

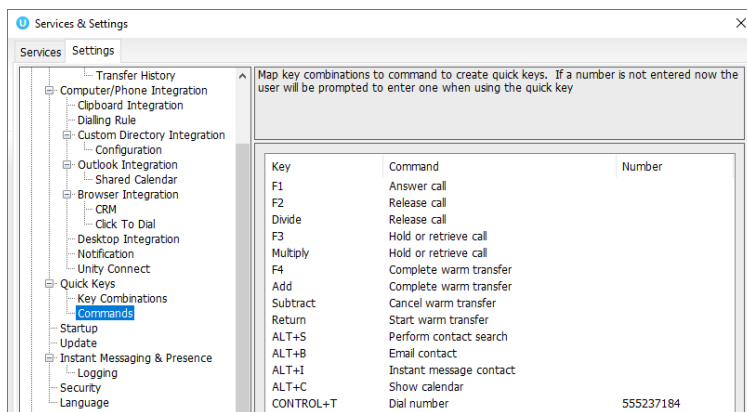
UNITY QUICK KEYS FEATURE OVERVIEW

This document outlines how quick keys can be used within the Unity interface to quickly perform common tasks such as hold/retrieve, transfer and instant message. Quick keys are often used in a receptionist environment where multiple calls must be processed concurrently, but this functionality is available in all Unity for Windows clients from version 7.2.4.0 and later.

1 Configuration

All quick keys contain a key combination and a command. A key combination is used to specify which key press (or combination of keys being pressed) will trigger the action. The command is the action to take.

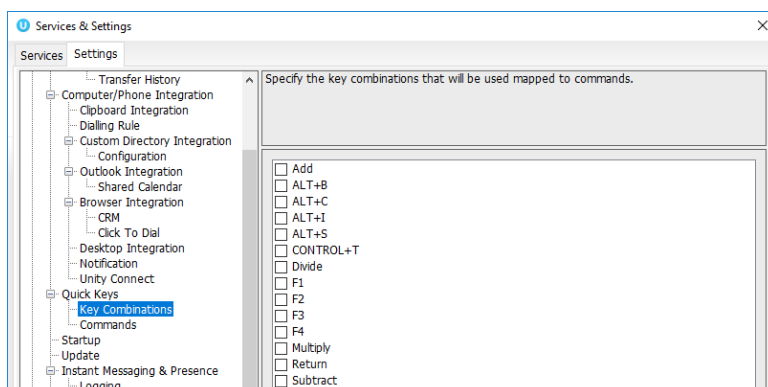
Quick keys can be managed in Unity Settings, as shown below.



1.1 Key Combinations

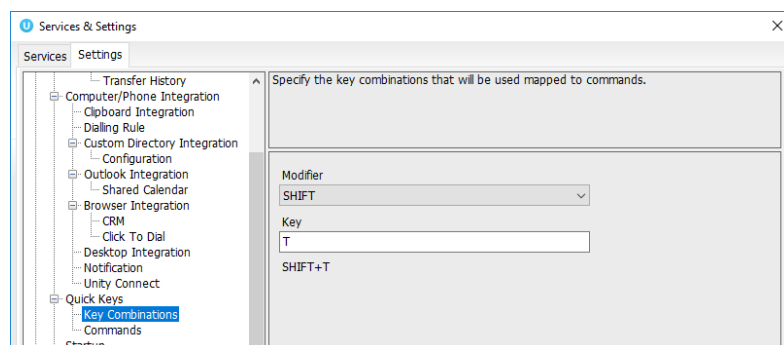
As previously mentioned, a key combination is what triggers the action, it is a single key or a combination of keys being pressed simultaneously.

In Unity Settings you can see all key combinations that are available, including some that may have been added by default.

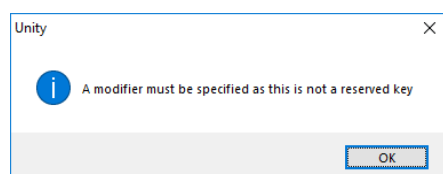


To add a new key combination, press the green plus sign and specify the details, as shown below. Existing combinations can be removed by selecting the item in the list and clicking the red cross.

Not any key can be used in a key combination, because these same keys are used as keyboard I/O to perform searches and write instant messages etc. Therefore a modifier must be used with keys between A and Z and 1 and 0, meaning that if that key is pressed then the action will not be performed, but if the key is pressed with a modifier (such as SHIFT, ALT or CONTROL) then Unity will know that rather than typing the character, the quick key must be performed. Other keys such as the Function keys (F1, F2 etc) and special characters such as “-”, “+”, “/”, “<”, “>” etc can be saved as a key combination without a modifier.



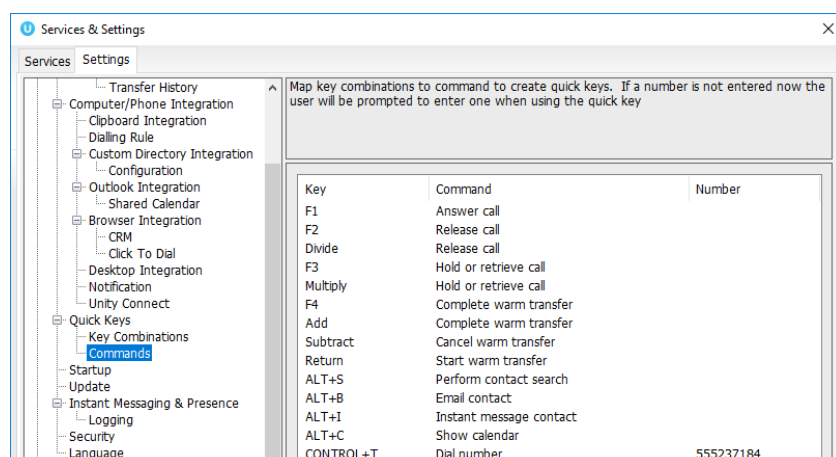
If a key is entered that requires a modifier but one isn't specified, then the below message will be displayed



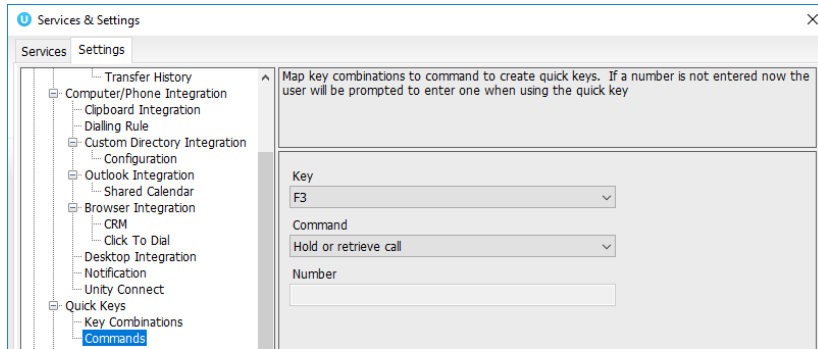
1.2 Commands

Once the key combination is created, an action must be associated with it. The Quick Key Command is what provides the link between the two.

In Unity Settings you can see all command that are available, including some that may have been added by default.



To add a new command, press the green plus sign and specify the details, as shown below. Existing commands can be removed by selecting the item in the list and clicking the red cross.



To add a command, select the key combination and command, if the command requires a number then it must also be entered. Possible actions are:

Answer call

Answers the first ringing call in the call list. If a specific ringing call is selected, that will be answered.

Answer or release selected call

Answers the first ringing call in the call list, or if the call isn't ringing Unity will end the call. If a specific call is selected, that will be processed

Blind transfer call to contact

Transfers the selected call to the selected contact. A contact must be selected. If there is only one call in the call list then that call will be transferred

Blind transfer call to number

A number can be entered when creating this command, if it is then Unity will blind transfer the selected call to that number. Otherwise the user will be prompted to enter the number that the call should be transferred to

Cancel contact search

Clears the Contacts search box and displays the default contact list

Cancel Hold&Link

Removes the link between the selected call and the monitored user that it was linked to.

Cancel warm transfer

Unity will release the last call in this warm transfer scenario. If a call is answered from user A and a warm transfer scenario is created with monitored user B, then when warm transfer is cancelled the call to user B will be released

Complete Hold&Link

Blind transfer the selected call and the monitored user that it was linked to.

Complete warm transfer

If the call is part of a warm transfer scenario then Unity will transfer both calls together. If the call isn't part of a warm transfer scenario but a contact is selected, then Unity will blind transfer the call to the selected contact

Dial number

A number can be entered when creating this command, if it is then Unity will automatically dial that number. Otherwise the user will be prompted to enter the number that should be dialed.

Dial selected contact

A contact must be selected in the Contacts list to activate this action. Unity will dial the contact's extension (if present) or phone number.

Email call request to contact

Available with Unity Reception Enterprise license only. A contact must be selected in the Contacts list to activate this action, and the user must have an email address set in their profile. Unity will send a callback request email to the selected user with the call details (remote party name/number and time of call) and a note if entered by the user. The user must click OK to send the email once a note has been entered. The email will not be sent from the email client of the logged-in Unity user, instead it uses the Unity cloud meaning the user doesn't need to have an email client running or configured on their PC.

Email callback request to contact without note

Available with Unity Reception Enterprise license only. A contact must be selected in the Contacts list to activate this action, and the user must have an email address set in their profile. Unity will automatically send a callback request email to the selected user with the call details (remote party name/number and time of call) but without a note. No user interaction is required to send the email; it is sent immediately. The email will not be sent from the email client of the logged-in Unity user, instead it uses the Unity cloud meaning the user doesn't need to have an email client running or configured on their PC.

Email contact

A contact must be selected in the Contacts list to activate this action, and the user must have an email address set in their profile. Unity will open a "new email" window to the selected user's email address using the default email client

Emergency escalate call

Unity Agent, Supervisor and Reception only. Escalates the ACD call to the first supervisor for that call center and creates an instant three-way conference with the current active call and the supervisor.

Hold call

If a call is selected in the call list, then Unity will hold that call if it isn't always held or ringing. Otherwise if a call isn't selected then Unity will either switch between parties in a warm transfer scenario, or hold the call if it isn't held or ringing.

Hold or retrieve call

If a call is selected in the call list, then Unity will hold or retrieve that call based on the current state. Otherwise if a call isn't selected then Unity will either switch between parties in a warm transfer scenario, or hold or retrieve the call based on the current state.

Instant message contact

An internal user must be selected in the Contacts list to activate this action. Unity will start an IM conversation with the user, or activate a conversation if one exists. Normal rules regarding whether to use Unity IM&P and/or XMPP will be used to determine how to send the message

Park call

A contact must be selected in the Contacts list to activate this action. Unity will park the call on the extension of the selected contact, only internal users can be used when parking a call.

Perform contact search

Makes the Contacts tab the active tab and activates the contact search box

Release call

If a call is selected in the call list, then Unity will release that call. Otherwise if a call isn't selected then Unity will either switch between parties in a warm transfer scenario, or release the call.

Retrieve call

If a call is selected in the call list, then Unity will retrieve that call if it's held. Otherwise if a call isn't selected then Unity will either switch between parties in a warm transfer scenario, or retrieve it if held.

Show calendar

Available with Unity Reception Enterprise license only. A contact must be selected in the Contacts list to activate this action, and the user must have an email address set in their profile (as this is used as the link between Broadworks and the shared calendar platform). Unity will show the shared calendar for the selected user, which will be displayed for a preconfigured duration. The user can press ESCAPE or an arrow key to hide the shared calendar. If the shared calendar hasn't completed loading (or if there was an error) then Unity will alert the user.

Show call log tab

Makes the call log list the active list

Show contacts tab

Makes the Contacts list the active list

Show context menu

Shows the context menu for the selected call or contact, which will show the same context menu as if the user right-clicked using the mouse

Show voicemail tab

Makes the Voicemail list the active list, if it is being displayed

Start Hold&Link with selected call and contact

An internal user must be selected in the Contacts list to activate this action. If the user is on the phone then Unity will link the call to that user, so that the call will reflect the hook state of that user in the call list. If the user isn't on the phone then Unity will blind transfer the call to the user.

Start warm transfer

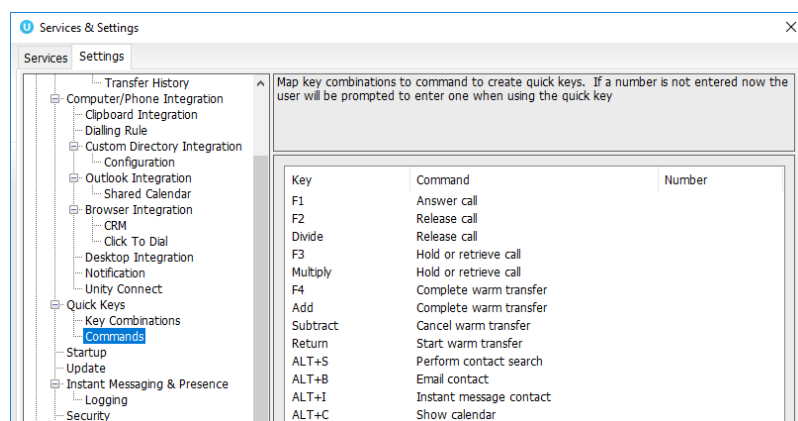
A contact must be selected in the Contacts list to activate this action. Unity will place the selected call on hold and call the selected contact, creating a warm transfer scenario with both calls.

Transfer call to voicemail

An internal user must be selected in the Contacts list to activate this action, and Voice Messaging User must be assigned to the user or Unity must be configured to allow transfer to voicemail for any internal user.

1.3 Default Quick Keys

Unity will load the below quick keys if none have been manually entered.



You can clear all existing quick keys by closing Unity, then deleting the QuickKey folder from the installation folder (C:\Program Files (x86)\Unity Client by default). Unity must be closed first because it writes to this folder during shut-down. When Unity is next restarted it will load the above default quick keys.

2 Execution

When a quick key is pressed, Unity determines which call to process based on the below rules:

If one call is selected then Unity will use this call

otherwise

If there is only one call in the list then Unity will use this call

This means if there are multiple calls selected, or multiple calls in the call list but none are selected, then a call will not be selected meaning many quick keys will not be triggered.