

User Guide - Unity Agent Best Practices

Recommended Settings



When deploying Unity Agent to Call Center agents we recommend the following setting be used. Some organizations may want to use [Unity Agent Templates](#) to enforce many of these settings. These are accessible in Unity | Settings button (or Tools | Settings) and found on either Services or Settings tabs.

Group	Setting	Options	State
Call Center			
	Join all my call centers		
		When Unity is Starting	Unchecked
	Leave all my call centers		
		When Unity is closed	Unchecked
	Agent		
		Include Call Center Calls in my call logs	Yes
	ACD State		
		Startup	Unavailable
		Desktop locked	Unavailable
		Only show current ACD state button	Yes
		Activate sign-out ACD state when Unity is closing	Activate
	Statistics	Agent Columns NumberOfCallsUnanswered	Set Column heading to "Bounced Calls"
		Call Center Columns TotalMissedCalls	Remove
		Call Center Columns NumberOfCallsInQueue	Remove
Messaging		Call Center Columns	Add NumberOfCallsAbandoned field and Set Column heading to "Bounced Calls"
Items below are available for template			

Appearance			
		Show missed call count in call log tab	Activate
	Contact Search		
		Include external contacts in search	Activate
		Show monitored users first	Activate
		Include Department name in search	Disable
		Clear the search box when activated	Activate
	Include Contacts when		
		The name contains the search criteria	Activate
	Contact Display		
		Show call duration	Activate
	Menu Options when a call is dragged over a contact		
		Transfer call to extension	Activate
		Transfer call to voicemail	Activate
		Transfer call to mobile	Activate
		Warm transfer call to extension	Activate
		Warm transfer call to mobile	Activate
		Park call on extension	Activate
	Current Calls		
		Resize the current call list	Activate
	Clipboard Integration		
		Enabled	Disable
	Outlook Integration		
		Load contacts from public folders	Activate
		Load contacts from my private folders	Activate
		Use Outlook caching	Activate
	Call Notifications		
		Perform auto answer when using click to dial	Activate
		pop summary notification	Activate and 10 seconds
		When call details clicked pop Unity	Activate
	Startup		
		Startup Application	Unity Agent
		Auto start Unity on operating system boot	Activate
	Update		
		Auto update Unity	Activate
	Instant Messaging and Presence		
		Send Ims to offline Users	Disable
		Show instant messages in docked panel	Activate
		Play a notification sound	Disable
		Show popup notification	Disable
	Security		
		If the template can't be loaded	Continue loading Unity
Connection			
	Authentication		

		Remember my login ID	Activate
		Remember my Password	Activate
	Call Centers		
		Default password	enter password
		Alert when a call center login fails	Activate