



USER GUIDE | UNITY AGENT



MASERGY

Unity Agent Getting Started Guide

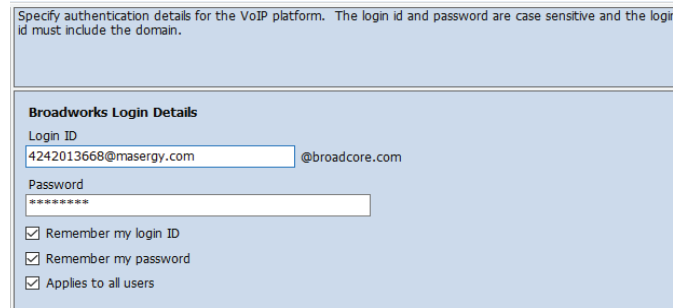
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Contents

1	INITIAL SETUP	3
2	THE INTERFACE	3
3	CALL CONTROL	4
	Transferring a Call	5
	Starting a Conference Call	5
	Ending a Conference Call	5
	Managing Multiple Calls	5
	Call Recording	5
	Abandoned Calls	6
	Supervisor Escalation	6
4	BUSY LAMP FIELD	6
	User Status Views	6
	Monitored User States	7
	Drag and Drop Calling and IM	7
	Call Pickup	7
	Options for a Busy User	8
	Options for an Available User	8
5	INSTANT MESSAGING (IM)	8
6	MY STATUS	9

1 INITIAL SETUP

When the Unity Agent client is first started you will be prompted to authenticate on the Masergy Global UCaaS platform, which requires a login ID [including domain] and password. The Login ID and Password will be assigned by Masergy.



Specify authentication details for the VoIP platform. The login id and password are case sensitive and the login id must include the domain.

Broadworks Login Details

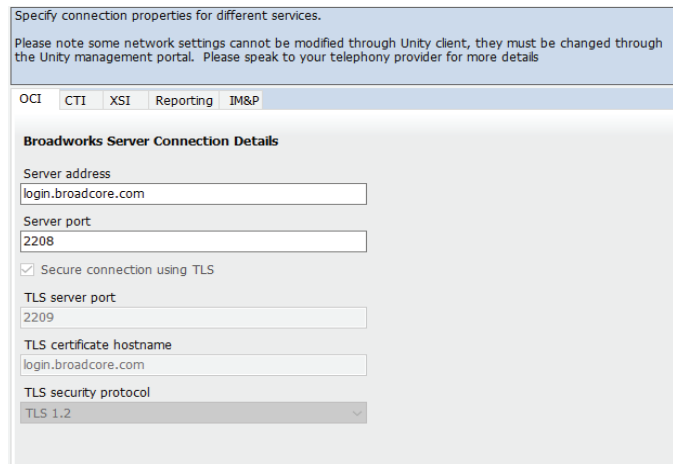
Login ID
4242013668@masergy.com @broadcore.com

Password

Remember my login ID
 Remember my password
 Applies to all users

Note: This is the same user ID and password you will use to log in to the personal Web Portal. Your user ID is a 10-digit phone number and ends in @masergy.com or @broadcore.com. If you do not know which user ID type to use, please contact your site administrator or Masergy support for assistance.

On the Masergy Global UCaaS system, the Unity network server settings have already been preconfigured by Masergy. Please do not change any of the prepopulated fields.



Specify connection properties for different services.

Please note some network settings cannot be modified through Unity client, they must be changed through the Unity management portal. Please speak to your telephony provider for more details

OCI CTI XSI Reporting IM&P

Broadworks Server Connection Details

Server address
login.broadcore.com

Server port
2208

Secure connection using TLS

TLS server port
2209

TLS certificate hostname
login.broadcore.com

TLS security protocol
TLS 1.2

When you click OK, the Unity Agent client will be restarted.

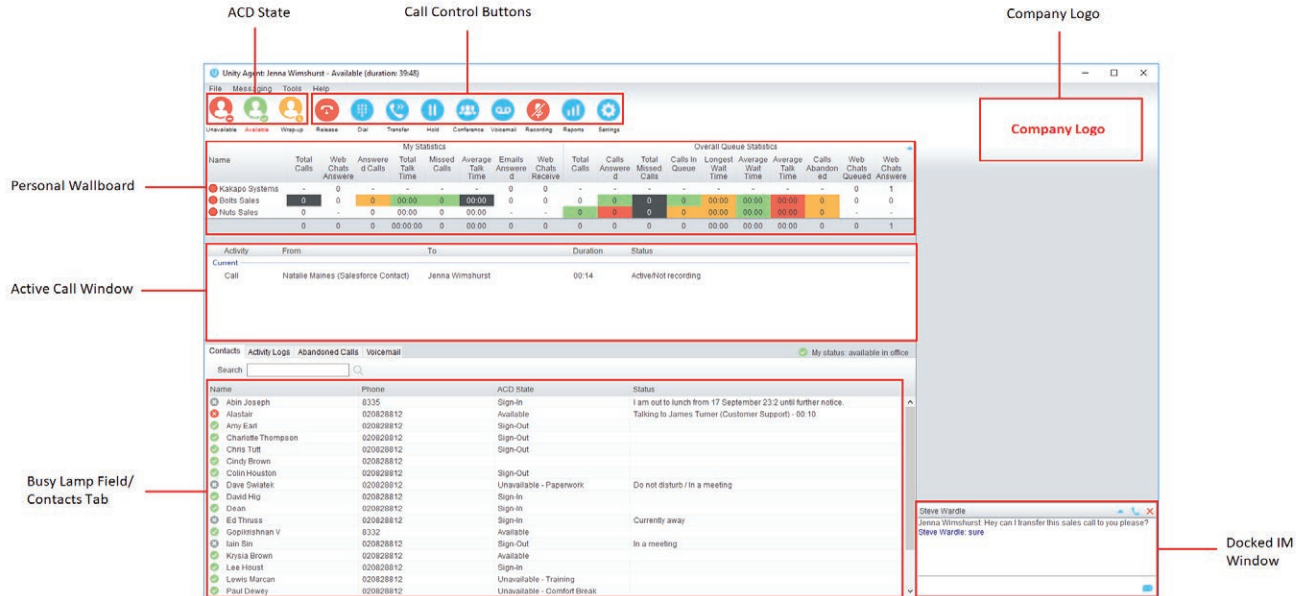
2 THE INTERFACE

Unity is split into three functional areas; Call Control, Current Call List and Productivity Tabs. The Productivity tabs are further split into Call Logs, Abandoned Calls and Voicemail tab.










The Current Call List will display the status of all current calls for the logged in user, which are controlled using the Call Control buttons.

These call control buttons will change based on the status of the call.

When Unity first starts it will automatically populate the Busy Lamp Field with 30 random users in your group or enterprise.



3 CALL CONTROL

ICON	FUNCTION	DESCRIPTION
	Dial	Click this to dial a number and make a call. Right click it to redial from the last 10 numbers called.
	Answer	This button will appear when a call is ringing.
	Release/End call	This button will appear once you have a call active. Click to end the call. If you have multiple calls, click the call you want to end first.
	Hold	This button will appear during a call. Click to hold the call. If you have multiple calls, click the call you want to put on hold first.
	Retrieve	This button will appear if you have a caller on hold. Click the button to take the caller off hold.
	Voicemail	Click the voicemail button to send an incoming call to voicemail. Click the button when you don't have a call and it will call your voicemail box.
	Transfer	Click this button to transfer a current call to a certain number. Drag and drop the call over a contact to transfer them without entering their number.
	Conference	Select two or more calls then click the conference button to start a conference with those callers.
	Recording	Click to start, pause or resume recording.

Transferring a Call

- **Announced Transfer:** Answer an inbound call then make a new call to the desired number, this will place the first caller on hold and initiate a new call. Once the new party answers, click transfer and transfer the two calls together.
- **Blind Transfer:** While on an active call, dial a number or drag to/right click the recipient then select transfer, this will send the caller directly to the destination number and disappear from your call list.
- **Warm Transfer:** Right click the user you want to transfer the call to and select “warm transfer”. This will then put the original caller on hold while you talk to the other user, when ready, click the transfer button.

(You can also transfer a call to someone’s voicemail or mobile by right clicking their icon and selecting the option.)

Starting a Conference Call

- Establish the first call.
- Call a second person.
- Click the conference button to create a new conference for all three of you.
- To add more people to the conference simply dial or start another call then click the conference button.

Ending a Conference Call

- To end the conference call but continue speaking to one of the callers, simply select the person/ call you want to end and click the Release button.
- To end the conference call and disconnect both parties, simply hang up the phone or select both calls and select Release.
- To leave the conference but allow the other callers to continue speaking to each other, perform an announced transfer between the two calls.

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.

Call Recording

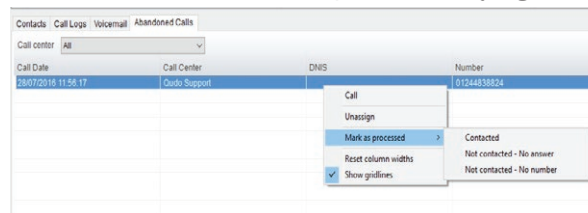
Call Recording options are:

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. Stop and pause are not available with this option.

Option	Description
Never	Calls are never recorded and recording cannot be started while a call is in progress.
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.

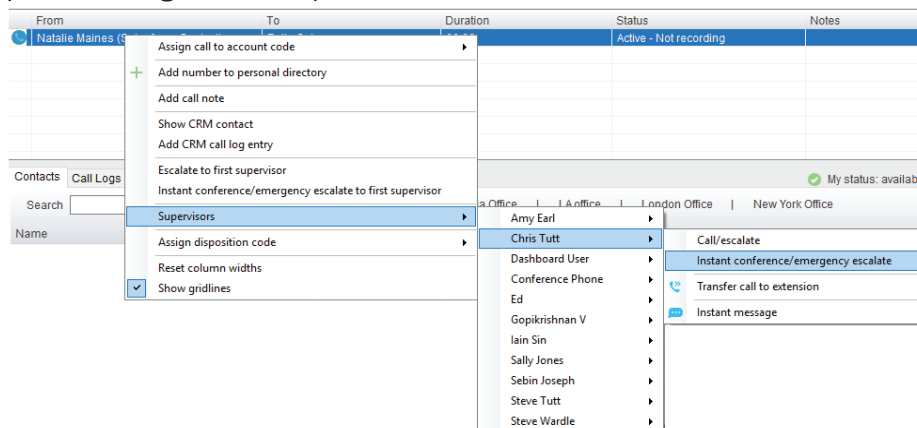
Abandoned Calls

- In the Agent Enterprise version, a supervisor can assign abandoned calls to the agent for a callback.
- These will be listed in the “Abandoned Calls” tab. Double click these calls to make the outbound call.
- Once the abandoned call has been called back, mark as processed by right clicking and selecting the option.



Supervisor Escalation

- Right clicking any queue in the Personal Wallboard will allow the agent to alert, either by calling or instant messaging, a supervisor assigned to the queue.

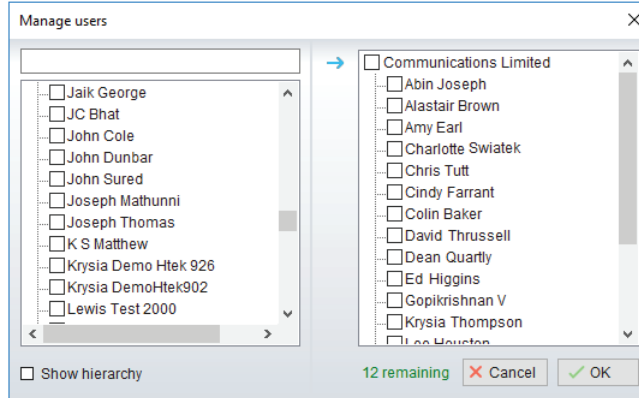


4 BUSY LAMP FIELD

User Status Views






- Monitor up to 30 users
- Right-click anywhere in the list to change the view of the users, e.g. list, icons etc.

- To modify the list of users currently being monitored, right-click and select Manage user list. Select the users you want to add or remove by using the arrows. Your monitored users are on the right.



Monitored User States

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

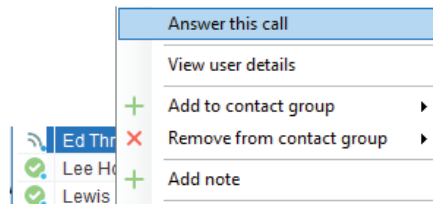
User State	Description	User Status Image
Available: In Office	I am in the office and available to receive calls.	
Available: Out Of Office	I am not in the office but am available to take calls	
Busy	I am currently busy (short term)	
Unavailable	I am currently unavailable (longer term)	
None	No call routing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

Drag and Drop Calling and IM

- Hold down and drag a user's icon to the docked IM panel to start instant messaging
- Drag a user to the Active Call Window to call them
- Drag an active call to another user to transfer/show available transfer options

Call Pickup

This feature allows the logged in user to answer an incoming call on behalf of a monitored user. Simply right click a ringing user and pick up the call.



Options for a Busy User

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

Options for an Available User

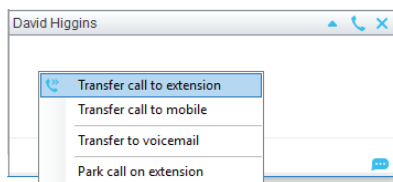
Call extension	Call the user
View user details	View user's number, mobile and email information
Instant message	Send the user an instant message
Add XMPP presence	
Send email	
Copy number	
Personal directory	Add, import and export a directory
Manage user list	Manage monitored users in the Busy Lamp Field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

5 INSTANT MESSAGING (IM)

If a user has a small blue dot then they are available for instant messaging.

Send an instant message by:

- Right clicking their user icon and selecting instant message
- Drag and drop the user to the docked panel on the right (this can be set up in the settings tab)
- Click messaging at the top of Unity and select start conversation. Then add the people you want to instant message, Multiple users can be selected to start an IM conversation [by holding down the CTRL key while selecting users], but they must all be online.



6 MY STATUS

- To activate your status, Available, Busy, Do Not Disturb etc, click on the My Status link and click the menu option.
- To activate call forwarding, select the option “Call forward always”, then configure the number. All incoming calls to the pre-defined phone number, meaning the user’s phone will not ring.

