

Unity Call Center Agent

Quick Reference Guide

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Install the application and adjust the appropriate settings (refer to Unity User guide for suggested

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The main Unity window has four separate sections: Call Control/CallCenter Icons, Personal Wallboard, Active Call Window, and User Status/Directories View.

Top Box - Call Control/Call Center Icons: This view provides the different call control icons needed to perform actions like Answering/Releasing a Call, Transferring and Conferencing calls. The Call Center Status Icons allow Agents to switch between Unavailable, Available and Wrap-up by clicking on the appropriate icon.

Top Middle Box - Personal Wallboard: Shows the current performance metrics for the Calls Centers an Agent is assigned to.

Bottom Middle Box – Active Call Window: All inbound and outbound calls will appear in this section. The following information will always be displayed: From (caller-id), To (caller-id), Duration of Call, and Call Status (Active, held, etc).

*Note that Gridline view can be turned off: Right-click in Active Call Window > Click Show Gridlines so it is unchecked and turned off.

Bottom Box – User Status/Directores: User Status shows the users currently being monitored. Directories provides the Enterprise/Group Directories along with a Personal directory for the end user's personal entries.

*Note that Gridline view can be turned off: Right-click in User Status Window > Appearance > Click Show Gridlines so it is unchecked and turned off.

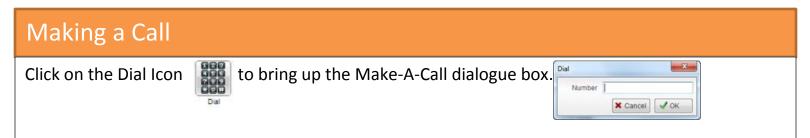


ACD State Icons	& Descriptions:	
ACD State	<u>lcon</u>	Description
Available	Available	Agent is available to receive ACD calls
Unavailable	Unavailable	Agent is unavailable to receive ACD calls
Wrap-Up	Wrap-up	Agent is performing post-call work

Active Call Control:

Active calls are managed through the Call Control Buttons at the top of the application. The Answer/Release Answer and Hold/Retrieve Answer icons toggle as only one of these options

will be valid at any time. For example, when an inbound call is ringing, the Answer icon will be available. Once the call is active, the icon will toggle to Release in order to hang up the call.



Enter the number on the PC keyboard and click OK or press enter to make the call. The desk telephone/headset will ring. Pickup the ringing phone to initiate the outbound call if using telephone.

Note: Right clicking on the Dial button will also provide a list of the last 10 numbers you dialed. To dial one of those numbers click the associated phone number. You can also make a call from the

Directory or Call Log.	Contacts	Call Logs (3 Missed)
	Search	Q
	Name	

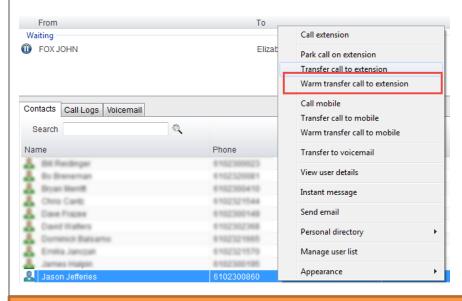


Announced Transfer

Receive and answer and inbound call. Put the first caller on hold. Make a new call to the desired destination, using the

instructions for making a call. Once the called party answer, announce the call then click Transfer to connect the call. Both calls will now disappear from the Active Call Window. IF you have multiple active calls, make sure you select the call you wish to transfer by clicking on it in the active call window.

To transfer to a user within your managed users list, right click on their name and select warm transfer call to extension. This will automatically put the first caller on hold. Follow the rest of the steps above to complete the transfer.



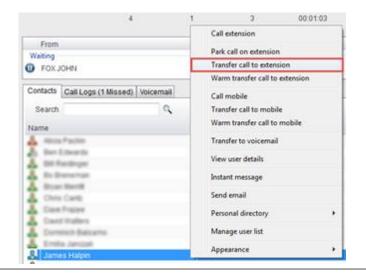
Blind Transfer

While on an active call, right click the recipient in the Contacts tab and select Transfer Call to Extension. This will send the caller directly to the destination number. The original call will disappear from the Active Call Window.

If the caller is not in the directory, dial the phone



number, click on the transfer Transfer and enter the number of the user you wish to transfer the caller to in the Dial box and click OK. The original call will disappear form the Active Call Window and be transferred directly to the destination number.





Conference Call: Once an active call is established, put the caller on hold to dial out to the third party. Once the third party has answered, click the Conference button ^{Conference} and all three parties will be connected. You can disconnect any individual call by clicking on the call display and clicking on the Release Icon To place both party's on hold, click the Hold Icon To release both parties, click on the Release Icon **User Status** The status of 30 users can be viewed. The users can be chosen by right clicking on white space on the Contacts page. A window will pop up, select Manage Users. To add a user to your view click on the name of the individual in the left hand

column and click on the to move to the right column. Click OK to save the selection. To remove a user from your view,

click on the name of the individual on the right and click 🖤 to move the name to the left column. Click OK to save the selection.

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Instant Messaging

To instant message a user within the manage user list or Enterprise directory search, right-click on the users name and select Instant Message.

🙎 Alicia Packin	6102320447	7	Sign-Out
💄 Ben Edwards	5: Call	extension	ailable
🐣 Bill Reidinger	6	extension	pn-Out
🐣 Bo Breneman	6 View	user details	
🐣 Bryan Merritt	6		n-Out
🐣 Chris Cantz	6 Insta	int message	
Dave Frazee	6 Send	l email	an-Out
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🙎 Emilia Janczak	6 Man	age user list	
💄 Jennifer Piperato	6	-9	an-Out
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🙎 Jason Jefferies	6102300860)	Sign-Out
& Katie Castiglione	6102300027	7	
& Katie Scott	6102321566	6	Sign-Out
Korni Conrad	610000000	h	

To open another IM window with another user from the Manage User list, click on the users name and drag and drop the user into the IM panel.

The IM window will appear in the IM panel on the right side of the application.

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Contacts Call Logs Voicemail				My status: in office		
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Lauren Klausner	6102321545	Sign-Out				
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8 Kristen Gallagher	6102320441	Sign-Out				
Nicci Townsend	6102302365	Sign-Out				
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