KAKAPO SYSTEMS

UNITY RECEPTION WEB

Help Guide

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1 ABOUT UNITY RECEPTION

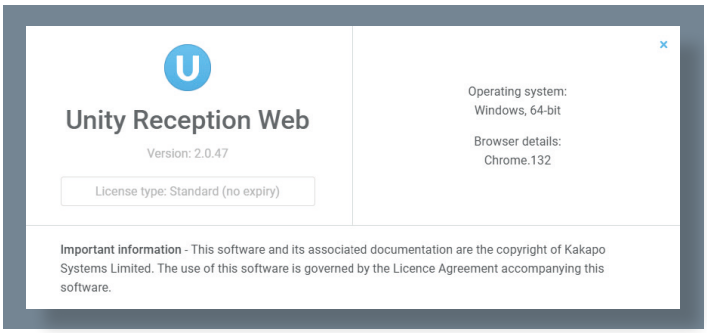
Unity Reception is a web-based end-user client designed for busy, front desk call handling environments or for those users who need visibility of multiple concurrent calls and extended presence information for colleagues.

1.1 FEATURES

Features provided:

- 50 users fixed busy lamp field (BLF)
- Drag and drop call control [to make a call, release, IM, transfer, park etc]
- BroadWorks call center agent functionality for join/leave queue and changing ACD state.
- Hold & Link User - Custom tagging of held calls [i.e. holding for Andrew Smith]
- Visibility of the party the inbound caller was previously transferred to.
- Ability to listen to, save and delete voicemails.
- Add notes for inbound calls and all group or enterprise users.
- Unlimited dynamic busy lamp field [displays hook status of all matched users on contact search]
- Remote service configuration for all BroadWorks group and enterprise users
- Contact Groups

The current version and licence can be found in Help > About.



1.2 NAMING CONVENTIONS FOR THIS HELP

- Call Center instances are also referred to as Queues in this guide
- ACD calls mean incoming calls into the call centre/queue
- BWKS means the BroadWorks platform

1.2.1 Internet and Firewall

Unity will run on the following browsers:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- Apple Safari

The Unity web clients are accessed over HTTPS only. If applicable, customer firewall rules must be based on the URLs below. These are:

- https://desktop.unityclient.com
- https://agent.unityclient.com
- https://supervisor.unityclient.com
- https://reception.unityclient.com

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If the BroadWorks environment uses an Access Control Lict (ACL), then the below IP's need to be added to allow inbound connectivity:

- 34.253.150.243
- 52.210.190.221
- 52.212.31.86

1.2.2 BroadWorks Platform Requirements

Unity Reception is supported on BroadWorks R21 SP1 and above.

Connecting using XSI

The Xtended Service Interface (XSI interface) allows remote applications to integrate with Cisco BroadWorks to perform telephony-related actions and to be notified about telephony events against subscribers hosted in a Cisco BroadWorks-powered network. XSI can be accessed over HTTPS as well as over TCP/IP using the CTI interface.

Unity Web Apps are able to integrate with BroadWorks either using XSI over HTTPS or CTI over TCP/IP, in which case TLS is also supported.

CTI

Default port: 8011 (insecure), 8012 (secure)

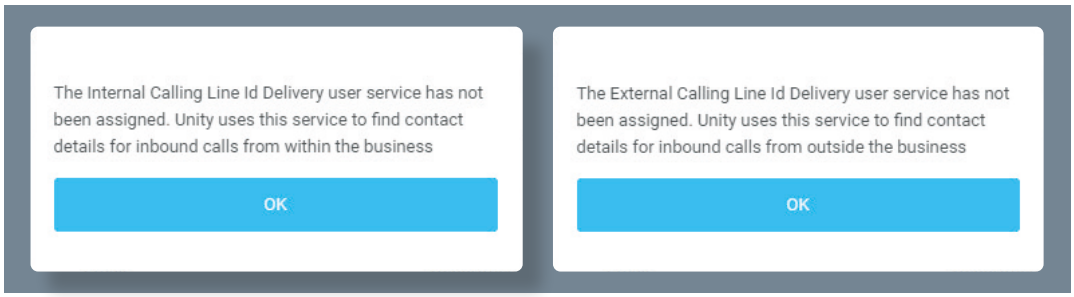
XSI/OCI OVER SOAP – HTTP/HTTPS

Default port:80 (insecure), 443 (secure)

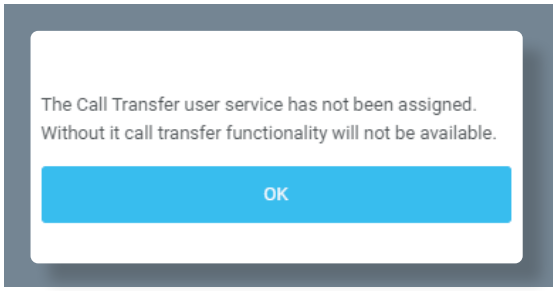
1.2.3 BroadWorks License and Service Requirements

Internal calling line ID delivery & external calling line ID delivery

The Internal Calling Line ID Delivery and External Calling Line Id Delivery services should both be assigned as these services allow Unity to identify calls to/from other users in the business. If not assigned Unity will function, but the user will be prompted that this functionality will not be available.



Call Transfer



The Call Transfer service is required in order to blind or announce transfer calls to internal and external numbers. Unity will alert the user if this service is not assigned.

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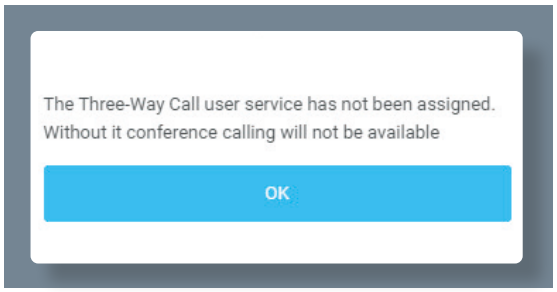
Call Logs



The Basic Call Logs service must be assigned to the user in order to see dialled, received and missed calls. Unity will alert the user if this service isn't assigned.

1.2.4 Optional Services

Unity allows many user services to be utilized and configured in Tools > Settings. However, these services are not mandatory, so Unity will remove visibility of them if not assigned to the user. The below services are supported:

Service	Description
Anonymous Call Rejection	Prevent a caller from contacting you if they have explicitly hidden their phone number
Call Forward Always	Automatically forward all incoming calls to a number
Call Forward Busy	Automatically forward all incoming calls to a number when the user is on the phone
Call Forward No Answer	Automatically forward all incoming calls to a number when the call hasn't been answered after a certain number of rings
Call Recording	Record incoming and outgoing calls, referring to section 5.9 for more information
CommPilot Express	Use pre-configured routing profiles to handle incoming calls based on the current state of the user
Do Not Disturb	Block all incoming calls and reroute to voicemail if available
Simultaneous Ring	Automatically ring another number when an incoming call is received, the call can then be answered through that number or the primary phone
Calling Line ID Delivery Blocking	Hide your phone number when making outgoing calls
BroadWorks Anywhere	Connect mobile or fixed-line devices to the VoIP account, and switch calls between them
Call Waiting	Answer an incoming call when already on a call
Call Park Retrieve	Retrieve a call that has been parked for a specific user
Directed Call Pickup with Barge-In	Automatically join other users call
Remote Office	Associate a mobile device to the VoIP account to make or receive calls
Voice Messaging User	Provide voicemail for unanswered incoming calls
External/Internal Calling Line ID Delivery	Provides Calling Line ID information of an incoming call from outside the group
Out of Office Assistant	Helps ensure seamless call handling when users or departments are unavailable

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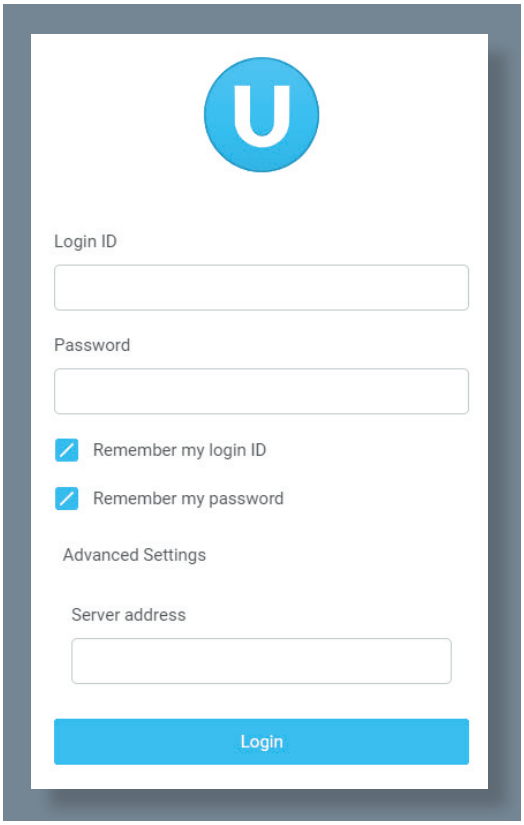
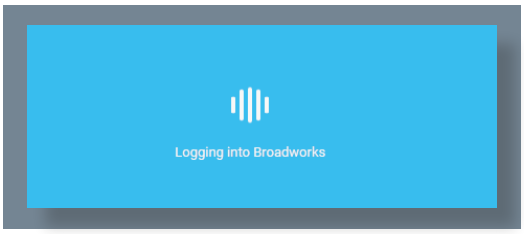
2 INITIAL SETUP



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

You may also be prompted for the server address for your Service Provider. However, this can be preconfigured for your System Provider in which case it will be prepopulated, and the Advanced Settings section will be hidden.

Enter your login ID and password and the BroadWorks Server Address as specified by your Service Provider [if displayed].



Once you have entered your login details click login. Unity will now display a dialogue box 'Logging into BroadWorks' as the application opens.

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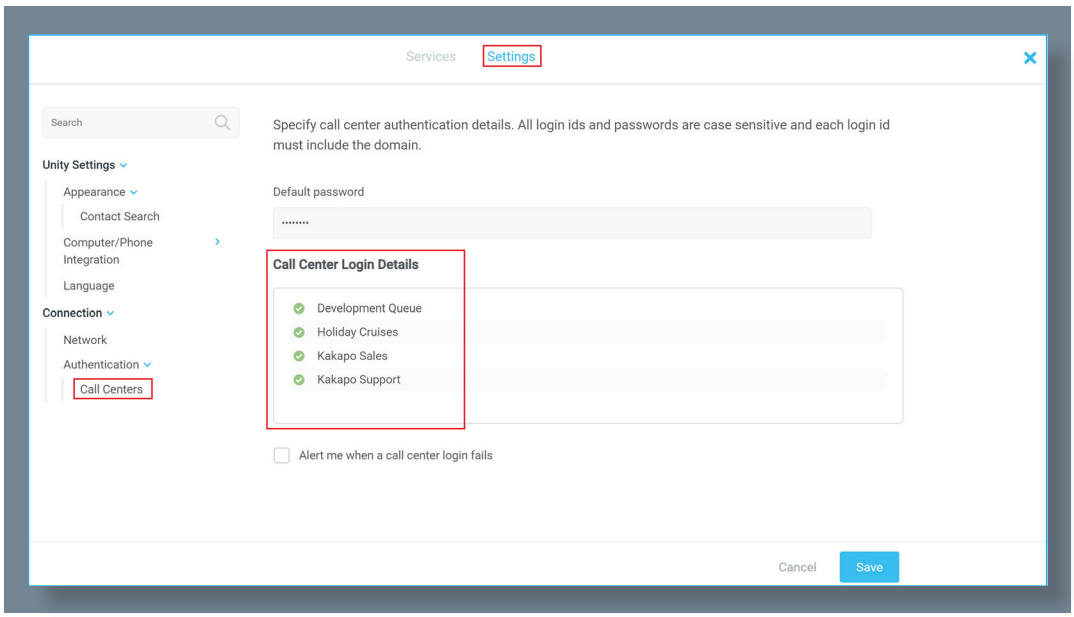
2.1 CALL CENTER LOGIN DETAILS

Once you are logged into Unity, it will connect to the host BroadWorks system and populate all the Call Center Instance IDs for the call centres that the user is a member of as shown below. This will include call centres that the user is associated to as an agent, a supervisor, or both.

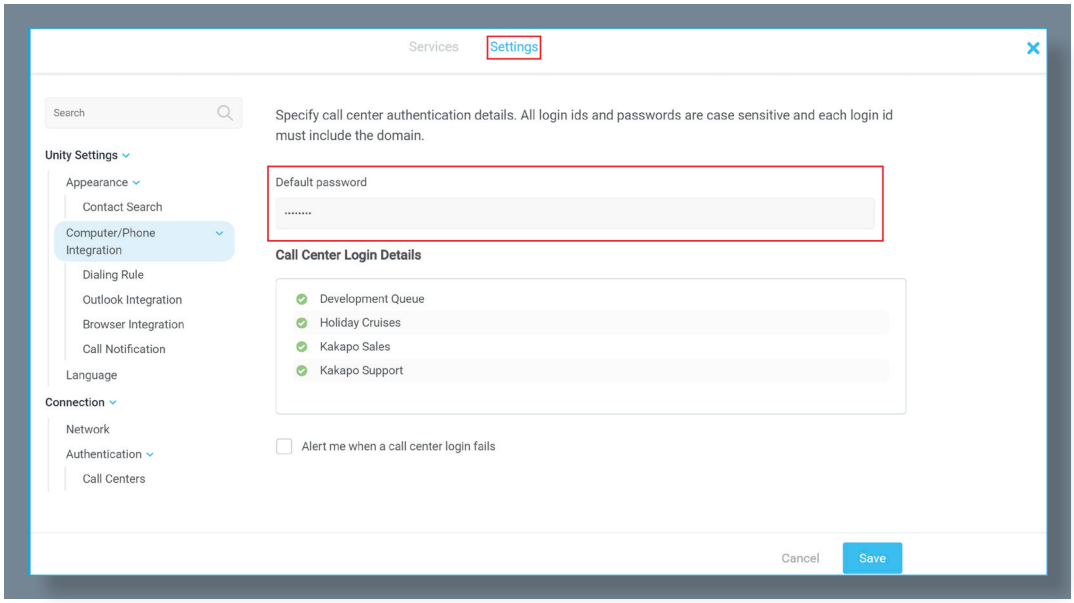
To access this panel, click Tools > Settings from the main window, then click the Settings tab, then client Call Centres under Authentication.



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

2.2 CALL CENTER LOGIN DEFAULT PASSWORD

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



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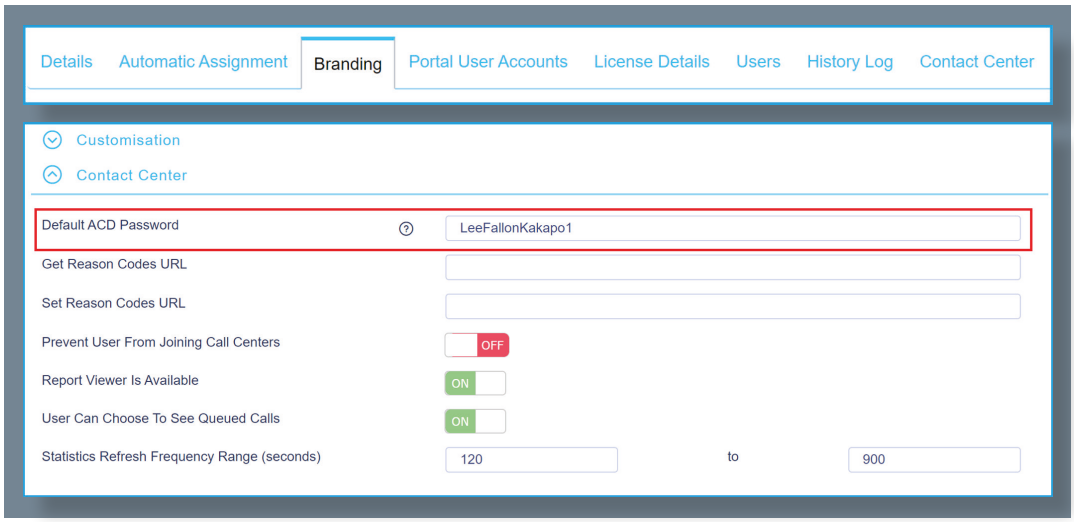
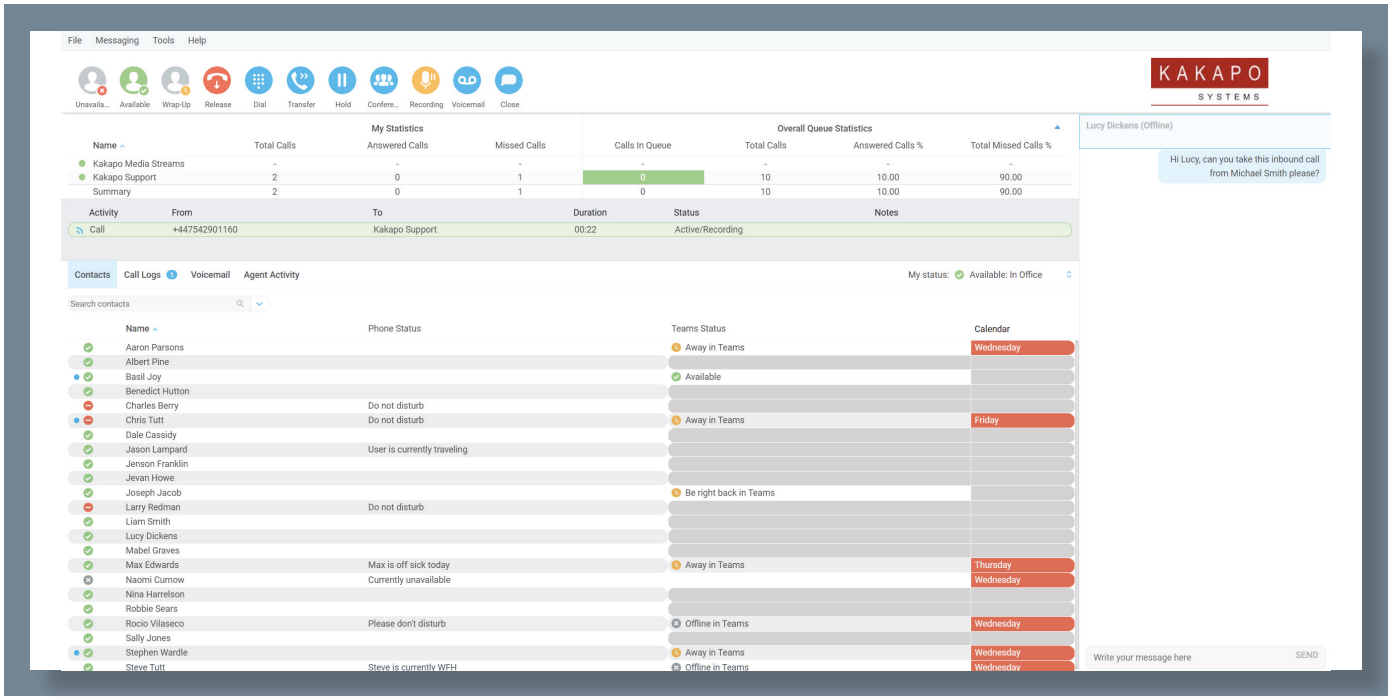


3 UNITY RECEPTION INTERFACE OVERVIEW

Unity is split into three functional areas: call control buttons, active call window and contacts [busy lamp field]. Contacts is a tab that can be toggled to display call logs and voicemail. Unity Reception can also act as an agent in a call centre environment. This is the case Unity will also display ACD state buttons and the Personal Wallboard, which shows current call centre conditions. Reception Call Centre Agent is covered in section 15.



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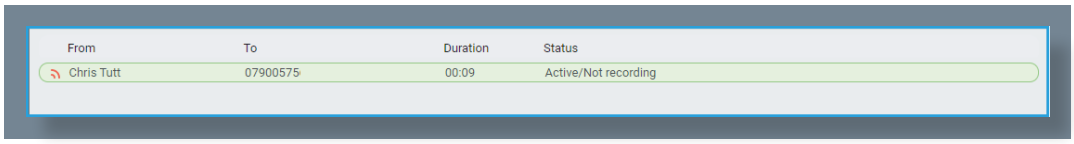
3.1 SHOW REMOTE PARTY PHONE NUMBER

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



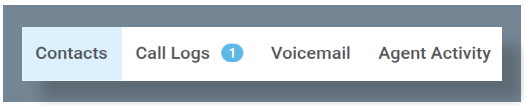
3.2 OVERRIDE CONTACT NAME USING NUMBER

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

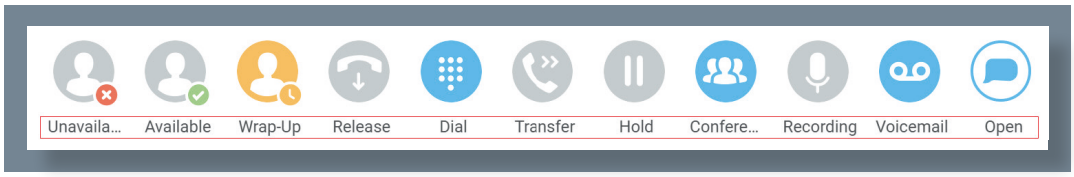
3.3 APPEARANCE

In Tools > Settings > Settings > Appearance, the user can change the behavior of Unity.

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



Show call button text in main windows – The button text will be displayed under the call control buttons.



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4 MAIN INTERFACE ELEMENTS

4.1 CALL CONTROL

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

4.2 ACTIVITY WINDOW

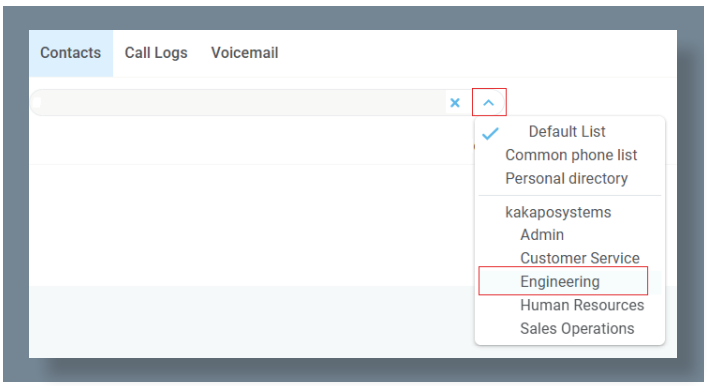
This provides a list of all current calls and their state. For example, ringing, active, held, parked etc. The duration of the call is also displayed, which is from the moment the call was first placed and does not reset when a call is held or retrieved. Unity will mirror any call handling made on the user's IP phone. For example, if the call is placed on hold on the handset, the user will show as being on hold in the Active Call Window. If there are multiple calls in the Active Call List then the correct call must be selected before performing the call control action, similarly a call can be dragged over the Call Control button to perform the action on that call.

4.3 CONTACTS LIST [BUSY LAMP FIELD]

This panel will display up to 50 monitored users, displaying their unavailable, available, Engaged or Ringing state as graphical icons.

The user can also perform a contact lookup which will search all directories available in Unity and return any internal or external contacts that meet the search criteria.

Left click the dropdown menu in the search box for the Contact list to view all directories available in Unity, then select the directory to load those contacts in the list, as below.



4.4 CALL LOGS

Toggling the bottom Contacts panel to Call Logs will display missed, received, dialled calls, and conversations. Missed calls will include both direct inbound direct calls, as well as ACD and hunt group calls. 20 numbers can be stored unless the user has Enhanced Call Logs service assigned.

To call any entry in a call log, simply double-click, right-click and select 'Call number' or drag the call log entry into the Active Call List.

Any recently missed calls are easily identified, as shown below.

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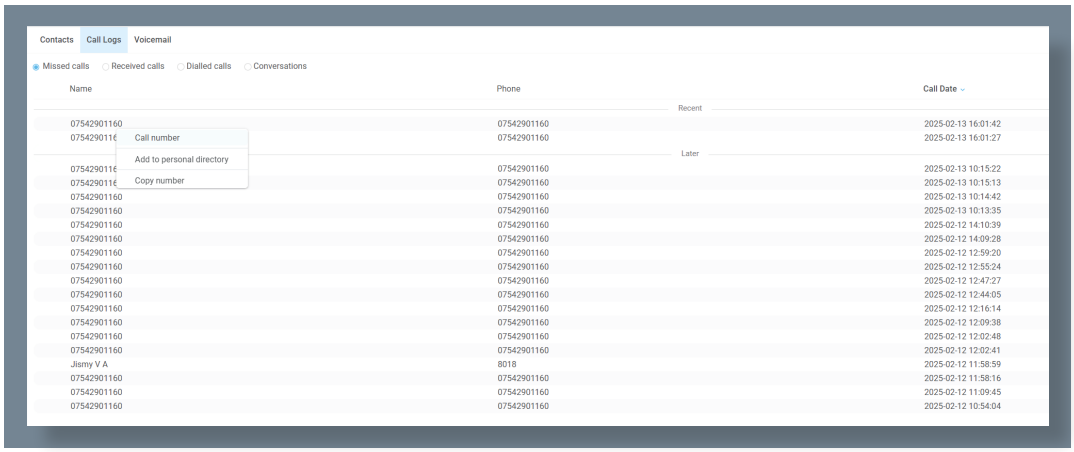
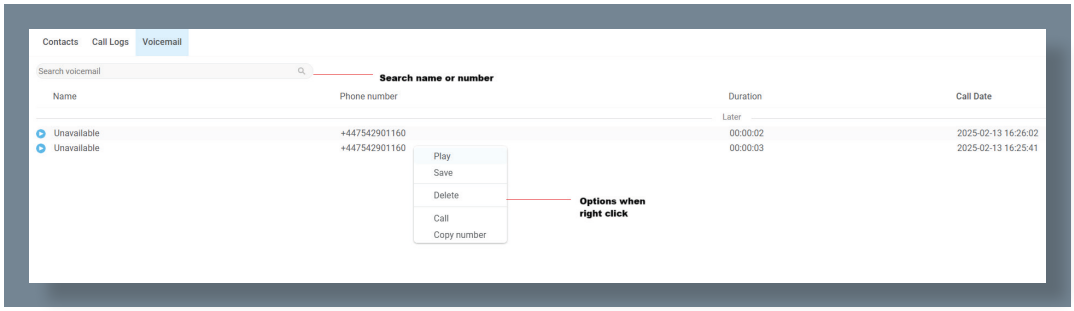
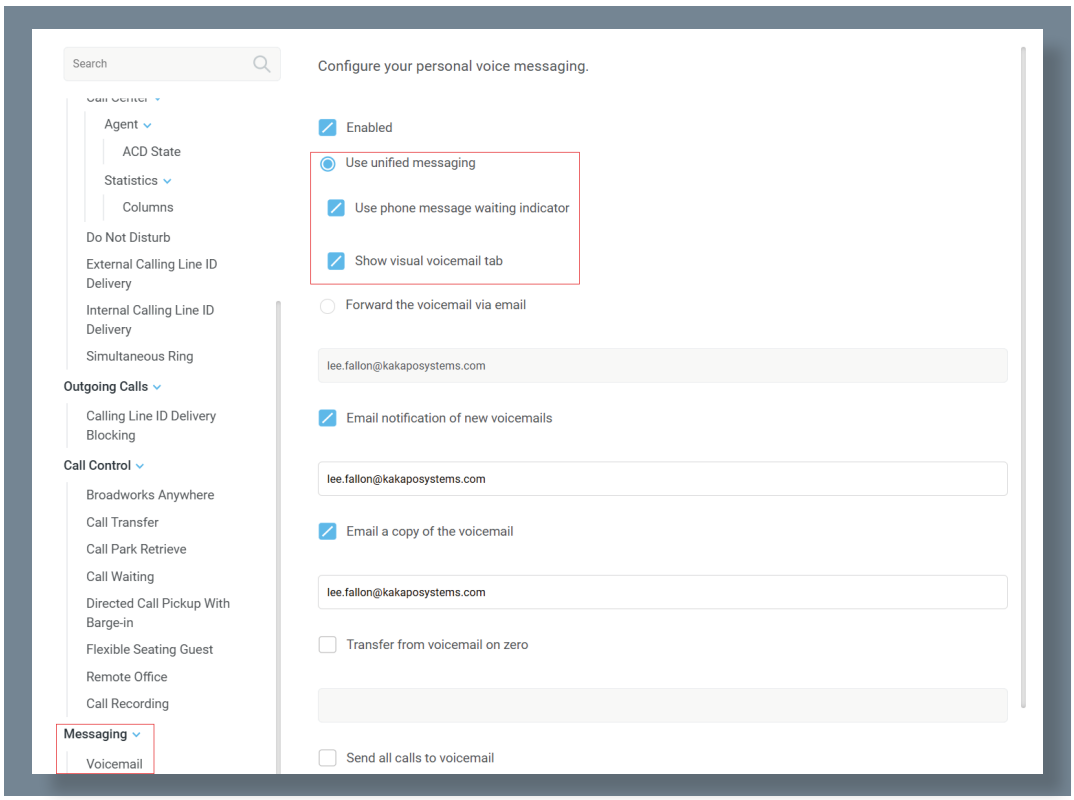


4.5 VISUAL VOICEMAIL

The Voicemail tab allows the user to interact with their voice mailbox to listen to, save and delete voicemails without using the phone.



The Voicemail tab is only displayed if the Voice Messaging User service if active and configured to use unified messaging. The 'Show visual voicemail tab' setting must also be enabled, as shown below. Tools > Settings > Services > Messaging > Voicemail.



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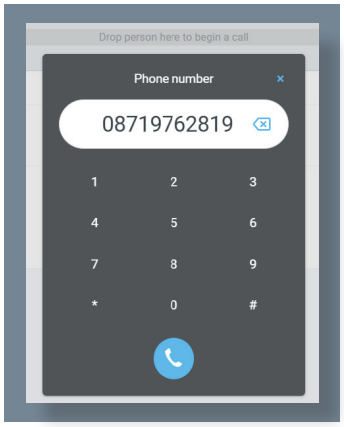
5 CALL CONTROL

All calls are managed through the call control buttons at the top of the main window. 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 Answer/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.

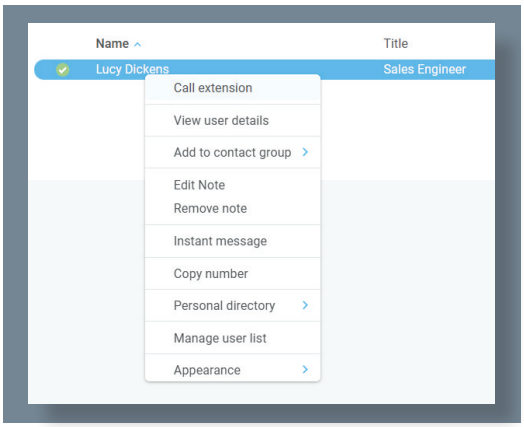
5.1 MAKING A CALL

5.1.1 Using the Dial Window



Click the Dial button to bring up the Dial dialogue box, as shown here. Using the computer keypad enter the desired number and press Enter or click OK to make the call. The primary phone will default to using hands-free speakerphone, if configured as outlined in section 4. Otherwise, you will need to lift the handset to establish the outbound call.

5.1.2 Using the Contacts Panel



Double click a user icon or right click and select 'Call extension' or 'Call number' if right-clicking on an external contact. It is also possible to call an internal user's mobile number if entered in their profile.

5.1.3 Drag and Drop

Left click a user in the Contacts panel and drag the icon up to the Active Call Window. This will open a call to that contact.

5.2 ANSWER A CALL

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

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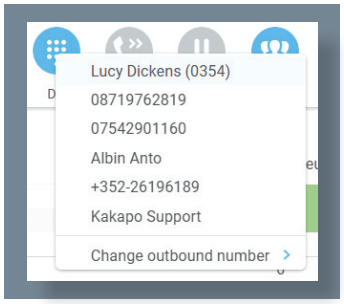
5.3 END A CALL

Click the Release button to end the currently selected call. If there are multiple calls in the current call list, make sure you select the right call before clicking Release.

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

5.3.1 Redial



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

5.4 SEND CALL TO VOICEMAIL

To send an inbound caller directly to your voicemail click the Voicemail button . Please note this button will not be visible if the Voice Messaging User service is not assigned or is currently disabled.

5.5 RETRIEVING VOICEMAIL MESSAGES

When no calls are currently selected, clicking the Voicemail button will dial the user into their voicemail using the user's primary device. This feature has been superseded by the Voicemail tab as outlined in section 5.5.

5.6 TRANSFERRING A CALL

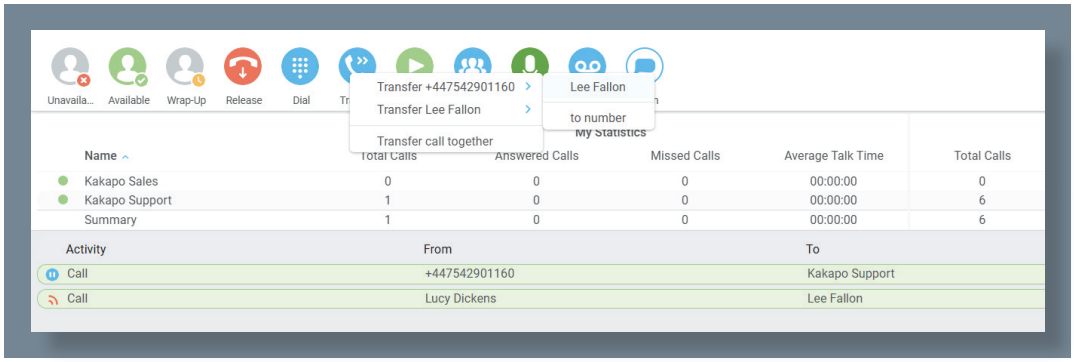
There are two ways to transfer a call; warm transfer, where you introduce the call to the receiving party before putting the call through, and transfer call to extension, where you blind transfer the caller directly to a recipient without introducing the call.

5.6.1 Announced Transfer using Transfer Button

With a call in progress, make a new call to the desired destination extension or number as described in section 5.6. This will automatically place the first call on hold and will add a new call in the Active Call Window. Once the called party answers, click Transfer and select the context menu option to transfer both calling parties together. Both calls will now disappear from the Active Call Window.

Note: The user is not limited to transferring received calls. The user can make two outbound calls and then use announced transfer to join them together.

Example 1 – Transfer with two live calls



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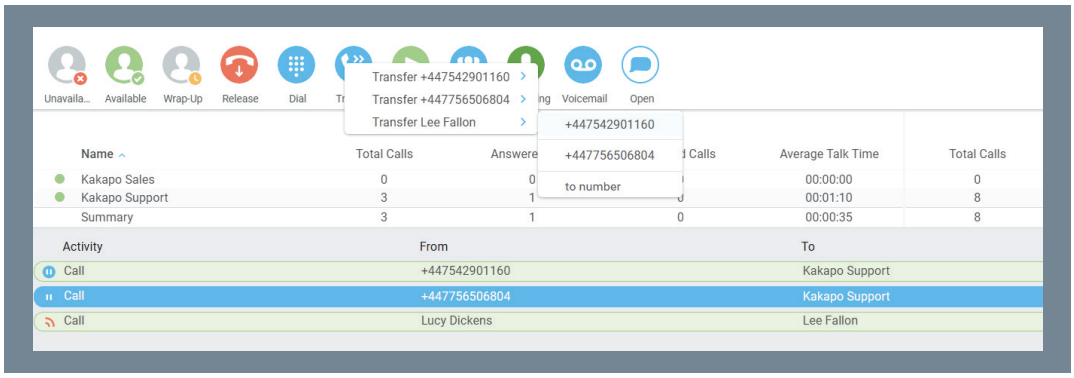
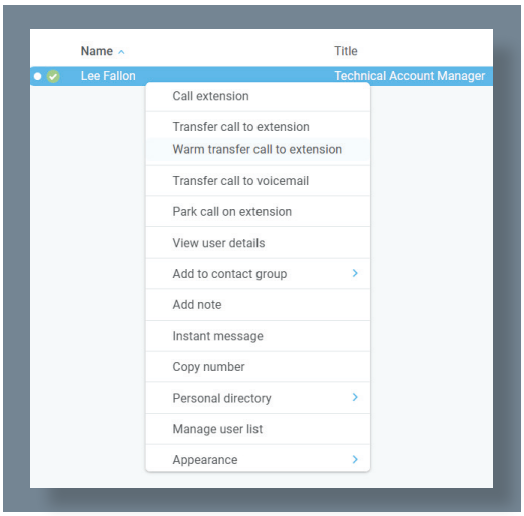
Example 2 – Transfer with three live calls



5.6.2 Announced Transfer using Drag and Drop

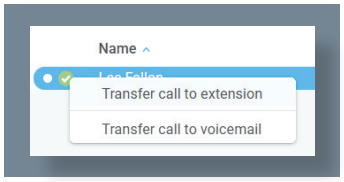
The easiest way to perform an announced transfer is simply to drag & drop one call on top of the other in the Active Call Window. This will join the calls together and remove them from the Active Call Window.

5.6.3 Announced Transfer using Drag and Drop



Unity offers a feature called Warm Transfer whereby the held call and the transferee are linked so that when either call is selected in the Active Call Window, they can be joined by clicking the Warm Transfer button, as shown here.

5.6.4 Blind Transfer using Drag and Drop



Unity Reception can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel or dropping it onto a call centre queue [if Reception is configured as an agent with call centre queues, as outlined in section 15].

5.6.5 Blind Transfer using Transfer Button

Select a call in the Active Call Window [if there are multiple calls present] and click the Transfer button . In the Transfer window enter the destination and click the call icon.

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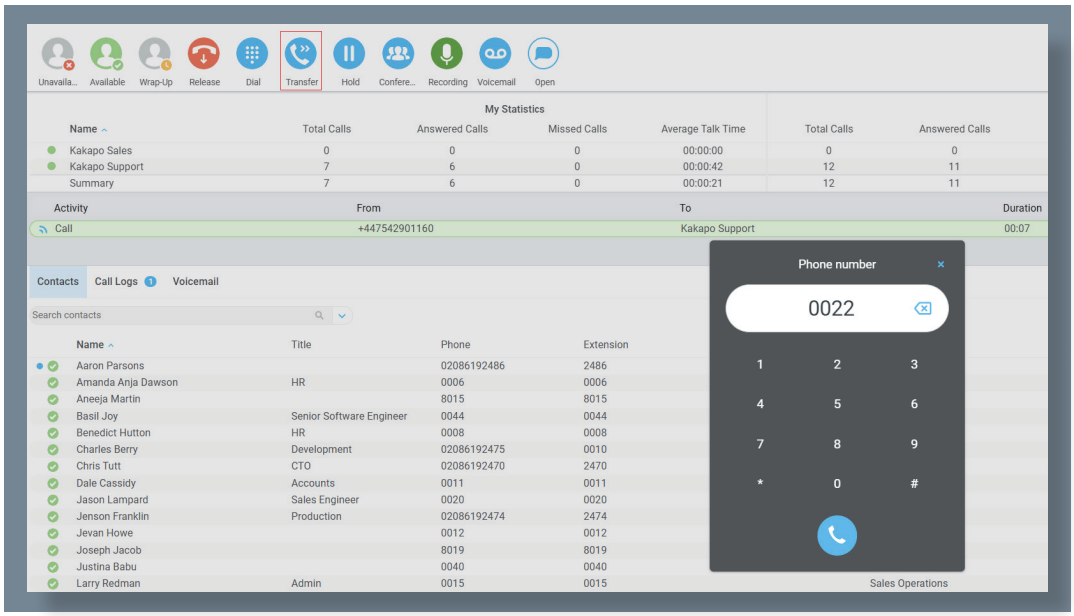
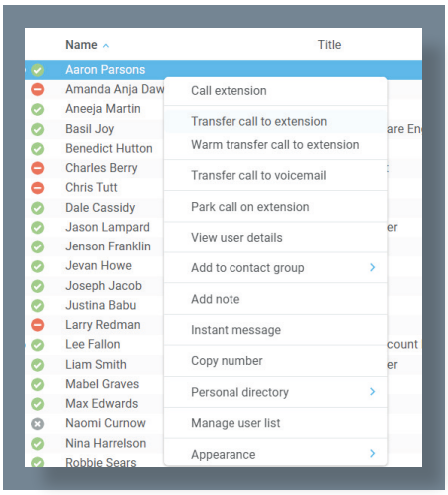
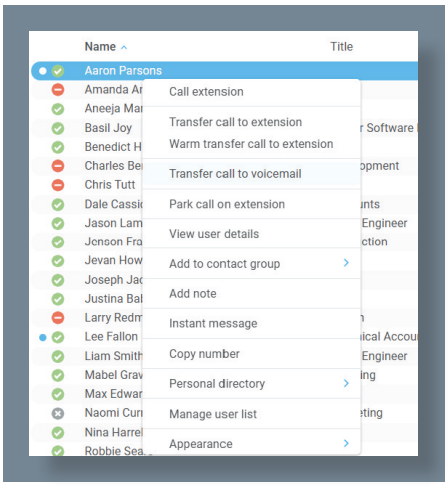


5.6.6 Blind Transfer using Right Click



Select a call in the Active Call Window [if there are multiple calls present] then right click the recipient icon or number in the Contacts list. Select 'Transfer call to extension' to blind transfer the call to an internal user, or 'Transfer call to number' to blind transfer to an external contact. It is also possible to transfer to the contact's mobile phone if they are an internal user and the mobile number is entered in their profile.

5.6.7 Transfer to Voicemail using Right Click



The option to Transfer to voicemail is valid only for internal contacts that have Voicemail assigned and activated. Select a call in the Active Call Window [if there are multiple calls present] then right click a user in the Contacts list and select 'Transfer to voicemail'. This will send the selected call directly to the destination extension voicemail without introducing ringing.

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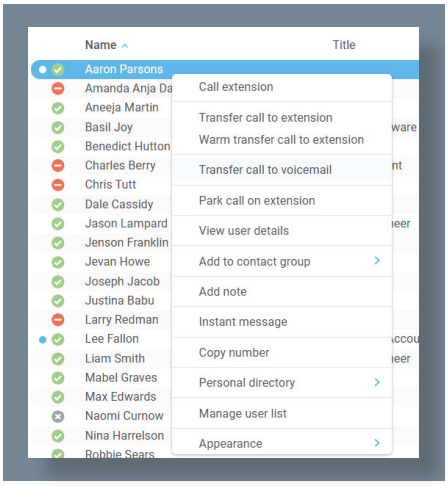
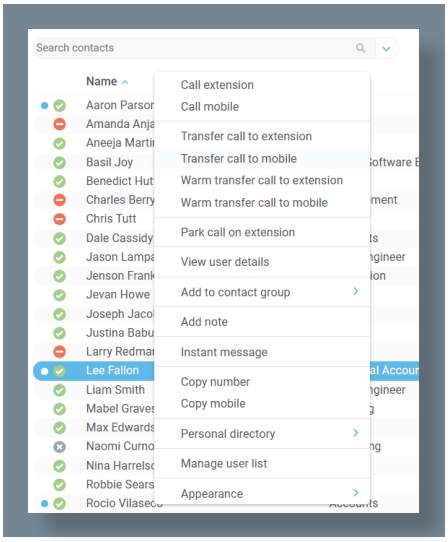
5.6.8 Transfer to Voicemail using Right Click



If configured, Unity will display 'Transfer to voicemail' as a context menu option when a call is dragged onto an internal contact in the Contacts panel. For more information on menu options when using drag & drop please refer to section 7.

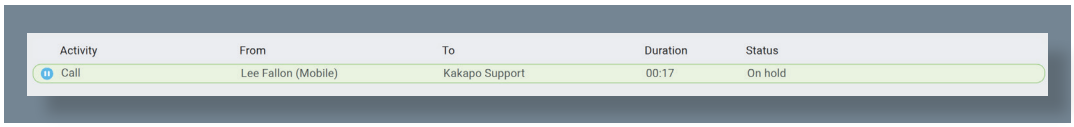
5.6.9 Transfer to Mobile



As mentioned, if the selected contact is an internal user and has a mobile number entered as part of their profile, you have the option to right click and select either 'Call Mobile' [to perform an announced transfer] or 'Transfer Call to Mobile' [to perform blind transfer]. This also applies when dragging a call, if configured in Settings as outlined in section 7.

5.7 CALL HOLD/RETRIEVE

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



Activity	From	To	Duration	Status
Call	Lee Fallon (Mobile)	Kakapo Support	00:17	On hold

5.7.1 Placing a Call on Hold

To place a current active call on hold, select the call [if there are multiple calls in the list] and press the hold button . The call status will now show as on hold in the Current Call Window and an icon will appear alongside the call to illustrate that it is currently held.

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5.7.2 Retrieving a Held Call

Select the call [if there are multiple calls in the list] and click the retrieve button, the 'held' image alongside the call will disappear. You can also double click the call to retrieve it, if configured to do so in Settings. Please note that any other active calls will be placed on hold before the selected call is retrieved, meaning you can toggle between calls by double-clicking them in the Active Call Window.

5.8 CONFERENCE CALLING

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

5.8.1 Starting a Conference Call

Once an active call is established, [that you have either made or received] call a second person. You can do this by clicking the Dial button or double clicking a user in the Contacts panel or Search or Call Log lists. Making this call will automatically place the first caller on hold. Once the second party has answered the call, click the Conference button and a new conference will be created between you and the other two parties. This is represented in the Active Call Window as shown below. Please note that if there are more than two calls in the Active Call Window then the two calls to conference will need to be selected.

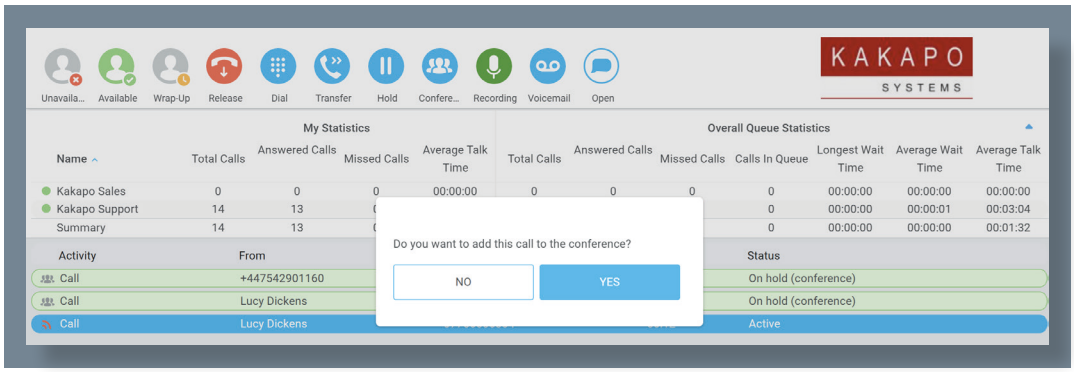
Activity	From	To	Duration	Status
Call	+447542901160	Kakapo Support	00:41	Active (conference)/Not recording
Call	Lucy Dickens	Lee Fallon	00:16	Active (conference)/Not recording

Selecting either call then clicking hold will place the conference call on hold, during which time the other callers can still talk to each other. The Active Call Window will be updated to illustrate that the conference is on hold, as shown below.

Activity	From	To	Duration	Status
Call	+447542901160	Kakapo Support	00:54	On hold (conference)
Call	Lucy Dickens	Lee Fallon	00:29	On hold (conference)

5.8.2 Adding Multiple Parties

Once a three-way conference is established you can add additional parties to create an n-way conference. Select the call to add and select Conference, you will be prompted to add the remote party to the existing conference, as shown below. You can see that the entire conference is held when processing other calls through the Active Call Window.



Please note that conference calls can be started with any two remote calls, regardless of the direction of either call or if the number is internal or external [for example between two mobile calls].

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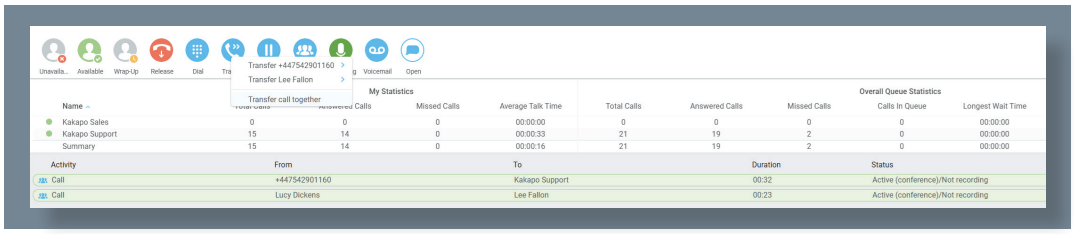
5.8.3 Dropping a Participant

To remove a caller from the conference call but continue speaking to the other caller[s], simply select the call to release in the Active Call Window and click the Release button as you would normally. This will release the selected party and will show only the remaining party[s] in Active Call Window.

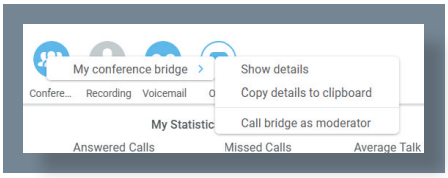
5.8.4 Ending a Conference

If the user wants to leave a three-way conference but allow the remote parties to continue talking, perform an announced transfer to join the calls together.



Otherwise, to end the conference simply hang up the phone.

5.8.5 Conference Bridge Integration

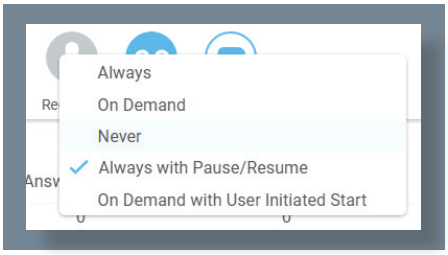


Unity allows the user to right click the Conference button to view or copy details of their 'reservation less' conference bridge(s), or to call a bridge as a moderator. If this has been configured in BroadWorks.

5.9 CALL RECORDING

If the Call Recording User service is assigned then the user may be able to manage call recording, although this depends on the functionality offered by the VoIP platform and service configuration parameters. If the functionality isn't available or is hidden, then the Call Recording button is not displayed in the main window.

5.9.1 Changing the Call Recording Option



Right-click the Recording button to select the call recording option, as shown here.

Please note that depending on permissions this may not be available, also not all the displayed options may be available. Call Recording options are:

Option	Description
Always	Calls are automatically recorded from the beginning of the call. There is no option to pause or stop recording.
On Demand	Calls are not automatically recorded from the start, but recording can be started at any time during the call in which case the entire call will be recorded.
Never	Calls are never recorded, and recording cannot be started while a call is in progress.

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Always with Pause/Resume	All calls are automatically recorded from the beginning of the call, but recording can be paused and resumed, which is especially important when taking credit card details over the phone [that need to be omitted]. This will still result in a single recording for the call, regardless of how many times it was paused and resumed.
On Demand with User Initiated Start	Calls are not automatically recorded from the start, but recording can be started at any time. However, any conversation before the recording was started will not be included in the recording. Recording can be paused and resumed, which will result in different recordings being created for a single call.

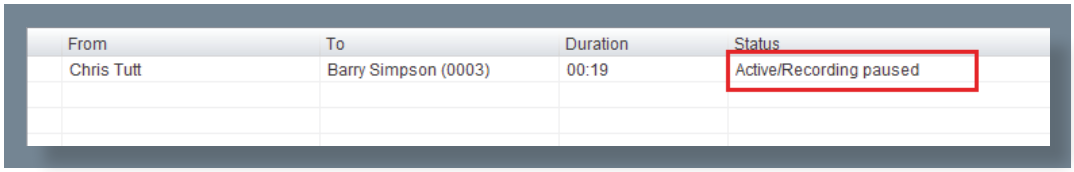
5.9.2 Controlling Call Recording

You can start, stop, pause and resume call recording depending on the Call Recording Option currently selected. Left click the Recording button to manage recording for the selected call in the Active Call Window will toggle the option depending on the current recording state. The call recording button will change to indicate this. When set as Always with Pause/Resume, the user can left click to Pause/Resume and the button will toggle as Resume [recording] or Pause.

When set as 'On Demand With User initiated Start' left clicking the call recording button presents the following menu to allow the user to control the call recording behaviour.

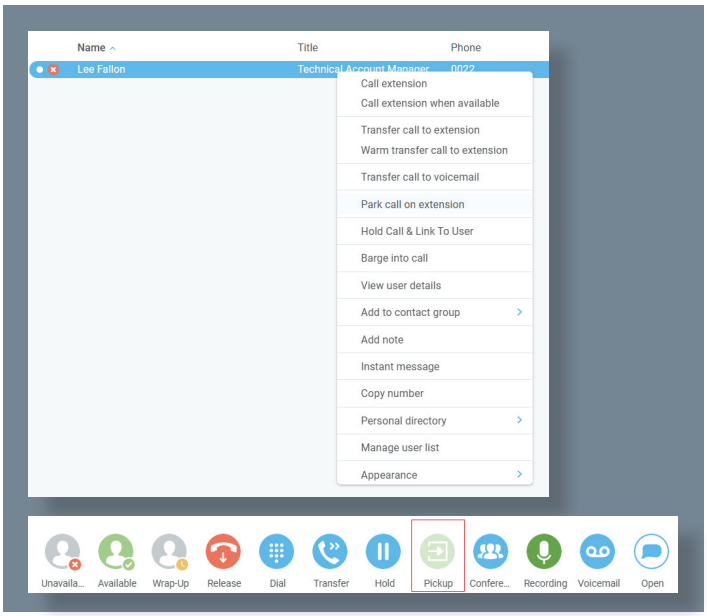
Click the Recording button again to continue/restart recording the call.

The Active Call List will also indicate the recording state of all calls, as shown below.



5.9.3 Retrieving a Parked Call

Unity offers a unique feature that allows the user to be notified when a call is parked on their extension, as shown below. Unity will automatically display a flashing Pickup button and, if the user clicks on the button, the parked call will be retrieved to the user's primary device.



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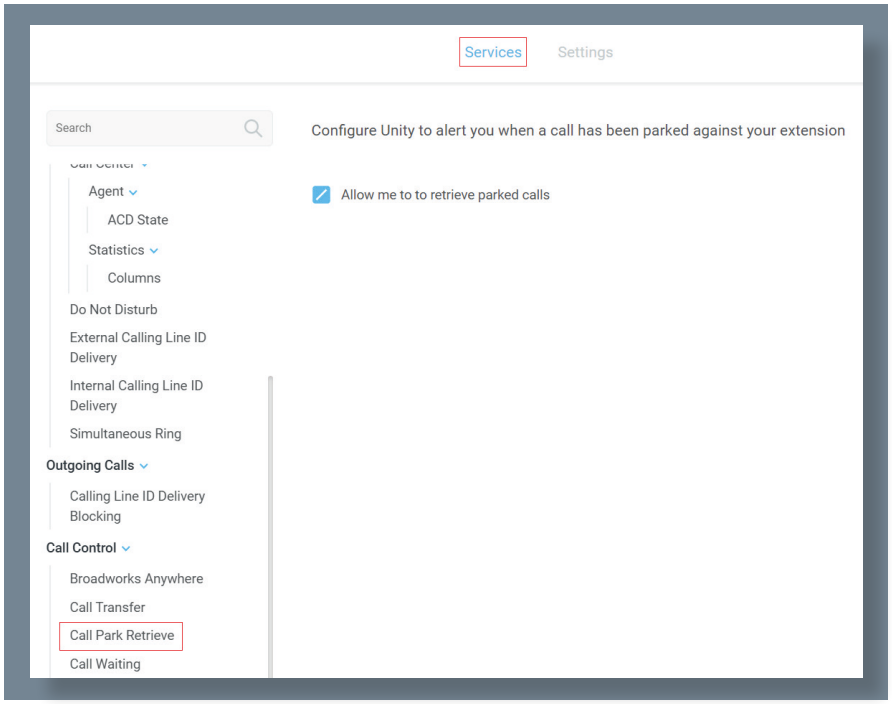
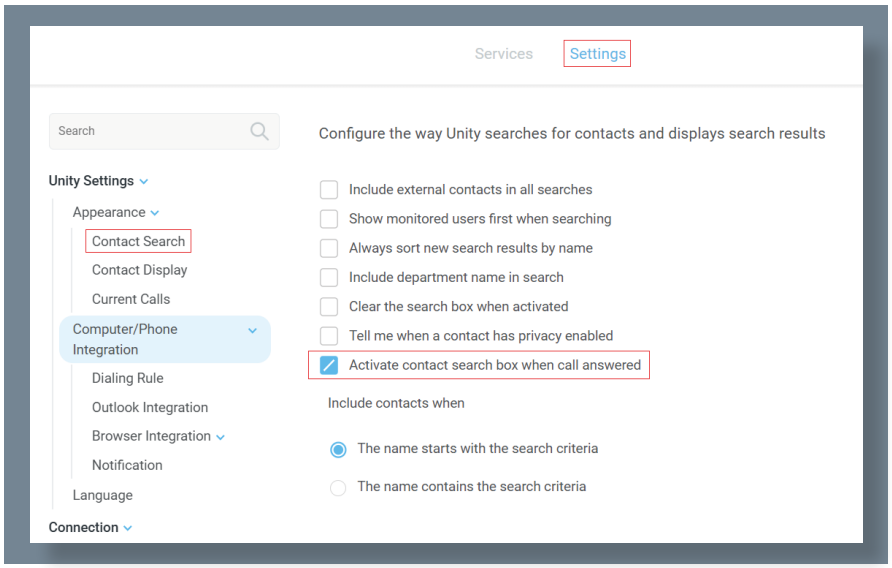
This can be configured through Tools > Settings > Services, as shown below.



5.9.4 Contact Search

Unity can be configured to open the contact search as soon as a call has been answered, this is done in Tools > Settings > Settings as shown below.



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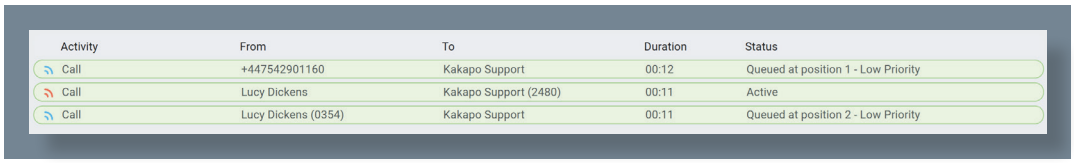
6 ACTIVE CALL WINDOW

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

6.1 WINDOW LAYOUT

The list is available in detail view.



Activity	From	To	Duration	Status
Call	+447542901160	Kakapo Support	00:12	Queued at position 1 - Low Priority
Call	Lucy Dickens	Kakapo Support (2480)	00:11	Active
Call	Lucy Dickens (0354)	Kakapo Support	00:11	Queued at position 2 - Low Priority

6.1.1 From

This column will display the name/number of the person who made the call. Therefore, it will be the remote calling party for an inbound call and the currently logged in user for an outbound call. If the name has not been delivered by the VoIP platform, then Unity will use the remote party number to search the Group/Enterprise directory, the common and personal phone lists, Outlook, speed dials and any external directories that have been configured.

6.1.2 To

This column will display the name/number of the person called, if the call is through a call centre it will display the name of the call centre. If making about outbound call Unity will attempt to find the remote party name as outlined above.

6.1.3 Duration

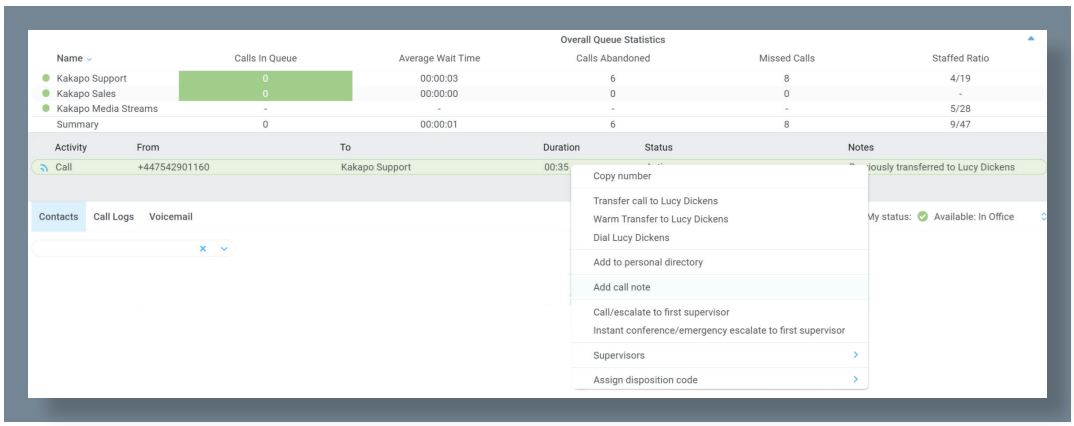
This displays the total time elapsed since the call was first answered. The timer does not restart when the call is placed on hold.

6.1.4 Status

This will show the current state of the call, which can be 'Ringing', 'Active', 'On Hold 'or 'Parked for... ' The current recording state will also be displayed if configured in Settings.

6.1.5 Notes

The Notes column will show the destination the call was previously transferred to for additional call handling information for repeat callers.



The user can right click the call and select 'Add call note' to add a note, if configured in Settings. This note is shared between Unity clients so that when the call is transferred the transferee will see the same note in their Unity client.

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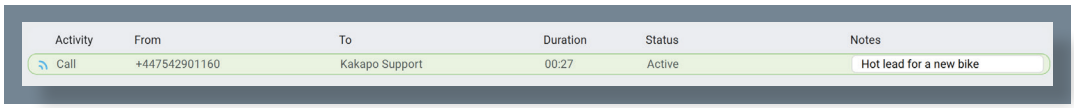
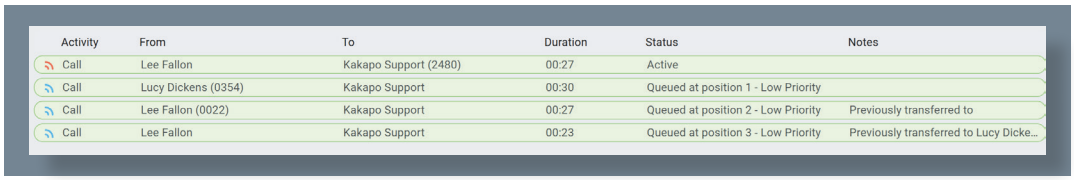


Activity	From	To	Duration	Status	Notes
Call	+447542901160	Kakapo Support	00:27	Active	Hot lead for a new bike

Receptionists can optionally see all calls in queue for the Call Centres they are joined to, as shown below. This is configured in Tools > Settings > Services > Agent > Display queued call centre calls in the list.



Activity	From	To	Duration	Status	Notes
Call	Lee Fallon	Kakapo Support (2480)	00:27	Active	
Call	Lucy Dickens (0354)	Kakapo Support	00:30	Queued at position 1 - Low Priority	
Call	Lee Fallon (0022)	Kakapo Support	00:27	Queued at position 2 - Low Priority	Previously transferred to
Call	Lee Fallon	Kakapo Support	00:23	Queued at position 3 - Low Priority	Previously transferred to Lucy Dicke...

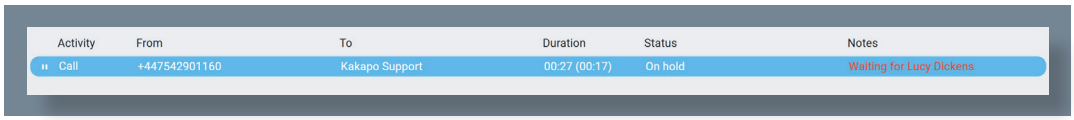
6.2 MANAGING MULTIPLE CALLS

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

You can also double-click an incoming [unanswered] call to answer it, or to retrieve it if currently on hold, if configured in Settings. Please note if this is not selected then double-clicking a call in the Active Call Window will allow a note to be entered, assuming the Notes column is being shown, as outlined in section 6.1.5.

6.3 CONFIGURING WHICH CALLS ARE DISPLAYED IN ACTIVE CALL WINDOW

The Active Call Window can be configured to retain visibility of processed calls, allowing the Reception user complete control of call management, as shown below.



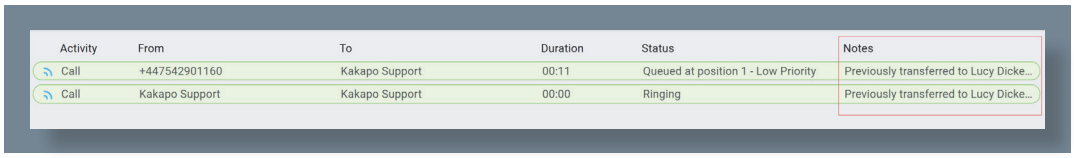
Activity	From	To	Duration	Status	Notes
Call	+447542901160	Kakapo Support	00:27 (00:17)	On hold	Waiting for Lucy Dickens

Parked, Hold and Linked calls [explained in section 8.5.3 and 8.5.4] can all be displayed in the Active Call Window and retrieved at any time.

6.4 TRANSFER HISTORY

Unity can be configured to indicate who the remote party was last transferred to.

This is displayed in the Notes field, meaning it is only available if this column is being displayed.



Activity	From	To	Duration	Status	Notes
Call	+447542901160	Kakapo Support	00:11	Queued at position 1 - Low Priority	Previously transferred to Lucy Dicke...
Call	Kakapo Support	Kakapo Support	00:00	Ringing	Previously transferred to Lucy Dicke...

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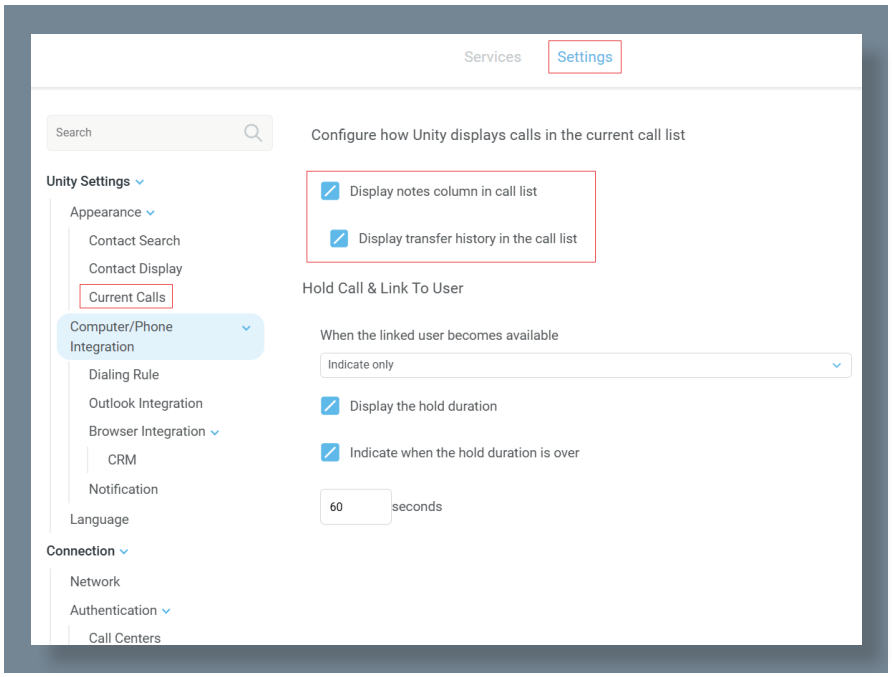
6.5 CONFIGURATION

The Active Call Window options can be configured in Settings as shown below.



Options are immediately applied when the OK button is pressed.

6.6 DOUBLE CLICK TO RETRIEVE

With Unity Reception, you can double-click on a held call in the Active Call Window to immediately place any active calls on hold and retrieve the selected one.

6.7 DISPLAY NOTES

This setting allows notes to be displayed against calls in the Active Call Window, if this setting is disabled the Notes column will not be displayed.

6.8 WHEN LINKED USER BECOMES AVAILABLE

When using the Hold & Link feature [as outlined in section 8.5.4] Unity can either alert the receptionist that the monitored user is now available, prompt to transfer or automatically transfer.

6.9 TRANSFER HISTORY

Transfer history is only available if the Notes field is being displayed.

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7 DRAG AND DROP

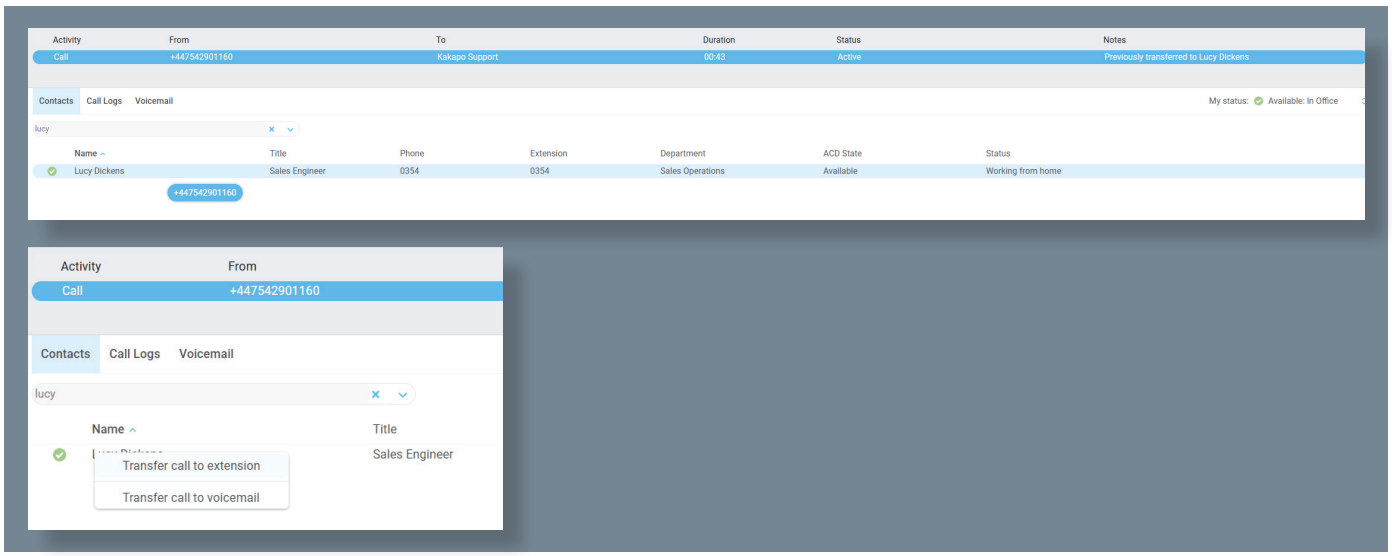
Many common call handling actions can be performed with drag and drop, as well as right click and call control buttons.

7.1 MAKE A CALL TO A USER OR NUMBER

Drag a user icon or a speed dial shortcut icon from the Contacts panel up into the Active Call Window to make a new call to the selected user or number. Call logs and voicemail items can also be dragged into the Active Call Window to call.

7.2 TRANSFERRING A CALL TO A USER

Drag a live call onto a user to either perform blind transfer, or to populate a drop list with call handling options. Drag and drop configuration is configured through Settings.



7.3 MAKE A CALL TO A CALL CENTER

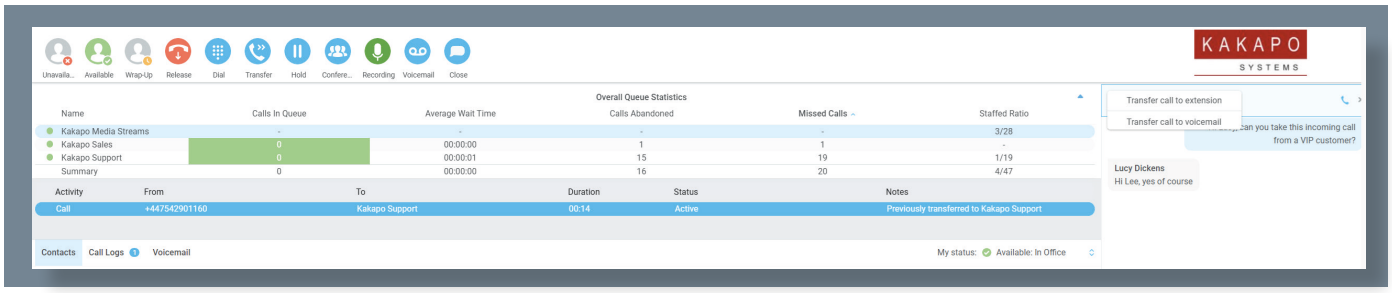
When Unity Reception is configured with call centre agent functionality, drag a call centre queue from the Personal Wallboard to the Active Call Window to make a call to that call centre.

7.4 TRANSFERRING A CALL TO A CALL CENTER

When Unity Reception is configured with call centre agent functionality, you can drag a current call in the Active Call Window and drop it on a call centre in the Personal Wallboard. This will blind transfer the call to that call centre.

7.5 MANAGE INSTANT MESSAGES

As illustrated in section 9, Unity offers a docked Instant Message (IM) panel, which fully supports drag & drop actions. The IM panel can always be displayed or only displayed when required, as configured through settings and outlined in section 9.



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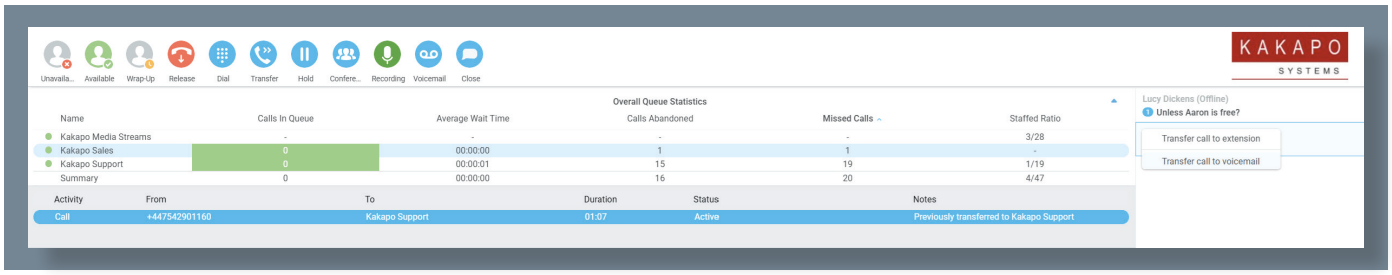
Drag an internal contact into the docked IM panel to send an instant message to that user. You can easily drag additional users into the same IM conversation to create group chat, and a call can be dragged from the Active Call Window into an IM conversation to quickly blind transfer to that user. This is particularly useful if you want to check the transferee's availability before transferring a call.

If there are multiple users in the IM conversation, then a menu will be displayed for each user.

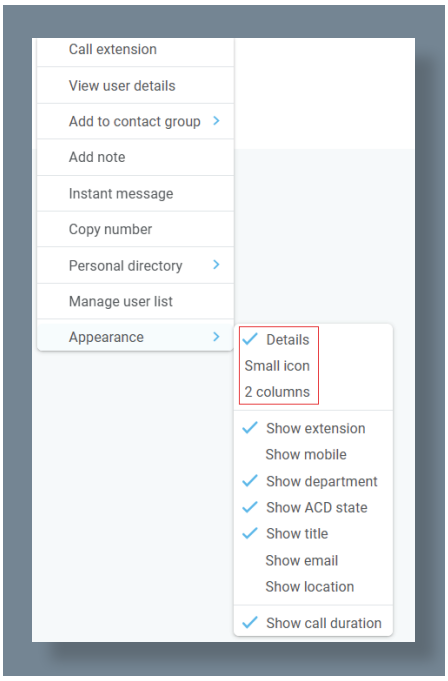


Please see section 9 for a full overview of Instant Messaging.

8 CONTACTS PANEL [BUSY LAMP FIELD]

The Contacts tab gives a visual indication of the status of users [within the group/enterprise] including current hook state and availability. Unity displays up to 50 internal users by default but will dynamically monitor any internal users returned through search results.

8.1 MANAGE INSTANT MESSAGES



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

8.1.1 Details View

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

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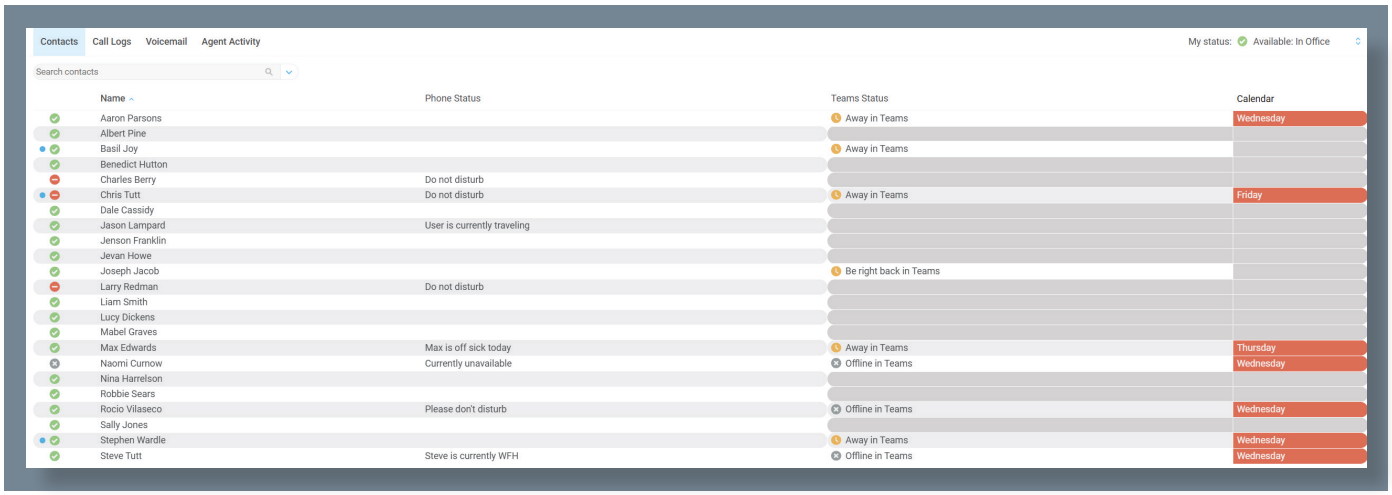
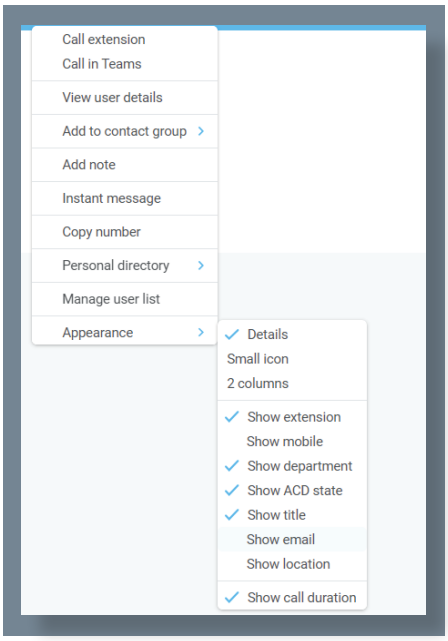
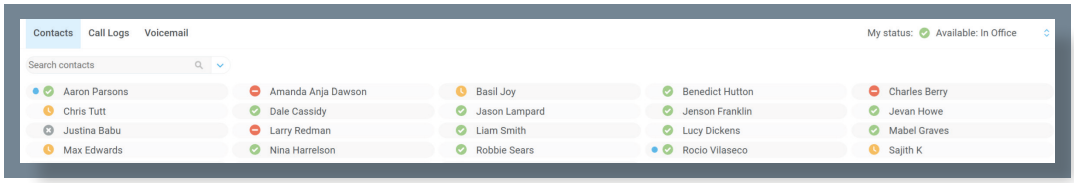




You can also configure Unity to display or hide the extension, department, ACD state and call duration columns.

8.1.2 Small Icon View

This view combines a simplified look and space reduction.



8.1.3 2 Columns View

This view is like Icon view but uses 2 columns to provide a cleaner look.

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In both the Small Icon and 2 column views, hovering the mouse over the image will provide more information about the monitored user, as outlined in section 8 below.

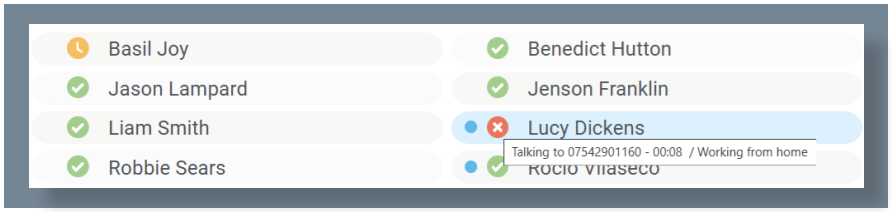
8.2 USER ICONS

There are four main user icons states shown for internal users in the Contacts panel, regardless of the view chosen. However, because the image will also illustrate if the monitored user is online (meaning they are currently logged into Unity) there are eight possible images, as outlined below.

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

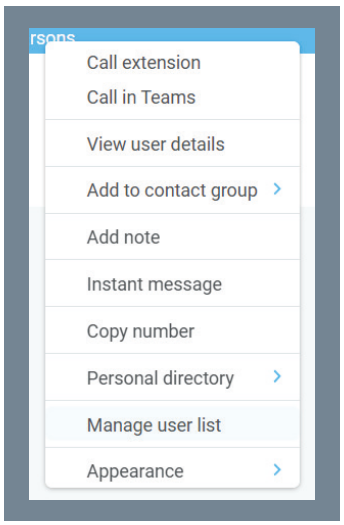
8.2.1 Displaying the Tool Tip

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



Please note that the tool tip is only available when displaying the contacts using the Small Icon or 2 Columns view.

8.3 SELECTING THE CONTACTS PANEL DEFAULT LIST



Unity Reception will display up to 50 internal users and an unlimited number of external users in a default list, which is always displayed when search criteria is not entered.

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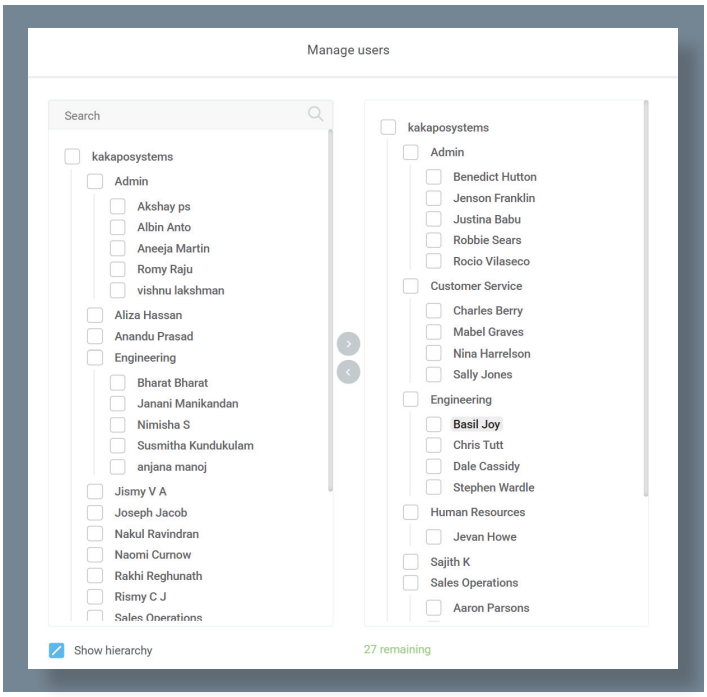
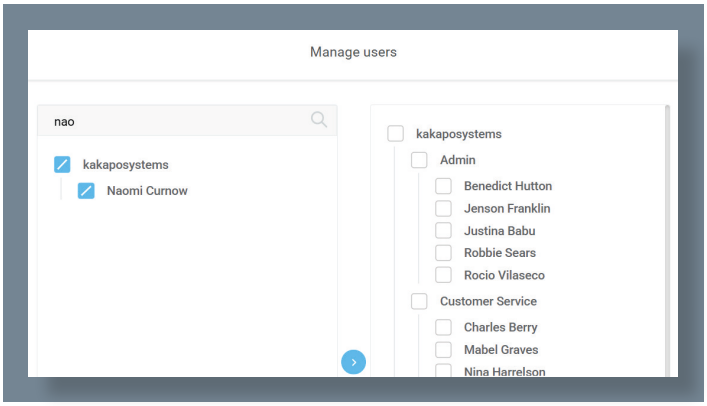


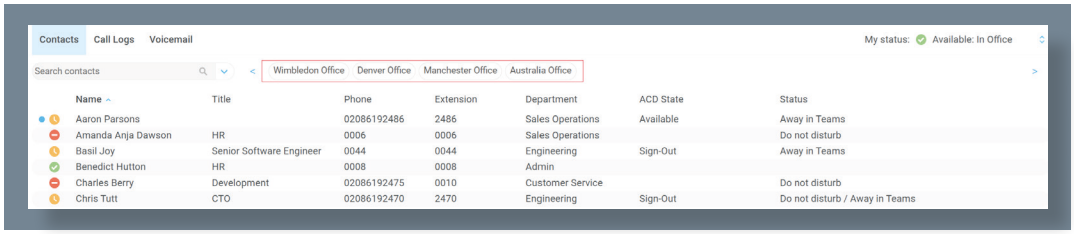
You will then be able to move users or departments between lists by checking the relevant box[es] then clicking the arrow button. All users in the right-side list will be monitored in the default contacts list. This list can be updated at any time and is saved between Unity sessions.



Tick the 'Show hierarchy' box to include group and/or departments in the lists, when one of these entries is checked all child entries will also be checked. You can also easily search for available users using the search facility.

8.4 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, as shown below.



Contact groups provide multiple real-time BLF instances for efficient call handling. The contact groups can be named intuitively by the Reception 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.

Section 8.4.1 outlines how to enable contact groups, which are displayed in the same place as the alphabet shortcut letters meaning if contact groups are enabled the shortcut letters will be hidden.

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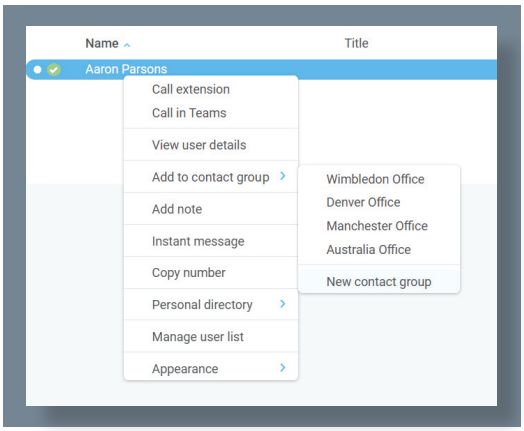
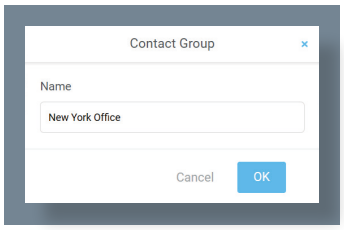
8.4.1 Creating a Contact Group



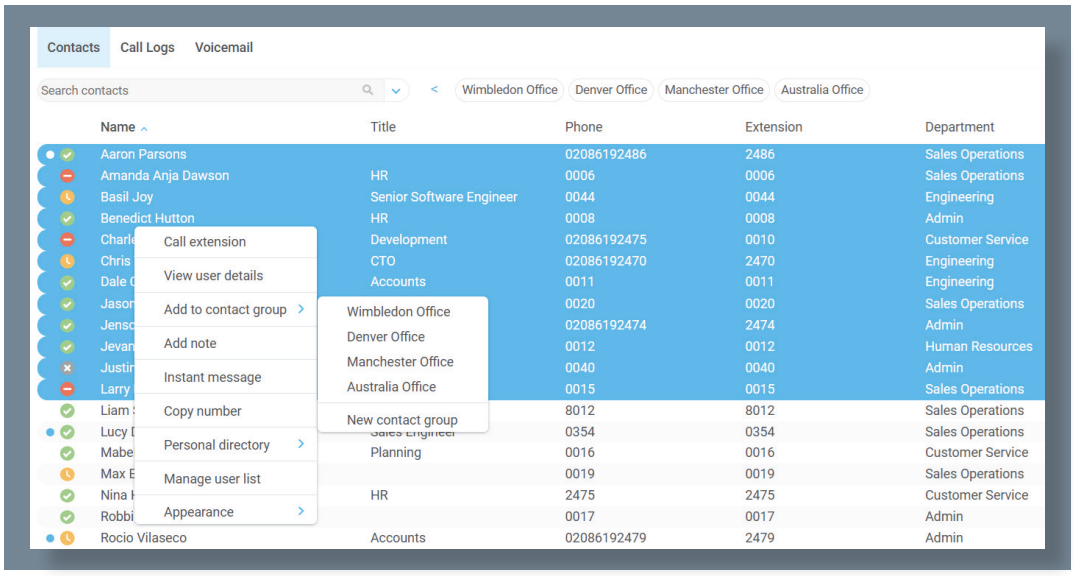
Drag over a group of monitored users in the Contacts panel, or CTRL + left click them in Contacts or Search and then right click the mouse and select 'Add to contact group > New contact group', as shown here.



From the dialogue box name the group and click OK.

8.4.2 Adding Users to an Existing Contact Group

After selecting additional internal users or external contacts right-click (single) or CTRL + left click (multiple) + right-click to add them to an existing contact group, as shown below. If a user or contact already exists in the contact group, they will not be duplicated.



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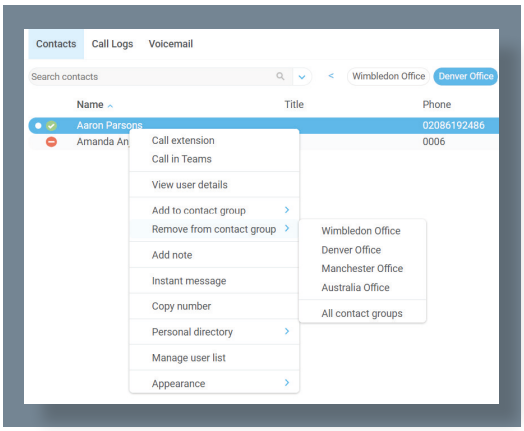
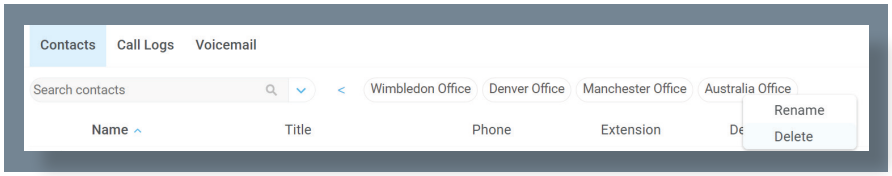
8.4.3 Removing Users from Contact Groups



Right click a user and select Remove from contact group.

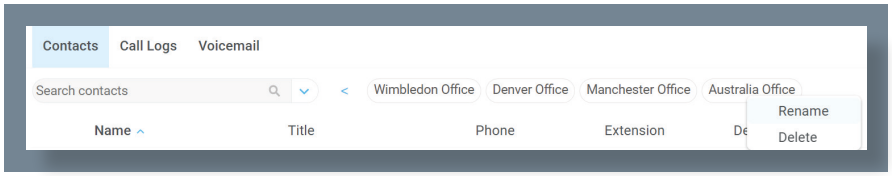
8.4.4 Deleting Contact Groups

Right click a Contact group name to delete it.

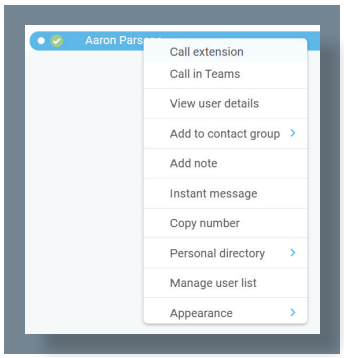


8.4.5 Renaming Contact Groups

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



8.5 PERFORMING CALL CONTROL ACTIONS IN THE CONTACTS PANEL



There are many call control functions that can be performed by right clicking a monitored user or external contact in the main Contacts panel. The menu options displayed will dynamically change to only show those available depending on the state of the user/contact as well as 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 'Hold and Link' will not be available unless there is a call selected in the Active Call Window and the monitored user is currently on the phone.

8.5.1 Call Extension

Selecting 'Call extension' will initiate 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' menu options.

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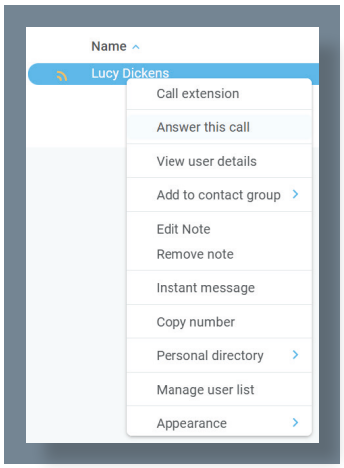
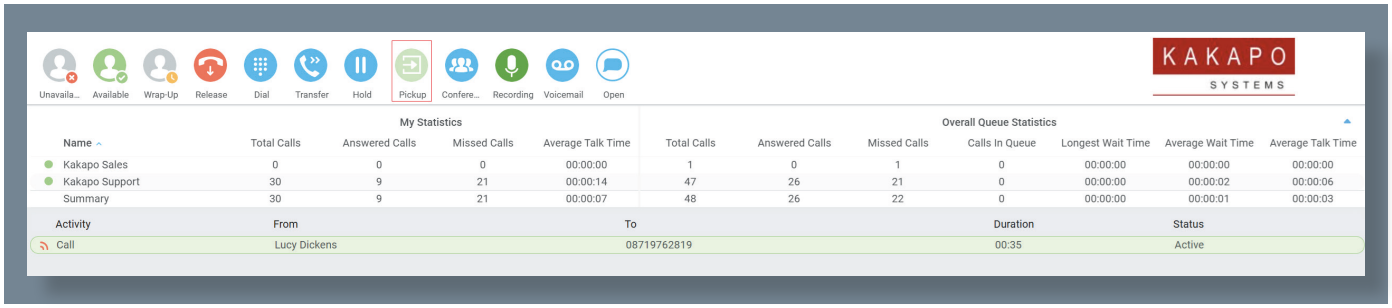
8.5.2 Answer This Call



This feature is only available if either the Directed Call Pickup service is assigned to the receptionist, or the receptionist is in the same call pickup group as the monitored user. Please confirm with your service provider that these requirements are satisfied. When selected from the context menu, Unity will pull the ringing call to the receptionist. Only calls that are currently ringing can be answered by the receptionist.

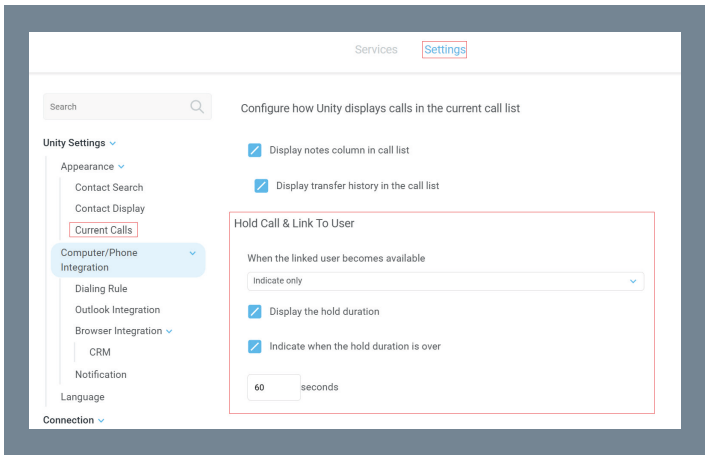
8.5.3 Park Call on Extension

Unity will park the call selected in the Active Call Window onto the monitored user's extension. The selected call cannot currently be parked or camped on another extension. If configured, the call will stay in the Active Call Window with a state of 'Parked', as shown below.



8.5.4 Hold Call and Link to User

This is a unique feature to Unity that allows the receptionist to link a call in the Active Call Window with an internal contact in the Contacts list. This feature is designed to give the receptionist visibility of who the caller is holding for and their current hook status without having to check manually, because the call remains in the Active Call Window. This is an essential feature for busy telephonist stations that manage many calls and often have several callers on hold simultaneously. When the linked user goes back on hook, Unity can indicate availability, automatically transfer the call or prompt to transfer the call. This is configured in Tools > Settings > Services > Current Calls.



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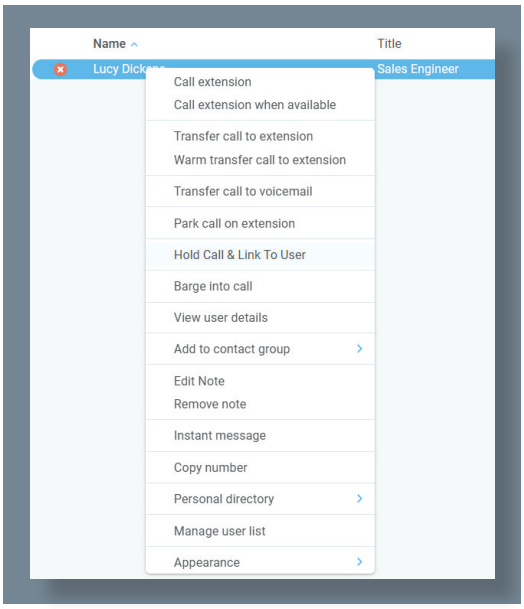
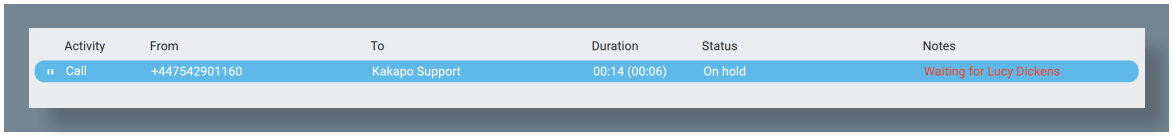
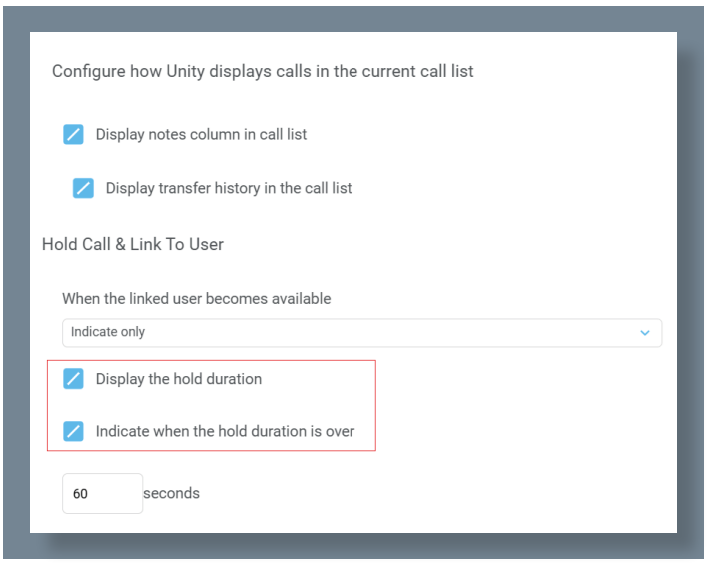


To hold and link a call to a monitored user, first ensure the call is selected in the Active Call Window [if multiple calls are present] and right click the monitored user in the Contacts list, as shown here. Please note that this feature is only available when the monitored user is currently on the phone.

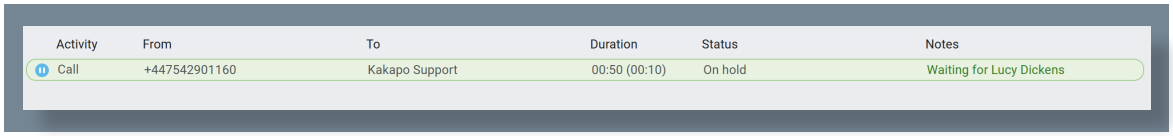
The call is now placed on hold and the receptionist user can continue taking other calls. The Notes field displays 'Waiting for Lucy Dickens' in red to indicate that she is still on the phone.



The Duration field will display the total time the call has been on hold for the user. This can be configured to have a threshold set against it, as shown below.



When Lucy Dickens becomes available the Notes field changes to green to alert the receptionist that the monitored user is available to take the call, as below.



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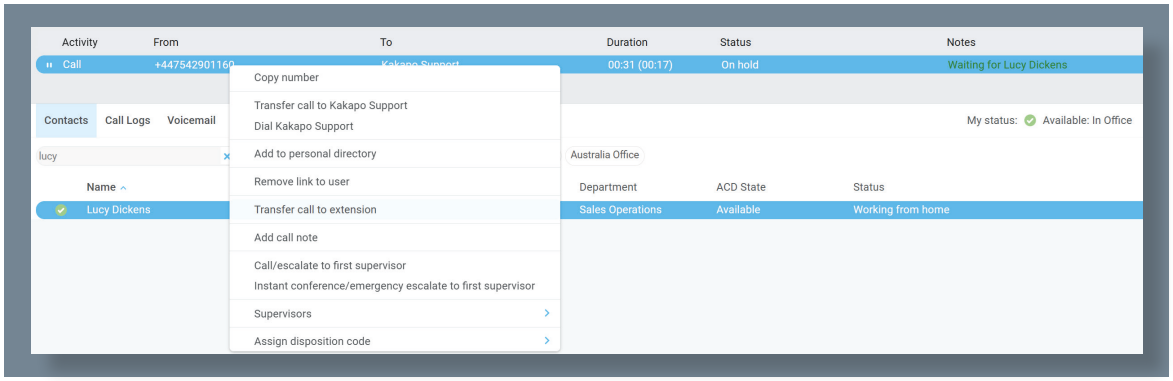
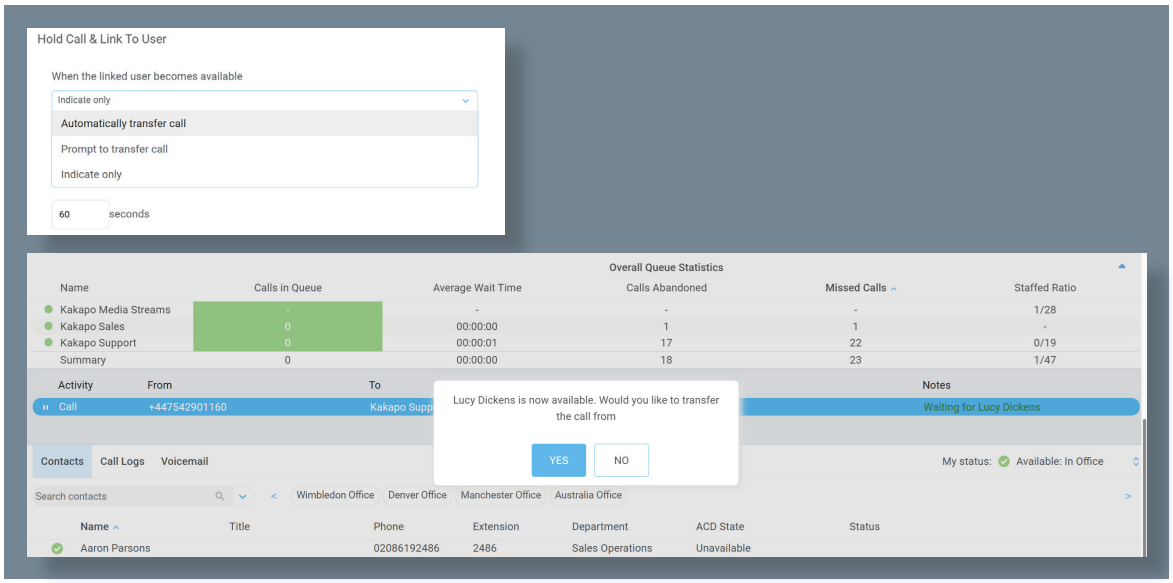
The user can now transfer the call either by dragging it over the monitored user, or by right-clicking and selecting 'Transfer call to extension', as below. The call can also be un-linked from the monitored user by right-clicking and select 'Remove link to user'.



Unity can be configured to automatically blind transfer the call when the linked user becomes available, or to prompt the receptionist to blind transfer the call, as shown here.



Once the call is transferred it will be removed from the Active Call Window. These options are set in Settings as outlined in section 6.8.

8.5.5 Call Mobile

When selected Unity will hold any active calls and dial the mobile number of the monitored user, which is added to the user profile in Broadworks.

8.5.6 Transfer Call to Mobile

When selected Unity will transfer the currently selected call in the Active Call Window [if multiple calls are present] to the mobile number of the selected monitored used. This menu option is only included when there is a call in the Active Call Window.

8.5.7 Transfer Call to Voicemail

If the monitored user has the Voice Messaging User service assigned and activated, then the receptionist can blind transfer a call directly to that user's voice mailbox. This menu option is only included when there is a call in the Active Call Window.

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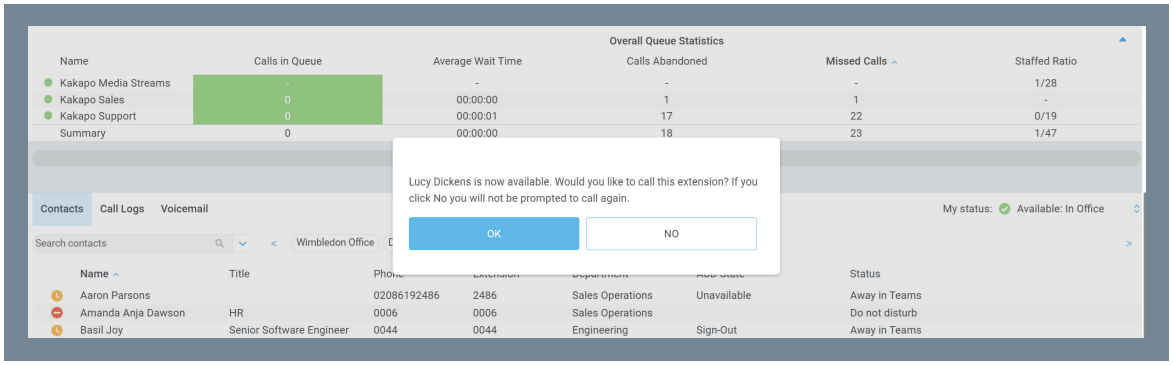
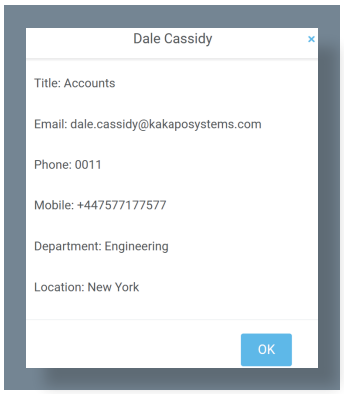
8.5.8 Call Extension when available

When selected Unity will place an alert on the engaged monitored user, so that when they become available a dialog box will prompt the receptionist to call.



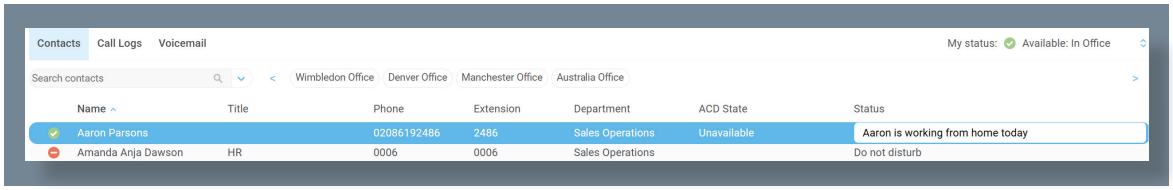
8.6 VIEW USER DETAILS

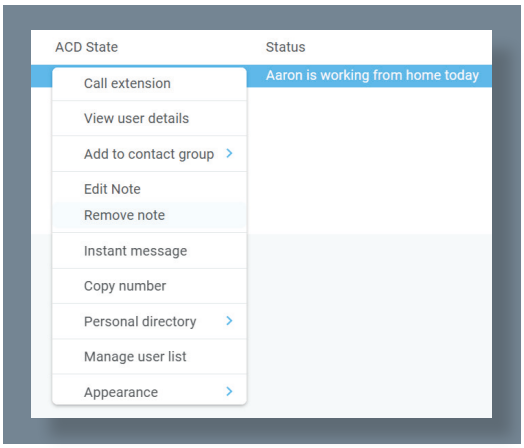


View details as entered in the profile for this user in the VoIP platform. This includes their title, phone number, mobile and email address. Click on the email address to send an email using the default email program.

8.6.1 Add Note

The receptionist can add notes for an internal user which are shared between Unity Reception users. They provide more information about the monitored user over the hook status, service configuration and other presence settings. Notes are displayed in the detail list or as tooltips.





Right click the user again to edit or remove the note.

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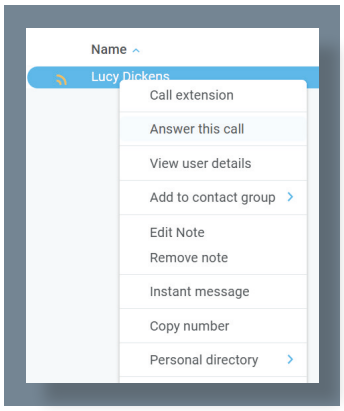
8.6.2 Answer This Call [Call Pick-Up]



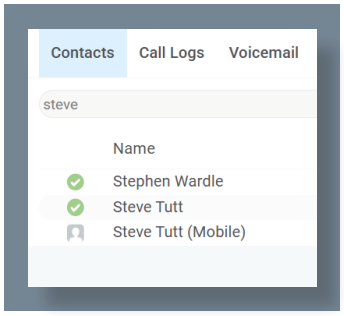
When a monitored user's phone is ringing their icon in the Contacts list becomes orange . To perform pick-up and answer the call on behalf of the monitored user, right click the icon and select 'Answer this call'. This option is only displayed when right clicking a ringing user, and if the receptionist and the monitored user belong to the same call pickup group, or the receptionist has the Directed Call Pickup with Barge-In service assigned.

8.7 CONFIGURATION

8.7.1 Include External Contacts in all searches

When checked Unity will always search all directories every time a search is performed, which is one second after the last key was pressed. If the user is a slow typist this could result in many searches, so if there is a large external directory [for example an Outlook folder with several thousand records or a slow-performing SQL database] then Unity performance may be impacted. Turning this setting off means that by default only the group/enterprise directory is searched, other directories will only be searched if the user presses enter or clicks the search image.

8.7.2 Show Monitored Users First When Searching



When this setting is turned on Unity will always display monitored users first in alphabetical order, then external contact is monitored order. Otherwise, internal and external contacts will be shown in alphabetical order, as shown here.

8.7.3 Always Sort New Search Results by Name

This setting can only be modified if the 'Show Monitored Users First When Searching' setting is not active. If active then search results will always be displayed in alphabetical order based on the name of the contact, otherwise the same sorting used in the default list [which could be based on any column in the Contacts list] will be used when searching.

8.7.4 Include Department Name in Search

If activated then Unity will include any internal users where the department name matches the search criteria, for example the receptionist could type 'sales' to quickly see a list of all salespeople. In a nested department environment only, the bottom-most department will be considered.

8.7.5 Clear the Search Box When Activated

If activated, then whenever the user clicks into the search box the current search criteria will be removed and the default list will be shown.

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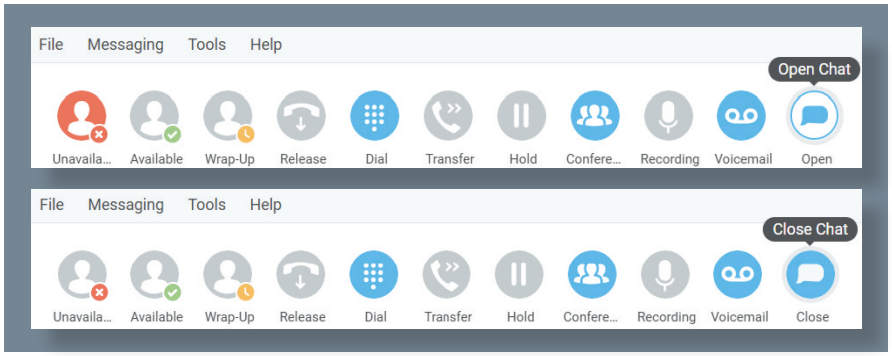
9 INSTANT MESSAGING

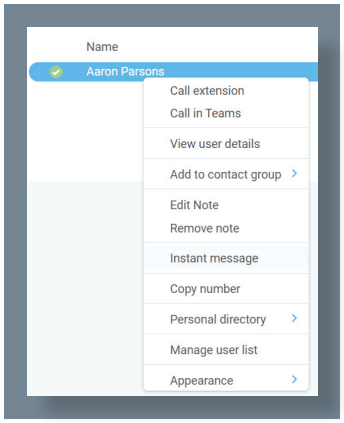
9.1 OPEN AND CLOSE THE IM CHAT WINDOW



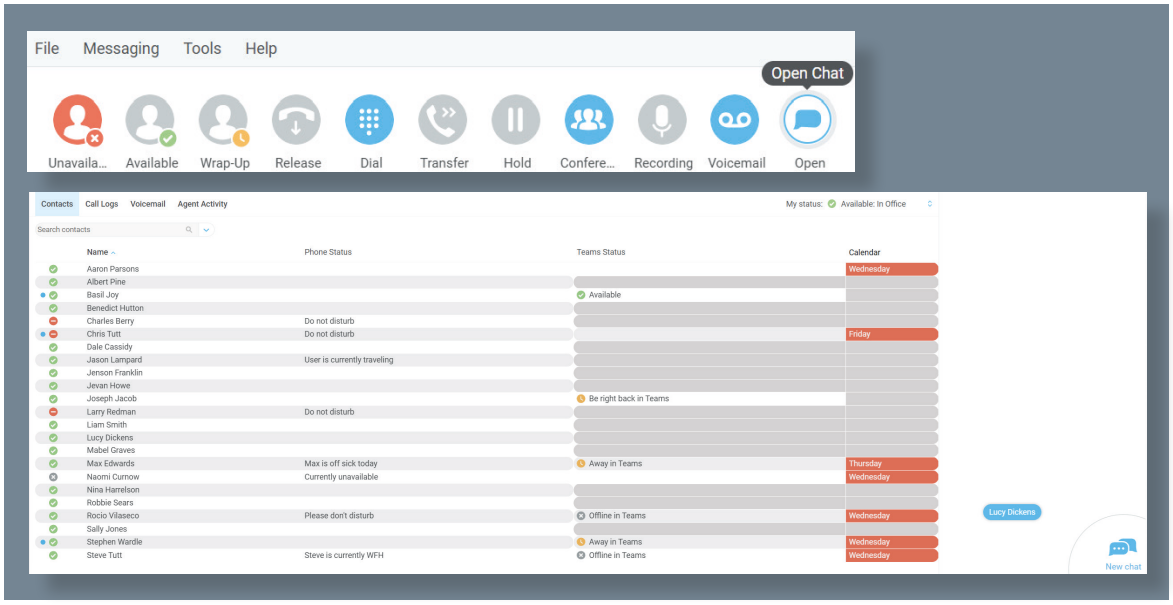
9.2 SENDING AN INSTANT MESSAGE

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

Search and right click



Drag and drop



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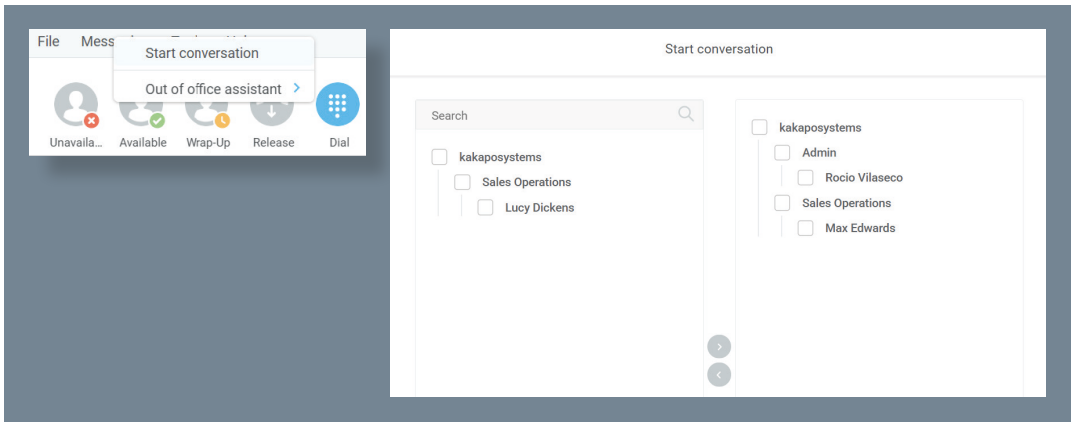
Messaging > Start Conversation

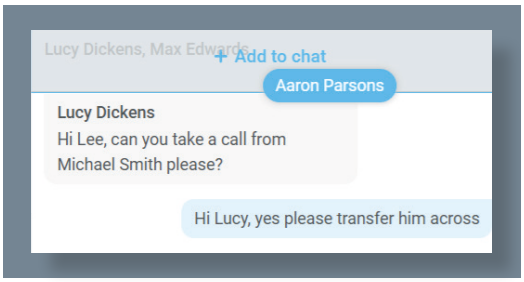


9.3 ONLINE/OFFLINE INDICATOR

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.

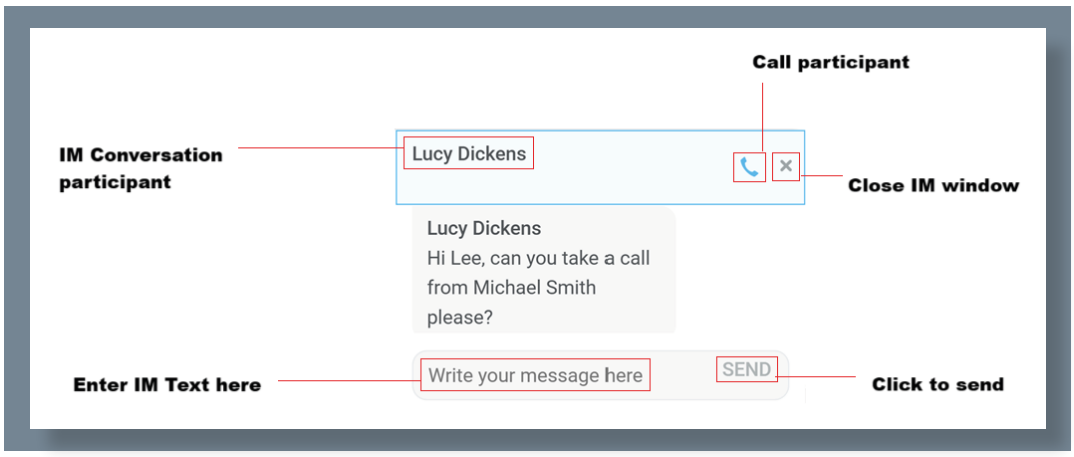
State	Online [Unity Open]	Offline [Unity Closed]
Available		
Ringing		
Engaged		
DND/unavailable profile		

9.4 ADDING PARTICIPANTS TO AN EXISTING IM SESSION



When an IM conversation is in the IM window 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.

9.5 IM FEATURE DESCRIPTIONS



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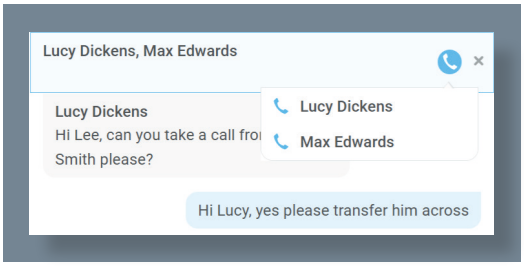


When there are multiple participants in the conversation you must select which user to call from the drop-down menu. Instant conference with all parties is not available.

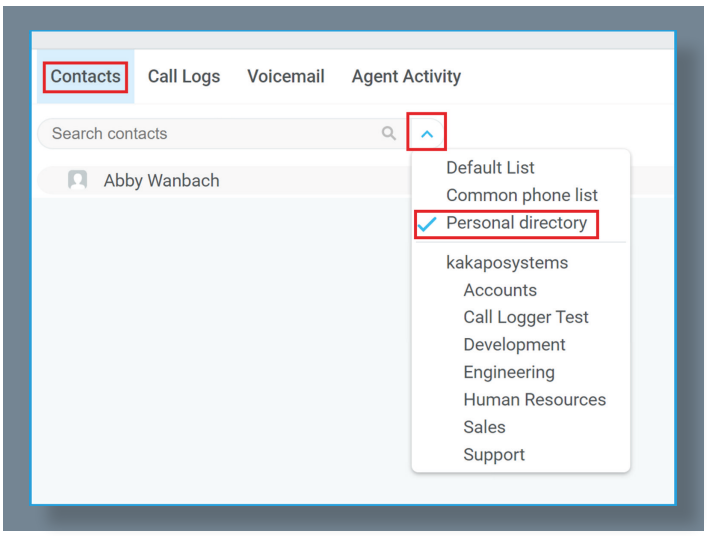
10 PERSONAL DIRECTORY

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

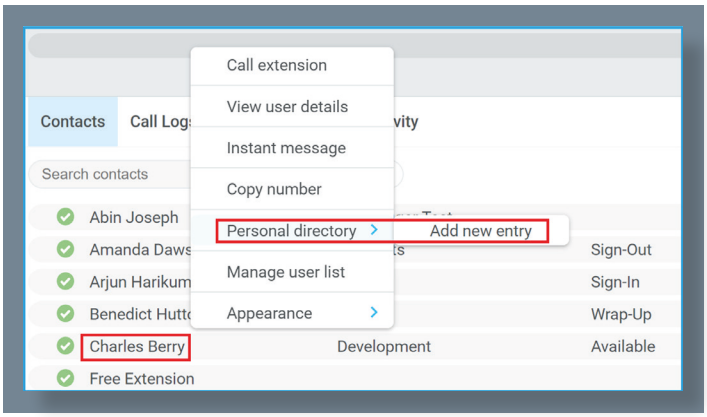
A Personal Directory entry is shown by a icon. Double clicking the icon will make a call to the Directory number.

The Personal Directory menu is available when right clicking a monitored user or in the Contacts panel.

Personal Directory – Blue drop down tab in Contacts



Personal Directory – Right click on monitored user



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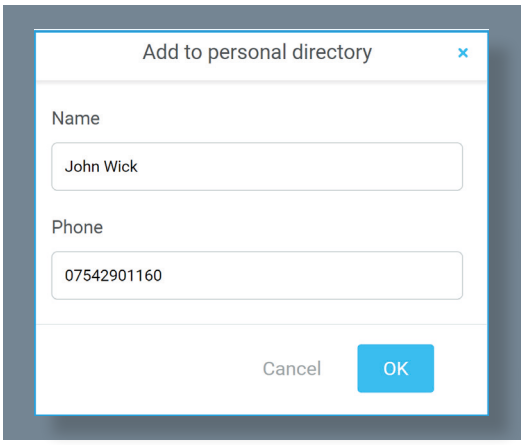
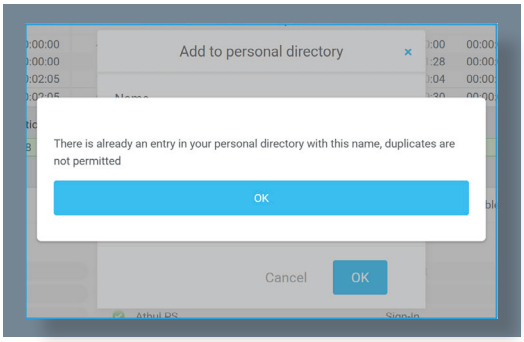
10.1 ADD NEW ENTRY

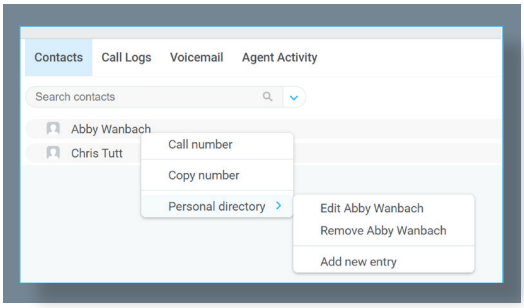


Enter the Name and Number and click OK.



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

10.2 EDIT ENTRY

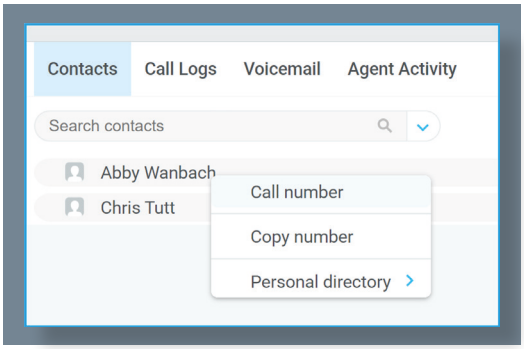


Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select 'Edit'.

10.3 REMOVE ENTRY

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

10.4 DIALLING DIRECTORY ENTRY



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

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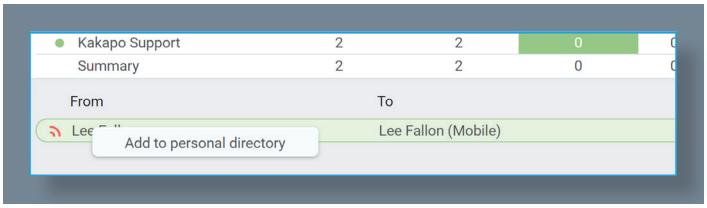
10.5 ADD USING RIGHT CLICK

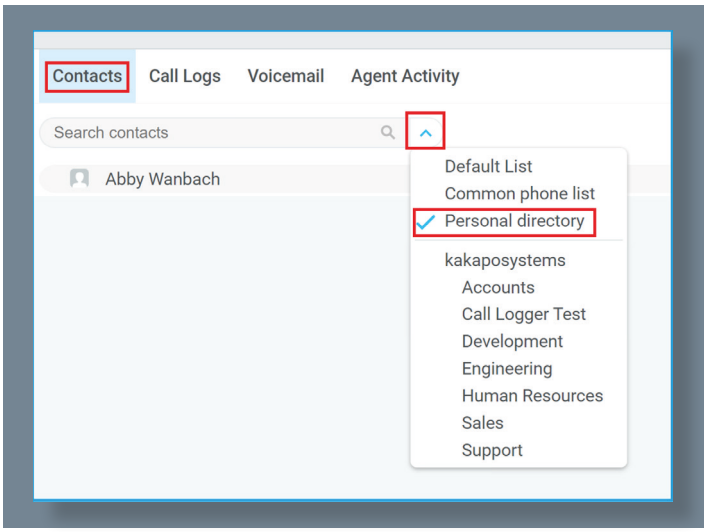


While on an active call right click the recipient icon or number in the Contacts panel or Search. You can then add this number to your personal directory. This also applies to the call log and voicemail lists.

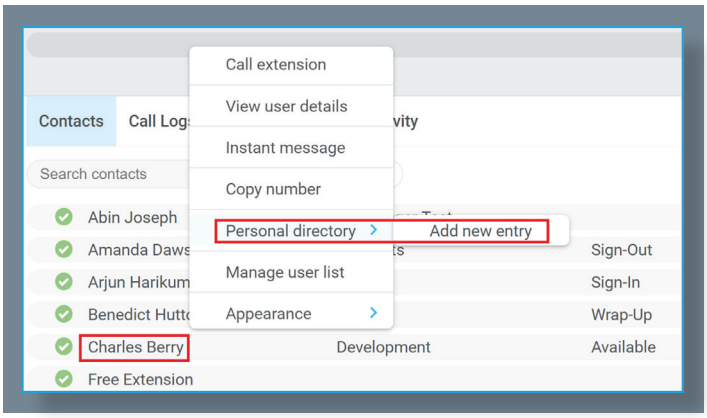
11 PERSONAL DIRECTORY

The Personal Directory is a repository on BroadWorks for each user to store personal speed dials. Using this feature in Unity will populate the directory on the host BroadWorks platform. Once numbers have been entered, they are available in the Search panel or can be pinned to the main Contacts Panel. A Personal Directory entry is shown by a icon. Double clicking the icon will make a call to the Directory number. The Personal Directory menu is available when right clicking a monitored user or in the Contacts panel.

Personal Directory – Blue drop down tab in Contacts



Personal Directory – Right click on monitored user



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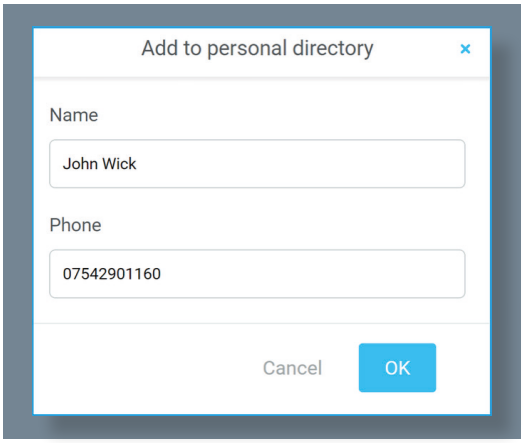
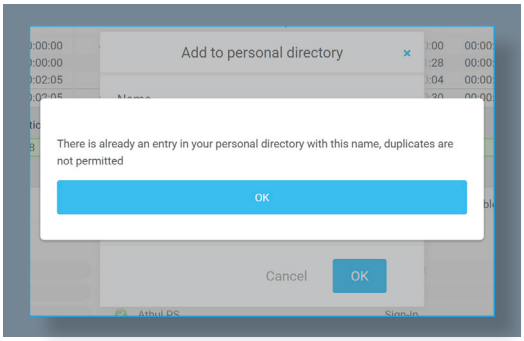
11.1 ADD NEW ENTRY

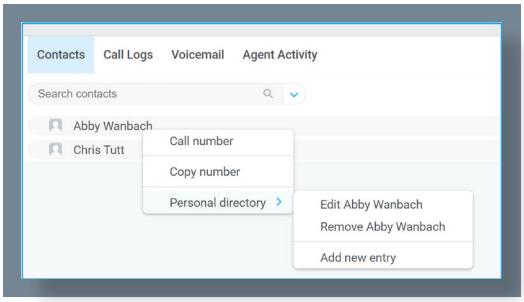


Enter the Name and Number and click OK.



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

11.2 EDIT ENTRY

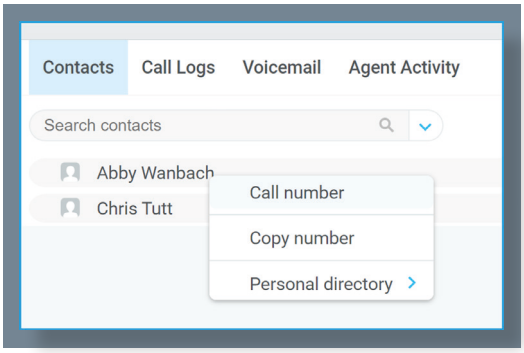


Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select 'Edit'.

11.3 REMOVE ENTRY

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

11.4 DIALLING DIRECTORY ENTRY



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

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11.5 ADD USING RIGHT CLICK

While on an active call right click the recipient icon or number in the Contacts panel or Search. You can then add this number to your personal directory. This also applies to the call log and voicemail lists.

12 CONTACT SEARCH DIRECTORIES

The Contact Search field combines all BroadWorks and Outlook Contacts directories to create a central search repository. The BroadWorks directories include the Group or Enterprise Common Phone List, the user's own Personal Directory entries, and the Group or Enterprise Directory which includes all the other users as well as hunt groups, auto attendants and call centres.

Directory Owner	Directory Type	Entry Type
BroadWorks	Group/Enterprise Directory	All other users for BLF presence as well as hunt groups and auto attendants
BroadWorks	Common Phone List	Shared contacts at the Group or Enterprise level
BroadWorks	Personal Directory	The user's own personal contacts

12.1 LOADING DIRECTORIES

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

Please note: It is possible not to include the Common Phone List from the Group or Enterprise level when loading Unity, this is configured at the System Provider level of the Kakapo Partner Portal and will impact all users.

12.2 CONTACT SEARCH RESULTS LAYOUT

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

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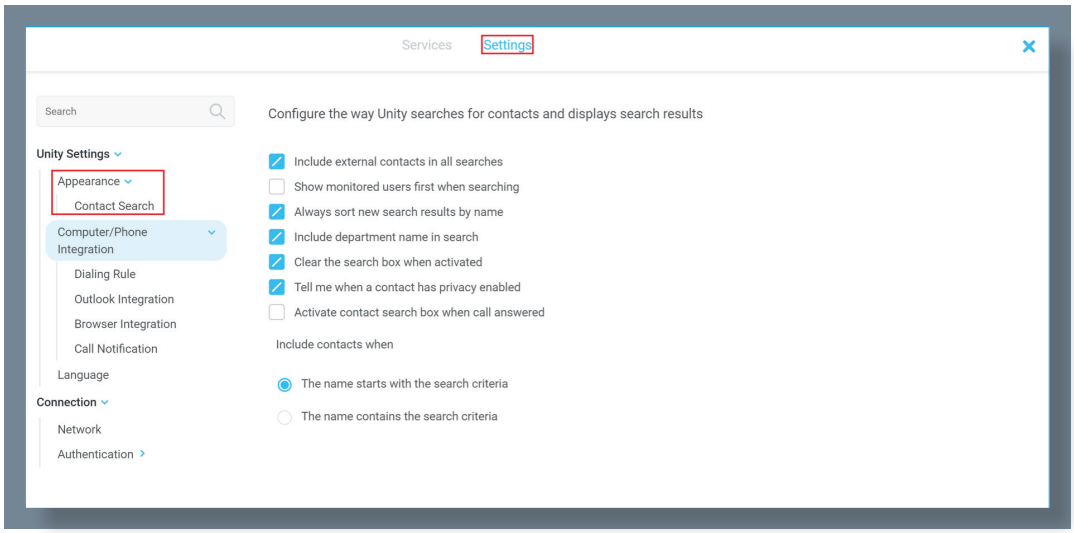
Search results will display each number for a contact as a separate line. Drag or double click the entry to make a call or right click to select a call action from the context menu.

icons represent external numbers or system resources such as hunt groups for which presence information cannot be displayed.

It is also possible to search on department name to list all users of matching departments.

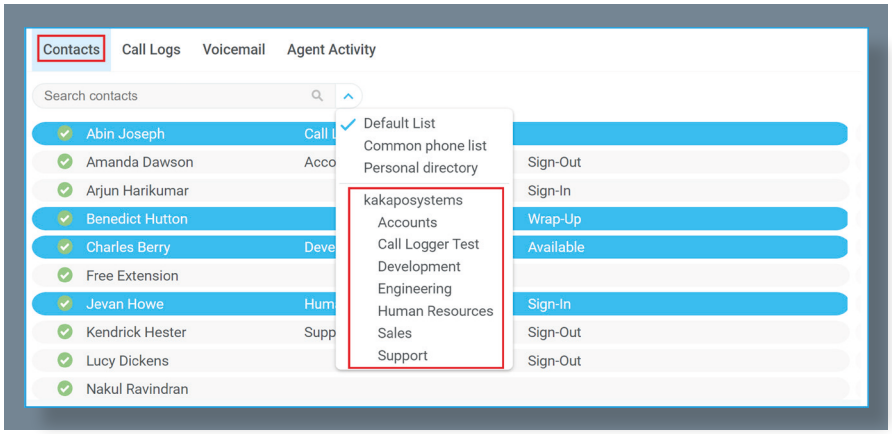
12.3 CONTACT SEARCH SETTINGS

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



12.3.1 Listing Directories

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



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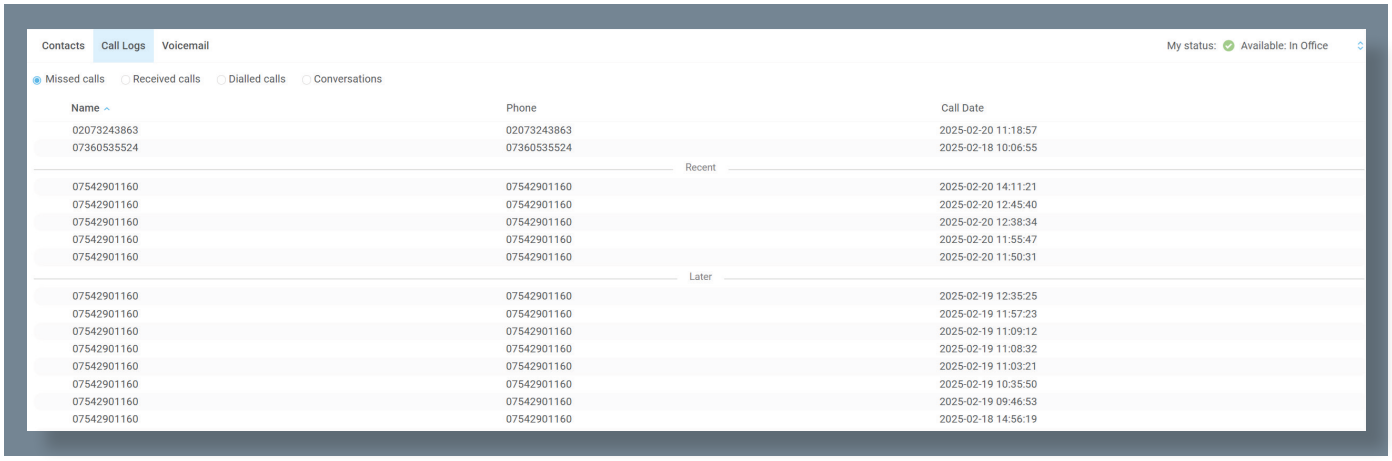
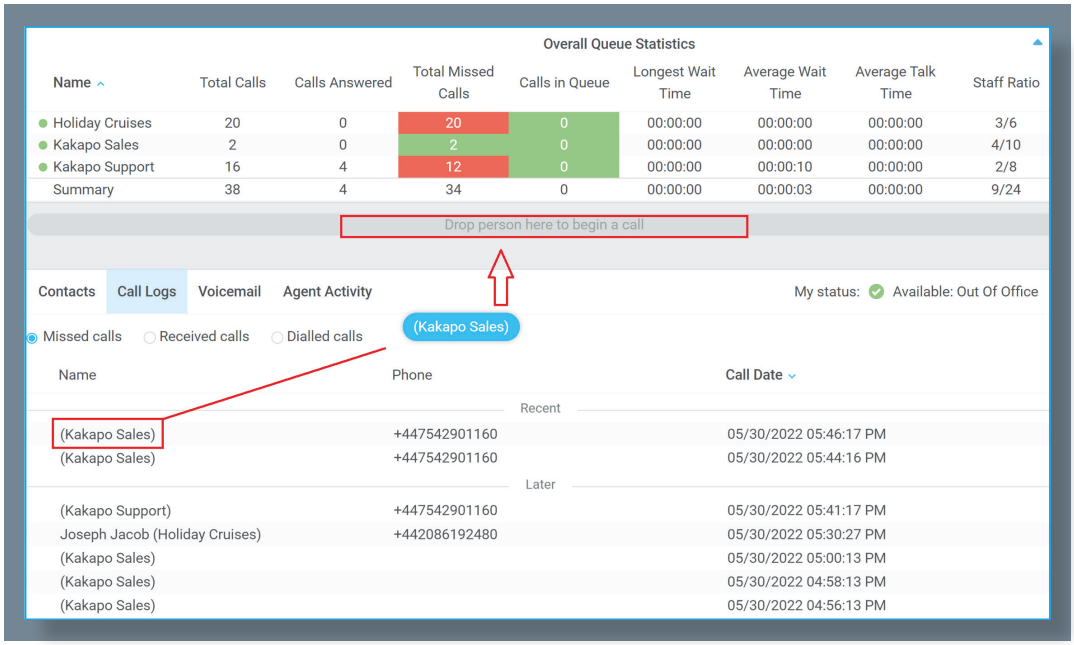
13 CALL LOGS

The Call Logs tab displays Missed, Received, Dialled Calls and Conversations with a date and time stamp showing the most recent statistic at the top. Up to 20 contacts are listed for each type of log. Direct calls to the user as well as hunt group and call centre calls that have reached the user are also shown.



Double left click or Left click, drag and hold an entry to make an outbound call to that number.



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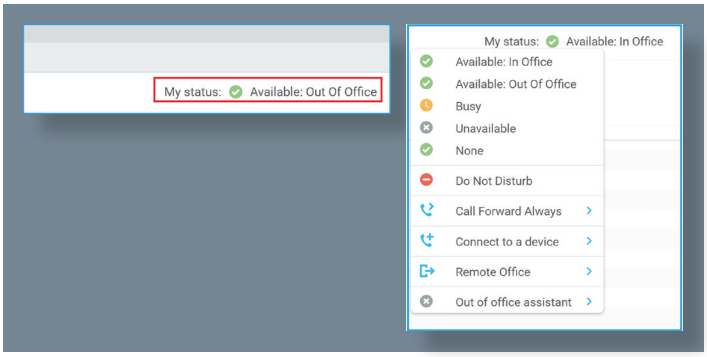
14 MY STATUS

The 'My Status' link provides an indication of the status of the user as well as quick access to key services that are regularly modified. Unity will only display the options for the services that have been assigned to the user, available services are CommPilot Express (CPE), Do Not Disturb (DND), Call Forward Always (CFA), Remote Office and Out of Office Assistant.

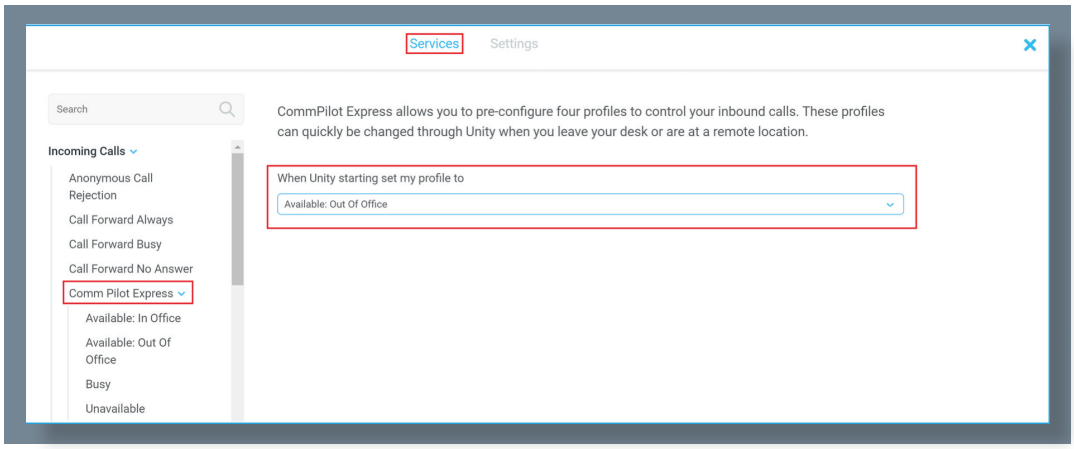


CommPilot profiles are also used to convey presence information to other users within the group or enterprise. As users change their CommPilot Express state, any Unity client that is monitoring that user [through the User Status list] will see their image change, as outlined below.

User State	Description	User Status Image
Available: In Office	I am in the office and available to receive calls	
Available: Out Of Office	I am not in the office but am available to take calls	
Busy	I am currently busy (short term)	
Unavailable	I am currently unavailable (longer term)	
None	No call routing plan is in use	

14.1 CONFIGURING COMMPILOT EXPRESS STATES

CommPilot Express allows the user to specify how inbound calls are to be handled. Once the four different profiles (above) have been configured in Settings, the profile in use can quickly be changed through the My Status link. Unity can also be configured to automatically apply a CommPilot Express profile when starting or closing, as below.



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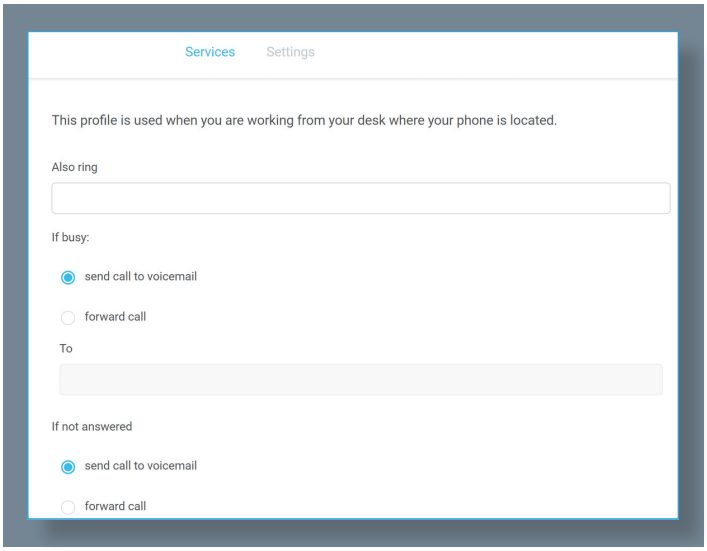
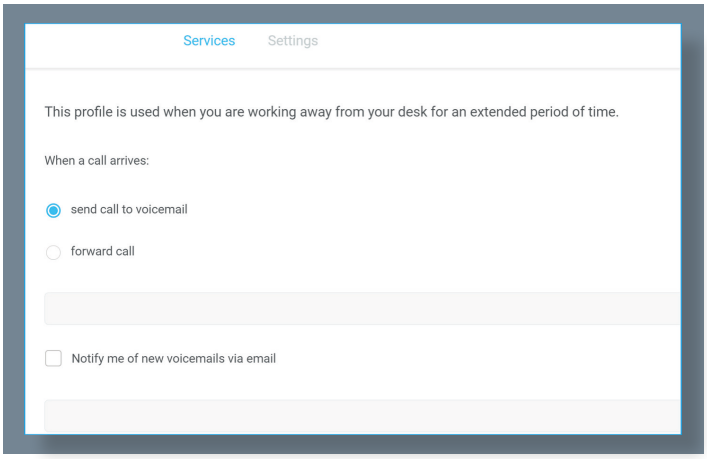
14.1.1 Available: In Office

This is the profile to use when you are working from the desk where you phone is located; it should represent 'normal' routing rules.



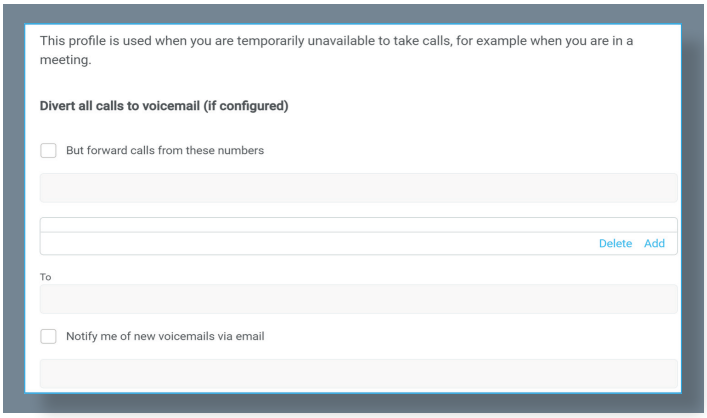
14.1.2 Available: Out Of Office

This is the profile to use when you are away from your desk for an extended period, but still available for receive calls. Examples are when in a meeting or when travelling.



14.1.3 Busy

This is the profile to use when you are temporarily unavailable to take calls, for example when in a meeting where you don't want to be disturbed.



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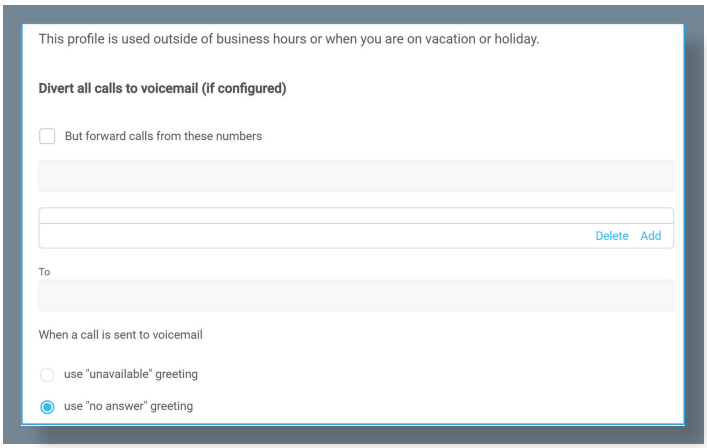
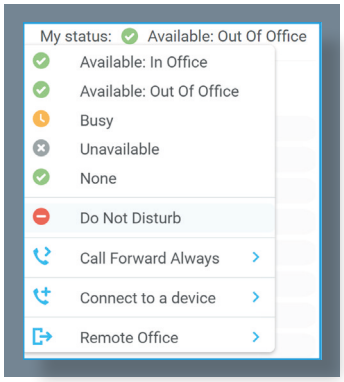
14.1.4 Unavailable

Use this profile when you are away for an extended period of time and not available to take calls, for example when on vacation.

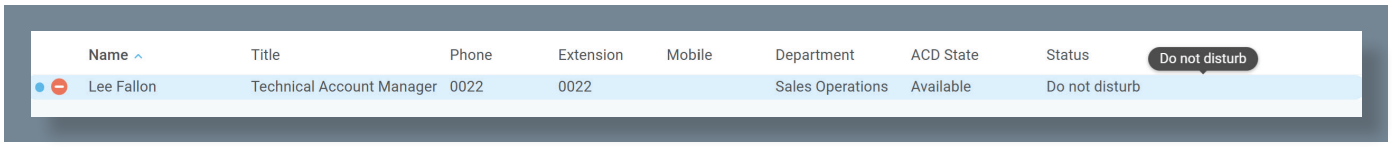


14.2 DO NOT DISTURB

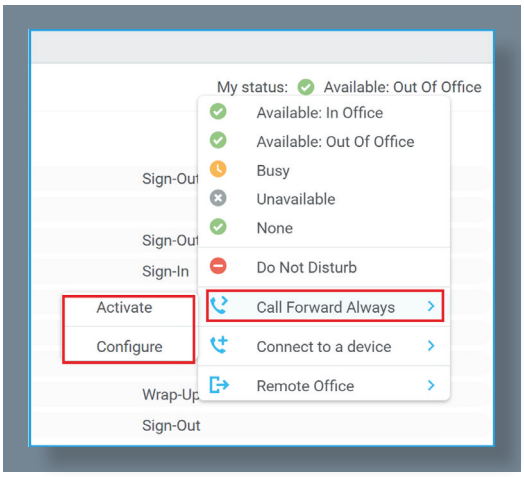


To activate Do Not Disturb, click on the My Status link and click the menu option. The My Status link will change to indicate the service activation, as will the Unity title bar.

Anyone monitoring the user [in the Contacts list] will also see that they currently have Do Not Disturb activated.



14.3 CALL FORWARD ALWAYS



Use the My Status link to quickly activate/ deactivate the service, or click configure to go directly to that service in Settings.

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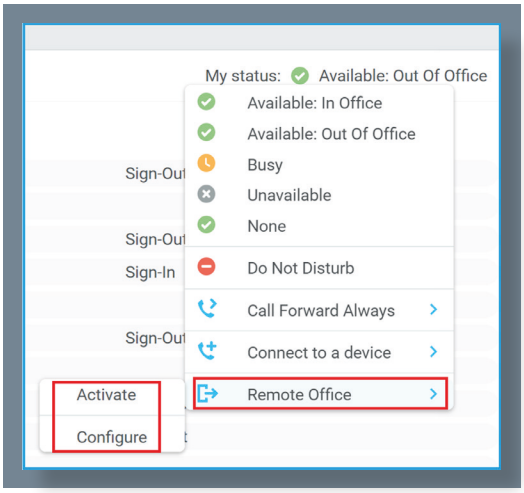
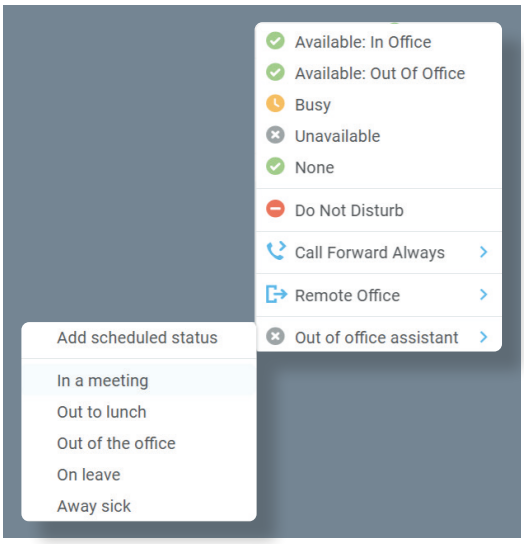
14.4 REMOTE OFFICE



Use the My Status link to quickly activate/ deactivate the service or click configure to go directly to that service in Settings.

14.5 OUT OF OFFICE ASSISTANT



All Unity clients provide the ability to set the status for the Personal Assistant service through the 'My Status' quick access link, as shown here. This menu option is only shown if the service is assigned to the user in BroadWorks.

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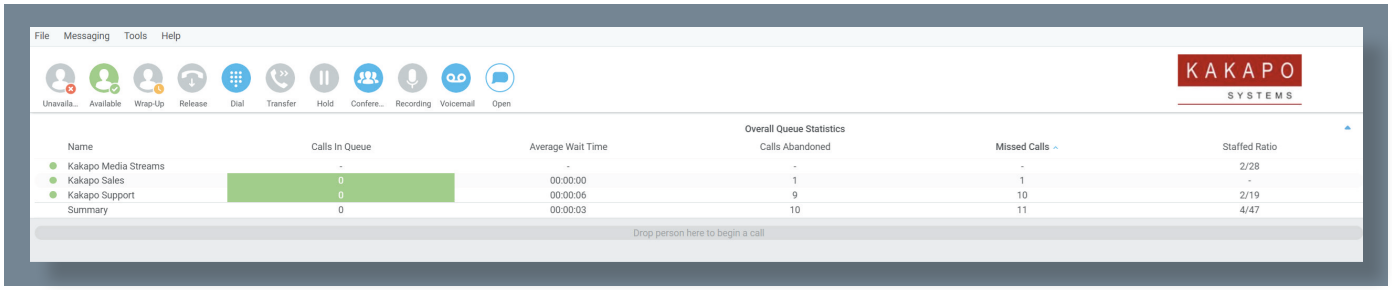
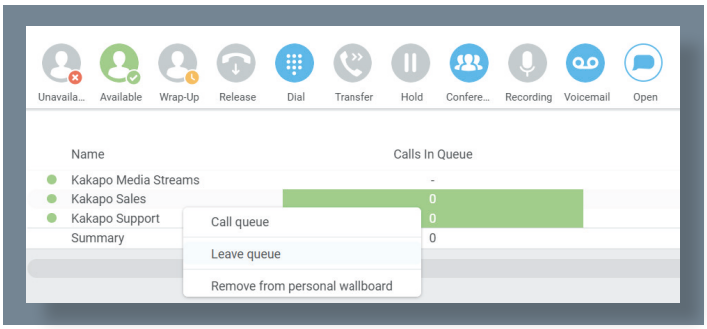
15 RECEPTION CALL CENTRE AGENT

Unity Reception includes all the call centre features of Unity Agent, because a receptionist may be part of a call centre in a busy front desk environment. If a call centre agent service assigned to the receptionist, then Unity will automatically display ACD state buttons and allow the user to join or leave specific call centres [if permitted in the VoIP platform].

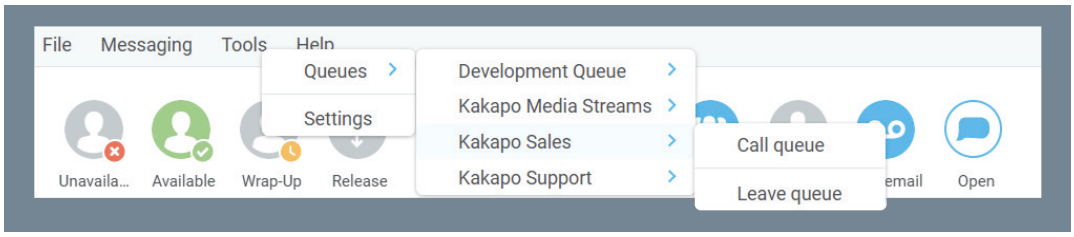


15.1 JOINING AND LEAVING QUEUES

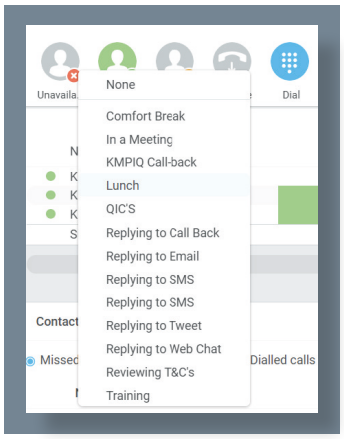
To join or leave a call centre queue, the user can right-click on that queue in the Personal Wallboard [if displayed] or use the Tools menu, as shown below.



The Tools menu will display all call centres that the user belongs to, even if not displayed in the Personal Wallboard.



15.2 CHANGING ACD STATE



The ACD State buttons allow the user to change their current ACD state, including setting the unavailable reason code, as shown here. The title bar will show the current ACD state.

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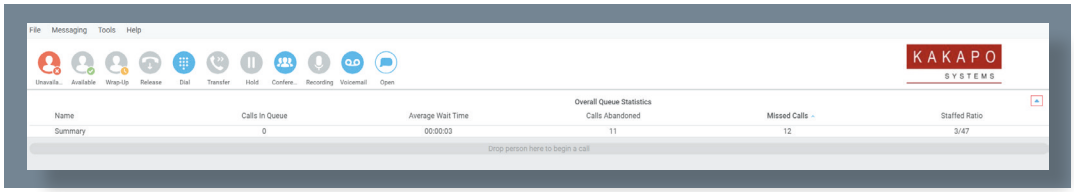
15.3 PERSONAL WALLBOARD

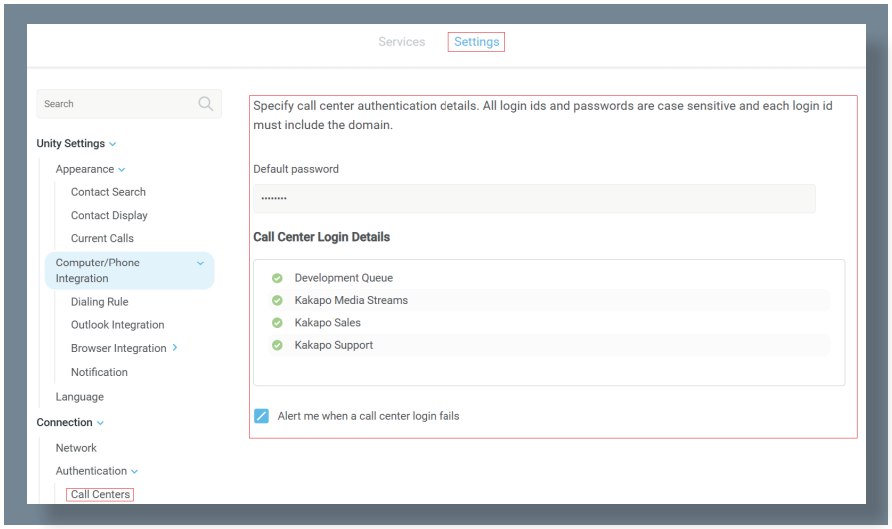
The Personal Wallboard gives the call centre agent a view of personal and overall queue performance by displaying key metrics. Statistics are broken down by 'My Statistics' which shows the agent's individual performance and 'Overall Queue Statistics' which will show the current conditions across the 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 centre] or a summary view only, this is toggled using the button in the upper right corner.



15.3.1 Authentication and Configuration

To display the Personal Wallboard Unity must log into the VoIP platform as each call centre, as well as the agent. To display real-time statistics, the call centre must have the Client Call Control service assigned in the VoIP platform, if this is not the case the call centre will still be displayed in the Personal Wallboard, but all statistics will be periodically polled.

Call centre authentication is performed through Tools > Settings > Settings > Call Centres, as shown below.



If all call centres share the same password, then it should be entered as the default password in Unity, which will then use it when logging into the VoIP platform as each call centre that the agent is a member of. Otherwise double-click on each call centre in the list to enter the password, the call centre ID will not be editable. If a default password has been entered, then this cannot be overridden for a call centre.

When setting the password for a specific queue, the same password can be used when logging into any other queues that don't currently have a password set, as shown here. The difference between this setting and the default password is that this setting only applies at the call centre level, meaning any new call centres that the agent becomes a member of will not take this password by default, whereas they will take the default password. Also, if some call centres have a different password, then they can set first, then this used to apply the same password to any other queues.

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The login status field will always show the current authentication state for that call centre, options are:

The call centre logged in successfully: Unity has successfully logged in as the call centre and the Client Call Control Service is assigned, meaning real-time statistics are available.

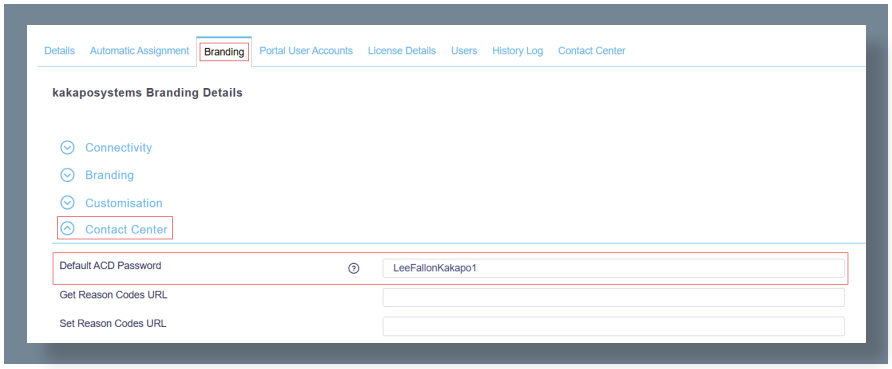
The Client Call Control service is not assigned to this queue meaning the 'calls in queue' statistic is not available in real-time: Unity was able to log into the VoIP platform as the call centre so statistics will be displayed in the Personal Wallboard. However, because the Client Call Control service hasn't been assigned to the call centre, all statistics will be polled.

The password has not been entered: A default password has not been specified and there is no password entered for this specific call centre.

The call centre login attempt failed. Please check the authentication details are correct and ensure the account is not disabled: Unity was not able to login as the call centre, most likely because the password is incorrect, or the account has been disabled through too many failed login attempts. Unity may also display a message to the user when the login fails, as below. This depends on the 'Alert me when a call centre login fails' setting being active.

15.3.2 Setting Default Password in the Portal

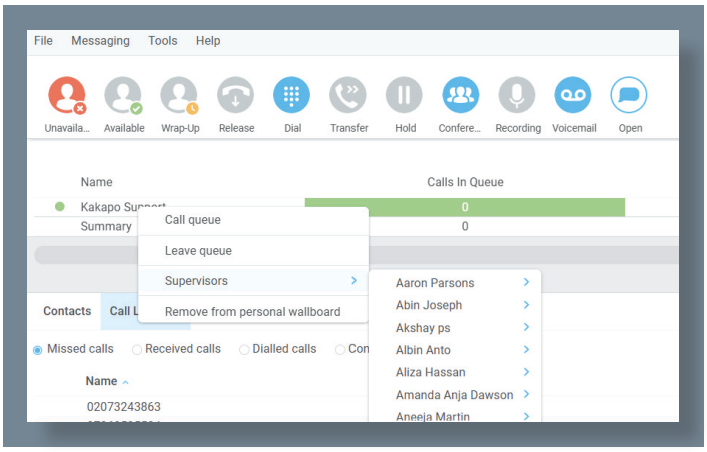
The default Call Center password can be set in the Kakapo portal at the Service Provider, Reseller, Business and Group level. This will set the default password for all users under that level. To set the password go to Branding > Contact Center > Default ACD Password, as shown below.



Please note: If the default password has been set in the portal, then it cannot be overridden in the Unity settings.

15.3.3 Overview

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



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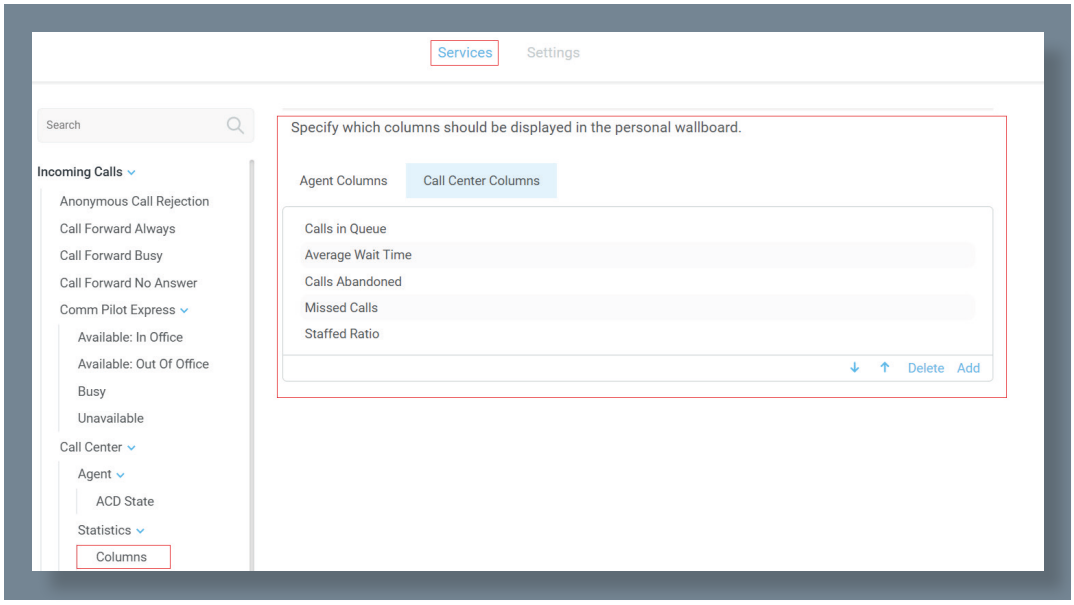
By right clicking the call centre, the receptionist can join or leave the call centre [these toggle depending on whether the receptionist is currently joined or not], can call the queue [or transfer if there is a call in progress], or instant message or call a supervisor of the call centre, as shown above.

15.3.4 Columns

There are multiple call and contact centre level statistics available to be displayed in the Personal Wallboard, which will automatically resize to include all columns in the window width. Columns can be added removed and reordered through Settings, as shown below.



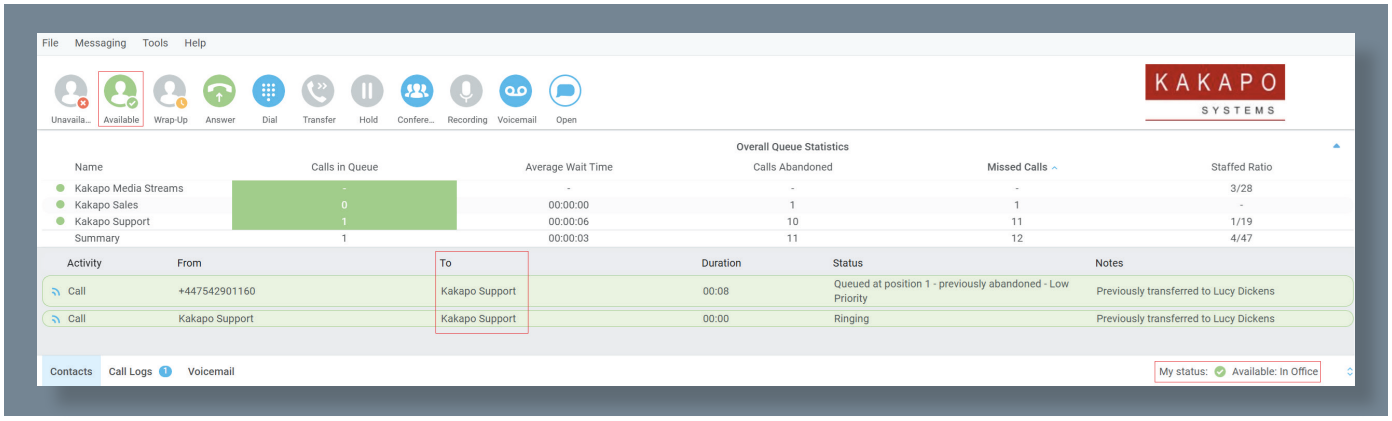
The panel shows the columns that are currently displayed both for the agent and call centre and the order. Use the arrow buttons to reorder columns in the personal wallboard, the plus and minus buttons to add or remove columns or simply double-click a column to view its configuration.

Many columns support thresholds which employ a 'traffic light' scheme to quickly indicate important call centre 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.

15.4 RECEIVING CALL CENTER CALLS

Agents will only receive calls routed through the call centre if they are currently joined to that call centre and the ACD state is set to Available. When receiving a call centre 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 centre call. If a DNIS name is present this will also be shown [in brackets].



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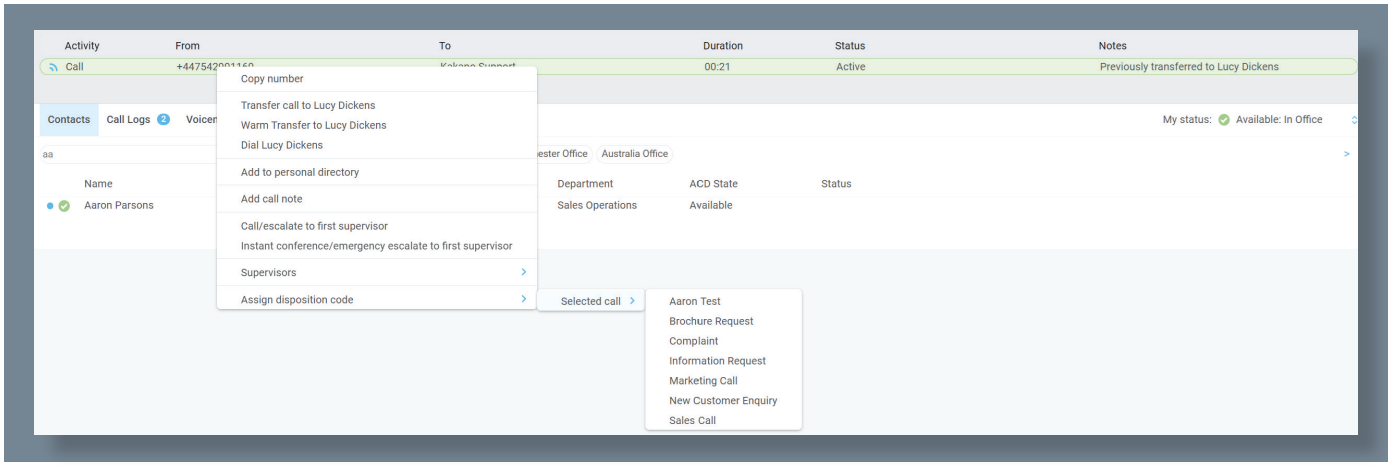
Call center calls are managed in exactly the same way as non-call center calls.

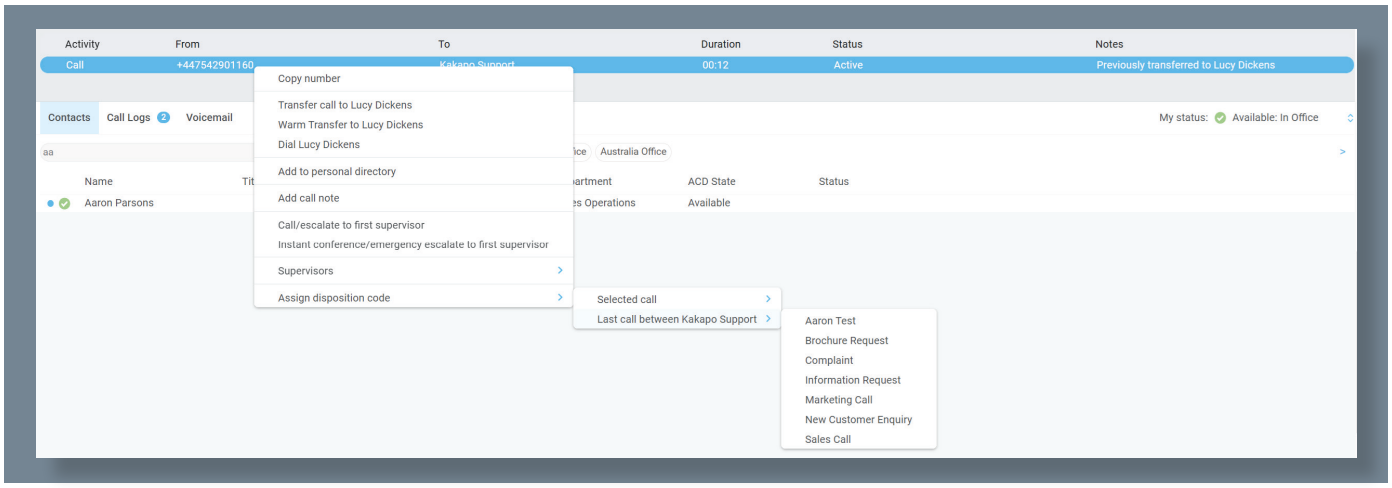
15.5 ASSIGNING DISPOSITION CODES

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 compaign, 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 centre call, as shown below. 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 which is automatically displayed to the user when the call is released.

The Unity UI will be disabled, and the popup window will appear over all applications on the user's desktop. A timer can be specified which will display a count-down to the user and will automatically close once the timer duration has elapsed. When they click Available, they get a drop list of Disposition Codes.

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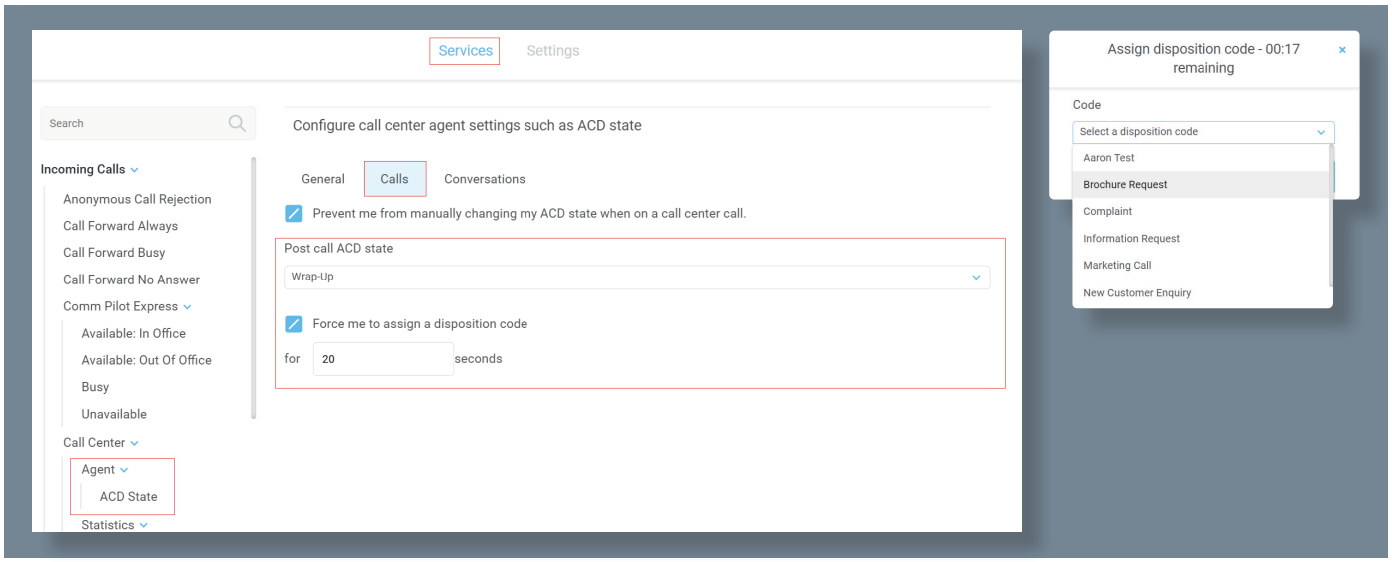
Unity can also be configured to also change the ACD state to Available or not. The default behaviour is to change the ACD state back to Available either when the disposition code has been assigned, or when the disposition code timer expires without a code being entered.

This feature is activated in Tools > Settings > Services > ACD State as below.



15.6 SUPERVISOR ESCALATION

Part of the call center agent functionality included in Unity Reception is the ability to escalate a call center call to a specific supervisor, or to the first supervisor available.

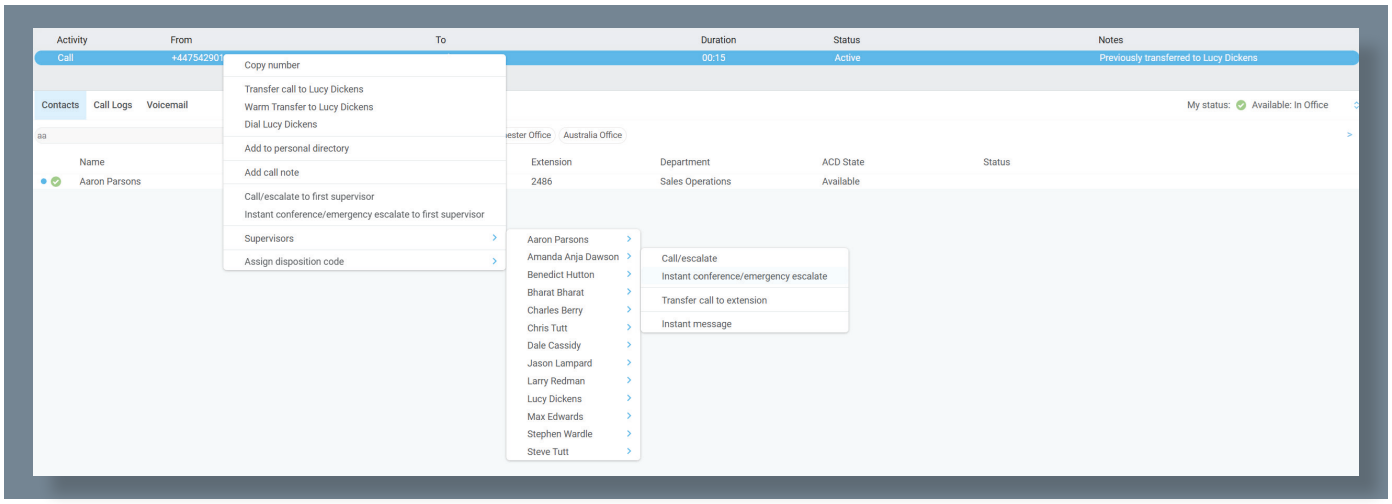
There are two kinds of escalation available, both of which are recorded as an escalation in the VoIP platform.

15.6.1 Standard Escalation

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

15.6.2 Emergency Escalation

Unity will dial the supervisor and when then call is answered, will start an instant conference with that supervisor and the remote caller.



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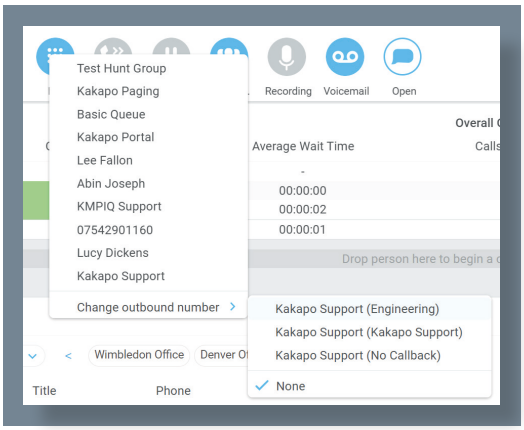
Escalate a call by right-clicking in the Active Call Window and selecting the escalation option as shown above. When performing a call escalation, the agent can select a specific supervisor to escalate to, or the first available supervisor which is decided by the VoIP platform. The agent can also blind transfer the call to the supervisor without performing an escalation or send an instant message if the supervisor.

15.7 ACTIVATING OUTBOUND DNIS



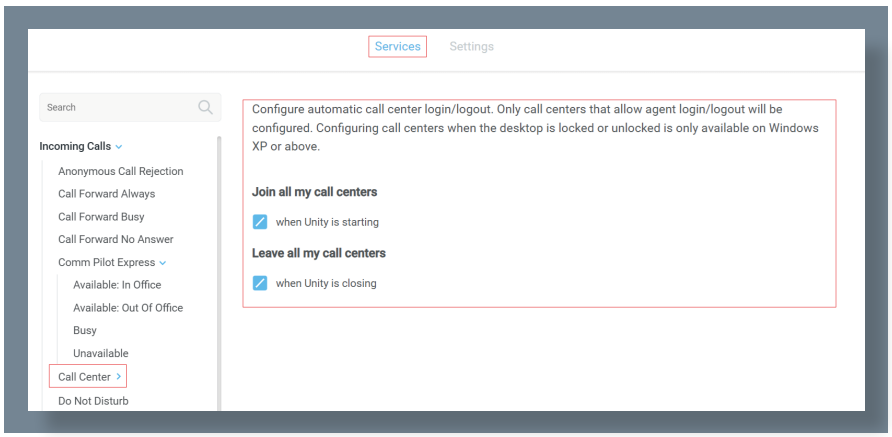
If the receptionist is an agent of one or more call centres that support outbound DNIS, then the user can select an outbound DNIS which will determine which outbound caller ID/ name is presented to the remote party when the user makes external outbound calls. To change the outbound DNIS right click the Dial button and select the menu option to change the outbound number, as below. 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.

15.8 CALL CENTER CONFIGURATION

Outside of call centre authentication, there are many settings available within Unity to automate actions or configure the call centre agent environment.

15.8.1 Call Center

Unity can be configured to automatically join the agent to all call centres that they are a member of [regardless of whether that call centre is displaying in the Personal Wallboard] when Unity is starting up or is closing. The agent can also be set to leave all call centres when closing Unity or locking the desktop.



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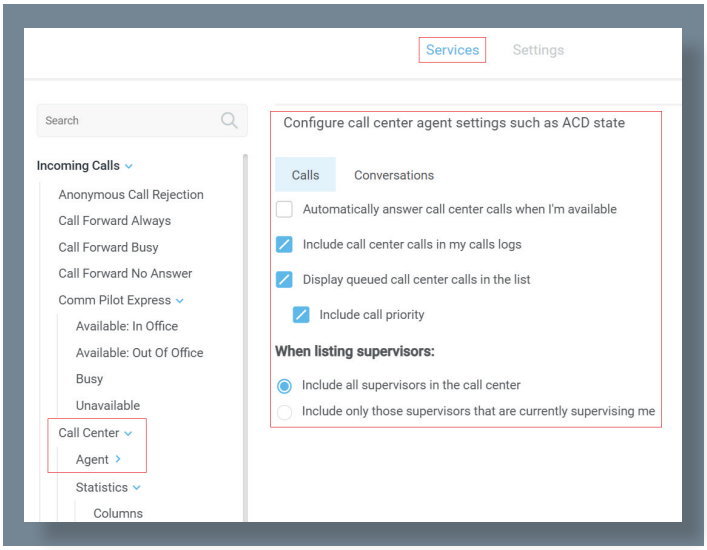
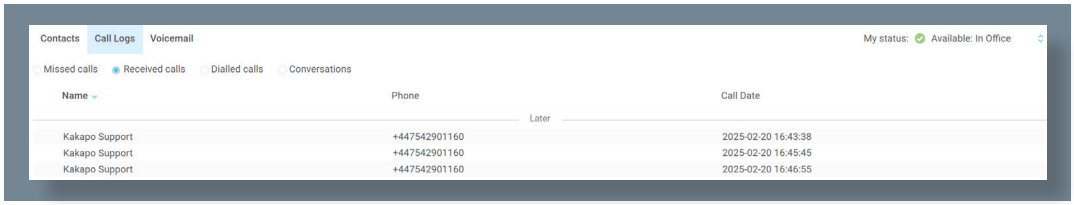
15.8.2 Agent

Unity may be required to automatically answer inbound call centre calls if the agent is available and not currently on a call, which removes the ability for them to reject/bounce the call.



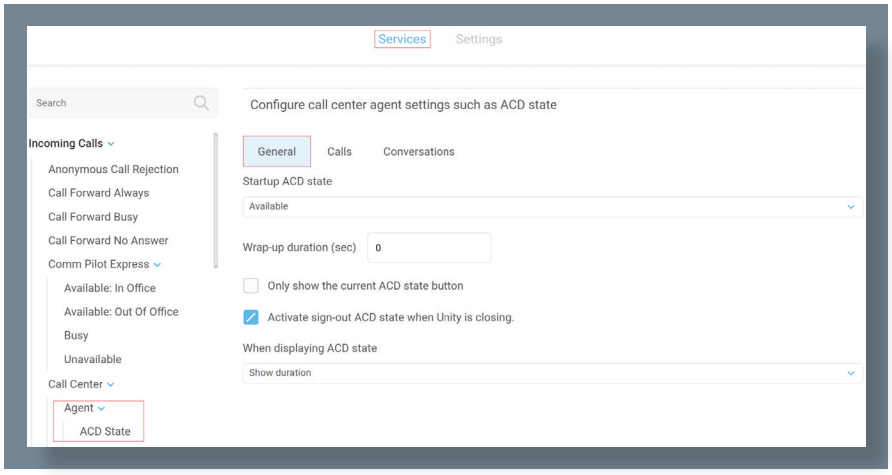
Call centre calls may need to be included in the Call Logs list, as shown below. If the call log entry is for a call centre, then the queue name will be shown in the Name field, however this is not stored in the VoIP platform so if the logs are refreshed or Unity is restarted this information will be lost.



When listing supervisors in the menus, Unity can show all supervisors in the call center or only those that are currently monitoring the agent.

15.8.3 ACD State

Unity can be configured to automatically change the ACD state of the agent based on specific events ocurring, such as the client open and closing ACD state.



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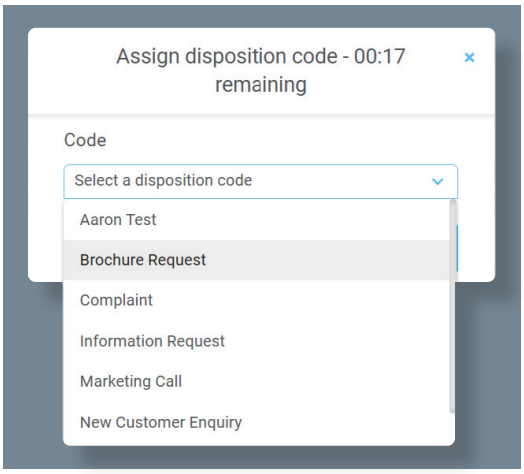
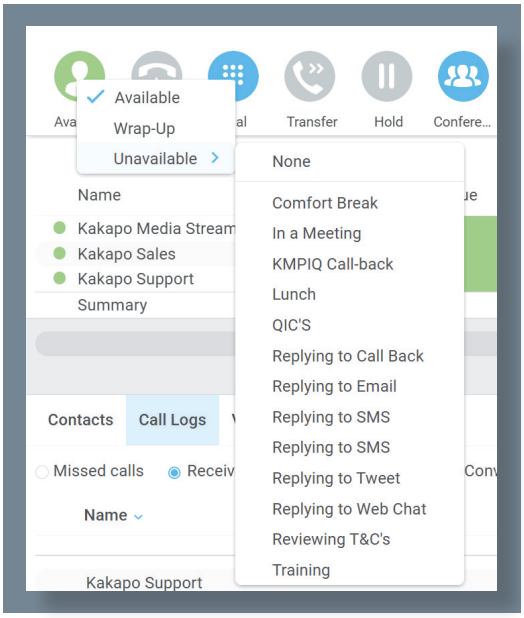
Wrap Up Duration: This will automatically change the ACD state to Available after the specified duration [in seconds] has passed. Please note this does not work with the same setting in the VoIP platform, so should only be set here if not set there.



Force me to assign a disposition code: If this setting is active then when a call ends for a call center that offers disposition codes, the ACD state will be automatically changed to Wrap-Up and the agent won't be able to change it back to Available without assigning a disposition code to the last call, as shown here.

When the agent selects a disposition code it will be recorded on the VoIP platform and Unity will change the ACD state to Available.

Prevent me from manually changing my ACD state when on a call center call: When activated, Unity will show the below message if the user attempts to change the ACD state when on a call center call, because this may impact agent performance statistics.



Only show the current ACD state button: Unity can show the three main ACD state buttons which is the default option, or only the current ACD state, in which case the agent changes the state using the context menu, as shown here.

Activate sign-out ACD state when Unity is closing: If this setting is not active then Unity will not change the ACD state when closing, which may impact agent performance statistics.

15.8.4 Statistics

Configure call center statistics delivery. Call center passwords (required to gather statistics) can be entered in the Authentication section. The Client Call Control service must be assigned to the call center if real-time statistics are required.

Only display summary statistics: If active the Personal Wallboard will only be shown in summary view, the agent will not be able to expand the list to include the call center detail.

Use scrollbars: When displaying a large number of call centers in the Personal Wallboard, scrollbars must be used to ensure the Personal Wallboard doesn't take all the space in the screen. This will ensure scrollbars are employed, the maximum value is 20.

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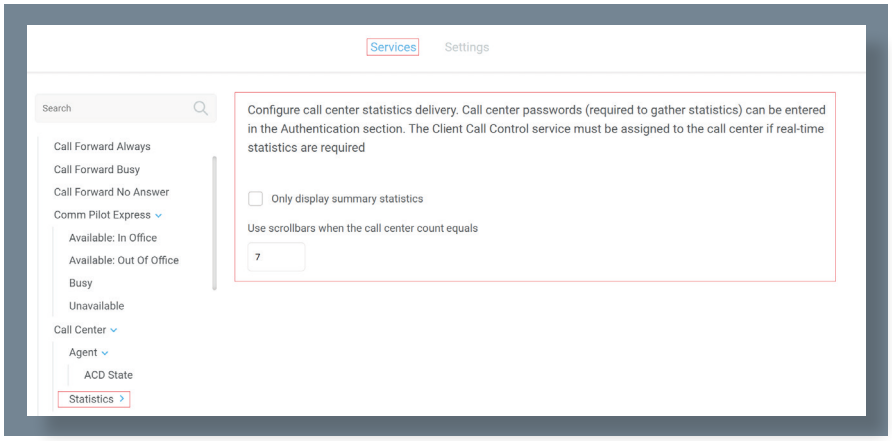

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