



UNITY AGENT

User Guide

MOMENTUM

T E L E C O M

CONTACTS PANEL CALL CONTROL OPTIONS

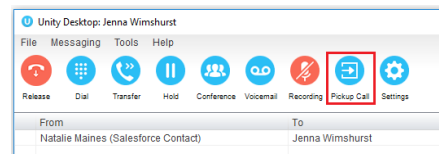
There are many call control functions that can be performed by right-clicking a monitored user in the main Contacts panel or Contact Search. The menu options displayed will dynamically change to only show those available depending on the state of the monitored user and/or the state of the selected call 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.

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.

ANSWER THIS CALL [CALL PICK-UP]

This will perform call pick-up and will pull the call to the supervisor. Monitored user must be ringing [orange icon] and the Supervisor and monitored users must be in the same pick-up group.

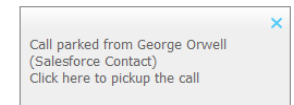


PARK CALL ON EXTENSION

Selecting this option will park a live call on the monitored user's extension park slot.

RETRIEVE PARKED CALLS

Once a call has been parked onto a user's extension, Unity displays a **P** and notifies the user with a pop-up dialog. To retrieve the parked call, click either the Pickup button or the pop-up.



If the call is not retrieved it will be redirected back to the original user who parked the call.

CAMP CALL ON EXTENSION

Users can camp a live call onto an 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 User.

CALL MOBILE

Places call to mobile. Any live call placed on hold. The monitored user must have their mobile number entered in BroadWorks.

TRANSFER CALL TO MOBILE

Performs blind transfer call to monitored users mobile. The destination user must have their mobile number entered in BroadWorks.

TRANSFER CALL TO VOICEMAIL

Performs a blind transfer of a live call to the destination user’s voicemail. The destination user must have voicemail service assigned and enabled.

BARGE INTO THIS CALL

Makes an immediate three-way conference call with the Supervisor, 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, 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, and the Supervisor user can Hold/Retrieve the same as for a conference call.

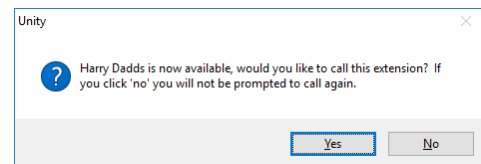
From	To	Duration	Status
Sasha Gorb	Jenna Wimshurst	00:15	Active (conference)/Not recording
Jenna Wimshurst	01268508018	00:02	Active (conference)/Not recording

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 then select the option Transfer calls together (leave conference)

Note: The Supervisor user must have directed call pick-up with barge-in service assigned, the Monitored user must be engaged on a call, and the monitored user must not have the Barge In Exempt service setting enabled. Reference the Unity Agent documentation for more setting information.

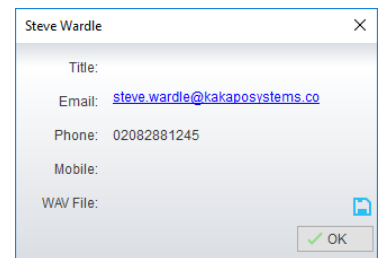
CALL EXTENSION WHEN AVAILABLE

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



VIEW USER DETAILS

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



ADD AUDIO ALERTS TO MONITORED USERS

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

SEND EMAIL

Opens a new email window in the default Email application. The user must have an email address defined in BroadWorks.

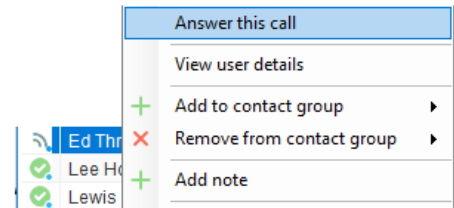
ANSWER THIS CALL [CALL PICK-UP]

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*.

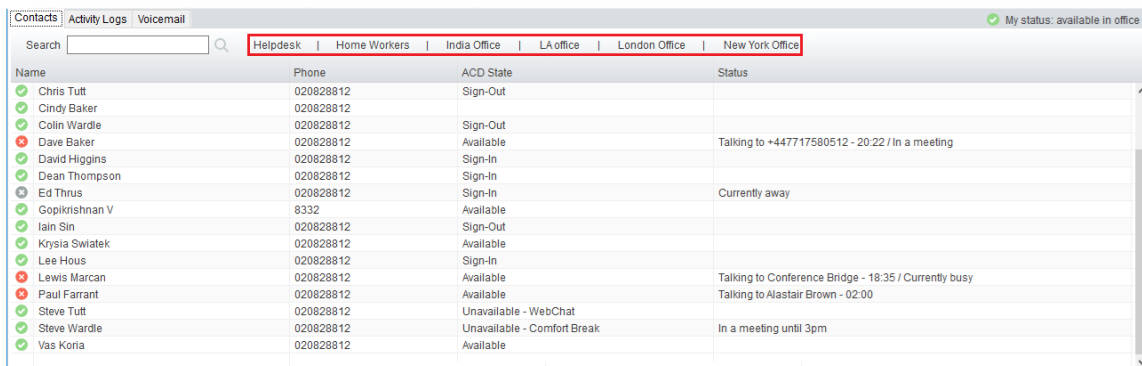
This option is only displayed when right-clicking a ringing user.

Note: The Supervisor user and the monitored user must be the same pickup group or the Supervisor user must have the “Directed Call Pick-Up” service assigned in BroadWorks and Unity.



CONTACT GROUPS

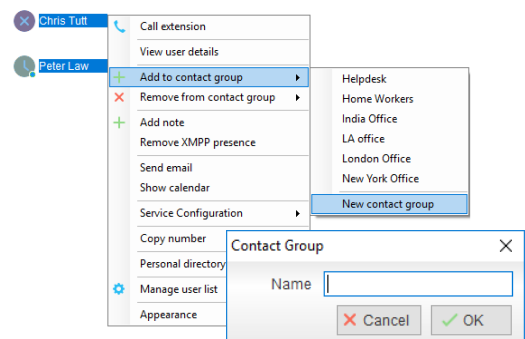
Contact groups are pre-defined logical groups of internal and external contacts that allow the user to quickly load selected contacts, they are very similar to the default user list expect they are pinned to the Contacts tab



Contact groups provide multiple real-time BLF instances for efficient call handling. The contact groups can be named intuitively by the Agent user, for example, “Denver Office” or “Sales Team” as appropriate. Up to 12 contact groups can be added and each contact group allows up to 50 internal users and unlimited external contacts. Internal users can belong to multiple contact groups.

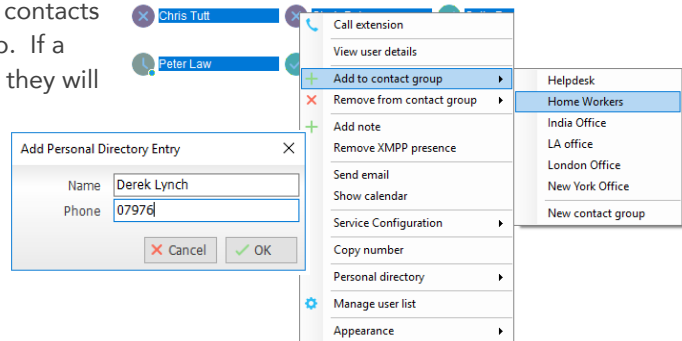
CREATE A CONTACT GROUP

Assuming contact groups are enabled in Settings, drag over a group of monitored users in the Contacts panel, or CTRL + left click them in Contacts or Search and then right click the mouse and select “Add to contact group > New contact group”. Name the group and click OK.



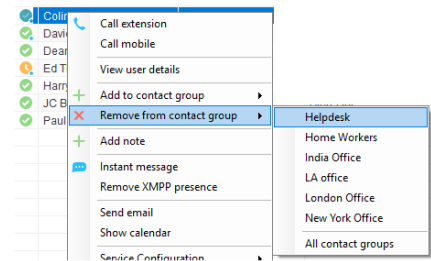
ADD USERS TO AN EXISTING CONTACT GROUP

After selecting additional internal users or external contacts right-click to add them to an existing contact group. If a user or contact already exists in the contact group, they will not be duplicated.



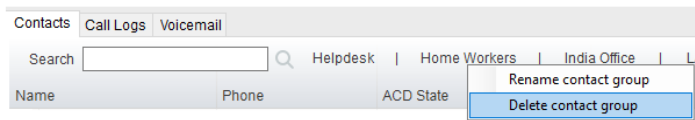
REMOVE USERS FROM CONTACT GROUPS

Right click a user and select Remove from contact group.



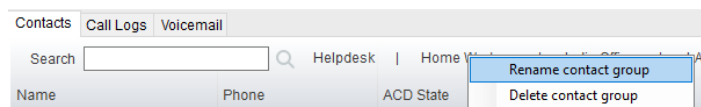
DELETE CONTACT GROUPS

Right click a Contact group name to delete it.



RENAME CONTACT GROUPS

Right click a contact group name and select "Rename contact group", then enter the new name and click ✓OK.

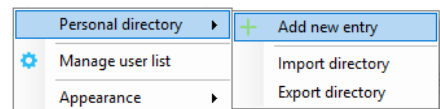


PERSONAL DIRECTORY

The Personal Directory is a repository on the VoIP platform for each individual user to store personal contacts, which are available to be added to the default contact list and are included when searching in the Contacts list. Personal directory entries are classed as external contacts, so are shown with a phone image. Double clicking the item in the Contacts list will make a call to the associated number.

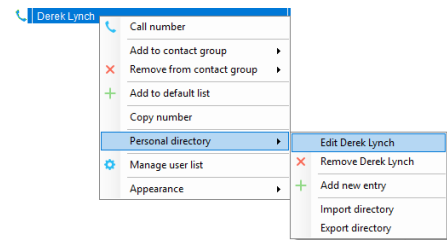
ADD A PERSONAL DIRECTORY ENTRY

To add an entry, right-click anywhere in the Contacts list and select **Personal Directory > Add new entry**. Then enter the name and number and click OK. If the number specified is already in the Directory the user will be alerted.



EDIT A PERSONAL DIRECTORY ENTRY

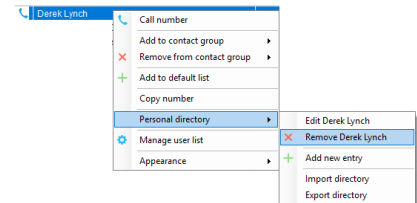
Search for the contact using either the name or number, then right-click and select the menu option to edit to contact.



REMOVE A PERSONAL DIRECTORY ENTRY

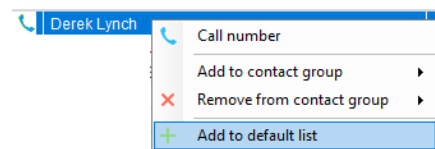
Search for the contact using either the name or number, then right-click and select the menu option to edit to contact.

Confirm the action when prompted. Use caution. This action cannot be undone.



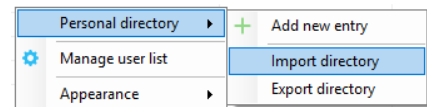
INCLUDE EXTERNAL CONTACTS IN THE DEFAULT CONTACTS LIST

To “pin” a personal directory entry [or any other external contact] to the default Contacts list, right click and select “Add to default list”, as shown here. Please note that external contacts that are pinned to the default Contacts list do not contribute to the limit of 50 monitored users.



IMPORT PERSONAL DIRECTORY

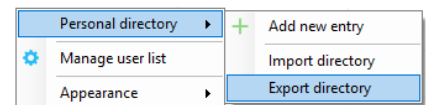
Unity allows multiple contacts to be imported into the personal directory through a .csv file, provided the file is in “name, number” format. Right-click anywhere in the Contacts list and select the import menu option as shown below, then select the location of the file to import. Depending on the number of contacts this may take several minutes.



EXPORT PERSONAL DIRECTORY

You can export the personal directory in case it needs to be imported for another user.

Right-click anywhere in the Contacts list and select the export menu option. You will be prompted to specify the file location, the format is .csv and the default file name is PersonalDirectory.csv

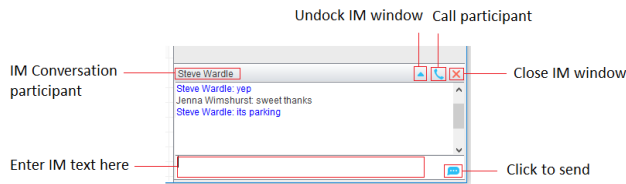


INSTANT MESSAGING

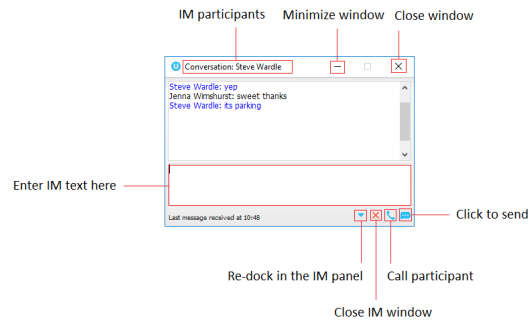
Instant messages can be sent and received between any Unity app [Reception, Desktop, Agent, or Supervisor]. Messages sent to offline user [those that do not have an instance of Unity open] can be stored and delivered when the recipient next opens Unity.

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



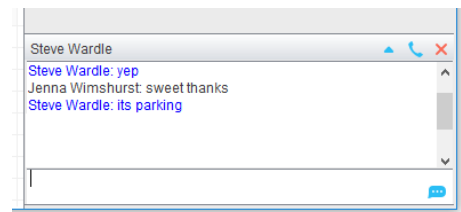
ONLINE/OFFLINE INDICATOR

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		
Ringing		
Engaged		
DND/unavailable profile		

DOCK 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 with contacts can be initiated via drag and drop and new IM windows will not pop over other applications.



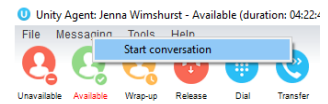
UNDOCK AND RE-DOCK IM SESSIONS

You can undock an IM message by clicking the "Expand conversation to separate window" button. The IM session will now be in a standalone window and drag and drop will not work to add contacts to the conversation.

Click the "Dock conversation in main window" button to pull the IM session back into the docked panel in the main Supervisor interface.

SEND AN INSTANT MESSAGE

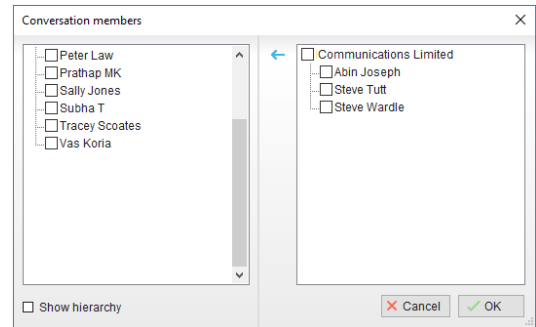
Send an instant message either by right clicking a user icon in Contacts panel or Search and selecting "Instant Message" from the drop list, or by dragging a user icon into the docked IM panel. Alternatively, you can select Messaging > Start Conversation from the top menu bar. You can then select the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



ADD 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.



SEND 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.

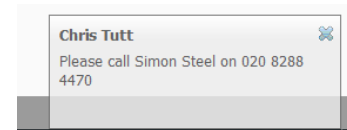
- ❖ The recipient user must have their email address entered in the system
- ❖ The Supervisor user must have their outlook client open and they must have full sharing
- ❖ Permissions to see the monitored user's Calendar in Outlook.

IM NOTIFICATION SETTINGS

Click on a notification to respond. Note: All notification options for IMs, including sounds and popup notifications can be modified in Settings under Instant messaging & Presence.

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.



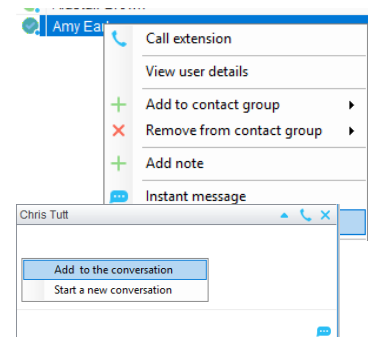
GET STATUS UPDATES

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

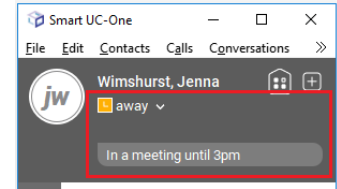
To subscribe to XMPP presence for a monitored user (meaning the Agent will receive real-time updates as the monitored user changes their presence in UC-One) simply right-click the user and select "Add XMPP presence", as shown here. If already subscribed, then right-click the user to remove XMPP presence.

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

	Steve Tutt	02082881251	
	Steve Wardle	02082881245	In a meeting until 3pm / Currently away



Unity can also be configured to automatically subscribe to all monitored user’s XMPP presence. 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 or add to the buddy list.



5. CALL CENTER TASKS

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.

PERSONAL WALLBOARD

The Personal Wallboard section in Unity Agent offers a user who is also a call center agent a view of personal and overall queue performance by displaying key metrics. Statistics 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 centre[s]. Some statistics are real-time while others are periodically polled from the VoIP platform. The Personal Wallboard can show a detailed view [one row per call center] or a summary view only, this is toggled using the button in the upper right corner. The color codes within the display (green, yellow, red and black) are user-defined Alert Thresholds for the Statistics in the columns, and can be managed in [Services](#).

The 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

Name	My Statistics							Overall Queue Statistics										
	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Receive	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Calls Abandoned	Web Chats Queued	Web Chats Answered
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	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

Name	My Statistics							Overall Queue Statistics										
	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Receive	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Calls Abandoned	Web Chats Queued	Web Chats Answered
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.

If the user is not also an agent for the queue in BroadWorks, then they will not be able to Join/Leave, or take calls for those queues. The Join/Leave status icon will show as grey and there will be no statistics in the “My Statistics” window.

When the user is also an agent:

My Statistics						Overall Queue Statistics									
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staffed Ratio		
Bolts Sales	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00	1/5		
Nuts Sales	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00	1/9		
	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00	2/15		

Call Center icons are green and red to show that the user is either joined or not joined to the Call Center queues.

As the user is assigned as an agent in BWKS the agent statistics are populated with the user's own statistics.

When the user is not an agent:

My Statistics						Overall Queue Statistics									
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Staffed Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staffed Ratio	
Bolts Sales	-	-	-	-	-	-	0	0	0	0	00:00	00:00	00:00	0/0	
Nuts Sales	-	-	-	-	-	-	0	0	0	0	00:00	00:00	00:00	0/0	
	0	0	0	00:00	00:00:00	00:00:38	0	0	0	0	00:00	00:00	00:00	0/0	

Call Center icons are grey to show that the user is not able to join or leave the Call Center queues.

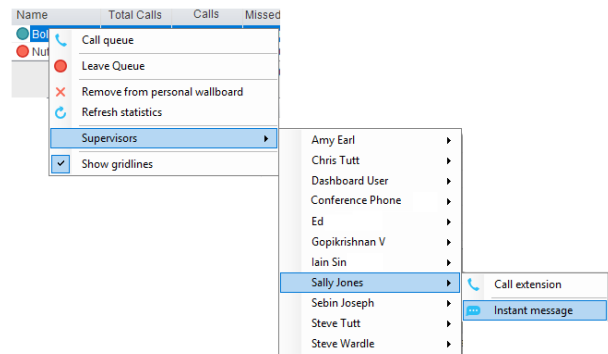
As the user is not assigned as an agent in BWKS the agent statistics are replaced with dashes.

OVERVIEW

The Personal Wallboard is used not only to show agent and queue statistics for call centers, but also to quickly perform other actions on behalf of the agent.

Right-click on the call center.

Join or leave the call center [this toggles depending on whether the agent is currently joined or not], call the queue [or transfer a call in progress], or instant message/call a supervisor of the call center.



COLUMNS

There are 6 agent level and 22 call center level statistics available to be displayed in the Personal Wallboard, which will automatically resize to include all columns in the window width available. Columns can be added removed and reordered and alert thresholds can be defined in Settings.

Many columns support thresholds which employ a “traffic light” scheme to quickly indicate important call center metrics, such as the number of missed calls or the longest wait time for queued calls.

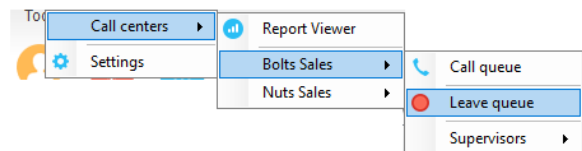
Please note that all statistics shown in Personal Wallboard reset every 24 hours at midnight.

JOIN & LEAVE QUEUES

To join or leave a call center queue:

1. Right-click on the queue in the Personal Wallboard [if displayed]

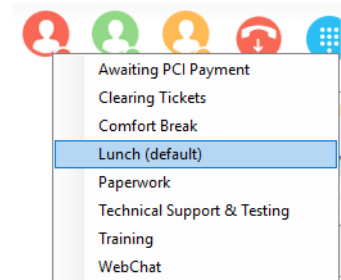
OR, click on the **Tools** menu to see your call centers.



2. Select **Call Centers** - all call centers that the user belongs to are available for selection, even if they are not currently being displayed in the Personal Wallboard.
3. Click on the correct queue.
4. Choose *Call, Join, or Leave*, as needed.

CHANGE ACD STATE

The ACD State buttons at the top of the view allow the user to change their current ACD state, including setting the unavailable reason code when selecting DND. The title bar may also be set to show the current ACD state.



RECEIVE CALL CENTER CALLS

Agents will only receive calls routed through the call center if they are currently joined to that call center and the ACD state is set to Available. When receiving a call center call, Unity will display the "To" field as the name of the queue rather than the name of the agent, to indicate that this is a call center call. If a DNIS name is present, this will also be shown [in brackets].

From	To	Duration	Status	Notes
Barry Simpson	Nuts Sales (Nuts International)	00:00	Ringing	Previously transferred to Andrew Smith

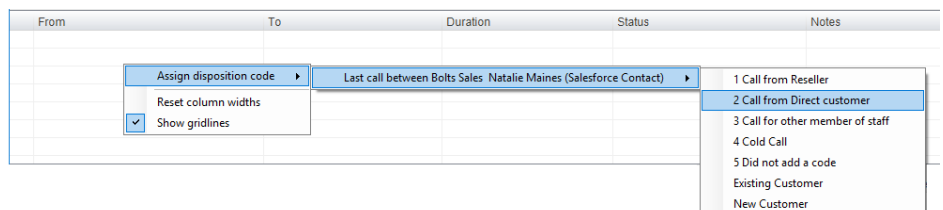
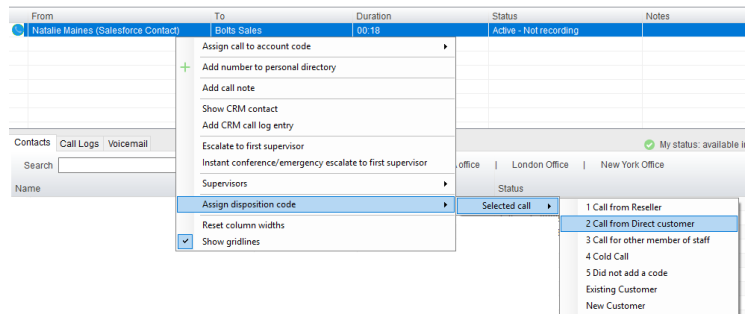
Call center calls are managed in exactly the same way as non-call center calls.

ASSIGN DISPOSITION CODES

Although unlikely in a reception environment, a call center call can be flagged with one or more disposition codes, which is recorded by the VoIP platform to give more information about this call, for example was it the result of a marketing campaign, is it a complaint etc.

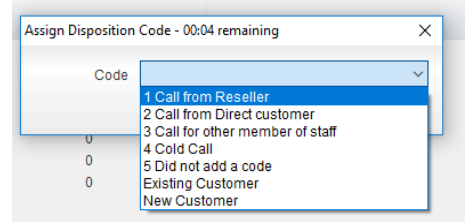
Assign a disposition code to a call by right-clicking and selecting the menu option above, a single disposition code can only be assigned once to a call, but multiple codes can be assigned to the same call.

A disposition code can also be assigned to the last received call center call. Right-click in the Active Call Window to assign the disposition code, please note that Unity indicates that "Sales Call" has already been assigned to this call.



The agent must be in Wrap-Up ACD state in order to assign a disposition code to the previous call center call. If this isn't the case Unity will prompt the user to change the ACD state the Wrap-Up, assign the disposition code, then change the ACD back to the current state.

When Unity is configured to force the agent to assign a disposition code through a popup window, that message is automatically displayed to the user when the call is released.

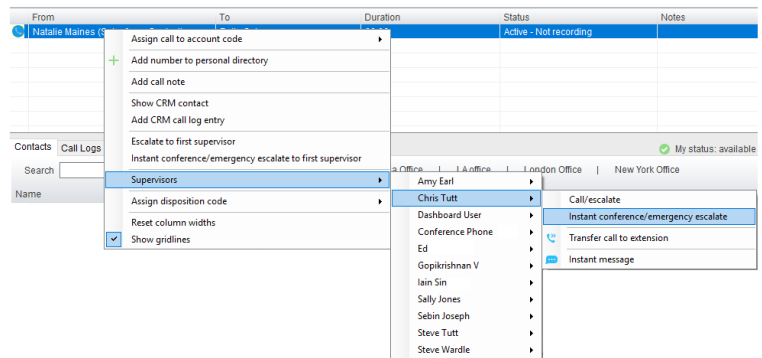


SUPERVISOR ESCALATION

A call center call can be escalated to a specific supervisor or to the first available supervisor. There are two kinds of escalation available, both of which are logged as an escalation in the VoIP platform.

To Escalate a call:

1. Right-click on an Active Call.
2. Select the desired escalation option (or a specific supervisor or **first available**) and the contact method from the context menu options.



STANDARD ESCALATION

Places the call on hold and dials the supervisor. Once the supervisor answers the agent can perform an announced transfer, a three-way conference or simply toggle between calls.

EMERGENCY ESCALATION

Select *Instant conference/Emergency escalate* to first supervisor, or chose a supervisor and the emergency escalation option and Unity will dial the supervisor and start an instant conference with that supervisor and the remote caller when the supervisor answers.

The agent can also *blind transfer* the call to the supervisor without performing an escalation or send an instant message to the supervisor.

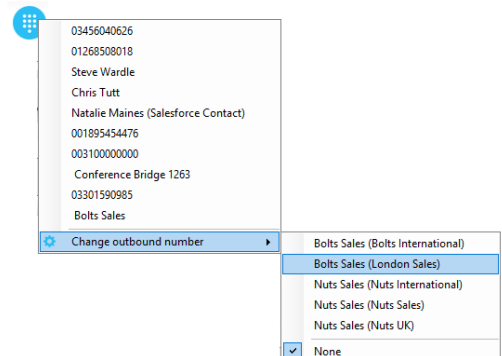
ACTIVATE OUTBOUND DNIS

If the receptionist is an agent of one or more call centers that support outbound DNIS, then the user can select an outbound DNIS which will determine which outbound caller ID/name is presented to the remote party when the user makes external outbound calls.


To change the outbound DNIS appearance:

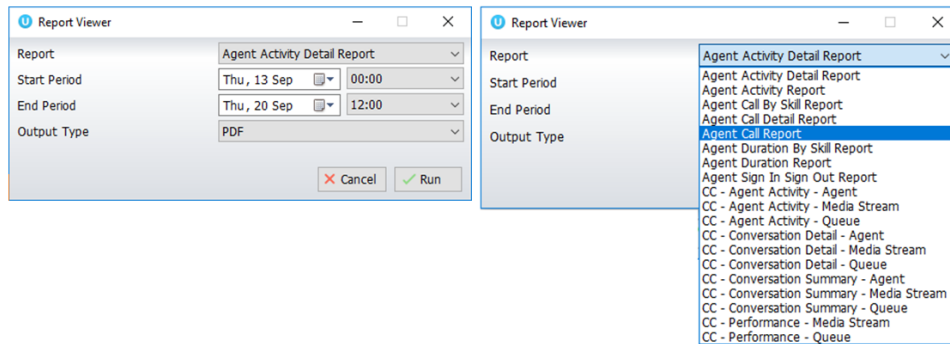
1. Right-click the **Dial** button
2. Select an available option to change the outbound number.

All numbers configured as outbound DNIS will be presented, and the currently select number will be ticked. Please note that if an outbound number is selected here, it will be used when making all calls until Unity is closed or the "None" menu option is selected.



VIEW REPORTS

Unity offers standard call center agent reporting to the receptionist, which is accessed through the Report Viewer  button, or go to *Tools > Call Centers > Report Viewer*.



The following default reports are available by default:


- Agent Activity Detail Report
- Agent Activity Report
- Agent Call by Skill report
- Agent Call Detail Report
- Agent Call Report
- Agent Duration by Skill Report
- Agent Duration Report
- Agent Sign-In/Sign-Out Report

As additional reports are made available in the VoIP platform they are displayed in the report viewer. Please consult your service provider for an overview of the call center reports, including input parameters.

6. MANAGE BASIC SERVICES

Unity is setup by the service provider, and generally uses pre-defined Templates to provide the default setup the organization prefers. Users may have access to modify some service and setting options to assist as they work. This section offers an overview of the Services tab options, with tips and general instructions for accessing and/or modifying commonly used services that are made available in Unity. For assistance with the options you cannot modify, contact your organization’s Unity Administrator.

Note: Unity must be restarted to update the system for immediate use when changes to services and settings are made.

The Settings  icon in the Call Controls section (or via the **Settings** option in the **Tools** menu within the **Toolbar**) offers access to view the *Services* tab. This area offers access to define specific behaviors for incoming and outgoing calls, call controls, and messaging including voicemail, and works with the BroadWorks settings that are currently licensed and defined for the user.

INCOMING CALLS

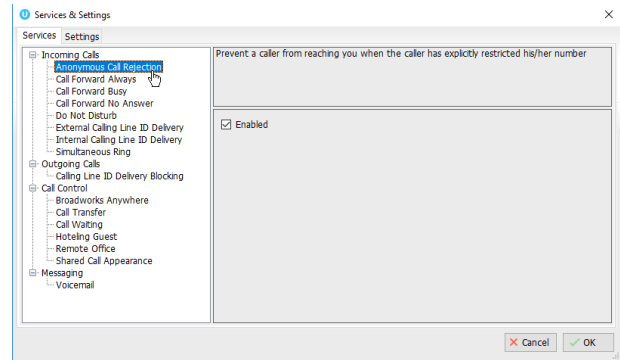
This service setting section allows users to enable and setup the BroadWorks features the user wishes to use for Incoming Calls while working in Unity.

ANONYMOUS CALL REJECTION

Settings > Services > Incoming Calls > Anonymous Call Rejection

Disallow calls from callers who have setup usage of a 'private', 'anonymous' or 'unknown' caller ID. This is an On/Off service.

1. Click to Enable.
2. Click OK and select Yes to restart and update the system when prompted.

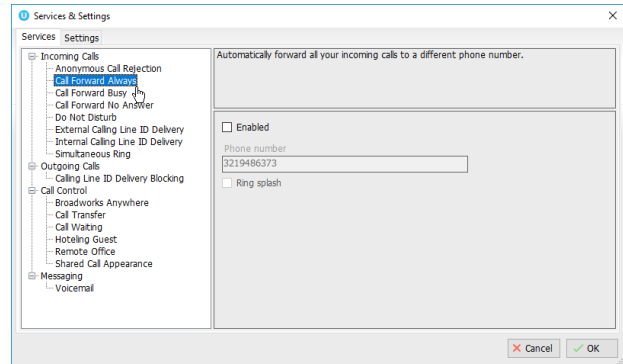


CALL FORWARD ALWAYS

Settings > Services > Incoming Calls > Call Forward Always

Automatically forward all incoming calls to a different phone number.

1. Enabled – Click to place a checkmark if you wish to use Call Forward Always.
2. Phone Number – Enter a 10-digit phone number, no spaces/special characters.
3. Ring Splash – Enable, as needed to ring the deskphone and forwarding number.
4. Click OK and select Yes to restart and update the system when prompted.

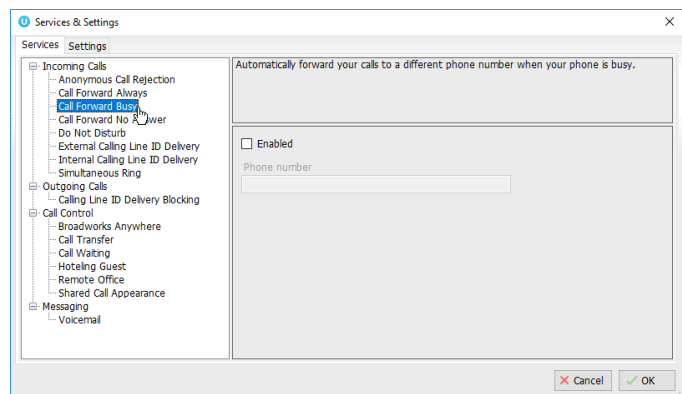


CALL FORWARD BUSY


Settings > Services > Incoming Calls > Call Forward Busy

Automatically forward calls to a different phone number when your line is busy. User may enable and define the phone number for forwarding.

1. Enabled – Click to place a checkmark if you wish to use Call Forward Busy.
2. Phone Number – Enter a 10-digit phone number, no spaces/special characters.
3. Click OK and select Yes to restart and update the system when prompted.

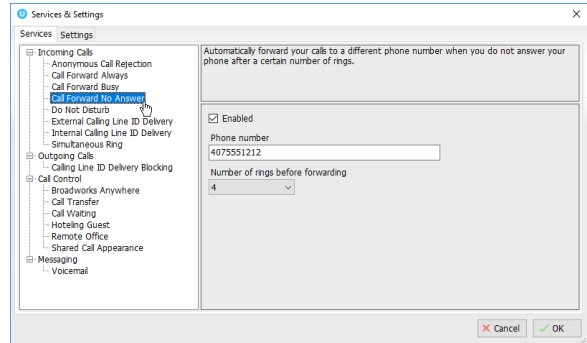


CALL FORWARD NO ANSWER


 **Settings > Services > Incoming Calls > Call Forward No Answer**

Automatically forward incoming calls to a different phone number if the call is unanswered for a set number of rings. User may enable, define the phone number and the number or rings before forwarding.

1. **Enabled** – Click to place a checkmark if you wish to use Call Forward No Answer.
2. **Phone Number** – Enter a 10-digit phone number, no spaces/special characters.
3. **Number of rings before forwarding** – Choose a number using the drop-down menu.
4. Click **OK** and select Yes to restart and update the system when prompted.



CALL CENTER

Go to  **Settings > Services > Incoming Calls > Call Center** to manage the call and display settings for contact center Agents, ACD States, Personal Wallboard Statistics and Column displays, Reporting, and for assigning Abandoned Calls.

AGENT

1. Define or select from the following Contact Center Agent settings:

Calls:

- Automatically answer contact center calls when I'm available
- Include contact center calls in the Activity List
- Display queued contact center calls in the Activity List

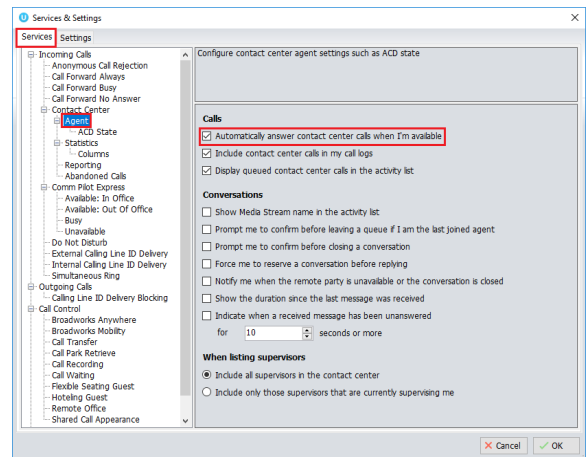
Conversations:

- Show Media Stream in the Activity List
- Prompt me to confirm before leaving a queue if I am the last joined agent
- Prompt me to confirm before closing a conversation
- Force me to reserve a conversation before replying
- Notify me when the remote party is unavailable or the conversation is closed
- Show the duration since the last message was received
- Indicate when a received message has been unanswered for X seconds or more

When listing Supervisors:

- Include all supervisors in the contact center (default)
- Include only those supervisors that are currently supervising me

2. Click **OK** to submit the change(s) and select Yes to restart Unity when prompted.



ACD State

Go to **Settings > Services > Incoming Calls > Contact Center > Agent > ACD State**

1. Enable or select from the following automation and display settings for ACD state:

Startup & Desktop Unlocked ACD State – select an option from the drop-down list or leave as **Not Set**.

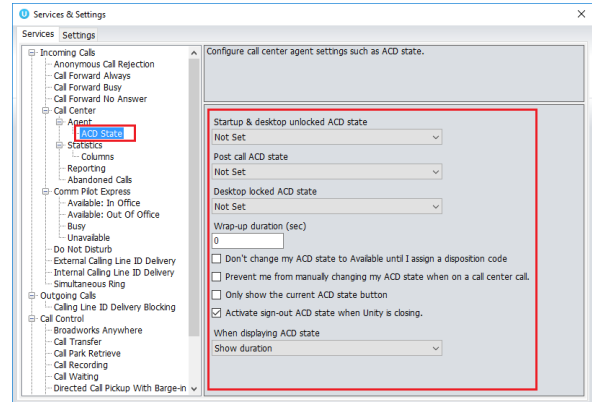
Post Call ACD State – select an option from the drop-down list, or leave as **Not Set**.

Desktop locked state – select an option from the drop-down list, or leave as **Not Set**.

Wrap-up duration (sec) – enter an amount of time in seconds to complete Wrap Up tasks before automatically using the following selected setting(s)

- 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
- Only show the current ACD State button
- Activate sign-out ACD state when Unity is closing (useful for ensuring users automatically leave Contact Center upon log out of Unity)

When displaying ACD State... select an option from the drop-down list or leave as **Show duration**.



2. Click OK to submit the change(s) and select Yes to restart Unity when prompted.

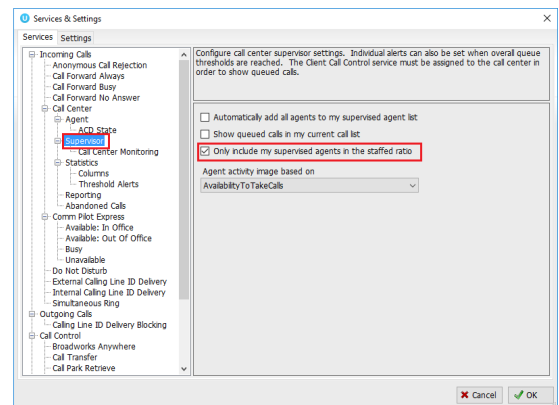
SUPERVISOR

Where enabled: Go to **Settings > Services > Incoming Calls > Contact Center > Supervisor** to manage call center supervisory settings, including the list of monitored agents you wish to view, and individual alerts when queue thresholds are reached.

1. Define or select from the following:

- Automatically add all agents to my supervised agent list** – Enable to let Unity display all assigned agents, disable to define your own list of agents to monitor.
- Show queued calls in my current call list** – Enable to display individual call queues, based on the current list.
- Only include my supervised agents in the staffed ratio** – Enable to limit the staffed ratio to your monitored agents.

Agent activity image based on – Select the preferred agent availability icon option display from the drop-down menu list.



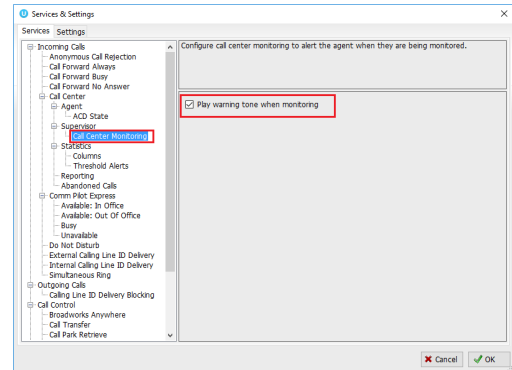
2. Click OK to submit the change(s) and select Yes to restart Unity when prompted.

CALL CENTER MONITORING

Where enabled: Go to **Settings > Services > Incoming Calls > Contact Center > Supervisor > Call Center**

Monitoring and elect whether to allow Agents to receive an alert tone when you are monitoring them.

1. Enable/disable the following:
 - Play warning tone when monitoring** – Click to place a checkmark in the box to enable.
2. Click **OK** to submit the change and select Yes to restart Unity when prompted.



STATISTICS


Go to: **Settings > Services > Incoming Calls > Contact Center > Statistics** to manage the display of statistics shown in the *My Statistics* and *Overall Queue Statistics* panels of the Personal Wallboard.

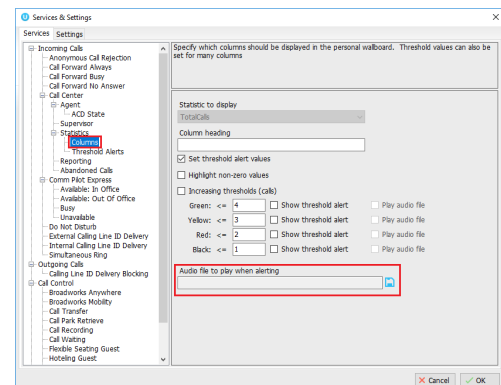
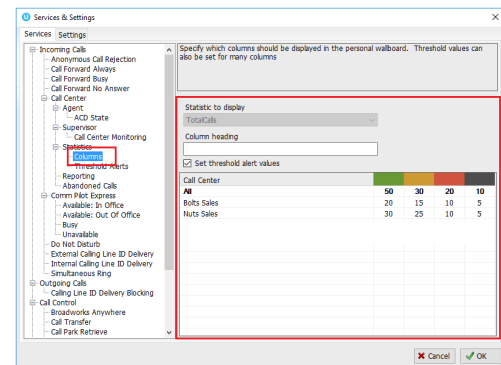
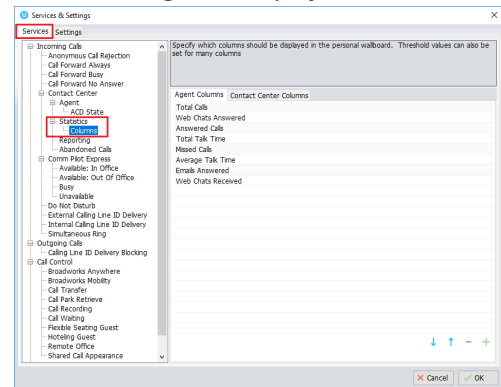
COLUMNS

Go to: **Settings > Services > Incoming Calls > Contact Center > Statistics > Columns** to specify the columns to be displayed for agents and contact centers, their order, and the threshold values for each.

- +** Add
- Remove
- ↑↓** Reorder

In the Agent Columns and Contact Center Columns tabs:


1. Double-click on a Statistic listing to define the following:
 - Column Heading** – Enter a new name for the column display, as desired.
 - Set threshold alert values** (for all or for each Contact Center listed) – Add a checkmark to enable editing of the threshold values for the statistics
 - Highlight non-zero values** – Add a checkmark to instruct Unity to show any value over 0 in red.
 - Increasing Thresholds (calls)** – Add a checkmark to enable and then define the less than / equal to call amounts for the color thresholds.
 - Show Threshold alert** – Click to place a checkmark in the box to enable.
 - Play audio file** – Click to place a checkmark in the box to enable.
 - Audio file to play when alerting** – Click the  file icon to select an audio file to upload.
2. Click **OK** to submit the change(s) and select Yes to restart Unity when prompted.



THRESHOLD ALERTS


Go to **Settings > Services > Incoming Calls > Contact Center > Statistics > Columns > Threshold Alerts** to define how Unity displays call center threshold alerts along with the audio notification options.

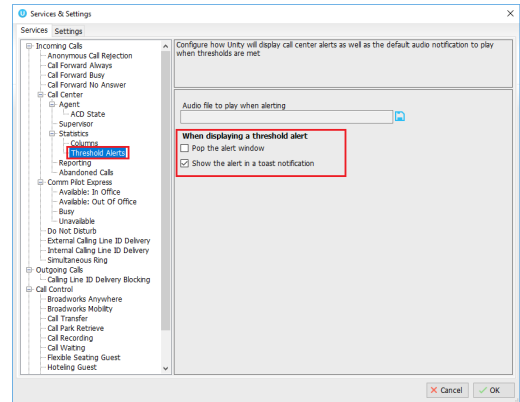
1. Specify/Enable the following as needed:

Audio file to play when alerting (only allowed if visual alerts are enabled in Columns) – Click the  file icon to upload an audio file.

When displaying a threshold alert

- Pop the alert window** (default)
- Show the alert in a toast notification** – Enable as desired.


2. Click  OK to submit the change(s) and select Yes to restart Unity when prompted.

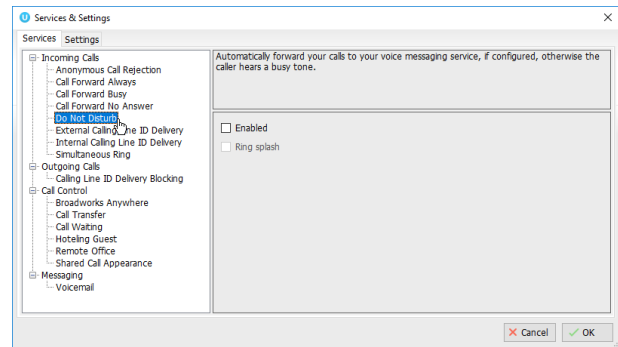


DO NOT DISTURB

Settings > Services > Incoming Calls > Do Not Disturb

Define how the system will handle calls when Do Not Disturb (DND status) is in effect.


1. **Enabled** – Click to place a checkmark if you wish the system to automatically forward calls to voicemail DND is in effect. **Otherwise the caller hears a busy signal.**
2. **Ring Splash** – Enable, as needed to ring alternate numbers.
3. Click  OK and select Yes to restart and update the system when prompted.

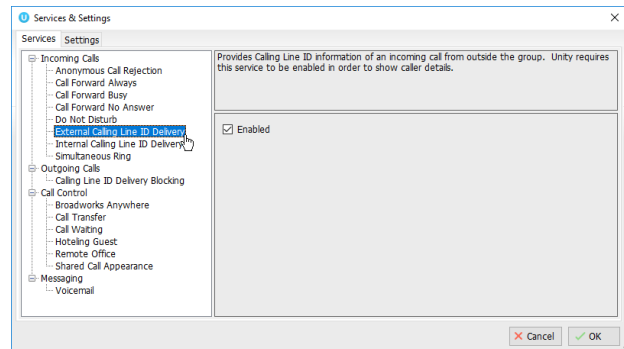


EXTERNAL CALLING LINE ID DELIVERY

Settings > Services > Incoming Calls > External Calling Line ID Delivery

Required to be enabled to see caller ID information for incoming calls that originate outside the enterprise group. This is an On/Off service.

5. **Enabled** - Click to place a checkmark in the box to use this service.
6. Click  OK and select Yes to restart and update the system when prompted.

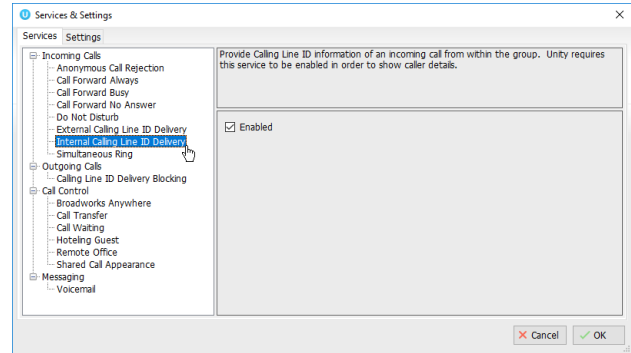


INTERNAL CALLING LINE ID DELIVERY

Settings > Services > Incoming Calls > Internal Calling Line ID Delivery

Required to be enabled to see caller ID details for internal callers. This is an On/Off service.

1. **Enabled** – Click to place a checkmark in the box to use this service.
2. Click **OK** and select Yes to restart and update the system when prompted.

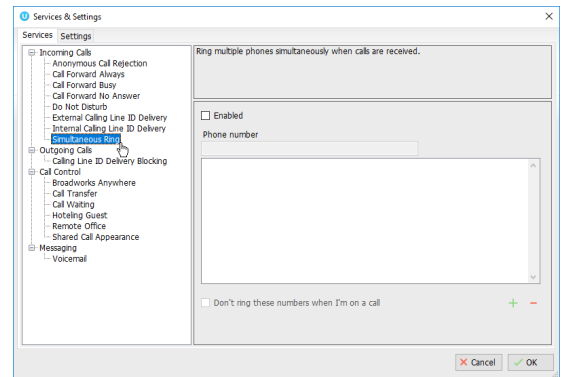


SIMULTANEOUS RING

Settings > Services > Incoming Calls > Simultaneous Ring

Ring multiple phones simultaneously when calls are received. Enable, enter one or more telephone numbers to ring simultaneously, and choose whether or not to ring numbers that are busy.

1. **Enabled** - Click to place a checkmark in the box to use this service.
2. **Phone Number** - Enter a 10digit phone number, no spaces/special characters.
3. Click on the **+** Plus sign to add the number to the list box below.
Click to highlight a number in the list and press the **-** Minus sign to remove the selected item.
4. Repeat as needed to add more numbers to ring simultaneously.
5. **Don't ring these numbers when I'm on a call** – Optional: Instructs the system NOT to ring the entered numbers when your main line is busy.
6. Click **OK** and select Yes to restart and update the system when prompted.



OUTGOING CALLS

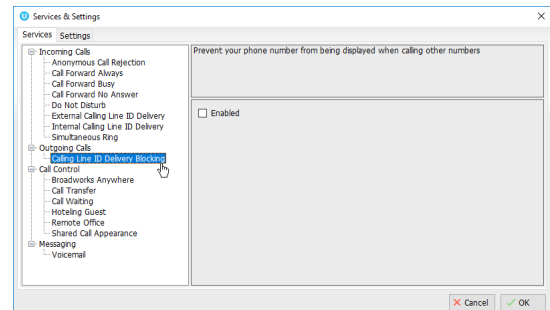
Define the outgoing Caller ID behavior for outgoing calls.

CALLING LINE ID DELIVERY BLOCKING

Settings > Services > Outgoing Calls > Calling Line ID Delivery Blocking

This service prevents your phone number from being displayed to recipients of outgoing calls.

1. **Enabled** - Click to place a checkmark in the box to use this service.
2. Click **OK** and select Yes to restart and update the system when prompted.



CALL CONTROL

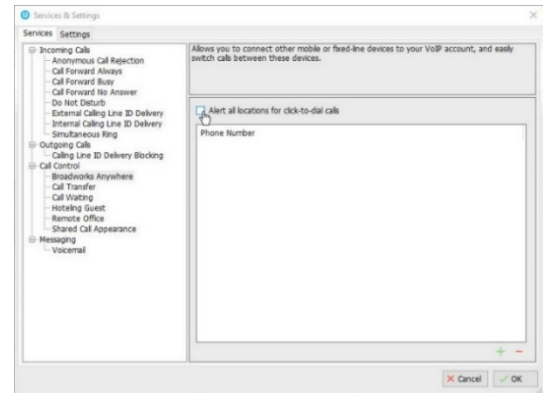
Define the behavior of call controls / BroadWorks services.

BROADWORKS ANYWHERE

Settings > Services > Call Control > Broadworks Anywhere

Add some additional mobile or fixed-line devices to the VoIP account, and switch between the devices while on a call.

1. **Alert all locations for click-to-dial** – Click to place a checkmark to enable this service.
2. Click the **+** Plus sign to add a 10-digit phone number, no spaces or special characters.
3. Select a phone number in the list and click the **-** Minus sign to remove the selected item.
4. Repeat to add or remove more phone numbers, as needed.
5. Click **✓ OK** and select Yes to restart and update the system when prompted.



CALL TRANSFER

Settings > Services > Call Control > Call Transfer

Configure call transfers, call recall, and Busy Camp on Features. Busy Camp On allows users to transfer a call to another person's [busy] extension on hold until they are available, and then the call is connected to that line.

1. Select and define the following settings, as needed:

Allow call transfer recall – Enable to have calls sent back to your line if unanswered.

Number of rings before recall – Specify a number of rings to allow on the busy line before the transferred call is recalled to your line.

Allow busy camp on – Click to place a checkmark to enable this feature and allow held call transfers to a busy line (caller stays on hold until answered).

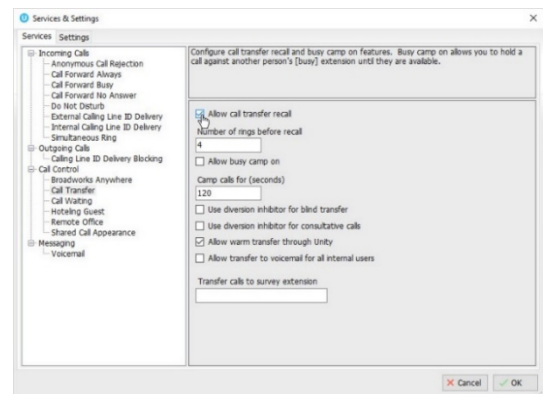
Camp calls for (seconds) – Set a number of seconds to camp held calls on a busy line.

Use diversion inhibitor for blind transfer – Click to place a checkmark to keep another person's settings from diverting your blind transferred calls.

Use diversion inhibitor for your consultative transferred calls – Click to place a checkmark to enable this service.

Allow warm transfer through Unity – Click to place a checkmark to enable this service.

Allow transfer to voicemail for all internal users – Click to place a checkmark to enable.



Transfer calls to survey extension – Optional For Surveys. Enter a telephone number or extension to send transferred calls to a survey line.

2. Click **OK** and select Yes to restart and update the system when prompted.

CALL WAITING

 **Settings > Services > Call Control > Call Waiting**

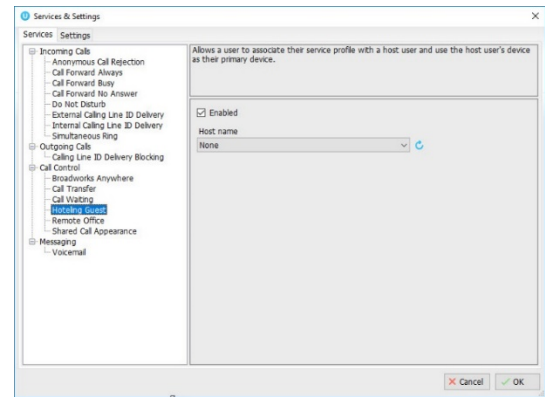
On/Off service setting. Click to place a checkmark next to **Enabled** to use the Call Waiting service which allows a user to continue to receive and elect to answer new calls when the line is currently in use (busy).

HOTELING GUEST

 **Settings > Services > Call Control > Hoteling Guest**

Allows a user to associate their service profile with a Hoteling Host user’s device and use that phone as their primary device for a period of time.

1. **Enabled** – Click to place a checkmark to enable this service.
2. **Host Name:** Select an available Host User from the drop-down list to use that device as your primary for the length of time the host has allowed.
3. Click **OK** and select Yes to restart and update the system when prompted.



CALL PARK RETRIEVE

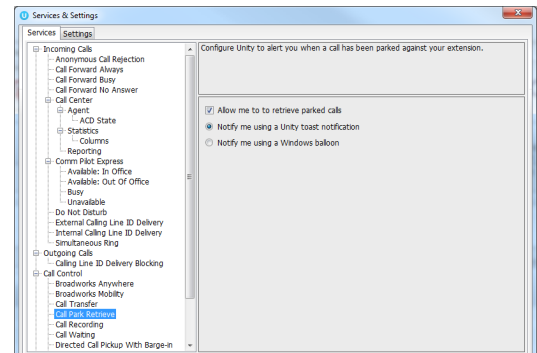
 **Settings > Services > Call Control > Call Park Retrieve**

1. Choose the following options to manage call park alert setting.

Allow me to retrieve parked calls – Click to place a checkmark in the box to be able to get calls parked on your line.

2. Choose a notification option:
 - Notify me using a Unity toast notification**
 - Notify me using a Windows balloon**

3. Click **OK** and select Yes to restart and update the system when prompted.



REMOTE OFFICE

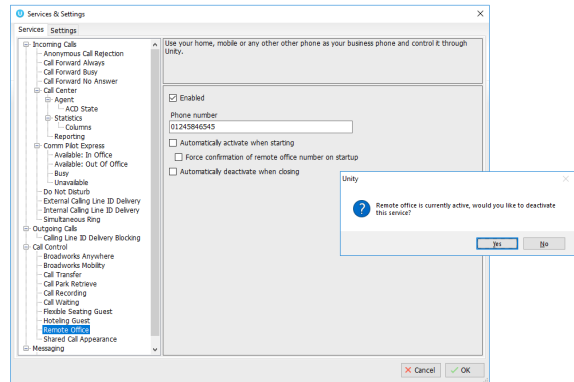
 **Settings > Services > Call Control > Remote Office**

Unity can be configured to automatically activate and deactivate Remote Office on start-up and shutdown and to use the [My Status](#) link to quickly activate/deactivate the service. If Remote Office is enabled, but Unity is not configured to automatically deactivate Remote Office when closing, a prompt will be presented to the user requesting confirmation of deactivation at sign out.

1. Select and define the following setting options, as needed:

- Enabled** – Remote Office can be used and setup.
- Phone Number** – Enter the alternate 10-digit phone number to use for remote office (no spaces/special characters).
- Automatically activate when starting** – When enabled, remote office will be in use for the session.
- Force confirmation of remote office number on startup** – When enabled, the user must select Yes for remote office usage or select no to deactivate for the session.
- Automatically deactivate when closing** – When enabled, Unity will automatically turn off remote office when the application is closed.

2. Click  **OK** and select Yes to restart and update the system when prompted.



SHARED CALL APPEARANCE

 **Settings > Services > Call Control > Shared Call Appearance**

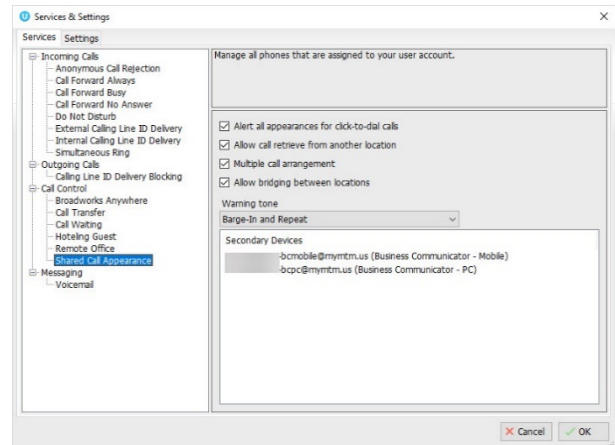
Manage all phones that are pre-assigned to your user account.

1. Select and define the following setting options, as needed:

- Alert all appearances for click-to-dial calls** – Click to place a checkmark in the box to enable this service option.
- Allow call retrieve from another location** – Click to place a checkmark in the box to enable this service.
- Multiple call arrangement** – Click to place a checkmark in the box to enable this service option.
- Allow bridging between locations** – Click to place a checkmark in the box to enable this service.

Warning tone: Select a warning option from the drop-down list (None, Barge In, Barge In and Repeat)

2. Click  **OK** and select Yes to restart and update the system when prompted.



MESSAGING

 Settings > Services > Messaging

Manage voicemail messaging and review settings.

VOICEMAIL

 Settings > Services > Messaging > Voicemail

Configure your personal voice messaging behaviors.

1. Select and define the following, as needed to setup voicemail:

Enabled – Click to place a checkmark in the box to enable voicemail.

Use unified messaging – Click to enable unified messaging and select from the following:

Use phone message waiting indicator – Click to enable the voicemail message waiting icon.

Show visual voicemail tab – click to enable and have access to the voicemail tab in Unity.

Forward the voicemail via email – Click to enable and enter one or more comma separated email addresses to receive voicemail .wav files.

Email notification of new voicemails – Click to enable and enter an email address to receive voicemail notifications via email.


Email a copy of the voicemail – Click to enable and enter an email address to receive a copy of the .wav file via email.

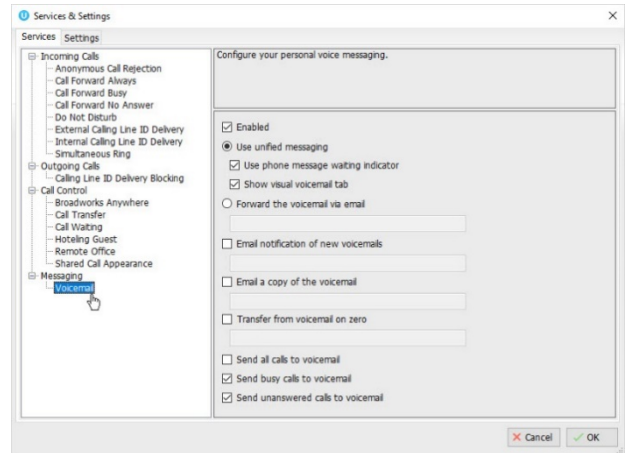
Transfer from voicemail on zero – Click to enable a caller to transfer to your voicemail by pressing 0.

Send all calls to voicemail – Click to enable and send all incoming calls to voicemail automatically.

Send busy calls to voicemail – Click to enable and send calls to voicemail when the line is busy.

Send unanswered calls to voicemail – Click to enable and send incoming calls to voicemail when unanswered.

2. Click  **OK** and select Yes to restart and update the system when prompted.



7. MANAGE BASIC SETTINGS

Settings > Settings Tab

The settings in Unity are pre-defined during implementation. Users may have access to modify some settings in Unity to assist as they work. This section describes the most common settings available and offers tips or instructions for working with them.

APPEARANCE SETTINGS

Settings > Settings tab > Appearance

Manage the Unity display on the desktop and how calls, contacts and searches display.

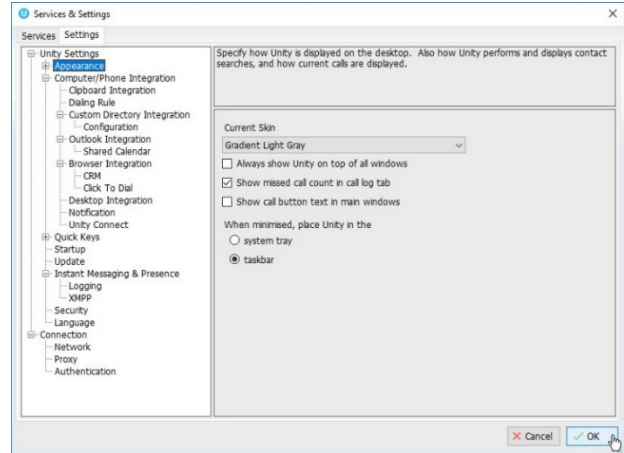
1. Enable / select the following settings, as needed:

Current Skin: Select an option from the drop-down menu options to choose a different color/text combination for the Unity application display.

- Always show Unity on top of all windows** – Click to place a check in the box to enable this setting.
- Show missed call count in call log tab** – Click to place a check in the box to enable the display of missed calls in the call logs tab.
- Show call button text in main windows** – Click to place a check in the box to display the call control icon descriptions.

When minimized, place unity in the: System tray or taskbar

2. Click OK and select Yes to restart and update the system when prompted.



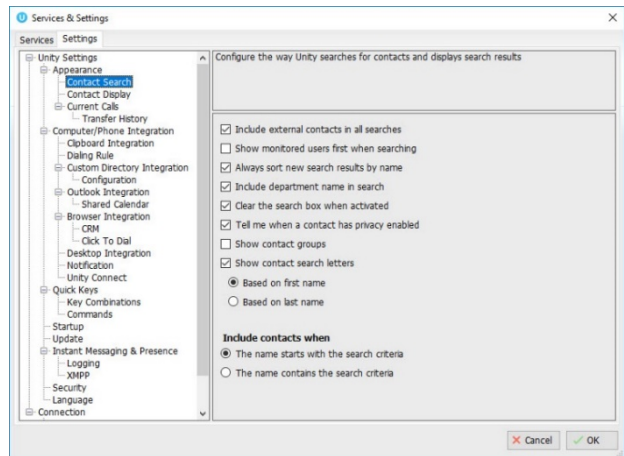
CONTACT SEARCH

Settings > Settings tab > Appearance > Contact Search

Manage the way Unity performs contact searches and the display of search results.

1. Enable and/or select from the following setting options, as needed:

- Include external contacts in all searches** – Enable to view any available CRM or Outlook contacts in searches.
- Show monitored users first when searching** – Enable to automatically display monitored users first.
- Always sort new search results by name** – Enable to sort alphanumerically by name.
- Include department name in search** – Enable to search by department.
- Clear the search box when activated** – Enable to auto-clear the search box when finished.



- Tell me when a contact has privacy enabled – Enable to include privacy indicators in the search results.
 - Show contact groups – Enable to include contact groups in search results.
 - Show contact search letters: Based on first name or Based on last name.
- Include contacts when: the name starts with the search criteria or the name contains the search criteria.

2. Click OK and select Yes to restart and update the system when prompted.

CONTACT DISPLAY

Settings > Settings tab > Appearance > Contact Display

Manage the way Unity displays contacts and the menu options to display when the drag and drop feature is used from Contacts.

1. Enable / select from the following contact display setting options:

- Show call duration in contact list – Enable to include call duration times in the display.
- Always show call details – Enable to include call details in the display.

Menu options when a call is dragged over a contact:

Choose the options you want to access in the right-click context menu when drag and dropping a call onto a contact:

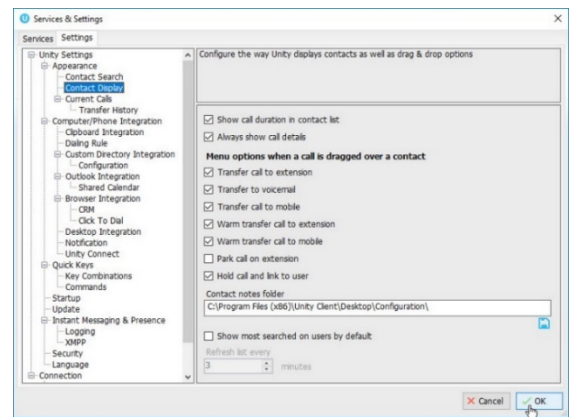
- Transfer call to extension
- Transfer to voicemail
- Transfer call to mobile
- Warm Transfer call to extension
- Warm transfer call to mobile
- Park Call on Extension
- Hold call and link to user

Contact Notes Folder: Click the file  icon to browse to and select a new folder

- Show Most searched on users by default – Enable to include your most searched results by default.

Refresh list every x minutes – select the refresh rate using the selection tool.

2. Click OK and select Yes to restart and update the system when prompted.



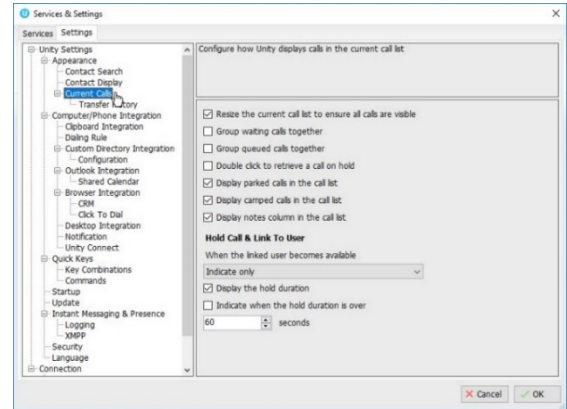
CURRENT CALLS

 **Settings > Settings tab > Appearance > Current Calls**

Configure the Unity Current Call list information and display.

1. Enable or specify the following current call list setting options, as needed:

- Resize the current call list to ensure all calls are visible
- Group waiting calls together
- Group queued calls together
- Double click to retrieve a call on hold
- Display parked calls in the call list
- Display camped calls in the call list
- Display notes column in the call list



Hold Call & Link To User – If Hold & Link to User is in use, choose from the following actions and display options when performing this action:

When the linked user becomes available: Select from the available action options using the drop-down list. **Indicate Only** is the default.

- Display the hold duration
- Indicate when the hold duration is over – Use the selection tool to choose the number of seconds to allow the call to remain on hold before receiving a notification alert.

2. Click  **OK** and select Yes to restart and update the system when prompted.

TRANSFER HISTORY

 **Settings > Settings tab > Appearance > Current Calls > Transfer History**


Manage the way Unity displays and saves transfer history information.

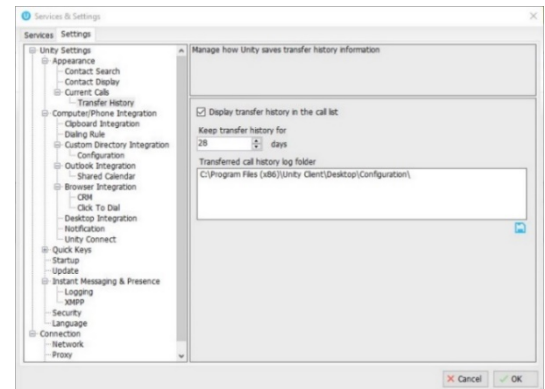
1. Enable or select from the following setting options:

- Display transfer history in the call list – Click to enable or disable.

Keep transfer history for x days: Choose the number of days using the selection tool. The default is 28 days.

To View logs: Click on the log folder listing in the box to go to the file location.

To choose a new log folder: Click on the  icon to browse to and select a different local folder location for the transfer history logs.



2. Click  **OK** and select Yes to restart and update the system when prompted.

COMPUTER/PHONE INTEGRATION SETTINGS

Settings > Settings tab > Computer/Phone Integration

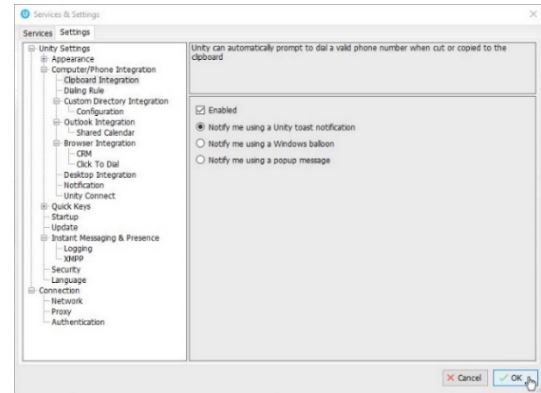
This section allows users to define the way Unity integrates with the computer, other applications, and the phone.

CLIPBOARD INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Clipboard Integration

Manage how Unity integrates with the system clipboard to allow auto-dial when a valid phone number is cut or copied into the clipboard.

- Select from the following:
 - Enabled** – Place a checkmark in the box to enable.
- Choose from the following notification methods:
 - Notify me using a Unity toast notification
 - Notify me using a Windows balloon
 - Notify me using a popup message.
- Click **OK** and select Yes to restart and update the system when prompted.



DIALING RULE

Settings > Settings tab > Computer/Phone Integration > Dialing Rule

Define custom rules for how Unity behaves when using click-to-dial or contact popping for incoming calls, including how specially formatted numbers are dialed, and manage how Unity uses the diversion inhibitor for outgoing calls/transfers.

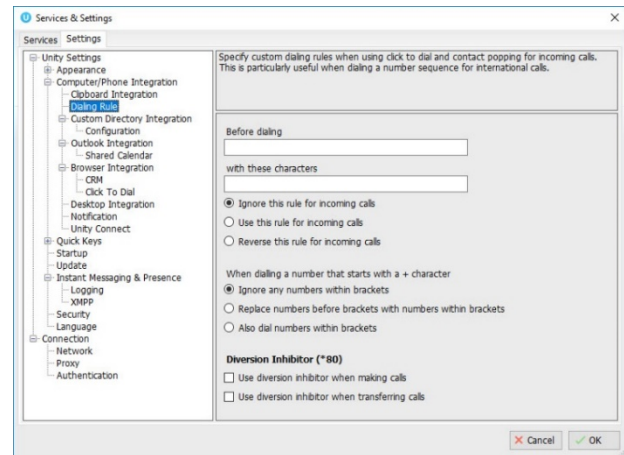
- Define and select from the following rule options:

Note: Contact your Unity Administrator for rule assistance.

Before dialing: Define the rule to be used prior to dialing from Unity.

With these characters: Enter specific characters to insert during click-to-dial or for incoming calls.

- Ignore this rule for incoming calls
- Use the rule for incoming calls
- Reverse this rule for incoming calls



When dialing a number that starts with a + character (useful for international calls) - Choose a rule option below:

- Ignore any numbers within brackets
- Replace numbers before brackets with numbers within brackets
- Also dial numbers within brackets

Diversion Inhibitor (*80) – Click to place a checkmark next to the desired setting options below:

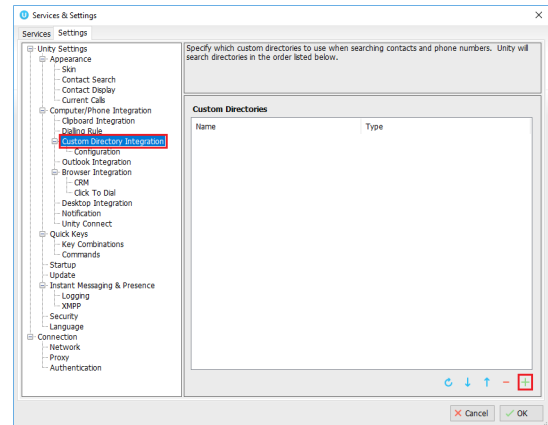
- Use diversion inhibitor when making calls – select to override the recipient’s settings and have these calls returned to you.
- Use diversion inhibitor when transferring calls – select to override the recipient’s settings and have these calls returned to you.

2. Click **OK** and select Yes to restart and update the system when prompted.

CUSTOM DIRECTORY INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Custom Directory Integration

Unity includes a wizard to connect to third party SQL or LDAP directories and upload them into your Unity directory. Users may have access to add, edit and remove custom directories. Contact your Unity Administrator for assistance with importing directories.





1. Perform one of the following tasks:
 - **Add:** Click the **+** Add icon to open the wizard and follow instructions to add a connection to a custom directory.
 - **Edit:** Double-click on a directory listing to modify the information, as needed.
 - **Remove:** Click on a directory listing to select it and click the **-** Delete icon to remove it.
 - **Set Order:** Select a directory listing and use the **↑** up and **↓** down arrows to modify the search order.
 - **Refresh:** Click on the **↻** Refresh icon to update the list.
2. Click **OK** and select Yes to restart and update the system with the changes when prompted.

CONFIGURATION

Settings > Settings tab > Computer/Phone Integration > Custom Directory Integration > Configuration

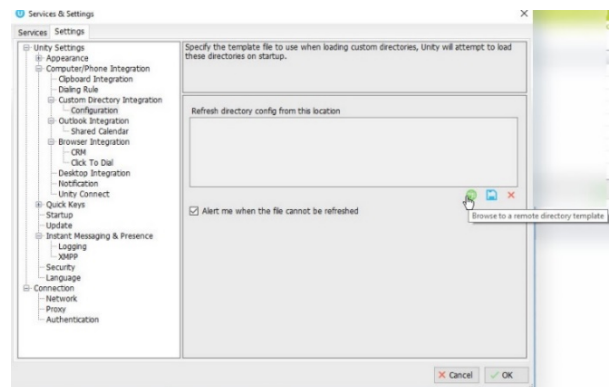
Specify and manage the template file to use when loading custom directories.

1. Choose an action/setting option and follow the prompts to:

Add – Choose  Browse to a remote directory template or  Add a local directory template and follow the steps to locate and upload the file.

Remove – Click on the listing and click the **X** icon to remove a template file.

Alert me when the file cannot be refreshed – Click to place a checkmark in the box to enable alerts.



2. Click **OK** and select Yes to restart and update the system with the changes when prompted.

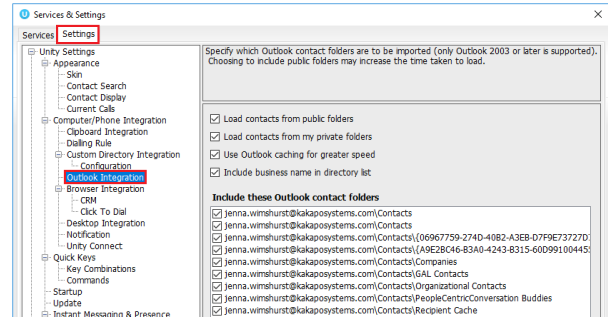
OUTLOOK INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Outlook Integration

Users may specify which contact folders to import and manage those available for review/search in your Contacts. Users can import both public and private folders. Expect longer load times when selecting public folders to import.

1. Click to place checks next to the following Outlook options to enable:

- Load contacts from public folders
- Load contacts from my private folders
- Use Outlook caching for greater speed
- Include business name in directory list



2. *Include these Outlook contact folders* – Click to place checkmarks next to any folders in the list to include them in your contacts/searches.

Refresh – Click the icon to update the list to the latest.

3. Click OK and select Yes to restart and update the system with the changes when prompted.

SHARED CALENDAR

Settings > Settings tab > Computer/Phone Integration > Outlook Integration

Configure how Unity displays Outlook shared calendar details.

1. Enable and specify the following time and setting options:

Enabled – Click to place a checkmark in the box to enable.

Start Hour (24hr time format so 9am = 9 and 3pm = 15) – Choose the start time Unity is allowed to display shared calendar details using the selection tool.

End Hour – Choose the end time Unity is allowed to display shared calendar details using the selection tool.

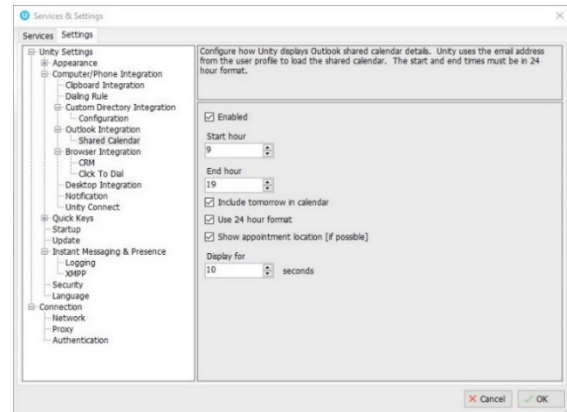
Include tomorrow in calendar – Click to

enable/disable

Use 24hour format – Click to enable 24hour format display times in Unity.

Show appointment location (if possible) – Click to place a check next to this setting option to enable.

Display for X seconds – Choose the number of seconds to display using the selection tool.

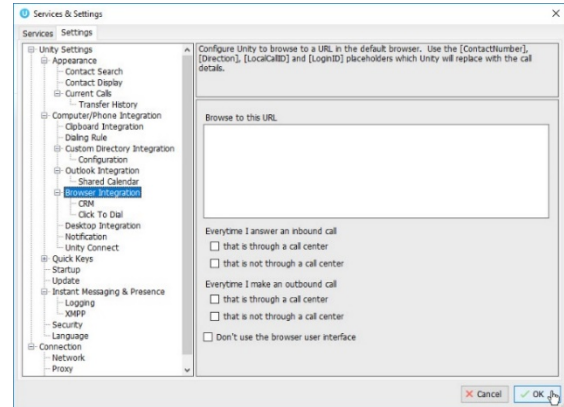


2. Click OK and select Yes to restart and update the system with the changes when prompted.

BROWSER INTEGRATION

 **Settings > Settings tab > Computer/Phone Integration > Browser Integration**

Configure Unity to browse to a URL in the default browser for inbound or outbound calls. Use the {contactNumber} [Direction] [LocalCallID] and [LoginID] placeholders which Unity will replace with the Call details, or contact your administrator for assistance.



1. Complete and select from the following to use Browser Integration:

Browse to this URL - Enter the URL to be used following the format displayed above in the description.

2. Select from the following rule options for using the URL defined above:

Everytime I answer an Inbound Call


- That is through a call center
- That is not through a call center

Everytime I make an outbound call

- That is through call center
- That is not through a call center
- Don't use the browser user interface

3. Click  OK and select Yes to restart and update the system with the changes when prompted.

CRM

 **Settings > Settings tab > Computer/Phone Integration > Browser Integration > CRM**

Configure Unity to integrate with a CRM for contact search and calling line information display.

Configuration Tab

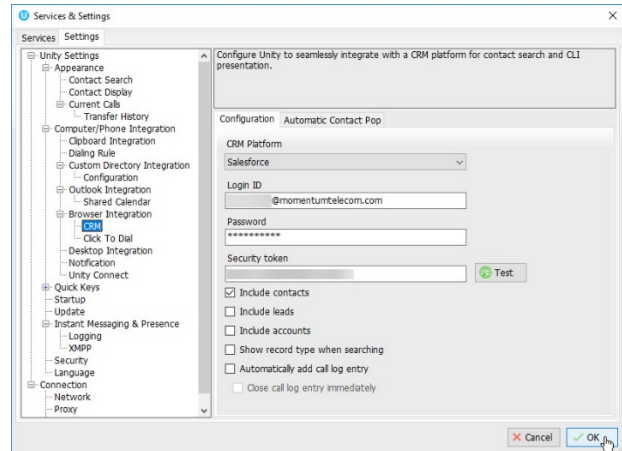
1. Define the following settings and feature options for CRM integration:

CRM Platform: Choose your CRM platform.

Login ID: Enter your CRM login ID

Password: Enter your CRM password.

Security Token: Enter your CRM Security Token (find/update in your CRM profile).



2. **Test** – Click the button to ensure the CRM account can be accessed.

3. Enable the following desired integration options:

- Include contacts
- Include leads
- Include accounts

- Show record type when searching
 - Automatically add call log entry and decide whether to...
 - Close call log entry immediately
4. Click OK and select Yes to restart and update the system with the changes when prompted.

Automatic Contact Pop Tab

1. Define the following CRM contact pop behavior setup options:

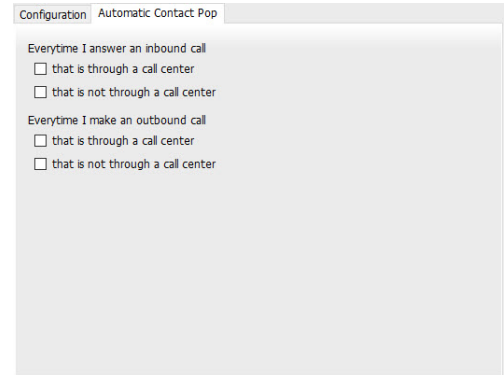
Everytime I answer an inbound call

- That is through a call center
- That is not through a call center

Everytime I make an outbound call

- That is through a call center
- That is not through a call center

2. Click OK and select Yes to restart and update the system with the changes when prompted.



CLICK TO DIAL

- Settings > Settings tab > Computer/Phone Integration > Browser Integration > Click To Dial**

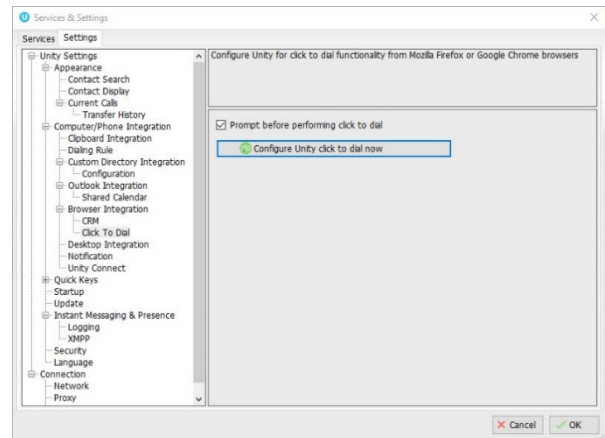
Configure Unity to be the click to dial default application and whether to prompt before using.

1. Choose from the following click to dial options:

- Prompt before performing click to dial.

Configure unity click to dial now – Click the button to set Unity as the default click to dial application.

2. Click OK and select Yes to restart and update the system with the changes when prompted.




DESKTOP INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Browser Integration > Desktop Integration

Configure remote number integrations with 3rd party applications and Unity through a shared file or the clipboard.

- Select/enable the following features, define file paths/names, and calling rules, as needed:
 - Copy remote number to clipboard – Click to enable/disable
 - Write remote number to file – Click to enable and define the following:

Path: Enter the navigation path to a local file or click the  Browse icon and select the folder location using the selection tool.

- Use remote number's file name – Click to select, or
- Use static file name – Click to select and enter desired file Name in the field provided


- Define the calling rules to use with the Desktop Integration settings defined above:

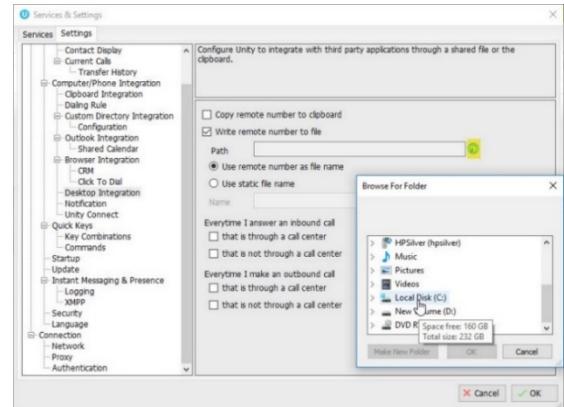
Everytime I answer an inbound call

- That is through a call center
- That is not through a call center

Everytime I make an outbound call

- That is through a call center
- That is not through a call center

- Click  OK and select Yes to restart and update the system with the changes when prompted.

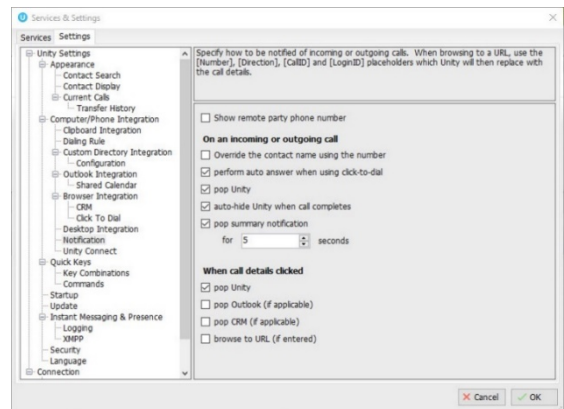


NOTIFICATION

Settings > Settings tab > Computer/Phone Integration > Notification

Manage call details notification settings for incoming/outgoing calls. Note: When browsing to a URL, Unity will replace the format placeholders for [Number], [Direction], [CallID] and [LoginID] with call details.

- Select and define the following setting options for incoming and outgoing call Notifications:
 - Show remote party phone number – Select to enable Unity to display this information in notifications.
 - Override the contact name using the number – Select if you prefer to show the number rather than the call ID information.
 - Perform auto answer when using click to dial
 - Pop Unity



- Auto-hide Unity when call completes
 - Pop summary notification – select to enable AND choose the display length in seconds using the selection tool provided.
2. Define Unity the preferred behavior/display when a call details notification is clicked:
 - Pop Unity – Select to display Unity contact information
 - Pop Outlook (if applicable) – Select to enable the display of Outlook contact information if defined/setup/enabled in the [Outlook Integration](#) section.
 - Pop CRM (if applicable) – Select to enable the display of CRM contact information if defined/setup/enabled in the [CRM](#) section.
 - Browse to URL (if entered) – Select to enable Unity to display the URL defined in the [Browser Integration](#) section.
 3. Click OK and select Yes to restart and update the system with the changes when prompted.

UNITY CONNECT

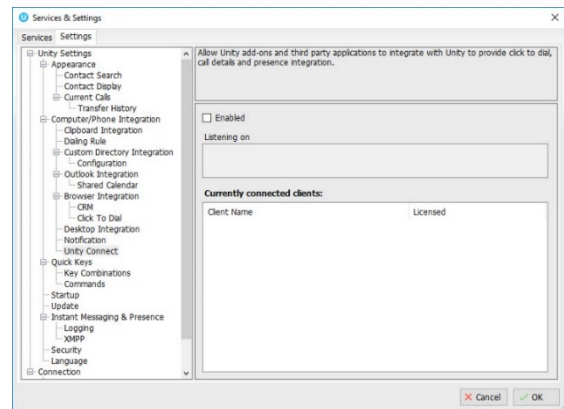
 **Settings > Settings tab > Computer/Phone Integration > Unity Connect**

Defined in the Unity management portal. Contact the Unity Administrator for assistance allowing Unity Add-ons and 3rd party application integrations with Unity to provide click to dial, call details, and presence information.

1. **Enabled** – Click within the checkbox to Enable/ Disable
Listening On – Read Only view of the port information.

Currently connected clients: Displays a list of the applications or add-ons that have been defined for usage.

2. Click OK and select Yes to restart and update the system with the changes when prompted.



QUICK KEYS

Settings > Settings tab > Quick Keys

The *Key Combinations* and *Commands* setting sections allow users to define shortcut keys and map them to commands that perform tasks like answering calls or dialing specific numbers.

KEY COMBINATIONS

Settings > Settings tab > Quick Keys > Key Combinations

This section allows users to choose the key combinations that will be setup in the Commands section.

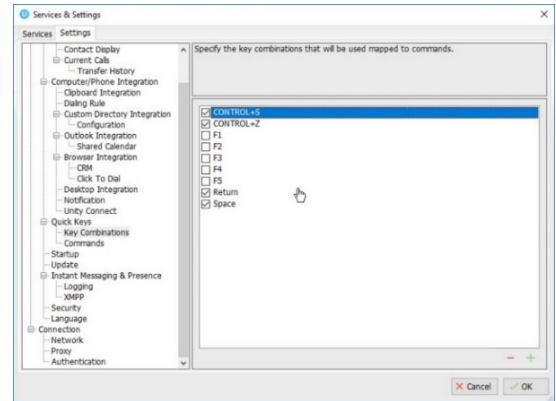
1. Complete the following actions, as needed to create or modify shortcut keys:

Select a Key Combination: Click within the checkbox next to a listed item to select it.

Add a Key Combination - Click on the **+** Plus sign and select the Modifier (Control, Shift, Alt or None) and the Keyboard key, then click OK to submit and return to the list to select it.

Delete – Click within a checkbox to select a combination in the list and press the **-** Minus sign. Then click Yes to delete the selected combination when prompted. **Use Caution.** Once a combination is deleted, the action cannot be undone and the user must recreate the combination and map the command once again if done in error.

2. Click **✓OK** and select **NO** to the restart when prompted to give yourself time to map the key combinations with Commands.



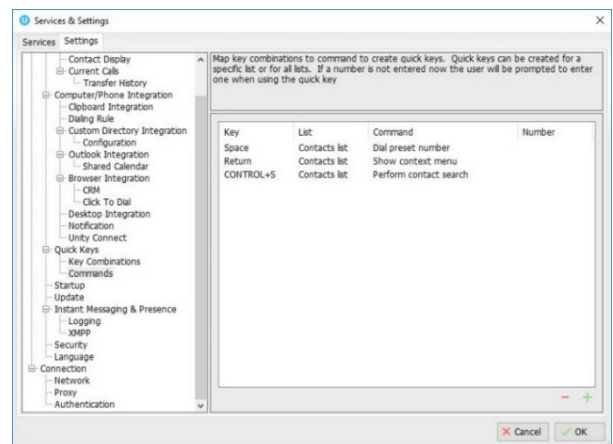
COMMANDS

Settings > Settings tab > Quick Keys > Commands

This setting section lists the current set of Key Commands and offers tools to Add, Edit and delete the commands used for selected Key combinations to create useful shortcuts for tasks.

Edit Commands

Double-click on a listed item to view the current setup, make changes as needed and click **✓OK** when finished.



Add Commands

1. Click on the **+** Plus sign to open the dialog that allows users to begin adding a new key and command combination.
2. Select options in the drop-down lists for the following fields. The drop-down list options update dynamically based on previous selections:

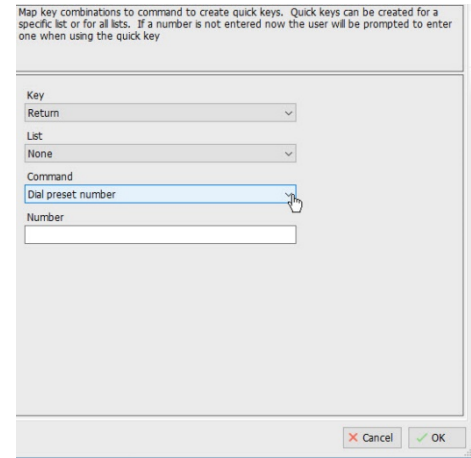
Key: Choose an available option from the list of key combinations.

List: Select the appropriate section of Unity in which the shortcut key will be used to perform an action.

Command: Choose the action to be performed.

Number: This field becomes available to enter the phone number if **Dial Preset Number** is selected as a command.

3. Click **✓OK** to update the system with the new Quick Key command and return to the command list.
4. Click **✓OK** to submit all Command changes and select Yes to the restart when prompted.



Delete Commands

1. Click on a listing to highlight it, click on the **-** Minus icon, and choose Yes when prompted.
2. Click **✓OK** and select Yes to restart and update the system with the changes when prompted.

STARTUP

Settings > Settings tab > Startup

Manage the options for automatic application startup and additional applications you may be licensed to use.

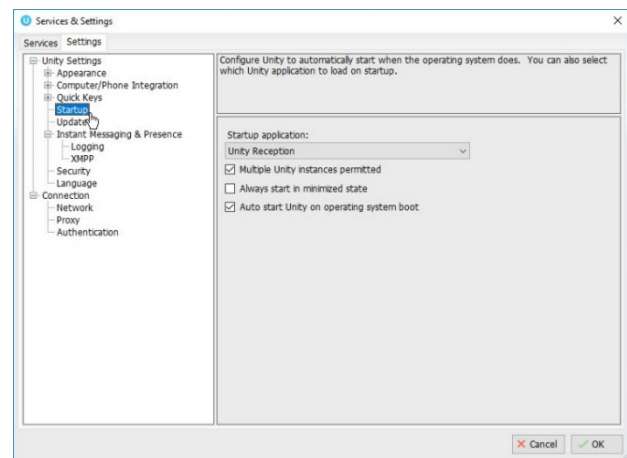
1. Select from the following options:

Startup Application: Choose the application to open at startup (options include your licensed application(s) and any Unity applications that may be available for a limited-time preview.)

Multiple Unity Instances permitted – Click to place a checkmark in the box to enable multiple Unity instances.

Always start in minimized state – Click to place a checkmark in the box to use this feature option on startup.

Auto start unity on operating system boot – Click to place a checkmark in the box to always start the selected Unity application when the system reboots.



2. Click **✓OK** and select Yes to restart and update the system with the changes when prompted.

UPDATE

 **Settings > Settings tab > Update**


Manage automatic updates and access the manual update feature.

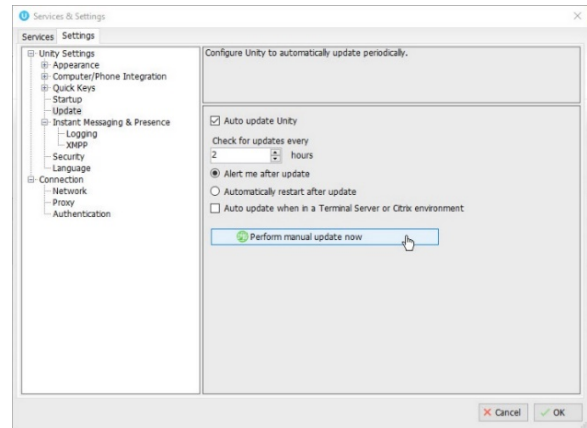
1. Select and define the following Update setting options:
 - Auto update Unity** – Click to place a checkmark within the checkbox to enable automatic updates.

Check for updates every x minutes: Choose the number of hours between update checks using the selection tool.


- Alert me after update** – Select to receive an update notification prompt to restart.
- Automatically restart after update** – Select to automatically restart after an update.

Auto update when in a Terminal Server or Citrix environment – Click to place a check in the checkbox to enable auto-updates if the system is on a Terminal Server or in a Citrix environment.

2. Click  **OK** and select Yes to restart and update the system with the changes when prompted.



MANUAL UPDATE

1. Go to  **Settings > Settings tab > Update**
2. Click the **Perform Manual Update Now** button and follow prompts to get the latest update, if a newer version exists.

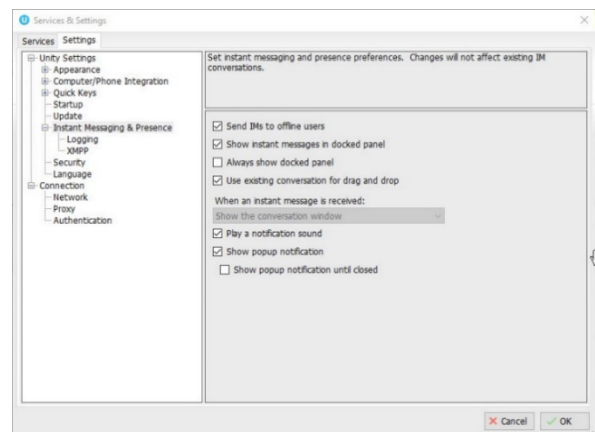
INSTANT MESSAGING & PRESENCE

 **Settings > Settings tab > Instant Messaging & Presence**

Users may define preferences for IM and Unity presence. Changes saved here only affect future IM conversations.

1. Select from the following Settings Unity Instant Messaging preference options:
 - Send IMs to offline users** – Click within the checkbox to enable the ability to send instant messages to users who are available for IM but not logged into Unity.
 - Show instant messages in docked panel** – Click within the checkbox to enable and display the IM panel when using Instant Messaging.
 - Always show docked panel** – Click within the checkbox to enable and require Unity to always show the IM panel, whether it is in use or not.
 - Use existing conversation for drag and drop** – Click within the checkbox to enable Unity to continue a conversation when a user is drag and dropped into the IM.

When an instant message is received: Show in the conversation window is preselected.



- Play a notification sound** – Click to place a checkmark within the checkbox to enable.
 - Show popup notification** – Click to place a checkmark within the checkbox to enable.
 - Show popup notification until closed** – click within the checkbox to enable Unity to require the user to close the notification window.
2. Click **OK** and select Yes to restart and update the system with the changes when prompted.

LOGGING

 **Settings > Settings tab > Instant Messaging & Presence > Logging**

1. Setup Instant Messaging and presence log file preferences:

Log instant message conversations – Click to place a checkmark within the checkbox to enable and select one of the following logging options:

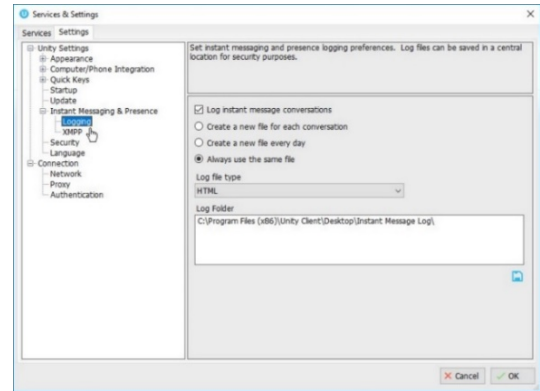
- Create a new file for each conversation**
- Create a new file every day**
- Always use the same file**

2. Define the log file type and location:

Log file type: Choose the file type from the drop down list.

Log Folder: Enter, or browse to and select, a folder location for the log file.

3. Click **OK** and select Yes to restart and update the system with the changes when prompted.



XMPP

 **Settings > Settings tab > Instant Messaging & Presence > XMPP**

Define the access details and subscription options for IM in Unity. The XMPP server will be assumed from the domain entered as part of the Login ID/Startup authentication.

1. Enter, enable, or define the following settings as needed:

Login ID: The login credential for the XMPP server.

Password: The password for the XMPP server.

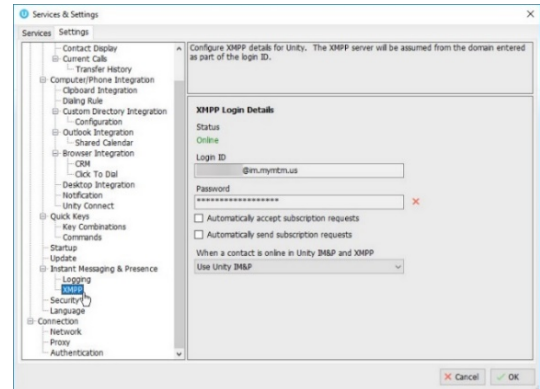
X (Delete Password) – Use Caution. Once deleted, Unity will not connect to the XMPP server for Instant Messaging. Click the **X** icon adjacent to the password field and choose **Yes** when prompted to delete the XMPP password.

Automatically accept subscription requests – Click within the checkbox to enable or disable.

Automatically send subscription requests – Click within the checkbox to enable/disable.

When a contact is online in Unity IM&P and XMPP: Choose the desired Unity display option (Use Unity IM&P, Use XMPP, or Use Both) from the drop-down list.

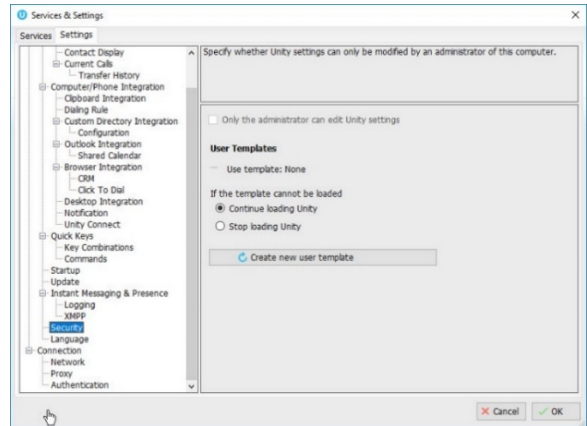
2. Click **OK** and select Yes to restart and update the system with the changes when prompted.



SECURITY

Settings > Settings tab > Security

Define whether Unity settings can only be modified by an administrator of this computer and whether Unity continues to open if the template cannot be loaded. Contact the Unity Administrator for assistance with modifying your access to these settings.

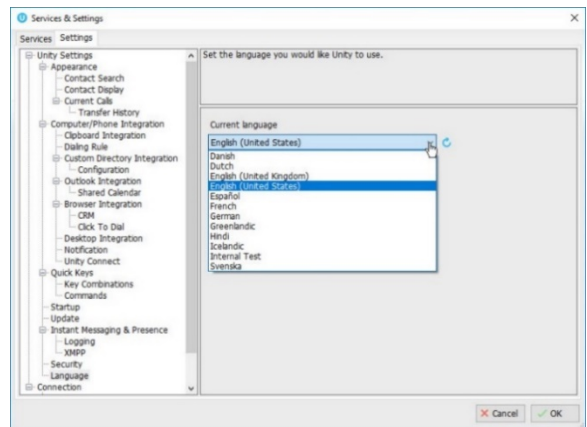


LANGUAGE

Settings > Settings tab > Language

Manage language display in your Unity application(s).

1. Select the language to be used in your display while working in Unity from the drop-down list.
2. Click **OK** and select Yes when prompted to restart and begin using the new language in the Unity display.



CONNECTION SETTINGS

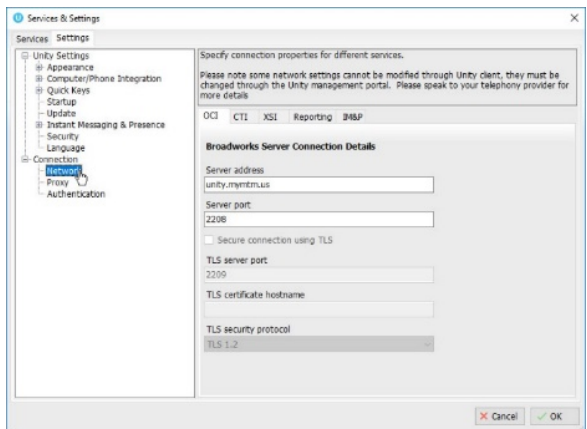
Settings > Settings tab > Connection

Define and manage available network, proxy server, and authentication settings for Unity access. Note: Most connection settings must be managed in the Unity Portal by an administrator or the service provider. Use caution. Contact your Unity Administrator for assistance if these settings require modification.

NETWORK

Settings > Settings tab > Connection > Network

Manage available network settings for OCI, CTI, XSI, Reporting and IM&P in the relevant tabs. Contact your Unity Administrator for assistance if these settings require modification.

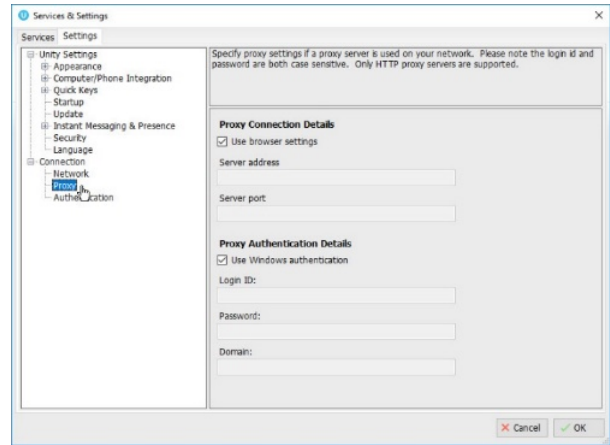


PROXY

 **Settings > Settings tab > Connection > Proxy**

Manage available proxy server settings (where a proxy server is in use within your system).

Contact your Unity Administrator for assistance if these settings require modification.




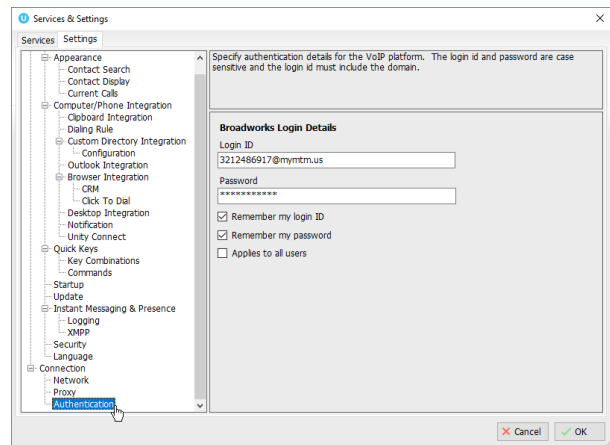
AUTHENTICATION

 **Settings > Settings tab > Connection > Authentication**

Manage Login ID and Password credentials for BroadWorks access.

Users must enter the correct BroadWorks Login ID and password, and may place checks next to the options to remember these credentials, as desired.

Click  **OK** and select Yes when prompted to restart Unity.



8. CUSTOMER SUPPORT

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, and service upgrades, as well as any other general inquiries you may have. Simply contact us and a representative will help you with your request.

In order to provide optimal support, we recommend that the account owner (or an Authorized Contact) submit a ticket online or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting. And always keep your account number handy to help us better assist you when you need us.

Support by Phone: [1-888-538-3960](tel:1-888-538-3960)

Live phone support is available 24/7 for emergency assistance

Online Support: www.momentumtelecom.com/support

Documentation: www.momentumtelecom.com/mu/training-library

Momentum University is a free online knowledge base of training and support content on the Momentum Telecom website. The MU library is easy to use and offers the latest information about Momentum's best-in-class cloud services and features. MU includes product guides, user guides, FAQs, videos, and quick reference tools to help you do what you do.

Additional Training:

Instructor-led training courses (LIVE web-based, or in-person) for the IVR Management Portal and its add-on modules are available upon request. Contact your Momentum Account Manager or Customer Support to find out about the course offerings, any related pricing that may apply, and to request a session for you and your team. A friendly representative of the Corporate Training team will contact you to schedule the training you need at a convenient time.

