Unity Call Center Agent Configuration

Best Practices Guide

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LOGIN to Unity

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You credentials will be provided to you by your leadership and will incorporate your phone number. You will either be given a 10 digit (###-###-####) phone number or 10 digits followed by a period then a 5 digit extension (###-###-####.#####).

Your login ID to Unity will be that phone number followed by *@voip.evolveip.net*. For example, a typical Login ID should have both components and look like this example

6109648000.89999@voip.evolveip.net

When Unity is first launched, you will be prompted to enter your login credentials.
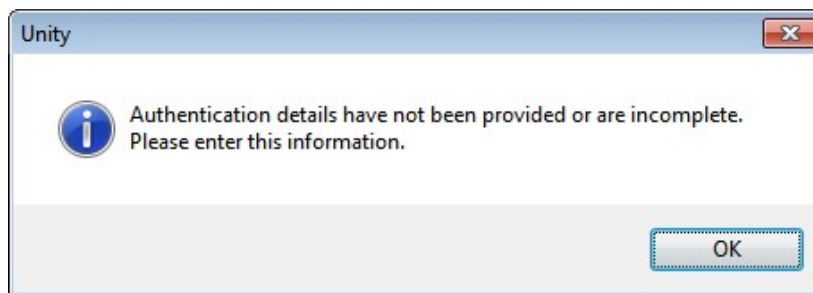
Enter your Login ID in that format along with the password that was provided by your leadership.

Be sure to uncheck the **Remember My Password** box in case you entered the wrong password the first time. We will enable that setting in a later step.

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Unity Settings

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Once logged into Unity, there a few settings that should be applied to each agent's workstation.

To access the services and settings options click on the [Settings] icon.

Agent ACD State

Within the Services Tab, select on the **Agent** option under Call Center. There are a few ACD configuration options that can be set up to ensure that the user is automatically placed into the correct ACD state (Available, Unavailable, Wrap Up) at various points.

Startup & Desktop Unlocked ACD State: **Unavailable**

Post call ACD State: **Wrap Up**

Desktop locked ACD State: **Unavailable**

Wrap Up Duration (sec): **[Determined by your leadership team]**

Also on this tab, enable **Activate sign-out ACD state when Unity is closing**.

Join/Unjoin Call Center Queues

Within the Services tab, select **Call Center** and activate **Join all my call centers….when Unity is starting** to automatically add the agent into every queue they are assigned.

Also, activate **Leave all my call centers….when Unity is closing**.

Queue Status Authentication

Within the Settings tab, click on the **Authentication** underneath **Connection**. There is a list of call center queues assigned to that user under the Call Center Login Details. Right click on each queue and select **Set** Password and enter in the queue password (******). This will enable the agent to join/ leave queues and also view the queue statistics.

Also on this screen, you can now check the **Remember My Password** screen for future logins.

Call Notification

The last option to consider is the Unity "Pop" option. Be default when an incoming call comes in, the users Unity client will pop to the front on the user's workstation. This is a setting to ensure that the Agent is able to view the incoming call information. Some agents find this feature distracting so this is a personal preference option. To disable this option select **Call Notification** underneath **Computer / Phone Integration on** the Settings tab and deselect **Pop Unity**

Additional Resources

Evolve IQ Knowledge Base – http://support.evolveip.net/kb/

Evolve IP Support - (610) 964-8000 Option 5

Training – Evolve IP provides free customer training -- registration is required and the full public training calendar can be viewed at:

https://learning.meeting.evolveip.net/perl/ilinc/lms/event.pl?div_view=reg&event_user_id=