

KAKAPO

SYSTEMS

UNITY RECEPTION WEB

Quick User Guide

CONTENTS

1 ABOUT UNITY WEB RECEPTION	1
Unity Reception Web	
1.1 Getting Started	
2 GETTING AROUND	2
2.1 Call Control Buttons	
2.1.1 Answer	
2.1.2 Release	
2.1.3 Dial	
2.1.4 Transfer	
2.1.5 Hold/Retrieve	
2.1.6 Conference	
2.1.7 Recording	
2.1.8 Call Park Retrieve	
2.1.9 Tools > Settings	
2.2 Active Call Window	
2.2.1 Drag & Drop	
2.2.2 Previously Transferred	
2.2.3 Adding a Note	
2.2.4 Configuration	
2.3 Contacts List	
2.3.1 Performing Call Actions	
2.3.2 Add a Note	
2.3.3 Hold & Link	
2.3.4 Contact Groups	
2.3.5 Configuration	
2.4 Call Logs	
2.5 Visual Voicemail	
3 INSTANT MESSAGE	14
3.1 Start IM Conversation	
3.2 Add a Participant	
3.3 Transfer Call to a Participant	
4 QUICK ACCESS SERVICE CONFIGURATION	16
4.1 CommPilot Express Profiles	
4.2 Do Not Disturb	
4.3 Call Forward Always	
4.4 Remote Office	
4.5 Out of office assistant	

1 ABOUT UNITY WEB RECEPTION

UNITY RECEPTION WEB

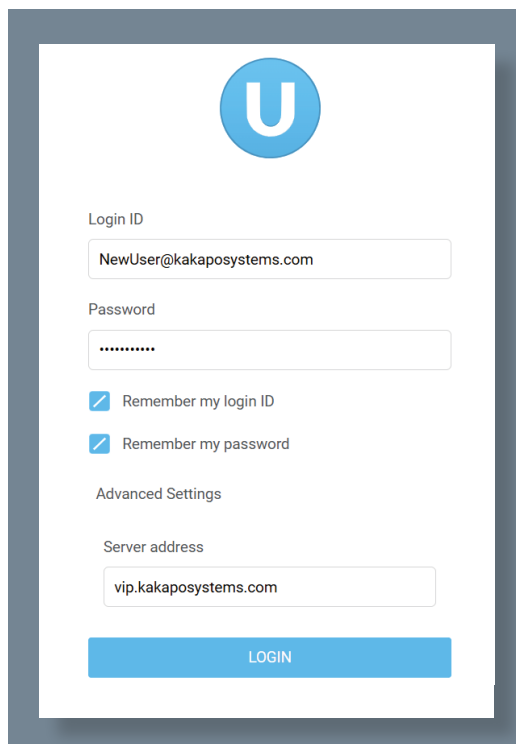
Features provided:

- Unlimited dynamic busy lamp field [displays hook status of all matched users on contact search]
- Drag and drop call control [to make a call, release, IM, transfer, park etc]
- Contact Groups
- 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

Unity Reception Web is specifically designed for busy front desk call handling environments, or for those users who manage many concurrent calls or require visibility of all users in the business.

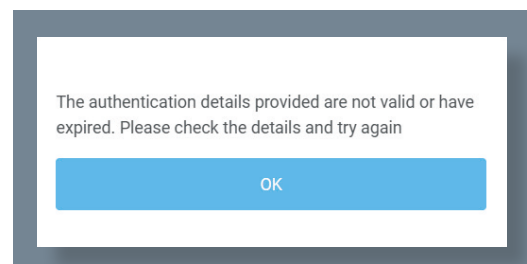
This document provides a quick overview of key functionality, aimed specifically at the receptionist. For a more in-depth description of the Unity client please refer to the full user guide.

1.1 GETTING STARTED



When Unity is first started you will be prompted to authenticate on the VoIP platform, which requires a login ID [including domain], password and server address. Please consult your service provider if you don't have these details.

If the login details are incorrect, you will be prompted to re-enter them, if problems persist, please consult your VoIP service provider.



2 GETTING AROUND

Unity provides key features such as drag & drop and context menus to allow you to quickly manage calls and colleagues in the business. Almost all actions can be performed by either dragging something over something else or right clicking the mouse.

Unity is split into three main areas; call control buttons, call window and contacts list. Call logs and voicemails can be seen in different tabs. Unity Reception can also act as an agent in a call centre environment. In this case Unity will also display ACD state buttons and the Personal Wallboard, which shows current call center conditions. Please speak to your service provider if you need more information about call centers and ACD states.

Unity also offers a docked Instant Message (IM) panel which makes it easy to connect instant messages, calls and colleagues. For example, you can drag a colleague from the contacts list into the docked IM panel to send them an instant message, then drag a call into the IM window to transfer a call.

The screenshot displays the Unity interface with several key components highlighted:

- ACD State:** Located at the top left, it includes a menu (File, Messaging, Tools, Help) and a set of call control buttons: Unavailable, Available, Wrap-Up, Release, Dial, Transfer, Hold, Confere..., Recording, Voicemail, and Open.
- Call Control:** A central area containing 'My Statistics' and 'Overall Queue Statistics' tables.
- Personal Wallboard:** A table showing call statistics for 'Kakapo Sales' and 'Kakapo Support'.
- Call Window:** A window showing the details of an active call from '+447542901160' to 'Kakapo Support' with a duration of 00:55.
- Busy Lamp Field/Contacts Tab:** A list of contacts with columns for Name, Location, Phone, Extension, Email, Department, ACD State, and Status.





Name	Total Calls	Answered Calls	Missed Calls	Calls In Queue	Total Calls	Missed Calls	Calls Abandoned	Calls Transferred	Longest Wait Time
Kakapo Sales	8	3	5	0	8	2	2	0	00:00:00
Kakapo Support	7	5	2	0	15	9	9	0	00:00:00
Summary	15	8	7	0	23	11	11	0	00:00:00

Name	Total Calls	Missed Calls	Calls Abandoned	Calls Transferred	Longest Wait Time
Kakapo Sales	8	2	2	0	00:00:00
Kakapo Support	15	9	9	0	00:00:00
Summary	23	11	11	0	00:00:00

Activity	From	To	Duration	Status	Notes
Call	+447542901160	Kakapo Support	00:55	Active/Recording	

Name	Location	Phone	Extension	Email	Department	ACD State	Status
Aaron Parsons	London	02086192486	2486	aaron.parsons@kakaposystems.com	Sales Operations	Available	
Albin Anto		0003	0003	albin.anto@kakaposystems.com	Admin	Sign-Out	Forward all calls to mobile
Amanda Anja Dawson	New York	0006	0006	adawson@testing.com	Sales Operations	Sign-Out	Do not disturb
Basil Joy		0044	0044	basil.joy@kakaposystems.com	Engineering	Sign-Out	
Benedict Hutton	London	0008	0008	benedict.hutton@kakaposystems.com	Admin	Sign-Out	
Charles Berry	Chicago	02086192475	0010	christut@christuti@gmail.com	Customer Service	Sign-Out	Do not disturb / ok
Chris Tutt	Weybridge	02086192470	2470	chris.tutt@kakaposystems.com	Engineering	Sign-Out	Do not disturb
Dale Cassidy	New York	0011	0011		Engineering	Sign-Out	
Jason Lampard		0020	0020	j.noqueue@kakaposystems.com	Sales Operations	Available	
Jenson Franklin	New York	02086192474	2474	linedhelp@kakaposystems.com	Admin	Unavailable - Comfort Break	
Jevan Howe		0012	0012		Human Resources	Sign-Out	
Joseph Jacob		8019	8019	joseph.jacob@kakaposystems.com	Sales Operations	Sign-Out	
Justina Babu		0040	0040	justina.babu@kakaposystems.com	Admin	Sign-Out	Working from home today
Larry Redman	London	0015	0015		Sales Operations	Sign-Out	Do not disturb
Liam Smith		8012	8012	suveesh.viswambaran@kakaposystems.com	Sales Operations	Sign-Out	
Lucy Dickens		0354	0354	l.dickens@kakaposystems.com	Sales Operations	Sign-Out	
Mabel Graves	London	0016	0016		Customer Service	Sign-Out	
Max Edwards	Chicago	0019	0019	max.edwards@kakaposystems.com	Sales Operations	Sign-Out	
Naomi Curnow	London	0013	0013	naomi.curnow@kakaposystems.com	Sales Operations	Unavailable - In a Meeting	Currently unavailable
Nina Harrelson	Chicago	2475	2475		Customer Service	Sign-Out	
Robbie Sears		0017	0017		Admin	Sign-Out	
Rocio Vilaseco		02086192479	2479	rocio.vilaseco@kakaposystems.com	Admin	Sign-Out	
Sally Jones	London	02086192477	2477		Customer Service	Sign-Out	
Stephen Wardle		02086192473	2473	stew.wardle@kakaposystems.com	Engineering	Sign-Out	
Steve Tutt	Wimbledon	02086192471	2471	stew.tutt@kakaposystems.com	Engineering	Unavailable - In a Meeting	

2.1 CALL CONTROL BUTTONS

All calls are managed through the call control buttons at the top of the application. These buttons will change depending on the state of the selected call, or the only call if there is only one call in the Active Call Window. For example, the Answer/Release   and Hold/Retrieve   buttons toggle as only one of these options will be valid at any time.

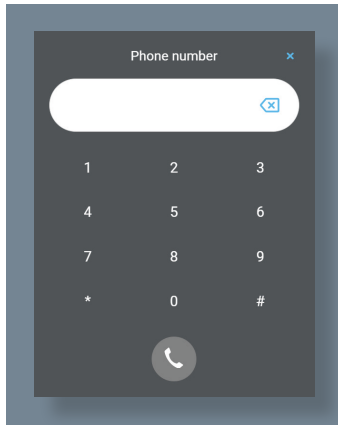
2.1.1 Answer

This will answer an inbound call that is not yet answered, it will only be shown in this scenario.

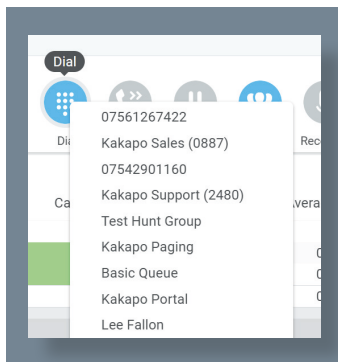
2.1.2 Release

This will end the selected call, regardless of the current state.

2.1.3 Dial



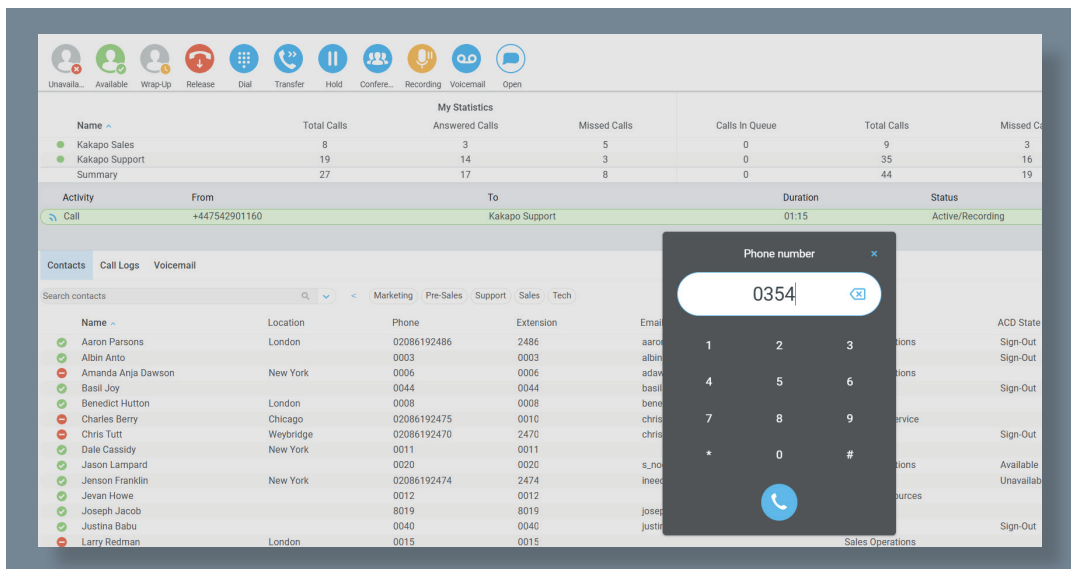
Use this button to dial a number from the Dial window.



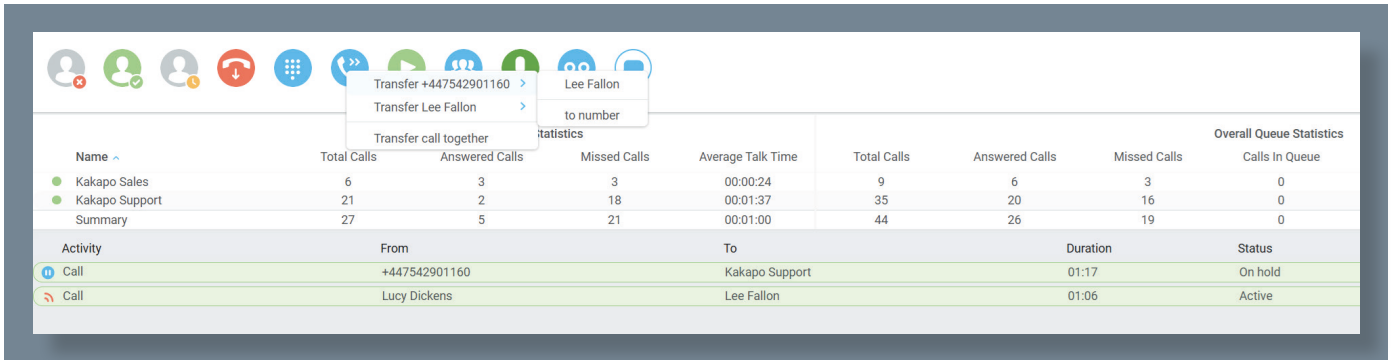
You can also right-click this button to quickly dial one of the ten last called numbers.

2.1.4 Transfer

Use this button  to blind transfer a selected call to a number.



If there are multiple calls you can use the context menu to transfer them together (announced transfer) or to transfer to another number.



2.1.5 Hold/Retrieve

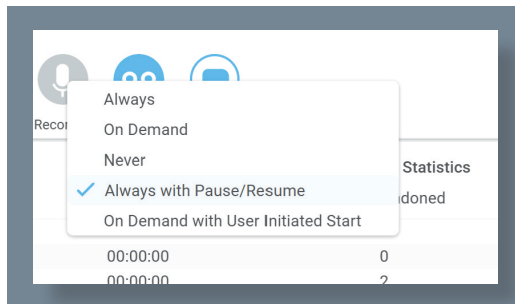
This will place a call on hold if active or take it off hold. These buttons change depending on the state of the selected call.

2.1.6 Conference

You can select two calls in the Active Call Window and click this button to quickly conference everyone together. Once in a conference you can easily select other calls and add them to it, but you must start with a conference with two other calls first. You can use the hold and retrieve buttons to hold the whole conference and use the release button to drop a caller out of the conference. Please note this feature depends on service assignment so may not always be available.

2.1.7 Recording

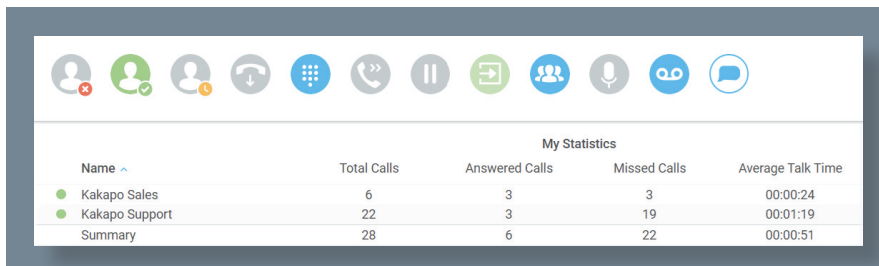
You can use this button to manage call recording in two ways. You can right-click on the button to select how to record calls. The recording status for the current call is shown in the status section in the Active Call Window.




Left click to start, stop, pause or resume recording the selected call. The button will change to show if the selected call is currently being recorded, or if recording is paused or stopped.


2.1.8 Call Park Retrieve

This button will only appear when there is a call parked on your extension.



The call park button will alert you by flashing in the application. 

When you click the parked call icon, Unity will automatically connect the call.




Activity	From	To	Duration	Status	Notes
 Call	Lee Fallon	07542901160	00:25	Active	

2.1.9 Tools > Settings

This is how you access service configuration and Unity settings.

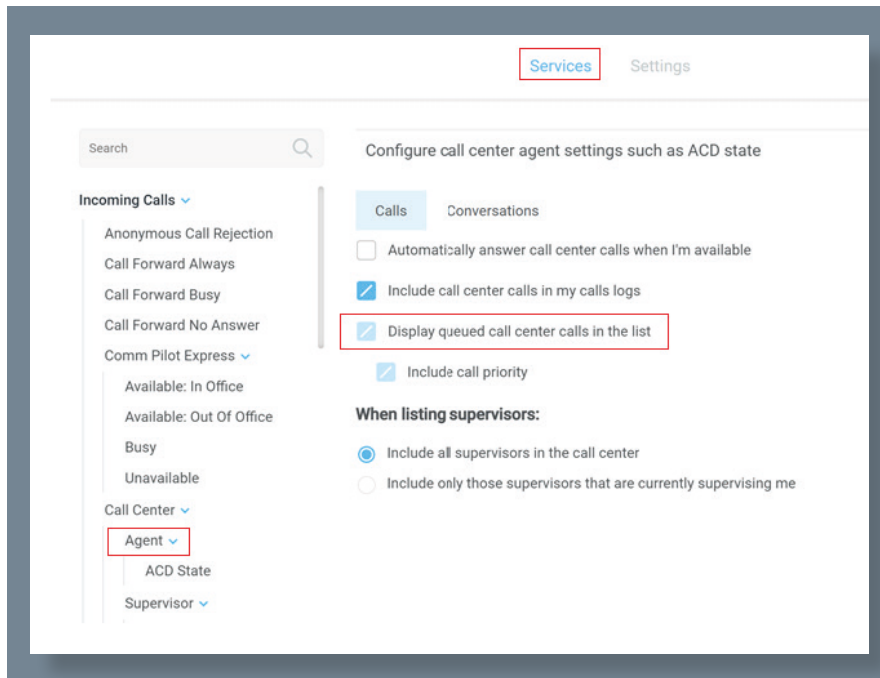
2.2 ACTIVE CALL WINDOW

The Active Call Window will display all calls that are related to you, either people that have called you or that you have called. You can see who the call is from and to, how long it has been in progress and the status [including the recording state].

Activity	From	To	Duration	Status	Notes
 Call	+447756506804	Kakapo Support	01:08	Active/Recording	
 Call	+447542901160	Kakapo Support	01:10	Queued at position 1 - Low Priority	
 Call	Lucy Dickens (0354)	Kakapo Support	01:00	Queued at position 2 - Low Priority	

The status can be 'Ringing', 'Active', 'On Hold', 'Parked for...' You will also see status icons when the call is on hold or part of a conference.

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



The screenshot shows the 'Services' settings page. On the left, there is a search bar and a list of settings including 'Incoming Calls', 'Anonymous Call Rejection', 'Call Forward Always', 'Call Forward Busy', 'Call Forward No Answer', 'Comm Pilot Express', 'Available: In Office', 'Available: Out Of Office', 'Busy', 'Unavailable', 'Call Center', 'Agent', 'ACD State', and 'Supervisor'. On the right, there are two tabs: 'Calls' and 'Conversations'. Under 'Calls', there are three checkboxes: 'Automatically answer call center calls when I'm available' (unchecked), 'Include call center calls in my calls logs' (checked), and 'Display queued call center calls in the list' (checked and highlighted with a red box). Under 'When listing supervisors', there are two radio buttons: 'Include all supervisors in the call center' (selected) and 'Include only those supervisors that are currently supervising me' (unselected).

2.2.1 Drag & Drop

Drag & drop is an important feature of Unity, it means that to perform an action on a call you can simply drag it on top of something. For example, if you want to blind transfer a call to a user then this can be done by simply searching for that user, then dragging the call and dropping it on that user in the contacts list. You may see some options here depending on what was configured in settings, or Unity can automatically blind transfer the call. Similarly, if you want to perform an announced transfer then simple drag one call on top of the other in the Active Call Window, the calls will be transferred together and be removed from the list.

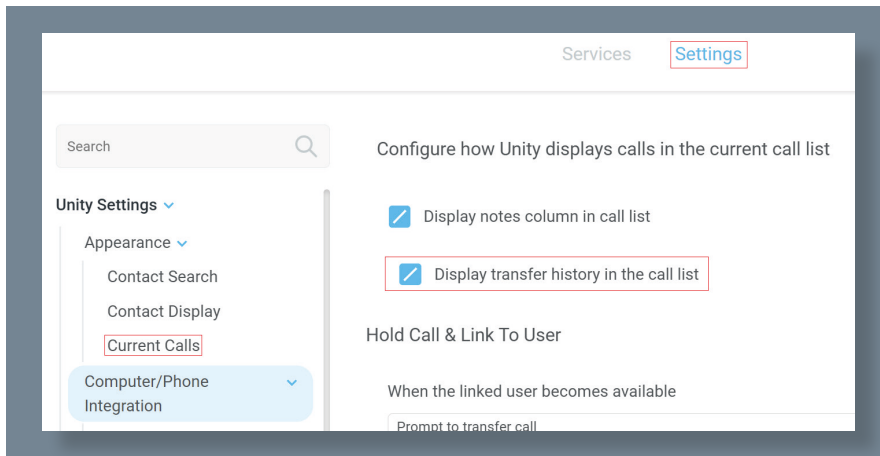
You can also drag other objects into this list to make a call, for example drag a user from the contacts list into the Active Call Window to call that internal user's extension or external contact's number.

Activity	From	To	Duration	Status	Notes
Call	+447542901160	Kakapo Support	00:18	Queued at position 1 - Low Priority	Previously transferred to Lucy Dicke...
Call	Kakapo Support	Kakapo Support	00:00	Ringing	Previously transferred to Lucy Dicke...

2.2.2 Previously Transferred

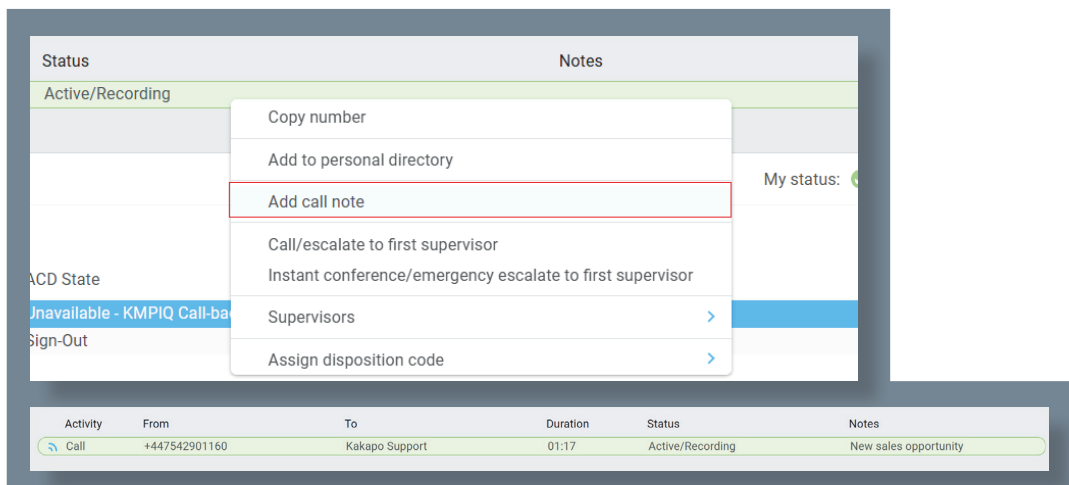
When a call is received, Unity Reception will automatically tell you who the caller was last transferred, if available.

This information is updated whenever you transfer a call and is shared between Unity Reception clients meaning if the call was transferred by another receptionist, when that same person calls in and can't remember who they spoke to, you have that information.



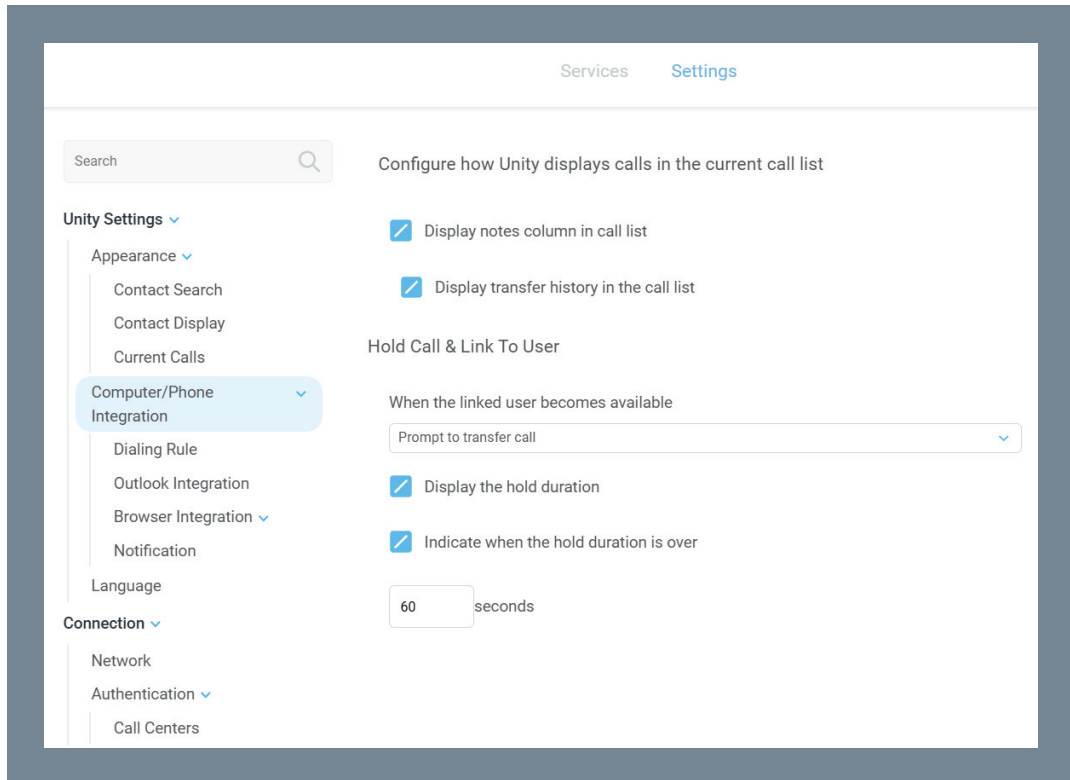
2.2.3 Adding a Note

You can add notes to the call by right-clicking and selecting add note, as below. Please note that notes are shared between all receptionists using Unity, so if the call is transferred away, then is transferred back and answered by another receptionist, they will see the note that you added. You can see below that previous transfer history and notes and combined in the same column.



2.2.4 Configuration

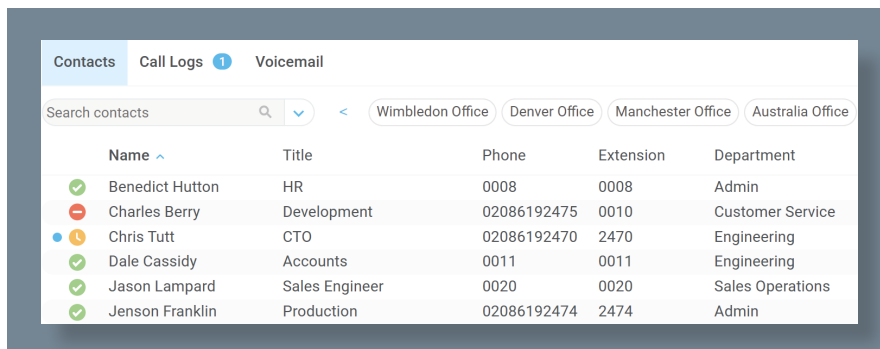
The Active Call Window can be configured through settings, as shown below.



When Linked User Becomes Available: When using the Hold & Link feature [as outlined in section 2.3.3] Unity can either alert the receptionist that the monitored user is now available, prompt to transfer or automatically transfer.





2.3 CONTACTS LIST

The Contacts list gives access to everyone in your business, as well as all contacts in your shared business directory, personal directory, speed dials, Outlook folders and any other third-party database that may be available. When you search for a contact Unity will search all directories and automatically start monitoring anyone within the business to see if they are on the phone or currently unavailable.



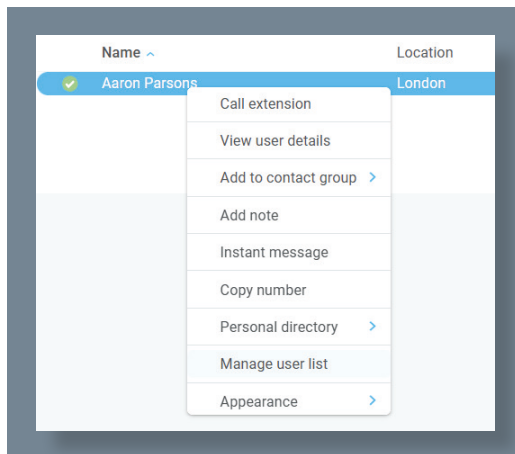
When not showing search results, the Contacts list can include up to 50 internal users and any number of external contacts in a 'default list'. Unity will monitor the internal users and indicate when they are on the phone, when they are in Do Not Disturb (DND) or another unavailable status [as outlined in section 4], or when they have entered any presence

information. All this information combines to give you a snapshot of that user, so that if a call comes in for them you can process it accordingly [by sending to voicemail, transferring to mobile etc]. It also means you can easily drag calls onto these contacts to blind transfer, park on extension etc.

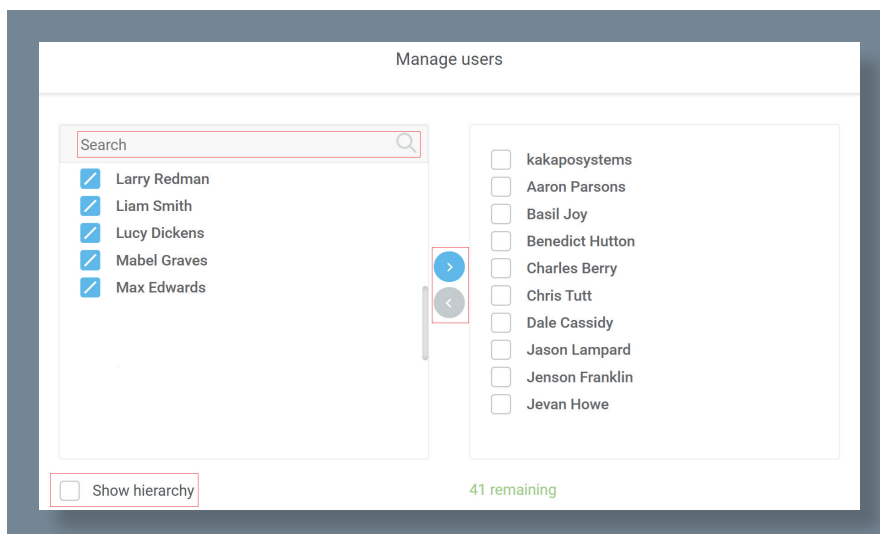
	Available	The monitored user extension is on hook
	Ringing	The monitored user extension is ringing
	Engaged	The user is on the phone
	Do Not Disturb	The user has selected DND or Unavailable profile

If the user is using Unity, then you can be sure that if you send an instant message, they will receive it immediately, if they are offline then they won't receive the IM until they next log into Unity.

To change the list of internal users to include in the default Contacts list, simply right-click anywhere and select Manage users, as below.



You can then select which internal users to include in the default Contacts list by moving them from the left list into the right, you can use the search feature to quickly search for users.

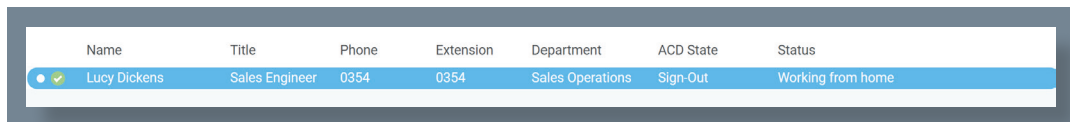


2.3.1 Performing Call Actions

To perform a call action against a contact in the Contacts list, simply select it and right-click. You will be presented with a context menu that dynamically displays various options based on the current state of the call and of the contact you selected. Options include transfer to extension, mobile or voicemail, camp and park the call on the user's extension or instant message.

2.3.2 Add a Note

As with calls in the Active Call Window, you can manually add notes for an internal user that are shared between Unity Reception clients. These notes can be added, edited and removed by right clicking the contact in the list. Depending on the view, the notes could be displayed in the status column or as a tooltip.

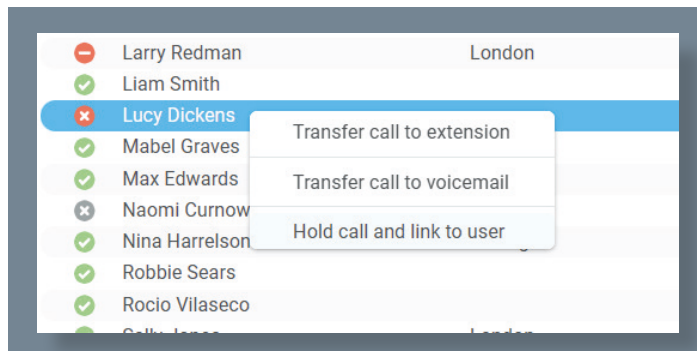


Name	Title	Phone	Extension	Department	ACD State	Status
Lucy Dickens	Sales Engineer	0354	0354	Sales Operations	Sign-Out	Working from home

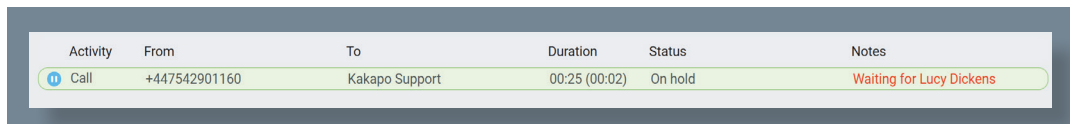
2.3.3 Hold & Link

Hold & Link is a unique feature in Unity Reception that allows you to link a call in the Active Call List with a monitored/internal user in the Contacts list, thereby giving visibility of who the caller is holding for and if they are currently on the phone, all from within the Active Call Window.

In the below scenario a call has come in from Barry Simpson who wants to talk to Lucy Dickens, but she is currently on the phone. Right-click Lucy from the Contacts list [or drag the call over Lucy] and select 'Hold call and link to user' and shown below.

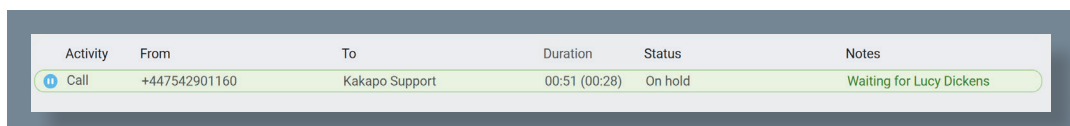


The call will be placed on hold so you can continue to take other calls. The call holding for Lucy will be shown as below. At any time, you can double click the call [or select the call in the list and click the Retrieve button] to ask the caller if they are happy to continue holding.



Activity	From	To	Duration	Status	Notes
Call	+447542901160	Kakapo Support	00:25 (00:02)	On hold	Waiting for Lucy Dickens

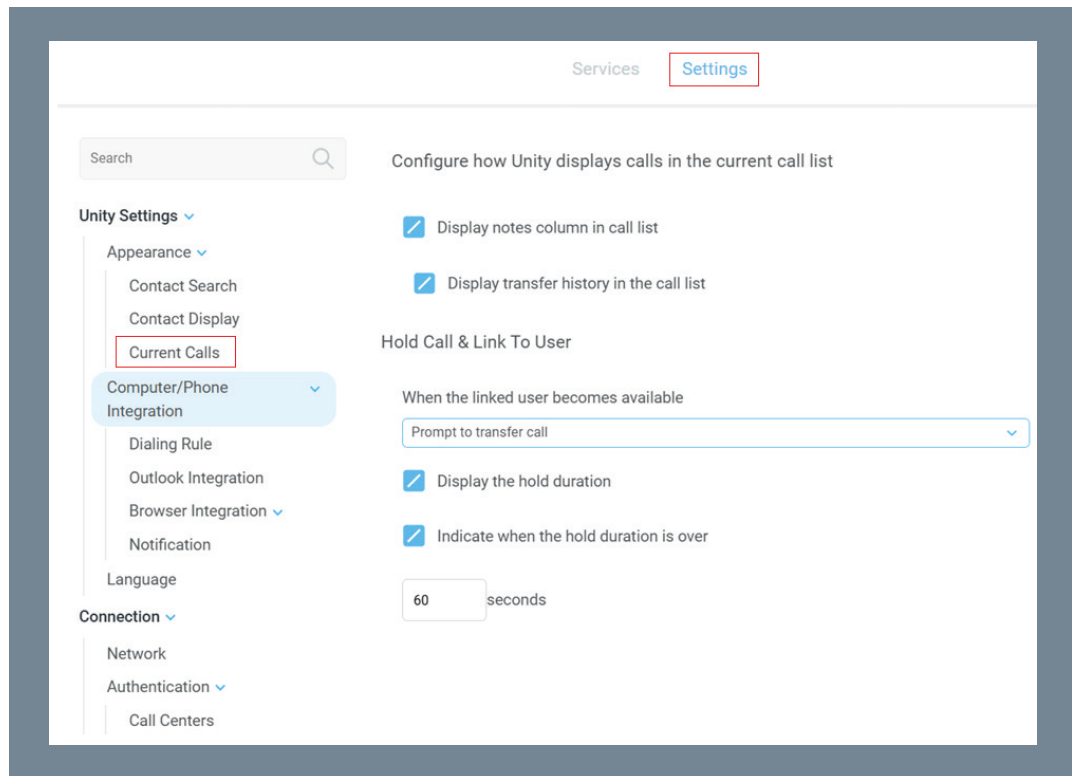
Once Lucy becomes available Unity will change the text in the Active Call Window to indicate that she is now available.



Activity	From	To	Duration	Status	Notes
Call	+447542901160	Kakapo Support	00:51 (00:28)	On hold	Waiting for Lucy Dickens

You can then drag the call over Lucy in the Contacts list to transfer, or right-click the call and select 'Transfer call to extension'.

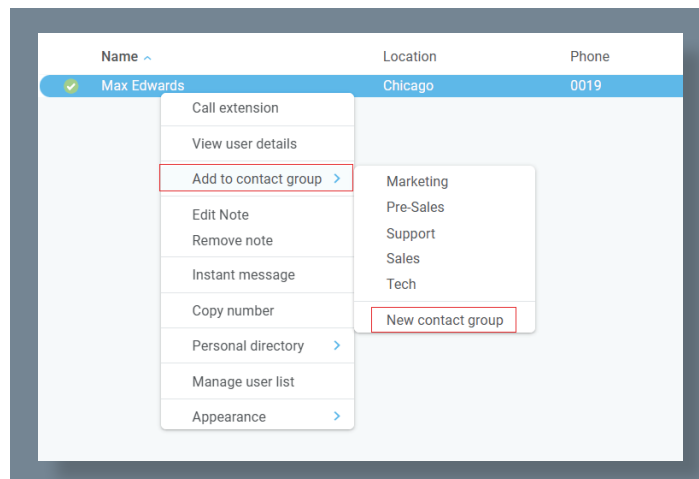
The hold duration and behaviour of Hold Call and Link to User is configurable and can be found in Tools>Settings>Current Calls, as shown below.



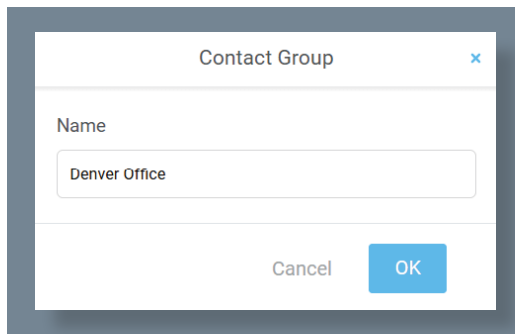
2.3.4 Contact Groups

A contact group is a grouping of internal and external users, very much like the default contact list but defined by a name. They are typically used to quickly group users by department or role, so that you can quickly find all users in a specific department simply by clicking the contact group.

To create a contact group, select the user(s) from the Contacts list that you want to include in the contact group, then right-click and select the menu option as below.

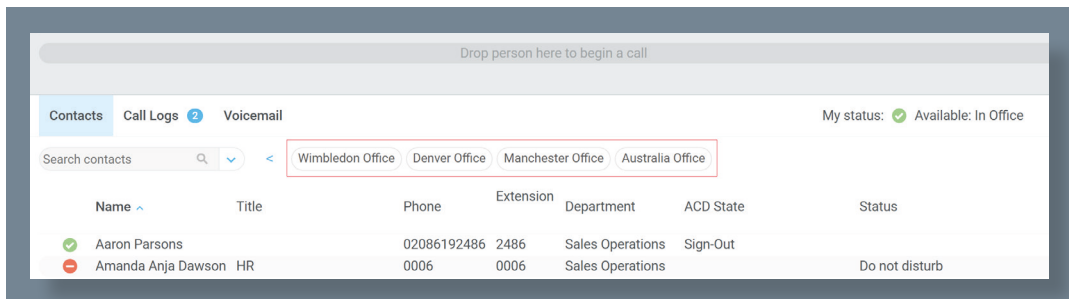


You will then be prompted to enter a contact group name.



Dialog box titled "Contact Group" with a close button (X). The "Name" field contains "Denver Office". At the bottom, there are "Cancel" and "OK" buttons.

And the contact group will be displayed in the Contacts tab.

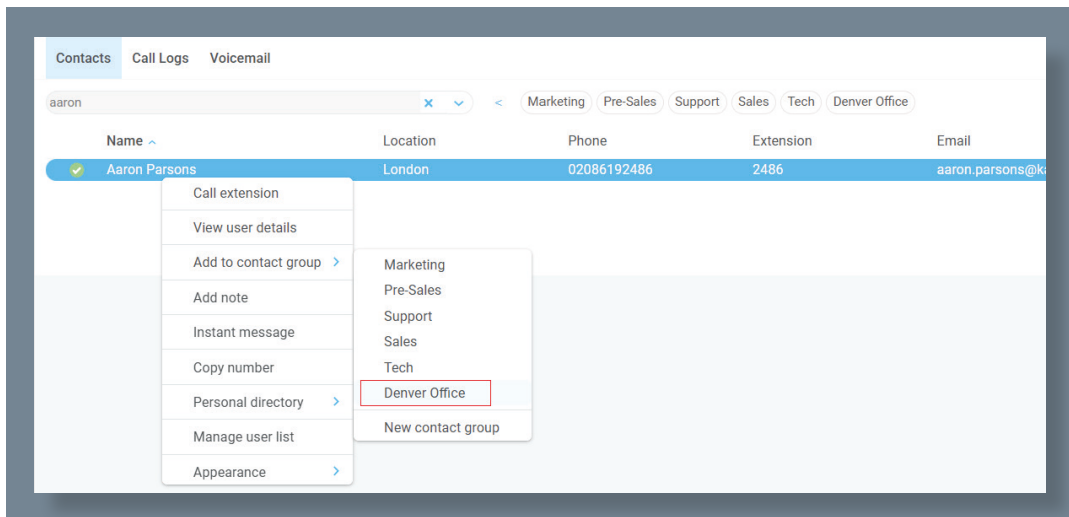


Contacts tab interface showing a breadcrumb navigation with "Denver Office" highlighted. Below is a table of contacts:

Name	Title	Phone	Extension	Department	ACD State	Status
Aaron Parsons		02086192486	2486	Sales Operations	Sign-Out	
Amanda Anja Dawson	HR	0006	0006	Sales Operations		Do not disturb

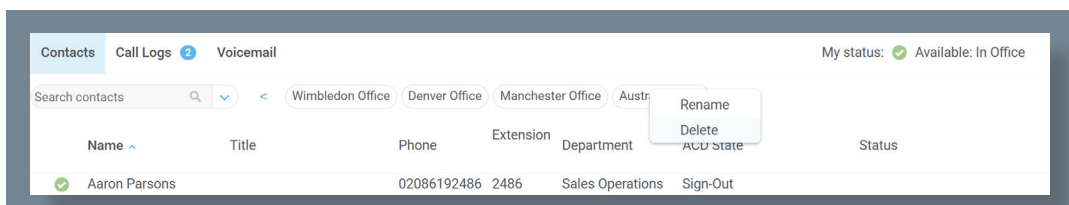
Click on any contact group to quickly see all internal users within that group, along with their phone status and any other information (DND, entered notes etc). Up to 50 internal users can be added to each contact group.

You can easily add other users to an existing contact group by right clicking as shown below.



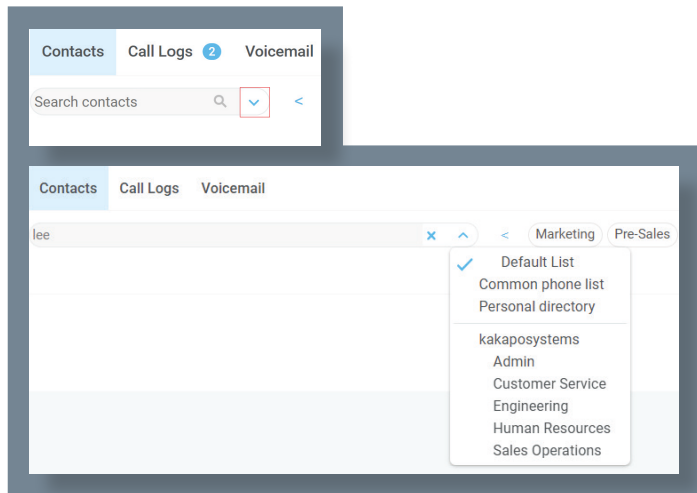
Contacts tab interface showing a right-click context menu for Aaron Parsons. The "Add to contact group" option is selected, and a sub-menu shows "Denver Office" highlighted.

You can also remove one or more contacts from a contact group by selecting 'Remove from contact group' from the menu option shown above, and can delete the entire contact group by right-clicking it and selecting 'Delete contact group'.



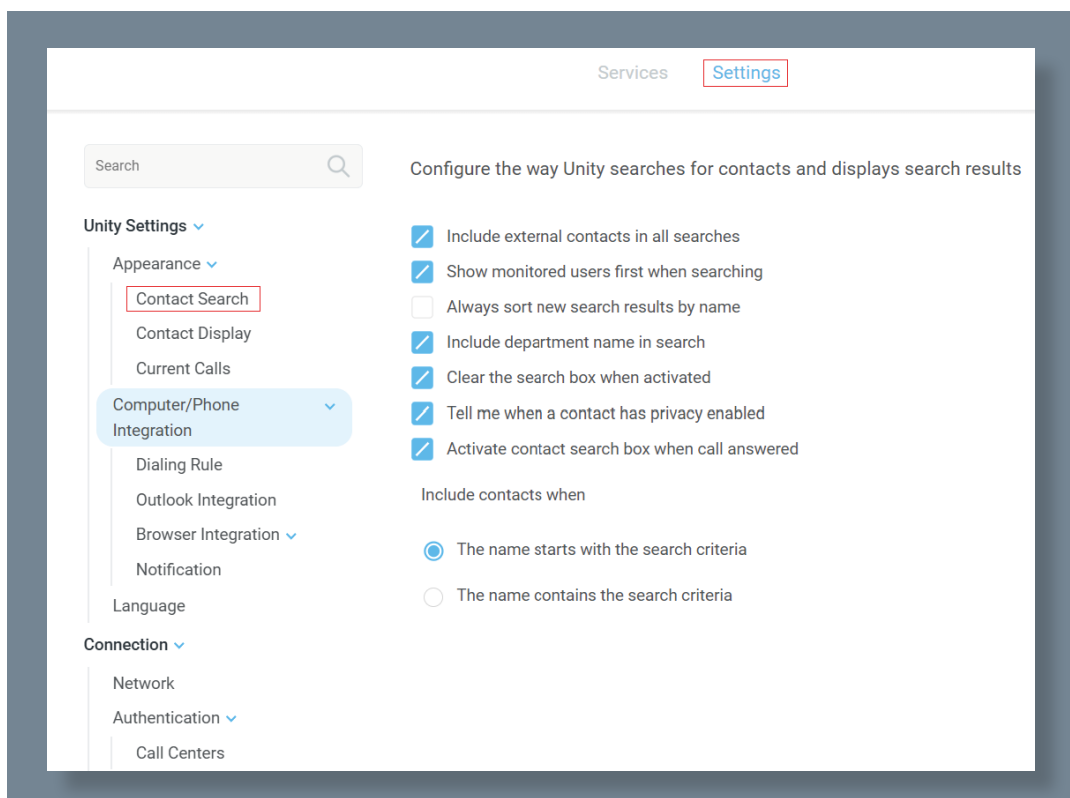
Contacts tab interface showing a right-click context menu for the "Denver Office" contact group. The "Delete" option is highlighted.

Click the dropdown menu in contact search to list all directories, then click the search button to clear it and see your default monitored users.



2.3.5 Configuration

The Contacts list can be configured through Settings, as shown below.



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 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.

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 in monitored order. Otherwise, internal and external contacts will be shown together in alphabetical order.

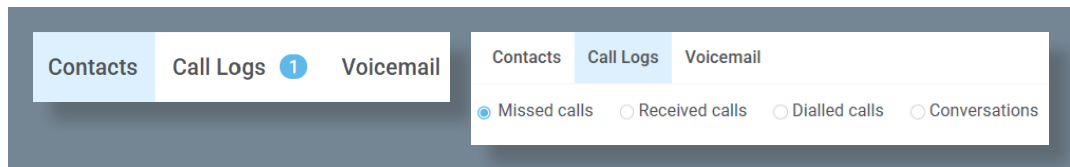
Always Sort New Search Results by Name: This setting can only be modified if the 'Show Monitored Users First When Searching' setting is not active. If active then search results will always be displayed in alphabetical order based on the name of the contact, otherwise the same sorting used in the default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

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.

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.

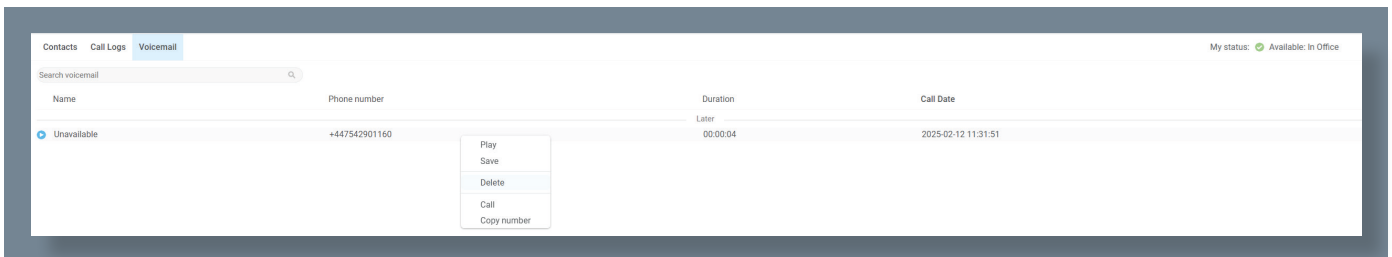
2.4 CALL LOGS

Unity will display your 20 last received, missed and called numbers. This may be more depending on service assignment. You can right-click or drag a call log into the Active Call Window to call the person back. Unity will show the number of missed calls since last used, or since started.

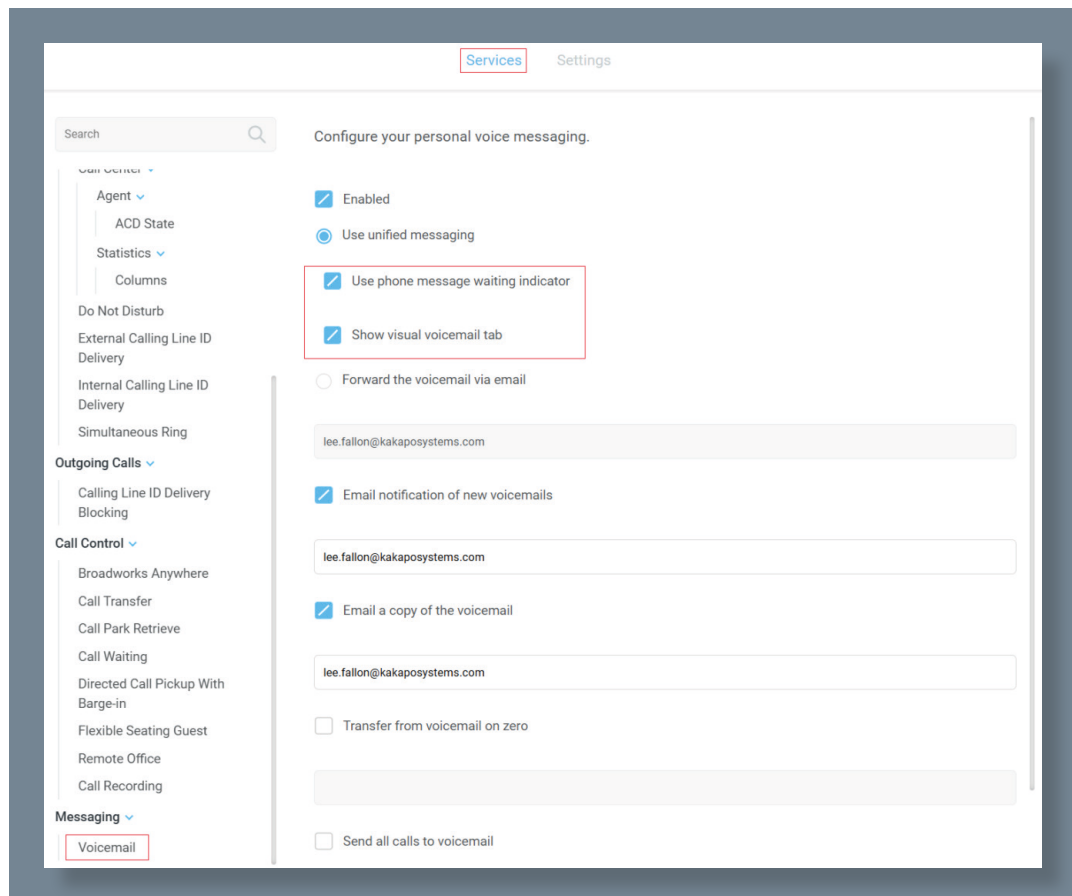


2.5 VISUAL VOICEMAIL

You can manage your voicemail box directly from within Unity to listen to, save and delete voicemails.

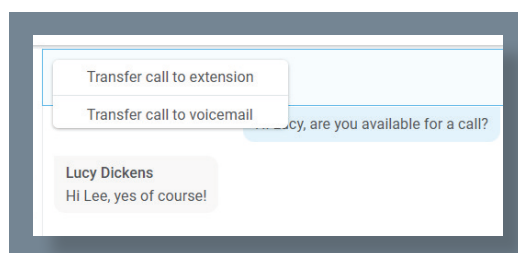


This feature is only available if the Voice Messaging User service is assigned and active, and the voicemail tab is configured to be displayed, as below.



3 INSTANT MESSAGE

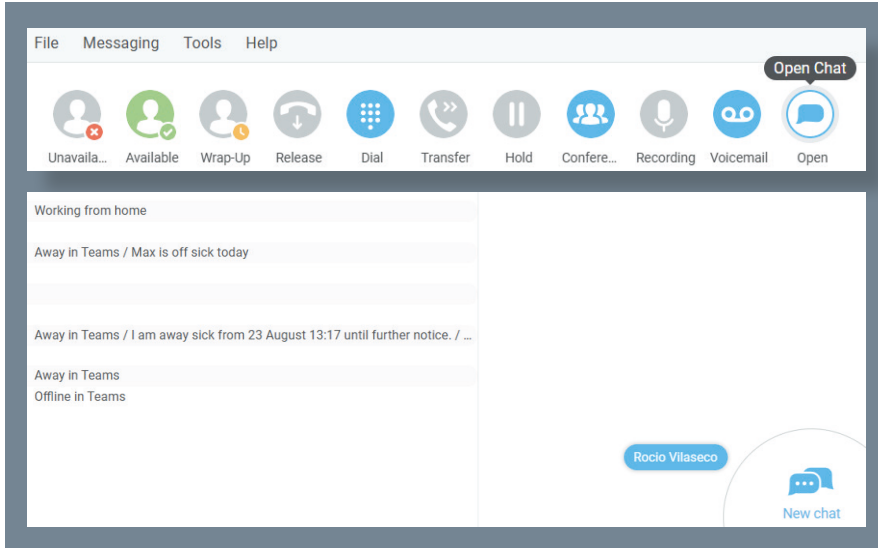
Instant Messaging (IM) is an integral part of Unity as it provides another communication channel in addition to the phone. Unity offers a docked IM panel which displays all IM conversations with internal users, this is the best configuration for a receptionist because everything is within a single Unity display and there are no other windows popping over the top.



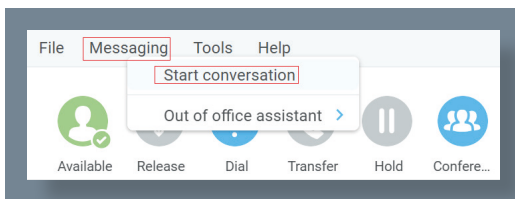
An 'online' user is one that is currently running an instance of Unity, and therefore available to send an online message to. These users are indicated with a small envelope on their user icon, which is shown for all states, as shown in section 2.3 above. If a user is offline, they are still available to be sent an instant message, but they will not receive it until they next start Unity, therefore this is an excellent tool for leaving 'post-it note' type messages, such as requests to call people back when next available.

3.1 START IM CONVERSATION

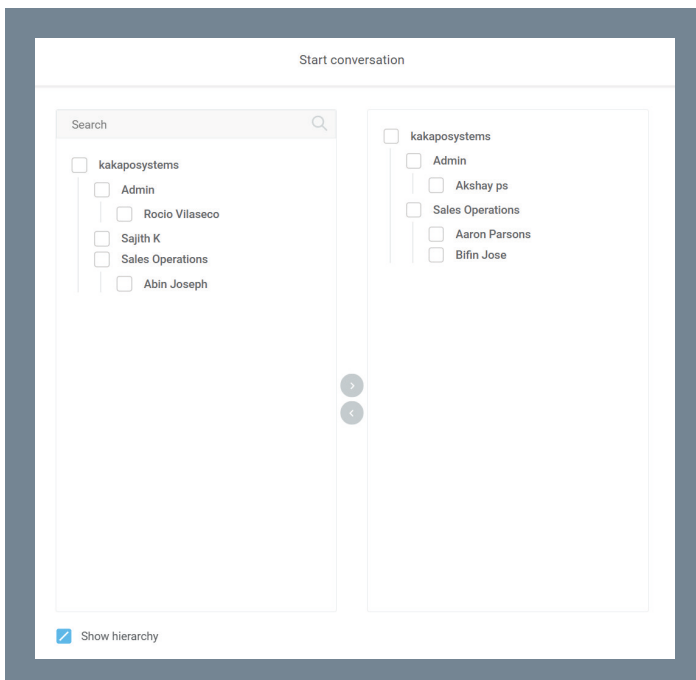
To send someone an instant message simply right-click them in the Contacts list or drag them into the docked IM panel [if displayed]. Unity will create a window like the one above that is used to IM that person, you will have one of these for each conversation you have open. Also, when people send you an instant message they will appear in this list as well.



You can also start a conversation to multiple parties [called 'group chat'] by clicking on Messaging > Start Conversation, as shown below.



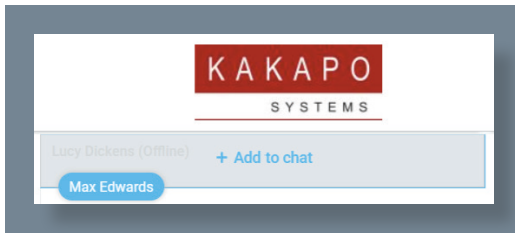
You can then select which users to include in the conversation by moving them into the right list.



Unity will only show users that are currently online, because group chat is only possible with online users. Therefore, if a user goes offline, they will automatically be removed from the conversation.

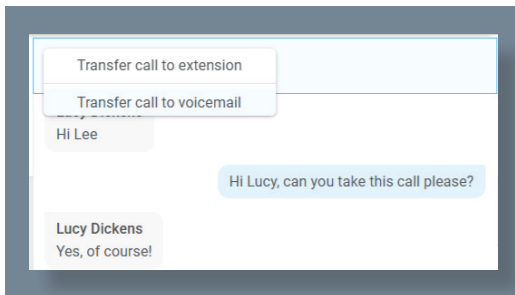
3.2 ADD A PARTICIPANT

You can easily add a participant to an existing IM conversation by dragging the user from the Contacts list over the top of the appropriate window in the docked IM panel, then selecting 'Add to the conversation' in the pop-up menu as shown below. You will see all participants of the conversation at the top of the window.



3.3 TRANSFER CALL TO A PARTICIPANT

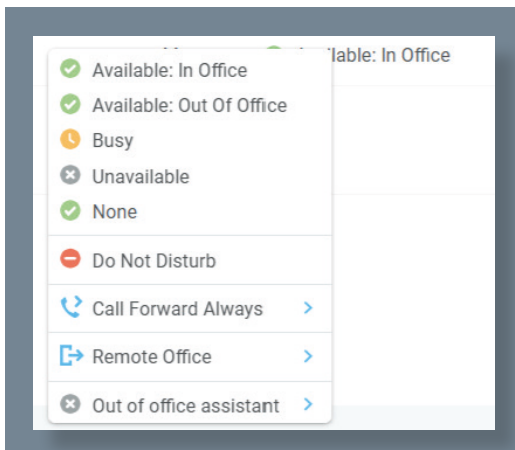
This is a key feature for a receptionist, it allows you to quickly create an instant message to a user to ask if they're available, then to drag a call into that IM conversation to blind transfer to that user. If there are multiple participants in the IM conversation, then you can select which user to transfer to.



There is a complete overview of instant messaging functionality and configuration in the full Unity user guide.

4 QUICK ACCESS SERVICE CONFIGURATION

This acts as a 'my current state' indicator in Unity, which will tell you if you are currently on Do Not Disturb (DND), have call forwarding activated or are otherwise unavailable.



To quickly change your status simply click on the 'My Status' link and select an option from the menu, these options depend on service assignment so may not all be present.

You can use the My Status link to change the below services.

4.1 COMMPILOT EXPRESS PROFILES

These profiles have two important uses; they can be used to setup call routing rules based on if you are in the office, on your mobile or away from your desk. They also tell other people this status, for example if you set your profile to 'Unavailable' or 'Busy' then other people will see this in their Contacts list, as below. This helps provide more information about where people are and if they are available.

4.2 DO NOT DISTURB

If this service is activated nobody will be able to call you. The My Status link will turn red to act as a reminder, and other people will see you are on Do Not Disturb in their Contacts list.

🔴	Charles Berry	Development	02086192475	0010	Customer Service		Do not disturb
🔴	Chris Tutt	CTO	02086192470	2470	Engineering	Sign-Out	Do not disturb

4.3 CALL FORWARD ALWAYS

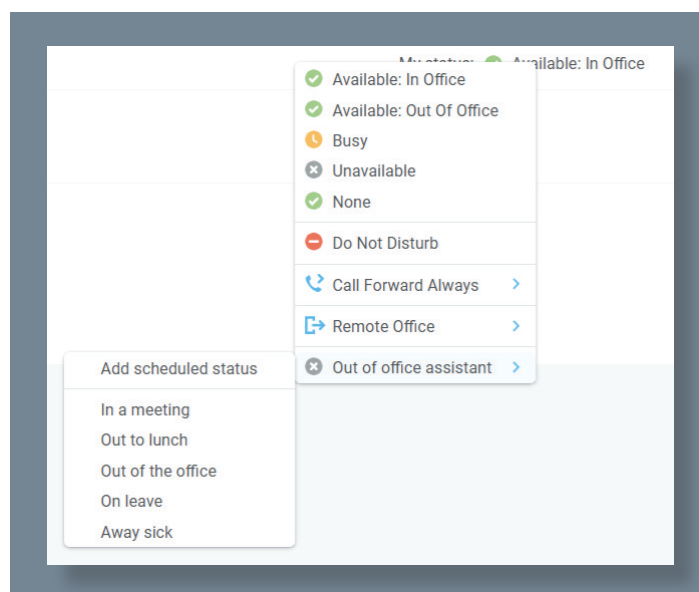
If activated all calls to your VoIP number will be forwarded to the number, you entered for this service. You can activate, deactivate or configure the service from here, when active the My Status link will turn red to act as a reminder. Other people will also see that you are forwarding all calls to another number in their Contacts list.

4.4 REMOTE OFFICE

This service allows you to use a 'normal' phone as your VoIP phone, so that all calls to you will be routed to this number, and you can use Unity to make outbound calls whereby this number will ring, then when you answer it, the outbound will be setup from that number.

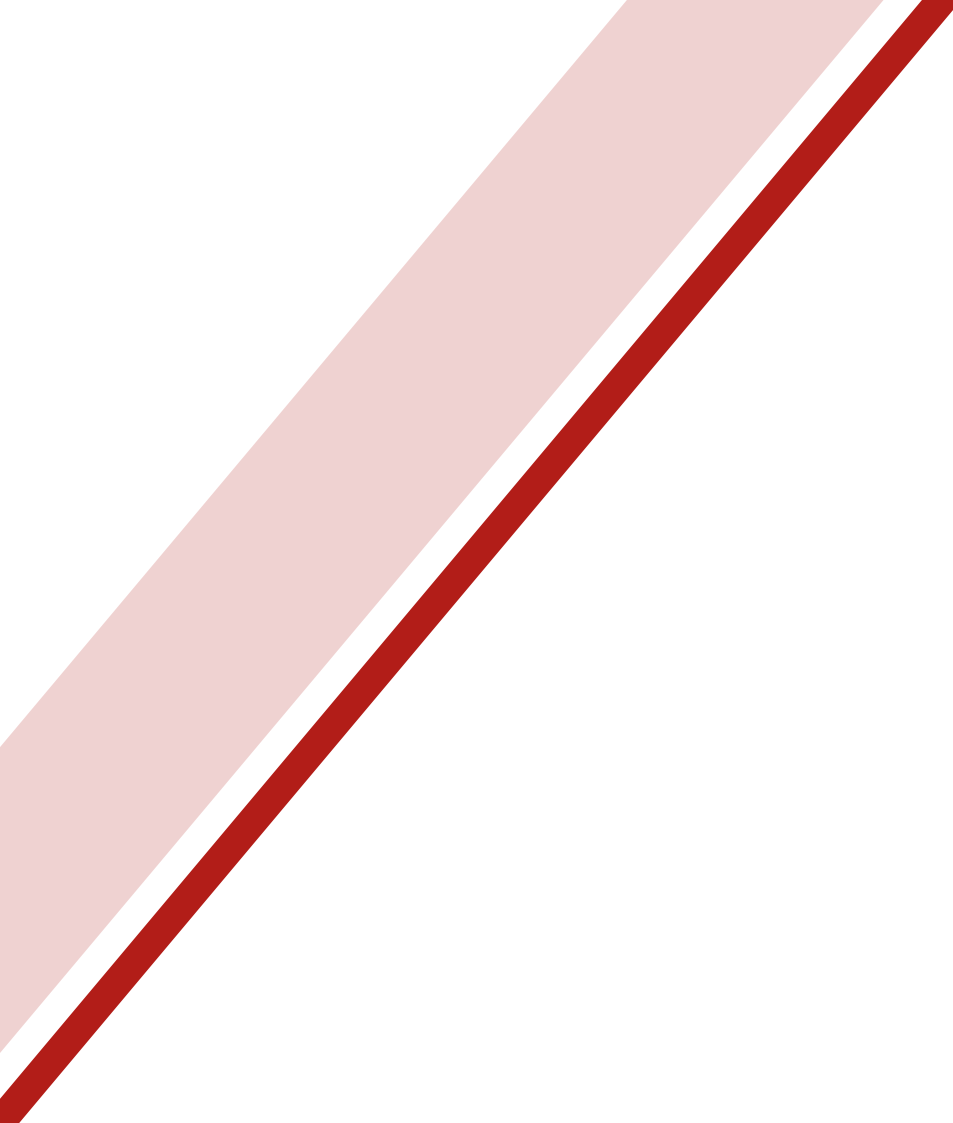
4.5 OUT OF OFFICE ASSISTANT

To configure the Out of office status, click on My Status and select from the options, as shown below.



Users can also schedule their Out of office assistant by clicking 'Add scheduled status' and scheduling the time and reason.

Please speak to your VoIP service provider if you require any further information on any of these services or features.



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SYSTEMS

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