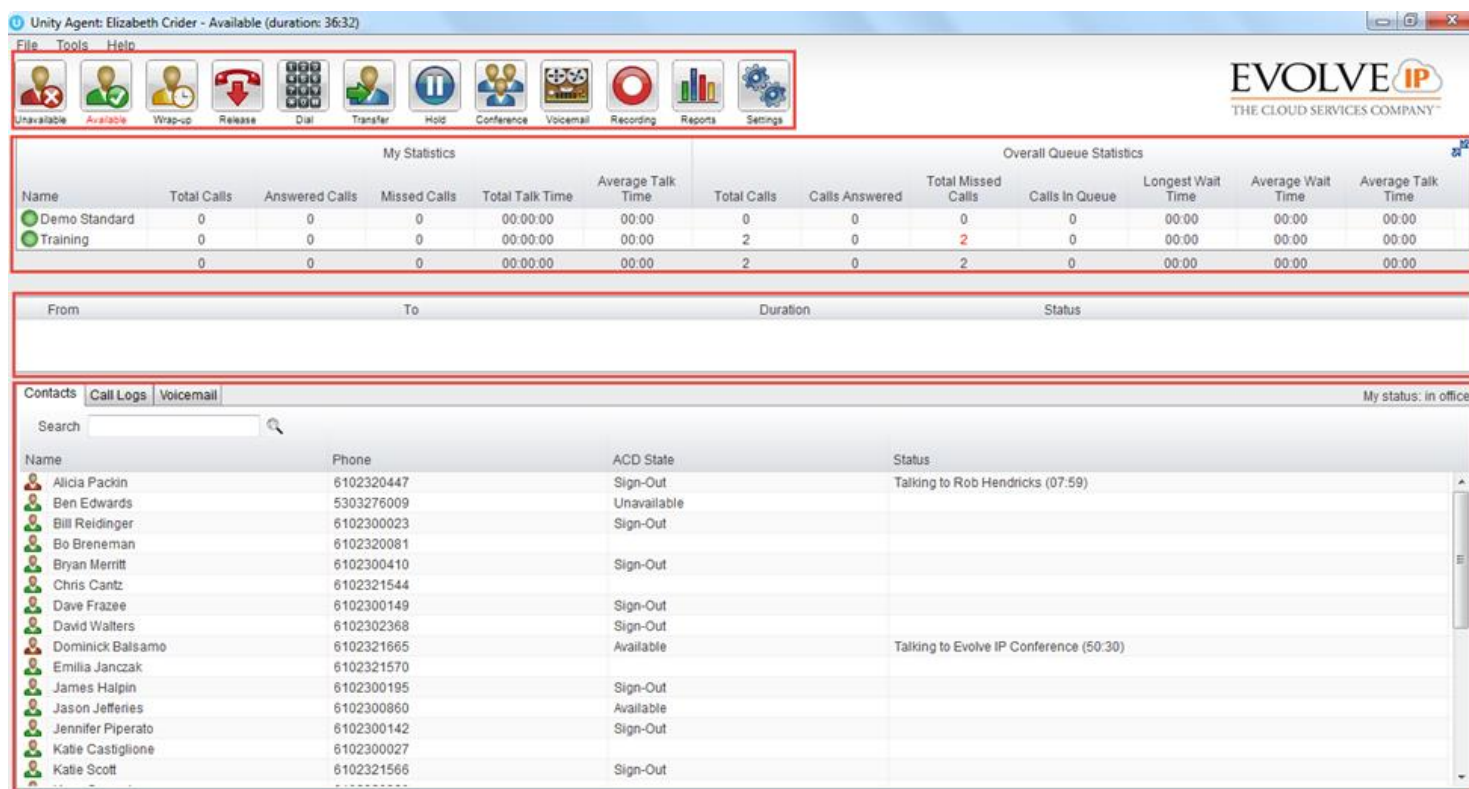


# Unity Call Center Agent

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## Quick Reference Guide

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



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/Directories:** 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:

<u>ACD State</u>	<u>Icon</u>	<u>Description</u>
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   and Hold/Retrieve   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.

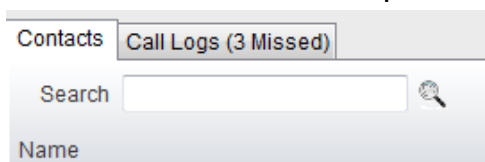
## Making a Call

Click on the Dial Icon  to bring up the Make-A-Call dialogue box.



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.



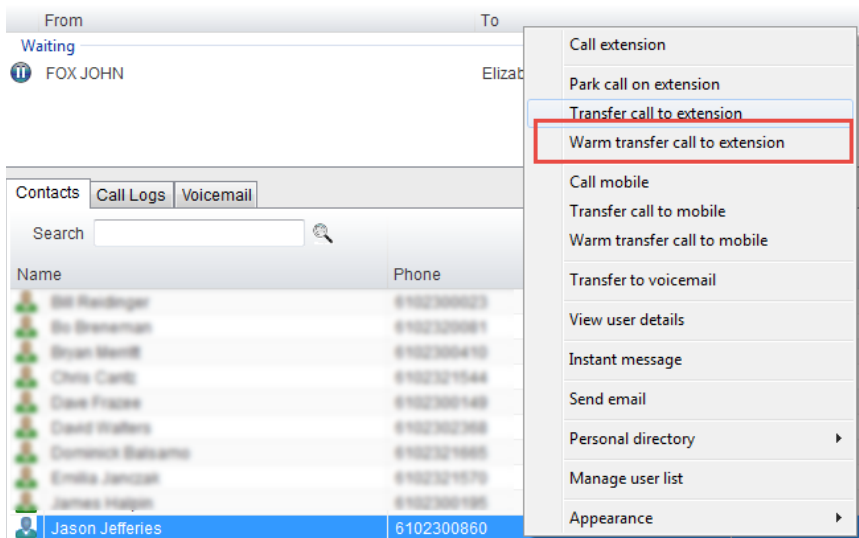
## Announced Transfer

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 answers, announce the call then click  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.




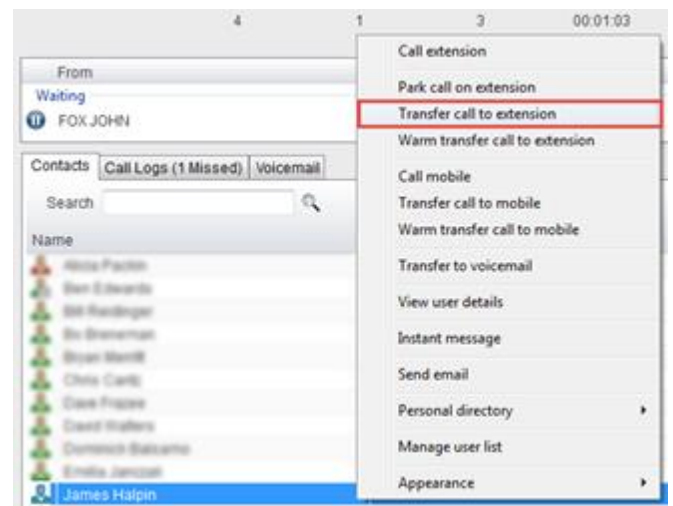
## Blind Transfer

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  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 from 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



Conference

the Conference button 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



Release



Hold



Release

To place both party's on hold, click the Hold Icon To release both parties, click on the Release Icon

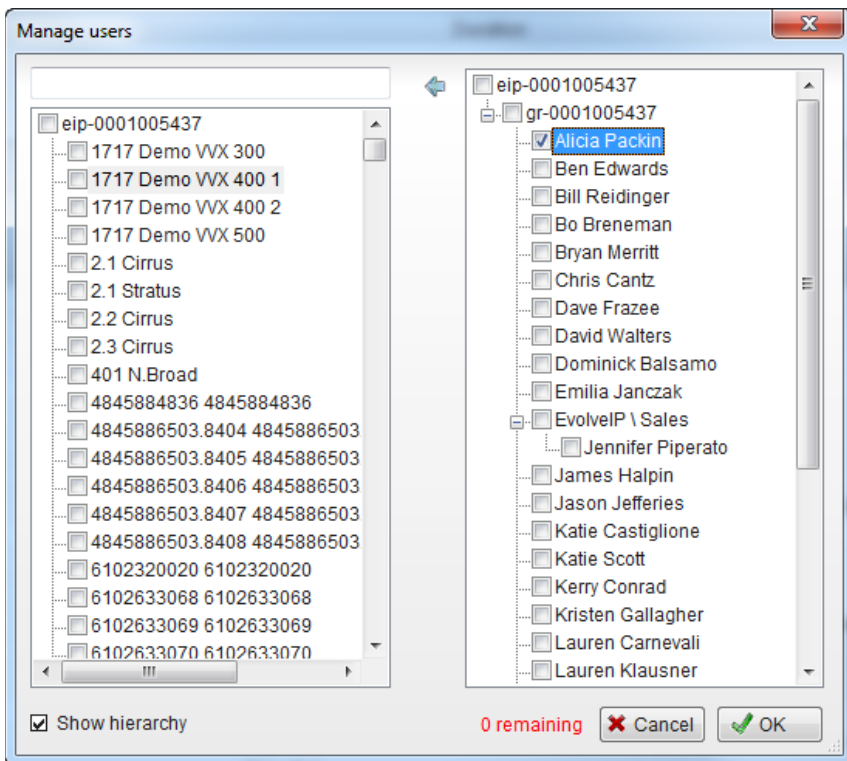
## User Status

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.

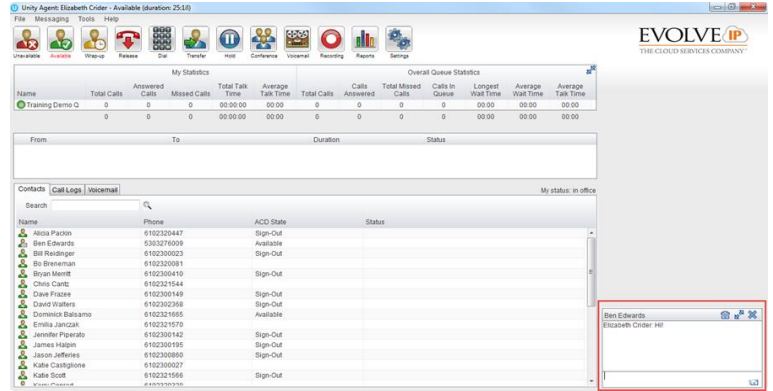


## Instant Messaging

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	Sign-Out
Ben Edwards	5102320447	Available
Bill Reidinger	610230023	Sign-Out
Bo Breneman	610230081	Sign-Out
Bryan Merritt	610230019	Sign-Out
Chris Cantz	610231544	Sign-Out
Dave Frazee	610230148	Sign-Out
David Walters	610230268	Sign-Out
Dominick Balsamo	610231565	Available
Emilia Janczak	610231570	Sign-Out
Jennifer Piperato	610230142	Sign-Out
James Halpin	6102300195	Sign-Out
Jason Jefferies	610230060	Sign-Out
Katie Castiglione	610230027	Sign-Out
Katie Scott	610231566	Sign-Out
Kerry Conrad	6102320320	Sign-Out

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



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.

