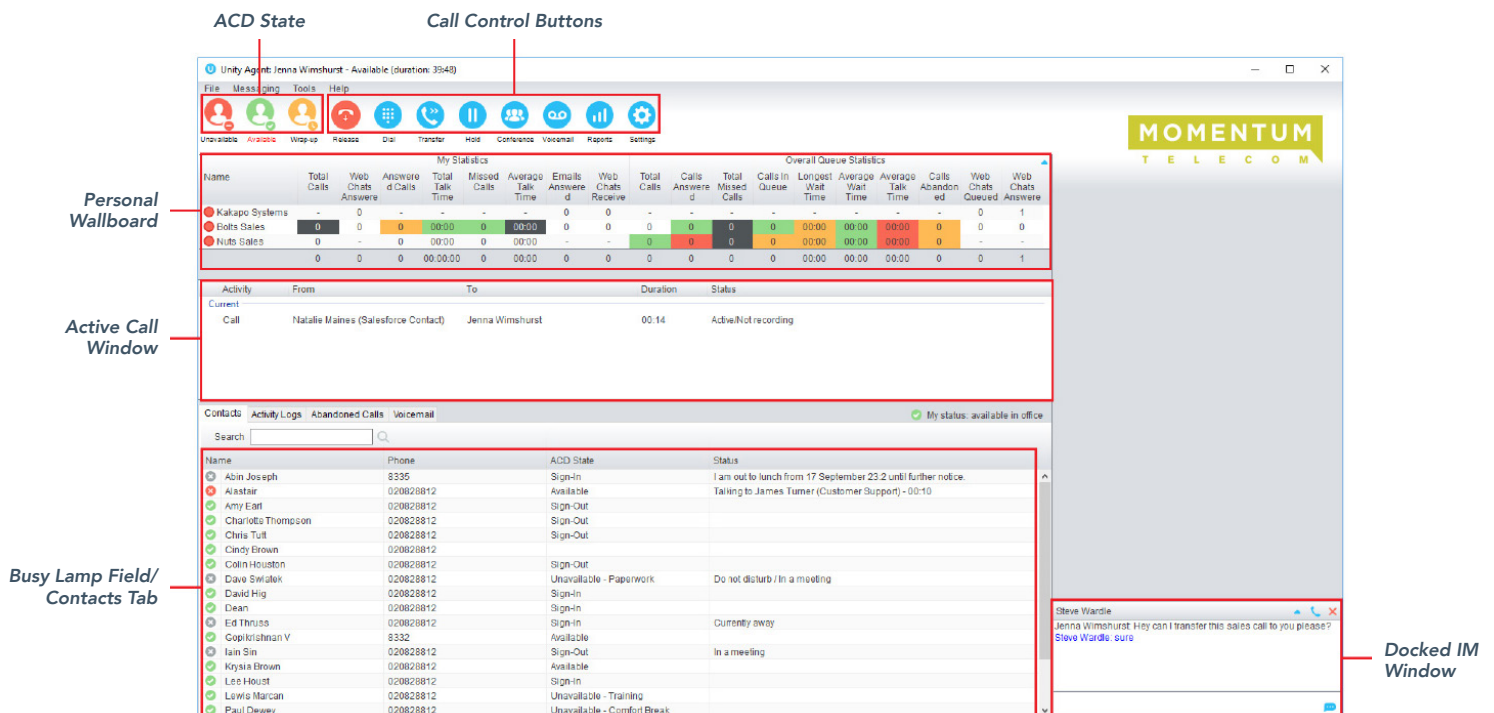3. Click the Save button to commit setting changes and restart the application.

Broadworks Login Details

Login ID

Password

☑ Remember my login ID
☑ Remember my password

Fig. 1

The Interface

» Unity is split into three functional areas: Call Controls, Active Calls, and Busy Lamp Field where Contact directories, Call Logs and Voicemail may be reviewed. Instant Messaging (where enabled) is also available.

» The Active Call List displays the status of all current calls for the logged in user, which are managed using the Call Control buttons.

» The 6 all 6 ontrol buttons change dynamically based on the status of the call to provide appropriate actions.

» When Unity first starts it automatically populates the Busy Lamp Field section with 8 or 30 random users in your group or enterprise [depending on Unity license assignment].

ACD State   *Call Control Buttons*

Personal Wallboard

Active Call Window

Busy Lamp Field/ Contacts Tab

Docked IM Window

Call Controls

Icon	Function	Description
	Dial	Click this icon to dial a number and make a call. Right-click it to redial from the last 10 numbers called.
	Answer	This button displays when a call is ringing.
	Release/End call	This button displays when in an active call. Click to end the call. If you have multiple calls, click on the call you want to end first.
	Hold	This button displays during an active call. Click to hold the call. If you have multiple calls, click the call you want to put on hold first.
	Retrieve	This button is available when a call is On Hold. Click the button to take the caller off hold.
	Voicemail	Click the Voicemail button to send an incoming call to voicemail. Click the Voicemail button when idle (no active calls) to dial your voicemail box.
	Transfer	Click the Transfer button to transfer a current call to a specified number. Drag and drop the call over a contact to transfer to them without entering their number.
	Conference	Select two or more calls then click the Conference button to start a conference with those callers.

TRANSFER A CALL

» **Announced Transfer**: Answer an inbound call then make a new call to the desired number, this will place the first caller on hold and initiate a new call. Once the new party answers, click transfer and transfer the two calls together.

» **Blind Transfer**: While on an active call, dial a number or drag to/right click the recipient then select transfer, this will send the caller directly to the destination number and disappear from your call list.

» **Warm Transfer**: Right click the user you want to transfer the call to and select "warm transfer". This will then put the original caller on hold while you talk to the other user, when ready, click the transfer button.
(You can also transfer a call to someone's voicemail or mobile by right-clicking their icon and selecting the option.)

START A CONFERENCE CALL

1. Establish the first call.

2. Click Dial and call a second person.

3. Click the Conference button to merge the calls and start a new conference for all three of you.

   » To add more people to the conference simply click Dial and start another call, then click the Conference button.

END A CONFERENCE CALL

» To end the conference call but continue speaking to one of the callers, simply select the person/call you want to end and click the Release button.

» To end the conference call and disconnect all parties, hang up the phone or select both calls and click Release.

» To leave the conference but allow the other callers to continue speaking to each other, perform an Announced Transfer between the two calls.

MANAGE 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.

ABANDONED CALLS

» In the Agent Enterprise version, a supervisor can assign abandoned calls to the agent for a callback.

» These will be listed in the "Abandoned Calls" tab in the Busy Lamp Field panel. Double-click a call to make the outbound call.

» Once the abandoned call has been called back, right-click to select the appropriate Mark as processed option. *(see Fig. 2)*.
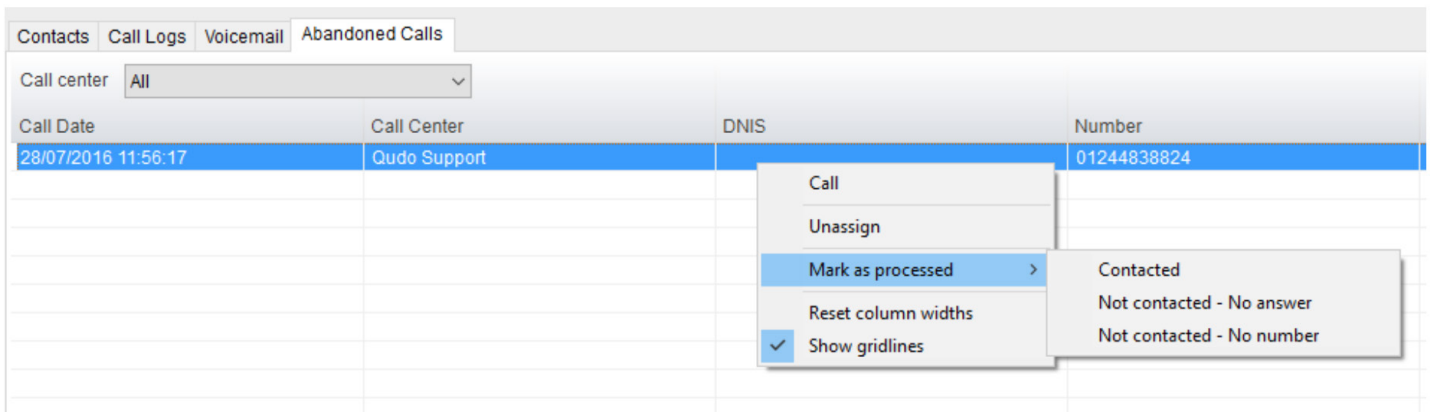

Fig. 2

SUPERVISOR ESCALATION

» A right-click on any queue in the Personal Wallboard allows the agent to alert an assigned Supervisor by call or instant message. *(see Fig. 3)*
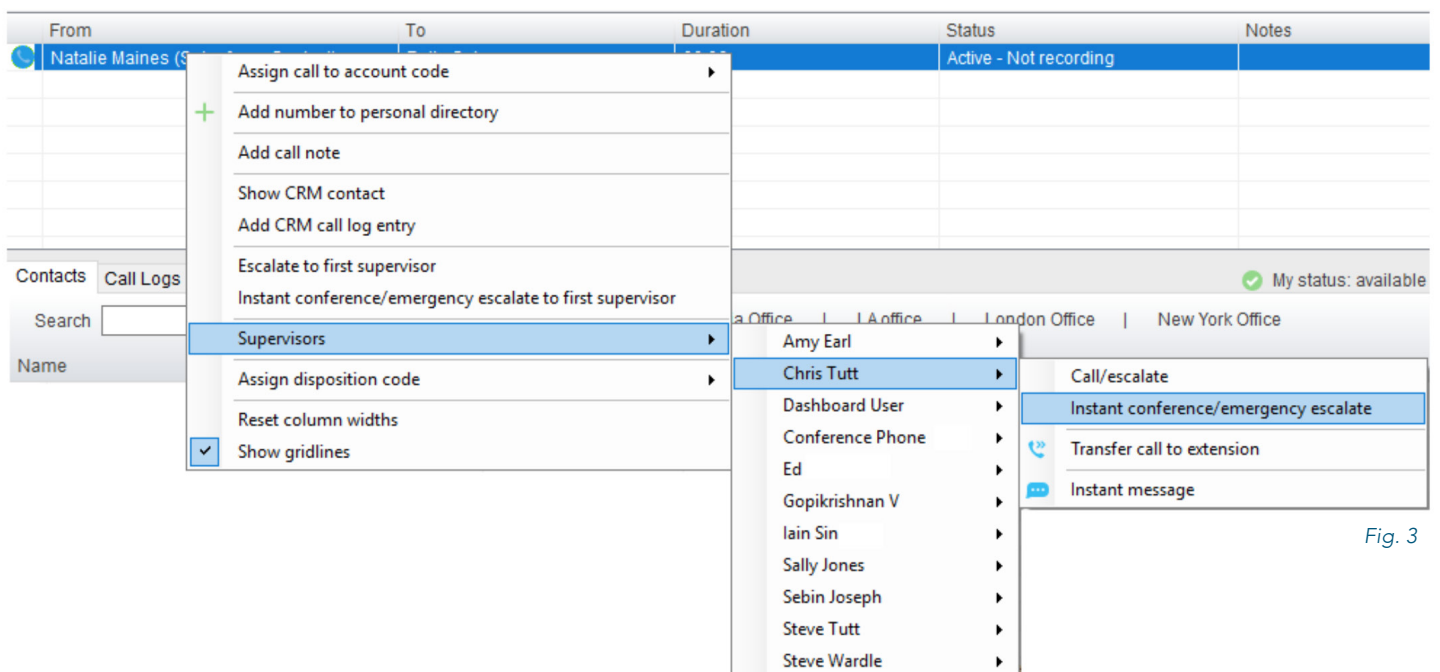

Fig. 3

BUSY LAMP FIELD

USER STATUS VIEWS

» Monitor up to 30 users, depending on Unity license assignment.

» Right-click anywhere in the list to change the view of the users, e.g.; list, icons, etc.

» To modify the list of users currently being monitored, right-click in Contacts and select Manage User List. Highlight and move the users you want to add to the list on the right using the → arrow. *(see Fig. 4)*.
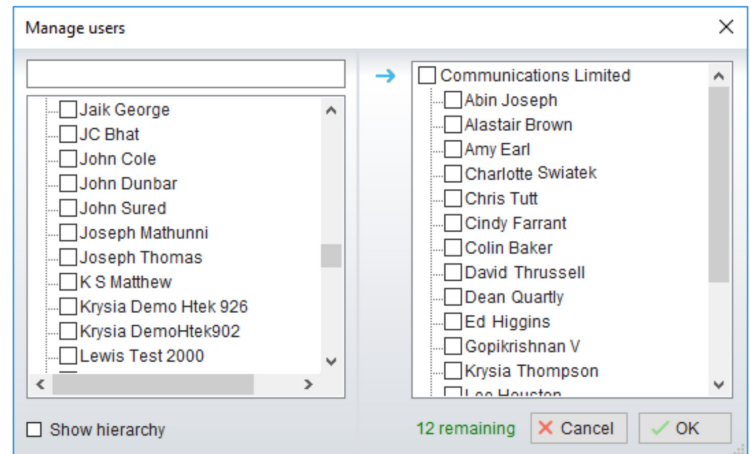

Fig. 4

MONITORED USER STATES

A monitored user will always be displayed in one of four states:

User State	Description	User Status Image
Available	The monitored user extension is on hook	✅
Ringing	The monitored user extension is ringing	📶
Engaged	The user is on the phone	❌
Do Not Disturb	The user has selected DND or Unavailable profile	⛔

DRAG AND DROP CALLS AND IM

» Hold down and drag a user's icon to the docked IM panel to start instant messaging.

» Drag a user to the Active Call Window to call them.

» Drag an active call to another user to transfer/show available transfer options.

CALL PICKUP

This feature allows the user to answer an incoming call on behalf of a monitored user. Simply right-click a ringing user and select Answer this call *(see Fig. 5)*.
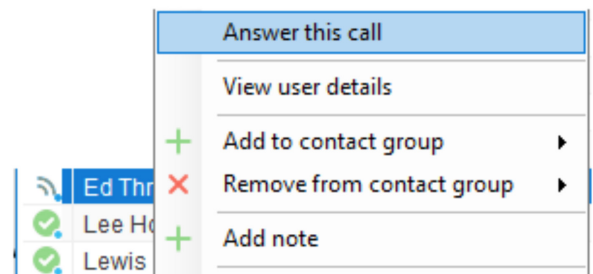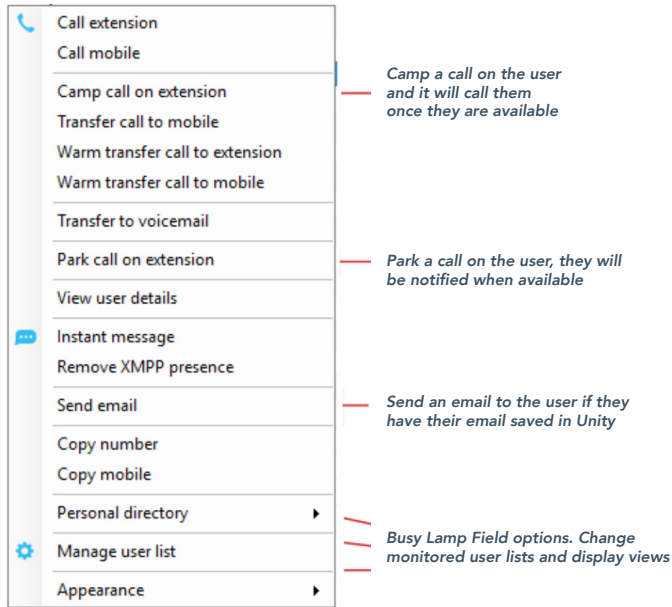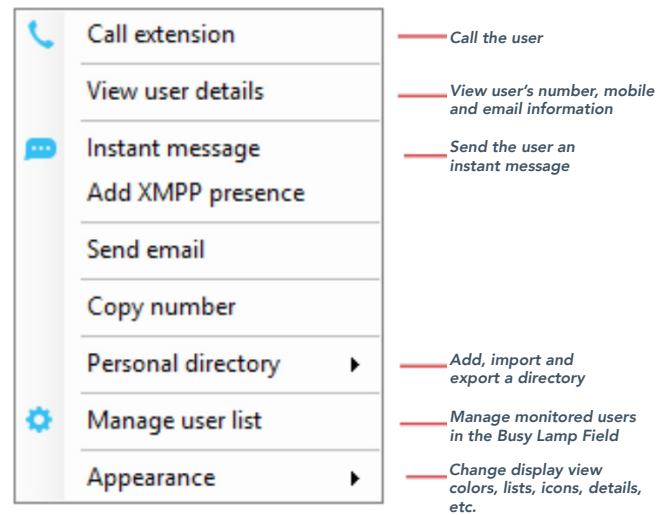

Fig. 5

ACTION OPTIONS FOR A BUSY USER

- Call extension
- Call mobile
- Camp call on extension — *Camp a call on the user and it will call them once they are available*
- Transfer call to mobile
- Warm transfer call to extension
- Warm transfer call to mobile
- Transfer to voicemail
- Park call on extension — *Park a call on the user, they will be notified when available*
- View user details
- Instant message
- Remove XMPP presence
- Send email — *Send an email to the user if they have their email saved in Unity*
- Copy number
- Copy mobile
- Personal directory
- Manage user list — *Busy Lamp Field options. Change monitored user lists and display views*
- Appearance

ACTION OPTIONS FOR AN AVAILABLE USER

- Call extension — *Call the user*
- View user details — *View user's number, mobile and email information*
- Instant message — *Send the user an instant message*
- Add XMPP presence
- Send email
- Copy number
- Personal directory — *Add, import and export a directory*
- Manage user list — *Manage monitored users in the Busy Lamp Field*
- Appearance — *Change display view colors, lists, icons, details, etc.*

INSTANT MESSAGING

If a user's icon has a small blue dot ● then they are available for instant messaging. To send an instant message you may:

» Right-click the user icon and select Instant Message.

» Drag and drop the user's icon to the docked IM panel on the right (this can be set up in the Settings tab).

» Click Messaging at the top of Unity and select Start Conversation. Then add the people you want to instant message (*see Fig. 6*).

» Multiple online users can be selected to start an IM conversation by holding down the CTRL key while selecting users.
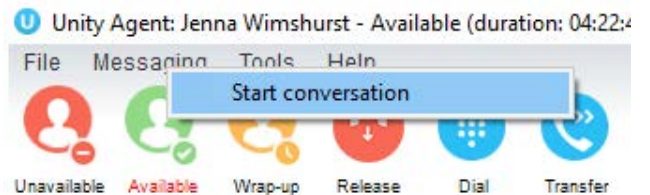

Fig. 6

MY STATUS

» To set your status to Available, Busy, Do Not Disturb, etc., click on the My Status link in the Busy Lamp Field and choose a status option. *(see Fig. 7)*

» To activate Call Forwarding, click on My Status, select the option "Call forward always", then enter the number. All incoming calls are sent to the pre-defined phone number, meaning the user's phone will not ring.

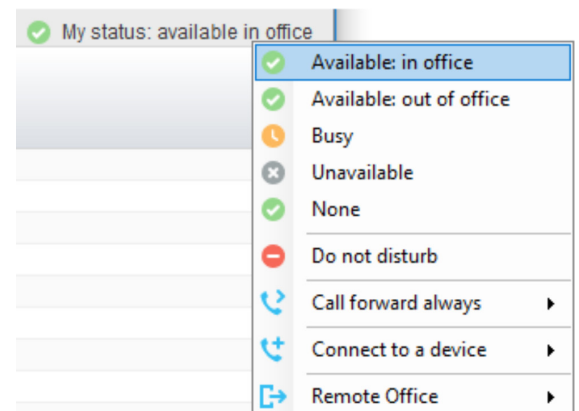» To activate and deactivate Call Forwarding, hover over "Call forward always" and select the desired option.

Fig. 7