



UNITY CALL CENTER AGENT WEB - getting started guide

November 2019



UNITY CALL CENTER AGENT WEB - GETTING STARTED

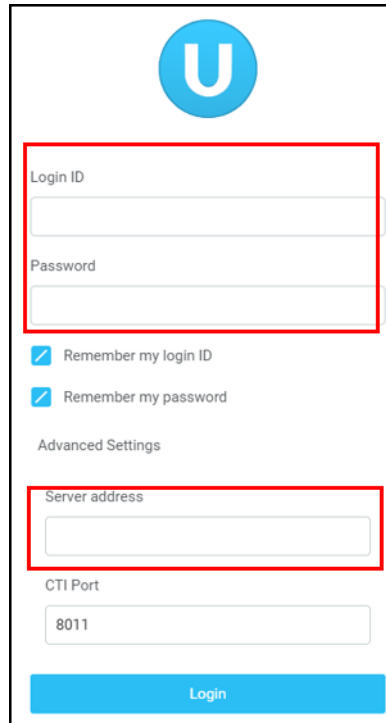
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1 INITIAL SETUP

Unity requires an initial configuration in order to communicate with Masergy Global UCaaS services. The Unity Web Agent client URL is <https://agent.unityclient.com/>.

The first-time Unity is started you will be prompted to enter the configuration details, as shown below. Unity can then retain the connection and authentication details for later use.



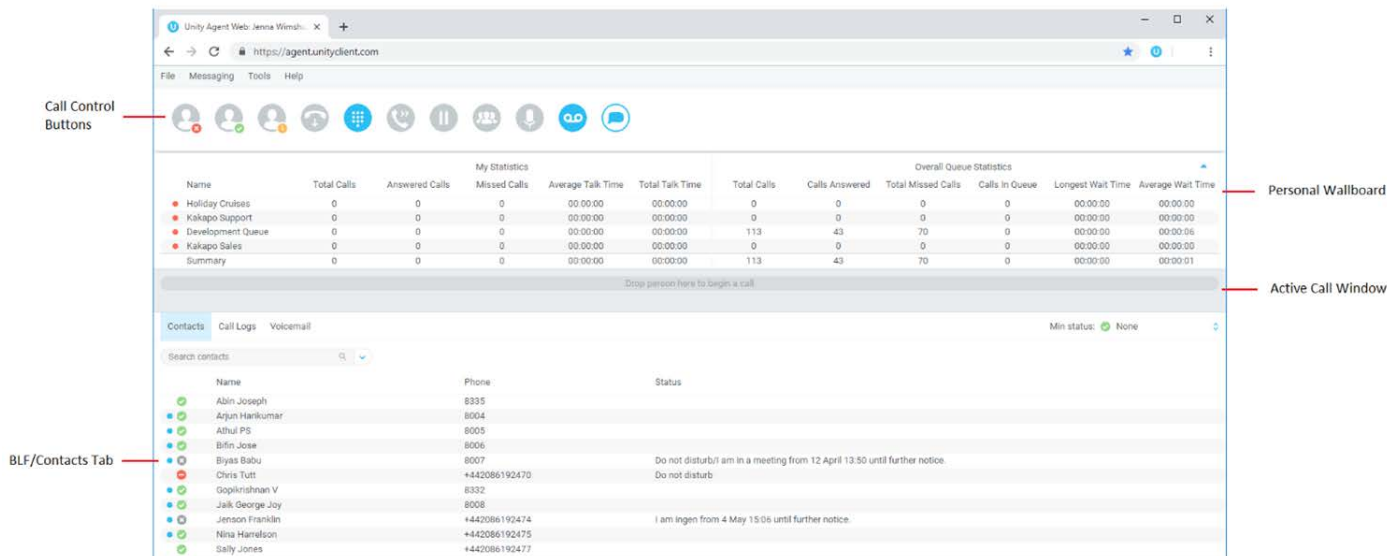
- Enter your Login ID and password.
- Masergy Server Address: login.broadcore.com or login.masergy.com

Note: if unsure of which Masergy server address to use, please contact your site administrator or Masergy support for assistance.










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

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.

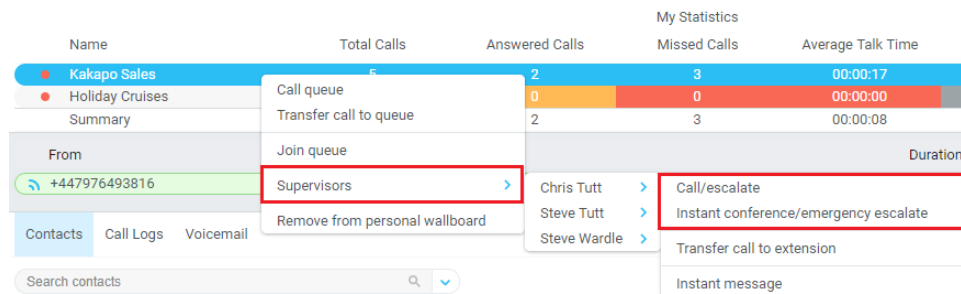
Call Recording

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.
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].
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.

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.

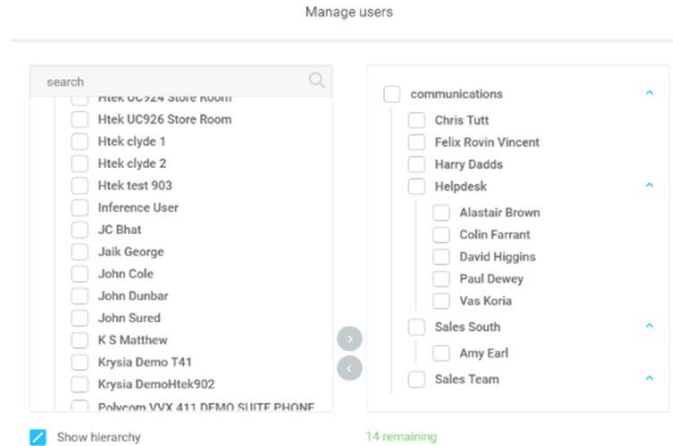


Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time
Kakapo Sales	5	2	3	00:00:17
Holiday Cruises	0	0	0	00:00:00
Summary	2	2	3	00:00:08

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 Icon
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 Instant Messaging (IM)

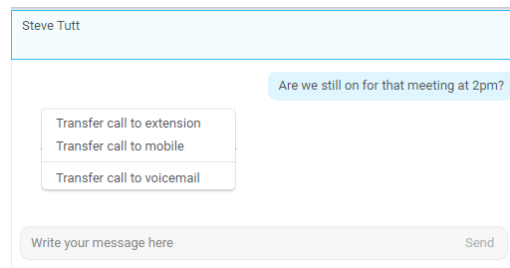
- Hold down and drag a user's icon to the docked IM panel to start instant messaging
- Drag a user to the Active Call Window to call them
- Drag an active call to another user to transfer/show available transfer options

5 INSTANT MESSAGING

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, 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.

