

Unity Receptionist User Guide

The screenshot displays the Unity Receptionist software interface. At the top, there is a toolbar with icons for: Unavailable, Available, Wrap-up, Release, Dial, Transfer, Hold, Conference, Voicemail, Call park, Recording, and Settings. The Clearstar logo is visible in the top right corner.

Below the toolbar is a table with columns: From, To, Duration, Status, and Notes. The table is currently empty.

Below the table is a 'Contacts' section with a search bar and a tab for 'Call Logs (1 Missed)'. The status 'My status: in office' is shown in the top right of this section. Below the search bar is an alphabetical index (A-Z). The main contact list table has columns: Name, Phone, ACD State, and Status.

Name	Phone	ACD State	Status
AfterHours Support VM	6502		
Alicia Diaz	8058846351	Available	
Billing1	6340		
Bruce Woods	8058846327		
Business Development	6403		
Chris Birns	8058846302		
Cristian Small	8058846316	Sign-Out	
Dan Schney	8058846367	Available	
Dane Allen	8058846388	Available	
Daniel Luna	8058846338	Unavailable	
Dave Clark	8058846339		
David Lopez	8058846310		
Dawn Goodnight	8058846320	Sign-Out	
Greg Wilson	8058846396		
Jasmine Brandt	8058846308	Available	
Jason Yearick	8058846360	Available	
Jay Hennigan	8058846323		
Jennifer Shipley	8058846329	Available	
Kris Loera	8058846335	Sign-Out	
Linda Escobar	8058846322		
Lynn Dewey	8058846379	Sign-Out	
Michael Papa	8058846381	Sign Out	
Roderick Newill	8058846386		
Ryan Amburgy	8058846355	Available	
Steve Borgogna	8058846392	Available	
Tracy Green	8058846313	Available	
Victor Green	8058846337	Sign-Out	
Wesley Korpeta	8058846354	Available	



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Overview of Features

Unity Receptionist is a software program that is used on a PC by the Receptionist to control their phone. It is best used in a high volume environment and with a phone and headset. Unity has many features and versions. The Unity Receptionist version has special features that are different from the standard Desktop version and Call Center version. The Receptionist client has all the Call Center agent features built-in and including logging in and out of Call Centers.

Presence

The main view is dynamic. That means you'll see the callers you transfer to most by default. You can see everyone in your company as you search. You'll see their Presence (AKA telephone status. AKA if they are on the phone and who they are talking to.) The maximum number of coworkers you can view on a single screen is 50 extensions.

Orientation

- ACD State: Call Center Status (Log in and out)
- Status: Who someone is speaking with and duration of call(s)
- Search: As you type in a name the results are presented below. The users with heads icons are in your system. A telephone icon represents a number outside the ClearStar system like a mobile number.

Click-to-dial Directories

View (and double click-to-dial) just by searching. The Search look in the following directories automatically:

- Group and Enterprise Listings
- Outlook Contacts
- Personal Call Logs (Missed, Placed, and Received Calls)

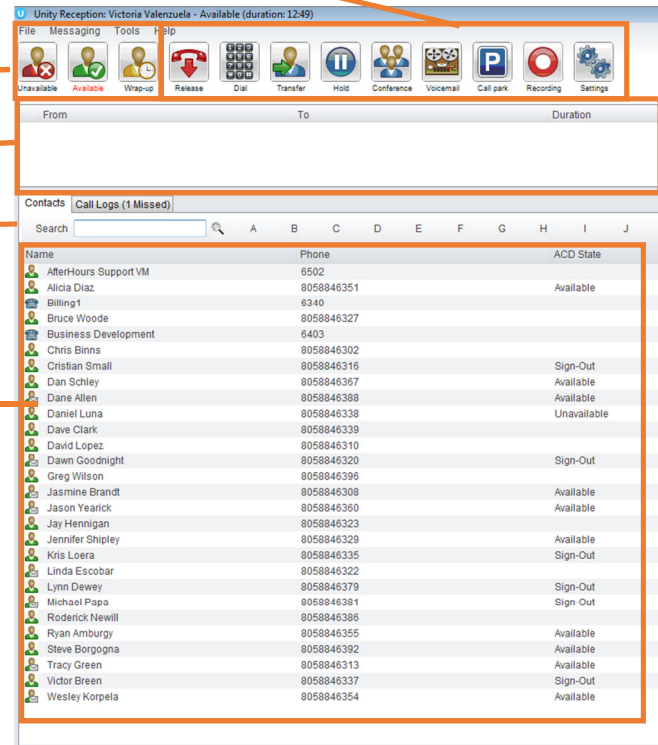
Call Control Section

Call Center Section

Live Call Section

Search

Contacts and Presence Section



How to

This is a basic “straight” click How to section of the document. See below for “Drag and Drop” instructions. You may use either method.

Make a Call

You can double click on a single user listed on your main page to make a call.

Here is another method to make a call:

- Tap the Dial button at the top of the page.
- Populate the desired phone enter.
- Click ok (or press enter on the keyboard.)

Answer an Incoming Call

When you receive an incoming call, and your Unity Receptionist is minimized, the Unity window will pop open. There is also a “Toaster” pop in the bottom-right corner of the screen.

Blind Transfer

Blind Transfer means you would like to send an outside caller to a person straight away without letting them know who is calling.

- While on an active call (no need to hold),
- Locate the proper person you wish to transfer to
- Right click on the user you would like to transfer to and choose “Transfer.”
- The call will ring at the desk of the person you selected. If they do not answer it will go to voicemail

Consulted Transfer

Consulted Transfer means you would like to speak with the person that has a call holding before you send them the call.

- While on an active call (no need to hold),
- Locate the proper person you wish to transfer to
- Double click the name of the person you want transfer to
- Once the person you are transferring to is ready to receive the call, click Transfer button near the top of the screen (in Call Control Section)
- Choose the direction you want to transfer (Likely the last option)

Transfer to Mobile

Transfer to Mobile means you would like to send a caller straight to a coworker’s mobile phone. The mobile number may be in the system, if not you may enter it manually.

- While on an active call (no need to hold),
- Locate the proper person you wish to transfer to
- Right click on the user you would like to transfer to and choose transfer to mobile
- If there is no option, click transfer button near the top of the screen (in Call Control Section). Enter or paste the mobile number and press OK.
- The call will NOT ring at the desk of the person you selected. It will go straight to the mobile phone.

Transfer to voicemail

Transfer to Voicemail means you would like to send an outside caller straight to a voicemail box without ringing.

- While on an active call (no need to hold),
- Locate the proper person you wish to transfer to.
- Right click on the user you would like to transfer to and choose transfer to voicemail.
- The call will NOT ring at the desk of the person you selected. It will go straight to voicemail.

Instant Messaging

Instant Message (IM) is available among all users at your company while they have Unity running. You can identify these users by the Envelope icon on the user's icon. You can IM users who are currently running any version of Unity (Desktop, etc.) A future version may allow for XMPP.

- Right click on user and choose instant message
- A window will appear in the right column of the Unity Console
- If you have many chat windows open a scroll bar will appear
- The button in the top right of the chat window will prompt the chat box to become detached from the Unity Console
- To add more users to a chat (group chat) simply drag a user into an existing chat window.

Sign-In and Sign-Out of Call Centers

To sign in and out, use the options at the top left labeled Available and Unavailable. When going unavailable, you may need to choose the reason you are signing out. If you are not a call center agent these buttons will not appear.

Using the Software

Tips and Tricks with Drag and Drop

You can drag and drop a call from the Active Call Section to a contact in the Contacts and Presence Section.

A menu will appear with some or all of the following options:

- Transfer call to extension
- Transfer call to voicemail
- Transfer call to mobile (if you have the users mobile number saved)
- Park call on extension (if the person you are trying to reach is on the phone)

Hold call and link to user

- This feature appears when people are on the phone,
- if clicked, the call will go on hold and the notes section will be Colored Red and say *"waiting for (employee name)"*

- It will turn Green when the employee is off the phone,
- you can then transfer the call to the employee or retrieve the call from hold and
- Let them know you will transfer them. (Then continue with your preferred transfer method above)

Tips and Tricks with Personal Directory

The Personal Directory can simplify transferring. Simply right click on a user, you may add a phone number and name, it will appear when you search for users. You may now click-to-dial your own personal directory. Personal Directory listings do not show presence (busy/available).

Current Call

Located in top row on the Unity Console

- *From*: Who made the call
- *To*: Who the call is to
- *Duration*: length of call
- *Status*: What stage the call is in
- *Notes*: Personal notes you add to a specific phone number
 - It will automatically inform you of the action taken last time you were on a call with this person
 - The transfer history length is 30 days

Right Click an Icon in Contacts

- Options:
 - *Appearance*
 - Change the view on your presence page
 - Options: Details, Large Icon, List, Small icon
 - Details: name, phone number, call center state (ACD State) and status (who they are talking to)
 - The other views are all similar, in order to view the details of the user you must hover over their icon.
 - *Call Extension* will place a new call to the extension and if you are already on the phone it will place your current call on hold
 - *View User Details* shows the office phone number and the users mobile number (only if the mobile number has been added)
 - *Instant Message* opens a chat window to the right. To add additional people to a current chat drag the user to the chat window and click “Add to the conversation”. The user must be signed into Unity in order to chat with them; this is indicated by an envelope located on the right shoulder of the users icon

- *Send Email and Show Calendar*, uses the local outlook on your computer if the users email address is saved
- Manage the users you see by default
 - Set this by Right Clicking on a user you wish to view without searching,
 - Click Always show in default list.
 - Choose up to 50 users to show in the default list.

Customizing the Software

Customized Appearance

- Presence View
 - Details View:
 - Name, Phone, ACD State, Status, Department
 - Other Views:
 - These four appearances only show the icon for certain users, if they are signed in and if they are logged in. In order to see whom they are talking to you must click on their name and/or hover.
 - Editing the view:
 - Resize the columns by clicking and dragging the line in front of the column name. Reset the common sizes: Right Click > Appearance > Reset Column Width
 - Sort Columns: Click the name of the column to sort

Alphabet Search

The Alphabet Search can show you all the first and last name that start with a particular letter. You can use Alphabet search or Contact Group Search, but not both.

Contact Group Search

You can set the alphabet instead to show Contract Groups. Such as “Sales” and “Engineering” or “HQ”, “Dallas”, and “Seattle.” People can be in any, all or none of the Contact Groups. You can have up to 12 Contact Groups. To create a contact group, click on a name you want in a Contact Group. Click “Add a contact group” And choose an existing list or create a new contact group.

Park Call on Extension

To enable drag and drop for call park, go to Settings > Settings > Reception Settings > Contact Display and check the box “Park call on extension” and click ok.

Contact Search

Contact Display – You can turn the following On or Off

- Show Call Duration
- Show Most Searched Users first by default
- Menu options when you drag a call over a contact
- Current Calls
- Show Notes
- Display options for what you would like to view in this row
- Current Calls – Manages the row at the top of Unity for your current calls