Print and share

Unity Browser-Enabled Call Center Agent

Table of contents

Call Logs

Contacts

Unity Browser-Enabled Call Center Agent Overview

Unity is organized into three key areas:

1. **Call Control**: This section allows you to manage your active calls. The buttons will change depending on the call status (answer, hold, transfer, etc.).
2. **Current Call List**: This list displays all your ongoing calls for quick access and management.
3. **Productivity Tabs**: This section provides additional tools to enhance your work. It includes tabs for:

   Call Logs: View a history of your past calls.

   Abandoned Calls: Track missed calls.
4. **Voicemail**: Access and manage your voicemail messages.

System Requirements

Web Browser Requirements

Unity will run on the following browsers:

1. Google Chrome
2. Microsoft Edge
3. Safari for Mac
4. Internet Explorer

Internet & Firewall

The Unity web client is hosted in multiple data centers; therefore, customer firewalls will not need to be configured – access it by going to https://spectrumagent.unityclient.com/.

However, any firewalls or Access Control Lists (ACLs) in the system provider core must be configured to allow the below inbound connections:

1. TCP port 2208 to the BroadSoft OCI server
2. TCP port 8011 (or 8012 if the connection is secured using TLS) to the BroadSoft CTI server
3. HTTP/HTTPS access to the BroadSoft XSI server

These connections will be established from one of two logical IP addresses, please ensure both IP addresses are allowed.

Primary IP Address: 185.17.172.185

Secondary IP Address: 85.13.237.8

Sign In

When you launch Unity for the first time, it will guide you through setting up your connection. This includes entering your login information, which will be provided by your Service Provider. Once configured, Unity can remember these details for your convenience, saving you from re-entering them in the future.

In some cases, Unity might also ask you to enter your Service Provider's server address. However, if your system administrator has already configured this information, the server address field will be automatically filled in (pre-populated) and the **Advanced Settings** section will be hidden to avoid unnecessary changes.

To login to the Unity Browser-Enabled Call Center Agent Portal:

Enter your login ID and you password. Once entered, click **Login**.

Managing ACD States

To change your ACD state, click on one of the available options within the ACD State panel of the window. These include, Unavailable, Available, or Wrap-Up. Your current status will be highlighted for easy reference.

Note: When you change you ACD State, it allows the call centers you are associated with to know when you are available for calls. This only affects calls routed through the system (ACD), not direct calls to your extension (DID).

My Status

To activate your status, Available, Busy, Do Not Disturb, etc, click on the **My status** link and select the menu option.

To activate call forwarding, select the option **Call forward always**, then configure the number. All incoming calls to the predefined phone number, meaning the user's phone will not ring.

To activate and deactivate call forwarding, simply hover over **Call forward always** and select the option.

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.

Place and Answer Calls

Click the **Dial** button to bring up the dial pad. Using the computer keypad enter the desired number and click the **Call** button or press **Enter** to make the call.

When Unity displays an inbound call, click the **Answer** icon, or double-click the call in the Active Call Window to answer the call.

Ending a Call

To end an active call, you can wither click the **Release** icon, or if you are using your handset, simply hang the phone on the desk mount.

Hold and Resume an Active Call

To place a current active call on Hold, click the **Hold** button.

To retrieve a call placed on hold, select the held call in the current call list and then proceed to click the **Retrieve** button.

Send a Call to Voicemail

To send an inbound caller directly to your voicemail click the **Voicemail** button.

Starting a Conference Call

To start a conference call, establish the first call and 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, click the **conference** button and dial the party's number to add them to the call.

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.

Transferring a Call

Unity Browser-Enabled Call Center Agent offers multiple ways to transfer calls:

1. **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.
2. **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.

3. **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.
4. **Transfer to Voicemail**: Right-click the user you want to transfer the call to and select the **transfer to voicemail** option. The call will be transferred directly to the recipients voicemail.

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.

Busy Lamp Field

You can 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.

Drag and Drop Calling

Drag a user to the Active Call Window to call them. Drag an active call to another user to transfer/show available transfer options.

Monitored User States

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

Available	The monitored user extension is on hook

	Ringing	The monitored user extension is ringing
	Engaged	The user is on the phone
	Do Not Disturb	The user has selected DND or Unavailable profile

Escalate a Call to a Supervisor

In the Personal Wallboard, agents can right-click any queue to directly notify the assigned supervisor. This notification can be done through a call or instant message.

Instant Messaging

Instant Messages can be displayed in the Docked IM Window or as separate dialogue boxes for each individual IM thread. If the docked window is used, IMs can be initiated via drag and drop and new IM windows will not pop over other applications.

If a user has a small blue dot, they are available for instant messaging. Send an instant message by:

1. Right-clicking their user icon and selecting **instant message**.
2. Drag and drop the user to the docked panel on the right (this can be set up in the settings tab).
3. 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.

Call Logs

The Call Logs tab displays Missed, Received, and Dialed Calls in chronological order (although the sort order can be changed by clicking on the column header). The Call logs tab will show the number of missed calls since Unity was last used, as well as any missed calls received while Unity is running.

Drag or double-click an entry to make a call to that number.

Contacts

The Contact Search field combines all UC with Webex and Outlook Contacts directories to create a central search repository. The UC with Webex directories include the Common Phone List (system speed dials), the reception user's own Personal Directory entries, and the Group Directory which includes all the other users in the group as well as hunt groups.

Search results will display each number for a contact as a separate line. Drag or double-click the entry to make a call or right-click to select a call action from the context menu.

Use the dropdown in the search box to select a directory, then click the search button to clear it and see the default list of monitored users.