

# Unity Browser-Enabled Call Center Supervisor

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## Unity Browser-Enabled Call Center Supervisor Overview

Unity's interface is divided into six key sections:

### 1. **ACD Buttons:**

The ACD State buttons allow supervisors with a Call Center Agent Standard/Premium license to manage agent availability across all call centers. Clicking "Unavailable" might prompt the user to select a reason code from a list, if these codes are configured within UC with Webex. This additional functionality helps supervisors maintain efficient call center operations by ensuring agents are properly marked as unavailable when needed.

### 2. **Call Control Buttons:**

Call Control buttons offer one-click access to frequently used commands for handling phone calls, such as answer, transfer, and hold calls during conversations. These buttons are dynamic, meaning they only display the features assigned to your specific user profile. For instance, if you don't have access to Call Recording or Voicemail, those buttons won't clutter your interface. This personalized approach keeps your workspace focused on the tools you actually use.

### 3. **Personal Wallboard:**

The Personal Wallboard displays key metrics for the call centers you're assigned to, whether as a supervisor or agent (if you have both roles). It provides two breakdowns:

**My Statistics (for supervisors acting as agents):** This section shows your individual performance.

**Overall Queue Statistics:** This section displays the current state of the entire call center(s).

### 4. **Active Call Window:**

This window displays a real-time list of your calls, including their current status (Ringing, Active, On Hold) and total duration (from the initial call placement, not affected by hold/resume). It essentially mirrors your phone's actions, so placing a call on hold on your handset will reflect the same in Unity.

### 5. **Contacts:**

This list will display up to 30 monitored users, displaying their Do Not Disturb in gray, available in green, engaged in red or ringing in orange state as icons.

#### 6. **Call Logs:**

The Contacts panel transforms into a call log when toggled. It displays missed, received, and dialed calls. The basic service shows the last 20 calls of each type upon Unity startup, with new calls automatically added as you use it.

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## System Requirements

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### Web Browser Requirements

Unity will run on the following browsers:

1. Google Chrome
  2. Microsoft Edge
  3. Safari for Mac
  4. Internet Explorer
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### 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://spectrumsupervisor.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

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## 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 Call Center Supervisor Portal:

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

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## 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 your 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).

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# 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 <b>Voicemail</b> 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 <b>Conference</b> 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.

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## Ending a Call

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

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## Auto Answer

Unity Supervisor allows agents to control ACD call answering. When in "Available" state, agents can choose to have incoming calls automatically answered. Note: This feature is only available for agents who are assigned to the specific call center queue.

To do this, click settings. Locate and select **Incoming Calls > Call Center > Agent**. Under calls, **check Automatically answer call center calls when I'm available**.

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## 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.

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# Send a Call to Voicemail

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

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## 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 part's number to add them to the call.

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## 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.

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## Transferring a Call

Unity Supervisor 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**. The call will be transferred.
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## 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.

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## 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.

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## 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

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# Changing an Agents ACD State

Supervisors have the power to manage agent availability within the call center. They can access this functionality through three locations:

1. **Personal Wallboard:** Right-click the call center queue and select the agent, then choose **Join, Leave**, or adjust their **ACD state** (including unavailable reason codes).
  2. **Tools Menu:** Navigate to **Tools Call Centers > Call Center > Agents** and select the desired agent. Choose **Join, Leave**, or modify their **ACD state**.
  3. **Agent Activity Tab:** Click the **Agent Activity** tab, select the call center, and right-click the agent. Choose **Join, Leave**, or adjust their **ACD state** with the appropriate state.
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## Silently Monitor an Agent Call

Supervisors can listen in on an agent's next calls without the caller's knowledge. This "silent monitoring" feature helps with coaching and improves agent performance. However, it requires two things:

To activate silent monitoring of a specific agent, right-click on the **agent** and select **Silent Monitor**. Proceed to choose how you would like to monitor their calls by choosing either **Next call only** or **All calls**.

You can set a warning tone to be played when the monitoring process begins. You can configure this option in the clients' settings. Go to **Settings > Services > Supervisor > Call Center Monitoring**. Proceed to check **Playing warning tone when monitoring**.

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## Set statistics and Set Thresholds Against Agents

Unity Supervisor allows you to customize how agent performance is tracked in the Agent Activity tab.

To add or remove statistics, navigate to **Settings > Statistics > Columns > Agent Activity**. This section lets you choose which statistics to display for agent monitoring.

To set thresholds for statistics, double-click any statistic you want to monitor more closely. You can then define threshold values. When a statistic reaches or exceeds a threshold, it will be visually highlighted, allowing you to quickly identify areas that might require attention.

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## Threshold Alerts

Supervisors can set performance thresholds for various metrics across all their assigned call center queues. These thresholds act as early warning systems, highlighting potential issues without impacting call routing or queue structure.

To do this, navigate to **Settings > Services > Columns > Call Center Columns**. Double-click the desired statistic (e.g., total calls) within the statistics menu. Different thresholds can be set for individual call centers or applied uniformly across all queues. Process to double-click the threshold value box and enter the desired number. Click **OK** when complete.

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## 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** top of Unity and select **Start Conversation** 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.

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## 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.

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# 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.