

# UNITY DESKTOP QUICK HELP GUIDE

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# 1 INTRODUCING UNITY

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Unity is a Microsoft® Windows® based application that enhances the Hosted PBX solution to provide call control, directory integration, instant messaging and service configuration. Featuring an intuitive icon based interface, Unity provides point and click call control within the familiar desktop environment. Unity improves workgroup collaboration by bringing users closer to each other and simplifying internal and external communication.

## Unity Lite

Features provided;

- Call control
- Directory Search
- User Status [Busy Lamp Field]
- Displays 8 users
- User service configuration
- Outlook Contacts click to dial
- Call pick up
- Call Recording Control
- Meet me Conferencing Moderator Dial in
- Hoteling [hot desking] logon/logoff
- VoiceMail tab playback, save, delete voice messages
- Browser click to dial [from Chrome, Edge, Firefox]

## Unity Pro

All Unity Lite features but also including:

- User Status [Busy Lamp Field]
- Displays 30 users
- Instant Messaging
- Third party database [SQL, LDAP, Active Directory] integration within Directories

## Unity Enterprise

- Unity Connect API integration with third party database applications

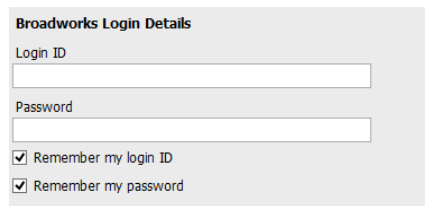
The below services are supported:

| Service   | Description   |
|---|---|
| <b>Anonymous Call Rejection</b>                       | Prevent a caller from contacting you if they have explicitly hidden their phone number  |
| <b>Call Forward Always</b>                            | Automatically forward all incoming calls to a number  |
| <b>Call Forward Busy</b>                              | Automatically forward all incoming calls to a number when the user is on the phone  |
| <b>Call Forward No Answer</b>                         | Automatically forward all incoming calls to a number when the call hasn't been answered after a certain number of rings                     |
| <b>Call Recording</b>                                 | Record incoming and outgoing calls, refer to section 5.8 for more information   |
| <b>CommPilot Express</b>                              | Use pre-configured routing profiles to handle incoming calls based on the current state of the user   |
| <b>Do Not Disturb</b>                                 | Block all incoming calls and reroute to voicemail if available  |
| <b>Simultaneous Ring</b>                              | Automatically ring another number when an incoming call is received, the call can then be answered through that number or the primary phone |
| <b>Calling Line ID Delivery Blocking</b>              | Hide your phone number when making outgoing calls   |
| <b>BroadSoft Anywhere</b>                             | Connect mobile or fixed-line devices to the VoIP account, and switch calls between them   |
| <b>Call Transfer</b>                                  | Transfer calls to internal or external numbers  |
| <b>Call Waiting</b>                                   | Answer an incoming call when already on a call  |
| <b>Call Park Retrieve</b>                             | Retrieve a call that has been parked for a specific user  |
| <b>Directed Call Pickup With Barge-In</b>             | Automatically join another users call   |
| <b>Hoteling Guest</b>                                 | Associate the VoIP account to another device so that it is treated as the primary device. Used in a hot-desking environment.                |
| <b>Remote Office</b>                                  | Associate a mobile device to the VoIP account to make or receive calls  |
| <b>Shared Call Appearance</b>                         | Control multiple devices for the same VoIP account  |
| <b>Voice Messaging User</b>                           | Provide voicemail for unanswered incoming calls   |
| <b>External and Internal Calling Line ID Delivery</b> | Provides Calling Line ID information of an incoming call from outside the group   |

## 2 INITIAL SETUP

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When Unity is first started you will be prompted to authenticate on the VoIP platform, which requires a login ID [including domain] and password. Please consult your service provider if you don't have these details.



**Broadworks Login Details**

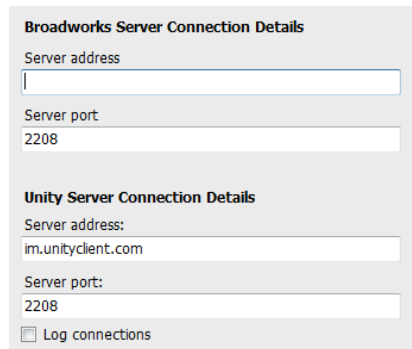
Login ID

Password

Remember my login ID

Remember my password

Now select Connection > Network from the list on the left to confirm the connectivity details, as below.



**Broadworks Server Connection Details**

Server address

Server port  
2208

**Unity Server Connection Details**

Server address:

Server port:

Log connections

Enter the Broadsoft Server Connection as specified by your Service Provider. In some cases, this will already be supplied in which case it does not need to be changed.

## 3 UNITY DESKTOP INTERFACE OVERVIEW

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Unity is split into three functional areas; Call Control buttons, Active Call Window and Contacts [Busy Lamp Field and Instant Messages]. The contacts tab can be toggled to display Call Logs and the Voicemail tab.

The Active Call Window will display the status of all current calls for the logged in user, which are controlled using the Call Control buttons. These call control buttons will change based on the status of the call.

The Busy Lamp Field list will automatically populate with 8 or 30 random users in your group or enterprise when Unity first starts, depending on Unity license assignment.

## 4 MAIN INTERFACE ELEMENTS

### 4.1 Call Control

Call Control buttons provide quick access to common telephone handling commands. Only services that are assigned to the user are displayed.

### 4.2 Active Call Window

This provides a list of all current calls and their state. For example, Ringing, Active or On Hold.

The screenshot displays the Unity Desktop interface for user Jenna Wimshurst. The interface is divided into several key sections:

- Call Control Buttons:** A horizontal bar at the top left contains icons for Release, Dial, Transfer, Hold, Conference, Voicemail, Recording, and Settings.
- Active Call Window:** A table below the buttons shows the current call details.

| From            | To                              | Duration | Status               |
|-----------------|---------------------------------|----------|----------------------|
| Jenna Wimshurst | Natalie Maines (Salesforce C... | 03:14    | Active/Not recording |
- Busy Lamp Field:** A list of contacts with their names, phone numbers, and current status.

| Name             | Phone      | Status                                   |
|------------------|------------|--|
| Alastair Farrant | 0208288126 |  |
| Charlotte Wardle | 0208288123 |  |
| Chris Tutt       | 0208288124 | Do not disturb                           |
| Cindy Bake       | 0208288123 |  |
| Colin Swiatek    | 0208288124 |  |
| David Higgins    | 0208288123 |  |
| Dean Marcan      | 0208288124 |  |
| Ed Baker         | 0208288124 |  |
| Harry Swiatek    | 0208288123 |  |
| Iain Quartly     | 0208288126 | Talking to Peter Law - 09:26             |
| Krysia Swiat     | 0208288126 |  |
| Lee Higg         | 0208288126 |  |
| Lewis Marcan     | 0208288126 |  |
| Paul Baker       | 0208288125 |  |
| Steve Tutt       | 0208288125 |  |
| Steve Wardle     | 0208288124 | Talking to Jenna Wimshurst - 00:03       |
| Vas Farrant      | 0208288125 | Talking to 02079807000 (Support) - 11:03 |
- Docked IM Panel:** A vertical panel on the right side shows active instant messaging conversations with Steve Tutt, Chris Tutt (Offline), and Charlotte Quartly, Amy Earl.

The duration of the call is also displayed.

### 4.3 Contacts [Busy Lamp Field]

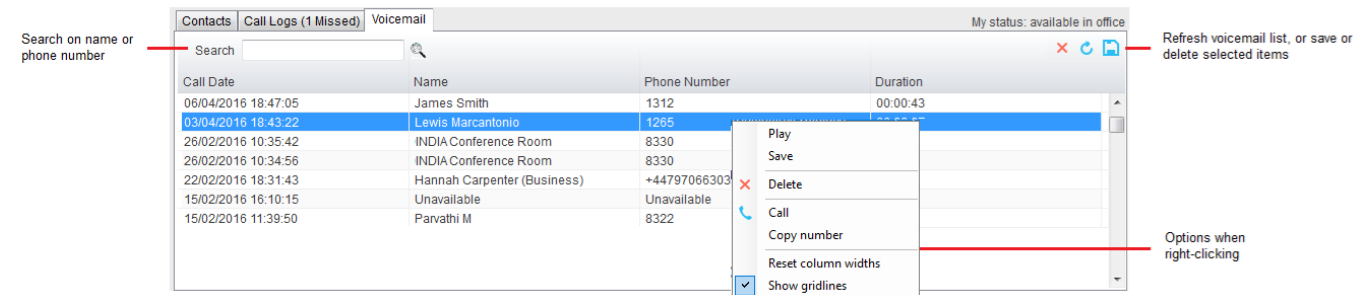
This panel will display up to 30 monitored users, displaying their Do Not Disturb [grey], Available [green], Engaged [red] or Ringing [orange] state as icons.

### 4.4 Call Logs

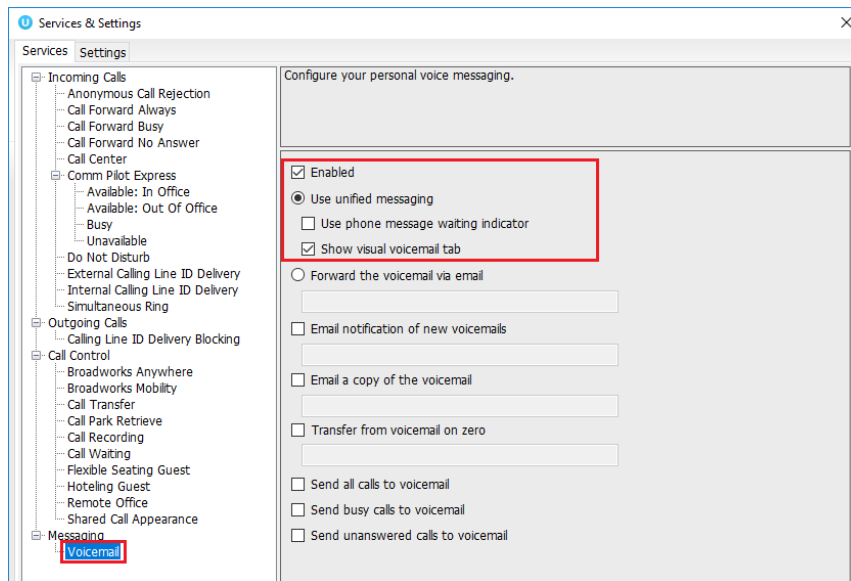
Toggling the bottom Contacts panel to Call Logs will display Missed Calls, Received Calls and Dialed Calls. Missed Calls will include both direct inward DID calls and Hunt Group calls.

### 4.5 Voicemail

Clicking into the Voicemail tab will display a list of voice messages with the most recent at the top. Double click an entry to play through the PC's default media player.







In order for the Voicemail tab to appear, Desktop must be configured for “Use unified messaging” and “Show visual voicemail tab” in Voicemail settings as below.




## 5 CALL CONTROL

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All calls are managed through the call control buttons at the top of the application. These buttons will change depending on the state of the selected call, or the only call if there is only one call in the Active Call Window. For example, the Answer/Release   and Hold/Retrieve   buttons toggle as only one of these options will be valid at any time.

### 5.1 Making a Call


#### 5.1.1 Using the Dial Window

Click the Dial button  to bring up the Dial dialogue box, as shown below. Using the computer keypad enter the desired number and press Enter or click OK to make the call.


#### 5.1.2 Dialling from the clipboard

Any number that is copied to the Windows clipboard, (highlight the telephone number, right click, then clicking copy) this will cause a popup toast above the system tray with the option to call the number. Click the toast notification to make the call.

### 5.2 Answer a 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.


### 5.3 End a Call

Click the Release button  to end the currently selected call. If there are multiple calls in the Active Call Window, make sure you select the right call before clicking Release.

#### 5.3.1 Redial


You can also right-click the Dial button to see a list of the last 10 dialled numbers.

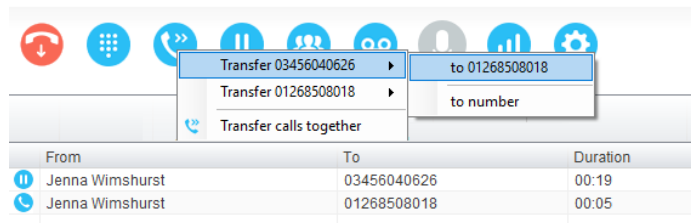
### 5.4 Send Call to Voicemail

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



## 5.5.1 Announced Transfer

Receive and answer an inbound call. Make a new call to the desired destination extension or number as described Make a Call above. This will automatically place the first caller on Hold and will open a new call in the Active Call Window. Once the called party answers, click Transfer  and select the context menu option to transfer both calling parties together.



### 5.5.1.1 Warm Transfer


Unity Desktop allows you to warm transfer a call by right clicking the user you want to transfer the call to and selecting “warm transfer” from the context menu. This will then put the original caller on hold and dial the selected number. When ready, click the transfer button in the call center control options panel and the two calls will be transferred.

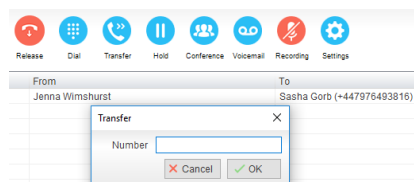
## 5.5.2 Blind Transfer

### 5.5.2.1 Using Contacts Panel Drag and Drop

Unity Desktop can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel.

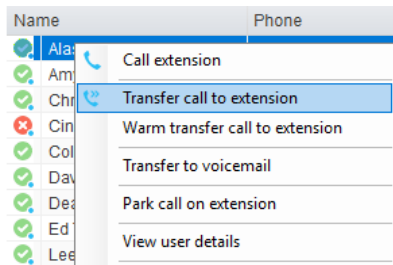
### 5.5.2.2 Using Transfer Button

Once on a call click the Transfer call control button . In the Transfer window enter the destination and click OK.





### 5.5.2.3 Using Right Click


While on an active call right click the recipient icon or number in the Contacts panel or Search. Select “Transfer call to extension” to blind transfer the call.




## 5.6 Call Hold/Retrieve

The Hold/Retrieve   function toggles depending on the status of the currently selected call. Hold is only available for an active call while Retrieve is only a valid option for a call currently on Hold.

### 5.6.1 Placing a Call on Hold

To place a current active call on Hold, press the red Hold button.  The call status will now show as on hold in the Active Call Window and there will be an On Hold icon alongside the call.

### 5.6.2 Retrieving a Held Call

Click the held call in the Active Call Window to select it. Click the Retrieve button  to take the call off hold, you can also double click the call to retrieve it.

## 5.7 Conference Calling

A conference call can be established with any combination of internal and external numbers. The total number of parties that can be supported is determined by service assignment. The Three-Way Calling user service supports conference calls with two other parties only while the N-Way Calling user service supports conference calls with more participants.

## 5.8 Starting a Conference Call

You can select two calls in the Active Call Window and click this button to quickly conference everyone together. Once in a conference you can easily select other calls and add them to it, but you must start with a conference with two other calls first. You can use the hold and retrieve

buttons to hold the whole conference, and use the release button to drop a caller out of the conference. Please note this feature depends on service assignment so may not always be available.


## 5.9 Call Recording

You can use this button to manage call recording in two ways. You can right-click on the button to select how to record calls.

## 6 ACTIVE CALL WINDOW

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The Active Call Window gives visual representation of the status of all calls the user receives or is currently managing.

| From  | To          | Duration | Status  |
|---|-------------|----------|---------|
|  Jenna Wimshurst | 03456040626 | 00:18    | On hold |
| Jenna Wimshurst   | Sasha Gorb  | 00:00    | Ringing |
|   |             |          |         |
|   |             |          |         |
|   |             |          |         |

**From** – This field will display the incoming CallerID or the name

**To** – This field displays the name of the user or hunt group

**Duration** – This displays the total time elapsed since the call was first answered

**Status** – This shows the Ringing/Active, on On Hold and recording status of each call

## 7 DRAG AND DROP

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Drag and drop is an important feature of Unity, it means that in order to perform an action on a call you can simply drag it on top of something. For example, if you want to blind transfer a call to a user then this can be done by simply searching for that user, then dragging the call and dropping it on that user in the contacts list. You may see some options here depending on what was configured in settings, or Unity can automatically blind transfer the call. Similarly, if you want to perform an announced transfer then simple drag one call on top of the other in the Active Call Window, the calls will be transferred together and be removed from the list.

You can also drag other objects into this list to make a call, for example drag a user from the contacts list into the Active Call Window to call that internal user's extension or external contact's number.

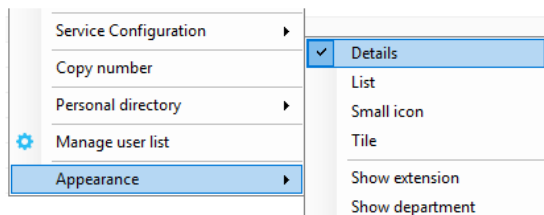
## 8 CONTACTS PANEL [BUSY LAMP FIELD]

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The Contacts tab gives a visual indication of the status of users [within the group/enterprise] that are currently being monitoring. A maximum of 30 users can be displayed. Double clicking a monitored user will call them and right clicking will bring up a dynamic options menu.

### 8.1 Contact Panel Display Options

There are three different views available, as outlined below. Right-click anywhere in the Contacts panel and select Appearance list to change the view.



#### 8.1.1 Details View

This view provides by far the greatest amount of detail, but requires more space [although the list can be shortened in which case scrollbars will automatically appear]. This is the recommended view for users as it shows the ACD state of up to 30 monitored users.

#### 8.1.2 List View

This option will display all users in a list.

#### 8.1.3 Small Icon View





This view combines a simplified look and space reduction.

#### 8.1.4 Tile View

This view is similar to Icon view but uses more white space to provide a cleaner look.

## 8.2 User Icons

There are four main user icons states shown in the Contacts panel, regardless of the view chosen.

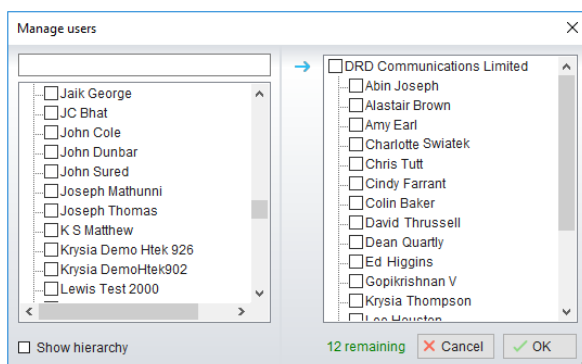
|   |                |  |
|---|----------------|--|
|  | Available      | The monitored user extension is on hook          |
|  | Ringing        | The monitored user extension is ringing          |
|  | Engaged        | The user is on the phone                         |
|  | Do Not Disturb | The user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

### 8.2.1 Instant Messaging Availability

Regardless of a user's Available/Ringing/Engaged/DND state, if they currently have any version of Unity open they will be available for instant messaging. This is shown by a small blue dot at bottom right of the user icon.

## 8.3 Managing Monitored Users in the Contacts Panel

The Contacts panel will display 30 users. In the Contacts panel right click anywhere and click "Manage user list". This will allow you to choose which users to display.



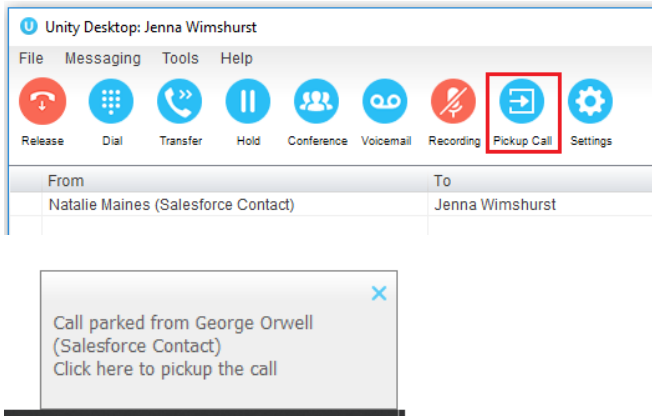
## 8.4 Park Call on Extension

Will park the call on the monitored user's extension park slot.

## 8.5 Retrieving Parked Calls

Once a call has been parked onto a user's extension, their Unity will display a "P" and a toast pop up window will appear. In order for the user to retrieve the parked call they simply need to click

either the “P” or the toast pop up. If the call is not retrieved it will be redirected back to the original user who parked the call.



## 8.6 Camp Call on Extension

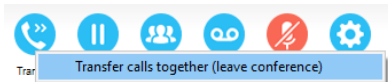
Will camp the call onto the engaged monitored user. When the user goes back on-hook the camped call will be delivered and their phone will start ringing.

## 8.7 Barge into This Call

Makes an immediate three-way conference call with the Desktop user, the monitored user and the third party the monitored user is talking to. When attempting to barge into a call, if the phone plays a “number doesn’t exist” tone then this means the monitored user cannot be barged into.

| From            | To              | Duration | Status                            |
|-----------------|-----------------|----------|-----------------------------------|
| Sasha Gorb      | Jenna Wimshurst | 00:15    | Active (conference)/Not recording |
| Jenna Wimshurst | 01268508018     | 00:02    | Active (conference)/Not recording |

Please note that when leaving a call that you barged into, you must transfer the call parties together in order to leave the conference without ending the original call.

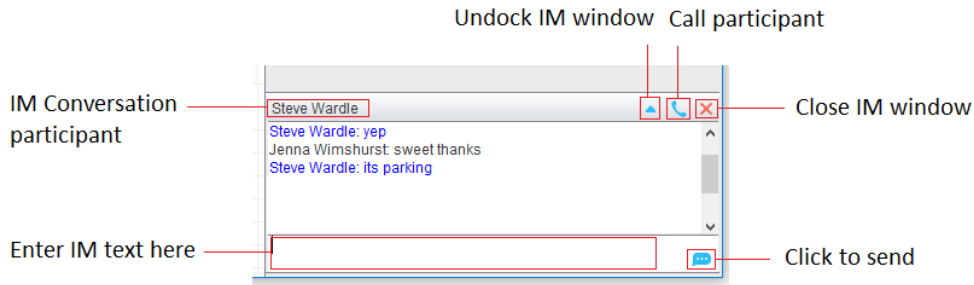


# 9 INSTANT MESSAGING

Instant messages can be sent and received between any Unity app [Reception, Desktop, Agent, or Supervisor]. Messages sent to offline user [those that do not have an instance of Unity open] can be stored and delivered when the recipient next opens Unity.

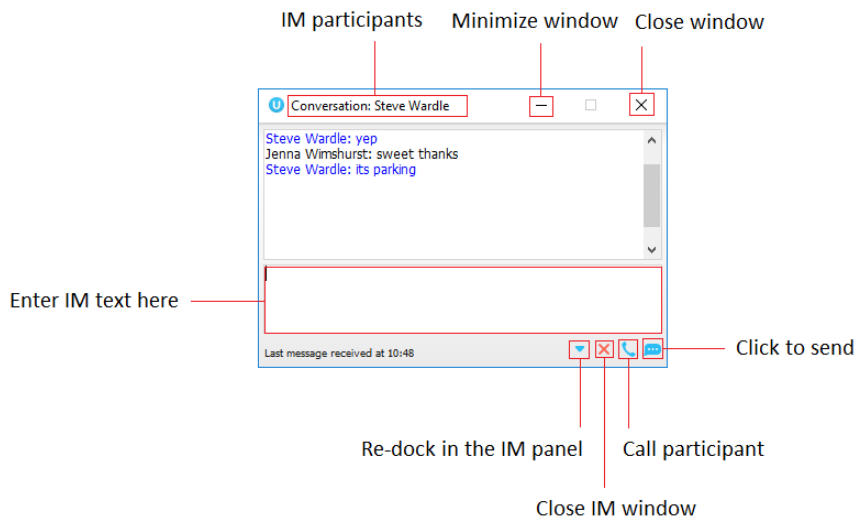
## 9.1 Docking the IM Window

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.



## 9.2 Undocking and Redocking IM sessions

You can undock an IM message by clicking the “Expand conversation to separate window” button. The IM session will now be a standalone window.



### 9.3 Sending an Instant Message

Send an instant message either by right clicking a user icon in Contacts panel or Search and selecting “Instant Message” from the drop list, or by dragging a user icon into the docked IM panel.

### 9.4 Adding Participants to an Existing IM Session

When an IM conversation is in the Docked IM panel you can drag a user icon from the Contacts Panel or Search and drop them on the IM window to add them to the conversation.

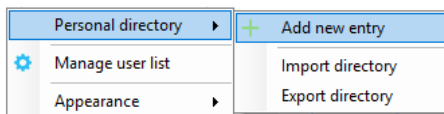
### 9.5 Logging IM Sessions

You will find the Instant Messaging and presence logging options in the Settings tab. Here you will be able to configure how IMs are saved, what file type they are (CSV or HTML) and where they are saved.

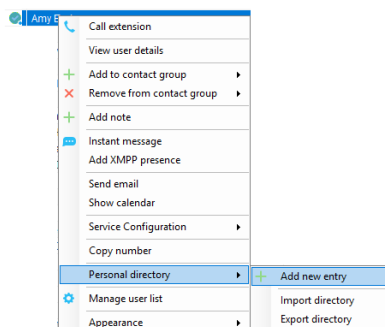
## 10 PERSONAL DIRECTORY

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### Personal Directory – Right click in Contacts



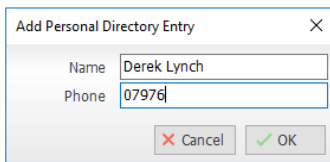
### Personal Directory – Right click on monitored user





## 10.1 Add New Entry

Enter the Name and Number and click Ok



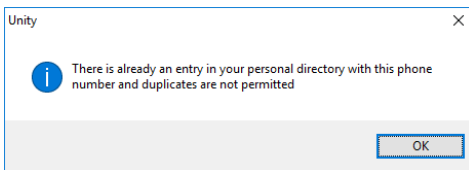
Add Personal Directory Entry

Name: Derek Lynch

Phone: 07976

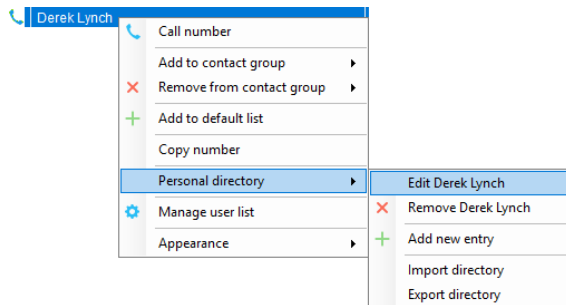
Cancel OK

If the number specified is already in the Directory the user will be alerted as below.



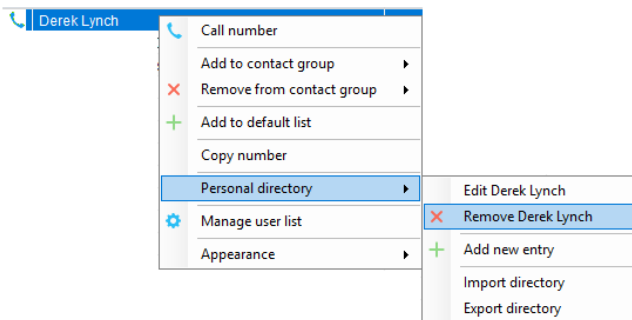
## 10.2 Edit Entry

Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select "Edit".



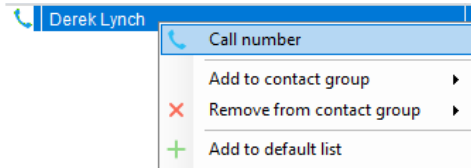
## 10.3 Remove Entry

Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select "Remove".



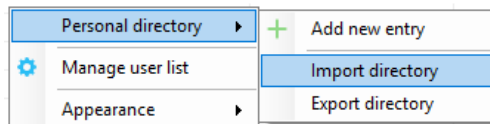
## 10.4 Dialling Directory Entry

Locate the entry either on the Contacts panel or Search. Drag the entry into the Active Call Window or double click to make a call, or right click the entry and click “Call number”.



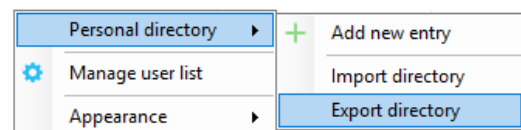
## 10.5 Import Personal Directory

Desktop will allow the user to import a .csv file of directory entries, provided they are in “name, number” format. Right click in the Contacts panel, select “Personal directory > “Import” and then browse to the location of the csv.



## 10.6 Export Personal Directory

To export Personal Directory entries right click in Contacts and select Personal directory > “export”. You will be prompted to save the file locally. The format is csv and the default file name is PersonalDirectory.csv



# 11 CONTACT SEARCH DIRECTORIES

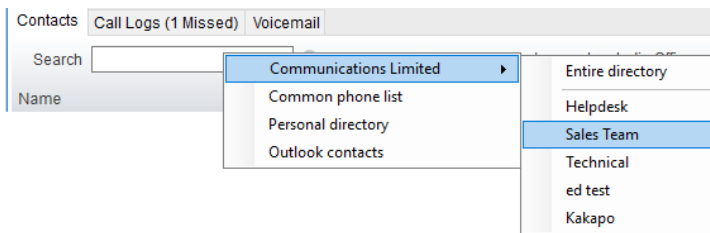
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The Contact Search field combines all BroadWorks and Outlook Contacts directories to create a central search repository. The BroadWorks directories include the Common Phone List [system speed dials], the reception user’s own Personal Directory entries, and the Group Directory which includes all the other users in the group as well as hunt groups. Unity can also integrate with third party LDAP [including Microsoft Active Directory] and SQL directories.

| Contacts                              |       |  |
|---------------------------------------|-------|--|
| Search joh                            |       |  |
| Name                                  | Phone |  |
| Camron Johnson (Salesforce Contact)   | 00180 |  |
| Glenn Johnstone (Salesforce Contact)  | 64214 |  |
| Johan Bergin (Salesforce Contact)     | 46850 |  |
| Johan Klaus (Salesforce Contact)      | 00313 |  |
| Jóhannes Guðmundsson (Salesforce C... | 00354 |  |
| John Cole                             | 01173 |  |
| John Daniels (Salesforce Contact)     | 07956 |  |

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.

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




icons represent external numbers or system resources such as hunt groups for which presence information cannot be displayed.

## 12 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, as shown below.

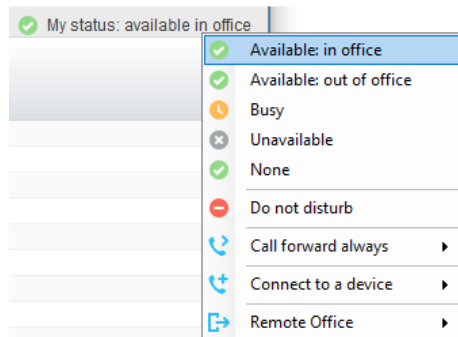
| Call Logs           |              |                  |
|---------------------|--------------|------------------|
| Missed calls        |              |                  |
| Call Date           | Phone Number | Name             |
| 19/08/2016 13:46:03 | 0797         | Sally Wainwright |
| 17/08/2016 12:19:04 | 0139         | 01392346148      |
| 15/08/2016 13:14:02 | 0797         | Sally Wainwright |
| 12/08/2016 13:15:22 | 1251         | Steve Tutt       |
| 11/08/2016 16:01:38 | 1248         | Chris Tutt       |
| 11/08/2016 12:37:31 | 0139         | 01392346148      |
| 08/08/2016 16:30:58 | 0208         | 02086584270      |
| 07/08/2016 18:34:40 | 0002         | Andrew Smith     |

Drag or double click an entry to make a call to that number. Call logs can be exported as a csv file, either individually or together, but clicked the  Export button.

## 13 MY STATUS

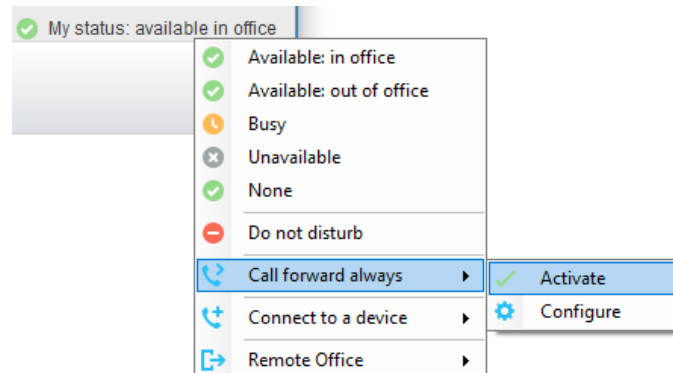
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The “My Status” link provides an indication of the current status of the user as well as quick access to key services that are regularly modified.

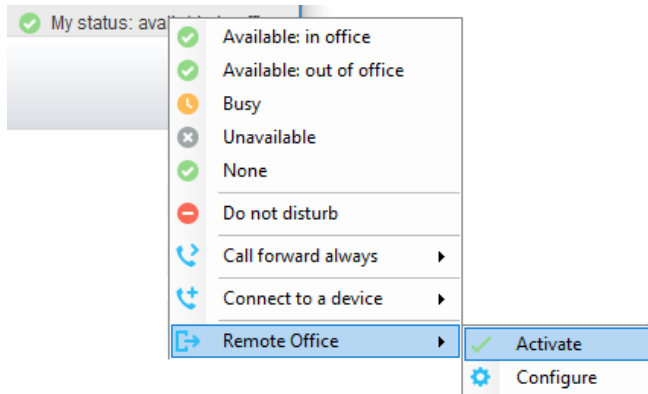


CommPilot profiles are also used to convey presence information to other users within the group or enterprise.

### 13.1 Call Forward Always



## 13.2 Remote Office



## 13.3 Connect to a Device

The user can easily select the device to connect to through the My Status link, as shown below.

