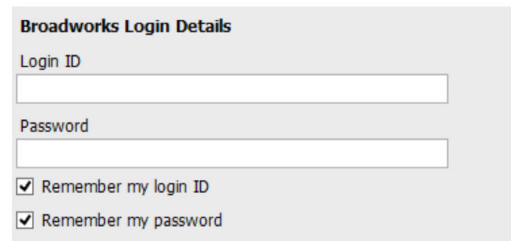


Initial Access

The first time Unity is started you will be prompted to login.
Contact the service provider to receive your credentials, or for assistance with server connection details, as needed.

1. Enter the Login ID and Password credentials you received from the Service Provider. (see fig. 1)
2. Click to remember ID and password for future login, as desired, and click OK.
3. Click the Save button to commit setting changes and Yes to restart the application.



Broadworks Login Details

Login ID

Password

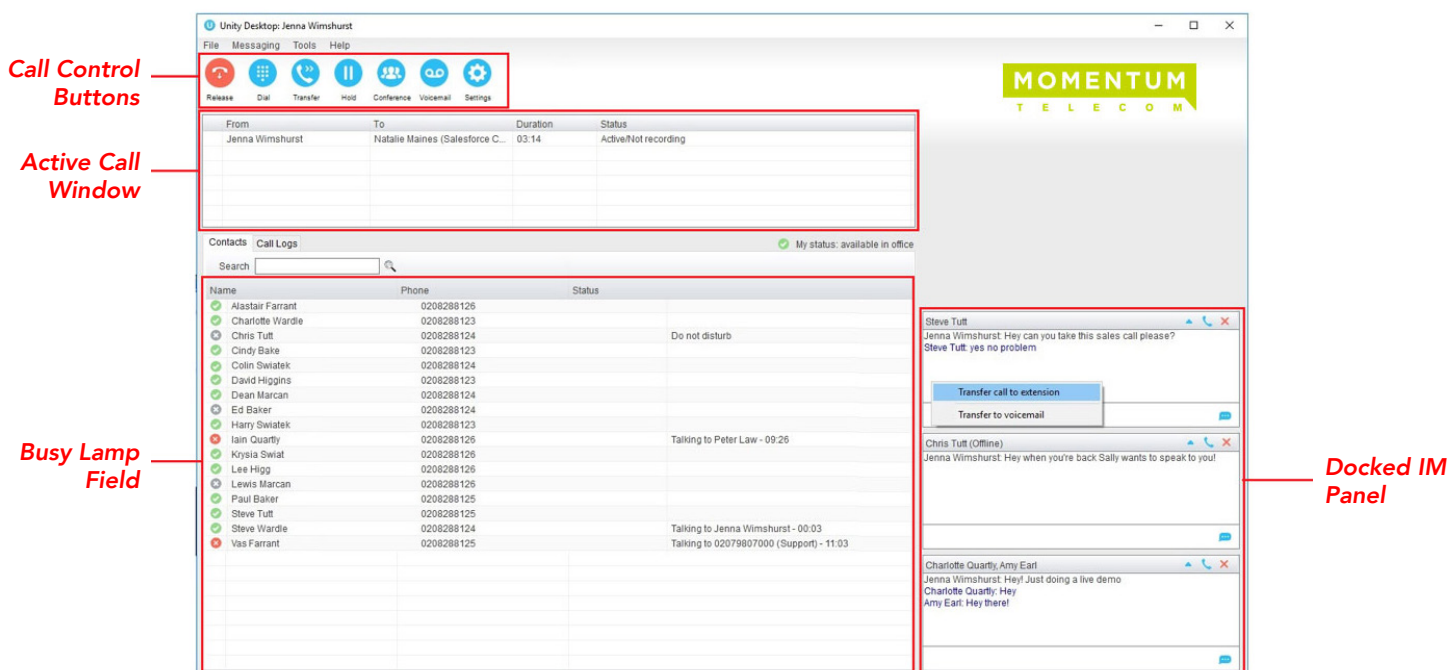
☒ Remember my login ID

☒ Remember my password

Fig. 1

The Interface

- » Unity displays three main functional areas: Call Controls, Active Calls, and Busy Lamp Field where Contact directories, Call Logs and Voicemail may be reviewed. Instant Messaging (where enabled) is also available.
- » The Active Call List displays the status of all current calls for the user, which are managed using the Call Control buttons.
- » The Call Control buttons change dynamically based on current state of the call to provide appropriate actions.
- » When Unity first starts it automatically populates the Busy Lamp Field section with 8 or 30 random users in your group or enterprise [depending on Unity license assignment].



The screenshot shows the Unity Desktop application window for user Jenna Wimbhurst. The interface is divided into several sections:









- Call Control Buttons:** A row of icons for Release, Dial, Transfer, Hold, Conference, Voicemail, and Settings.
- Active Call Window:** A table showing the current call with columns: From, To, Duration, and Status. The active call is with Natalie Maines (Salesforce C...).
- Contacts / Call Logs:** A section with a search bar and a list of contacts with columns: Name, Phone, and Status. The list includes contacts like Alastair Farrant, Charlotte Wardle, Chris Tutt, etc.
- Busy Lamp Field:** A section showing a list of users with their status (e.g., Available, Do not disturb, Talking to Peter Law).
- Docked IM Panel:** A vertical panel on the right showing instant messaging conversations with Steve Tutt, Chris Tutt (Offline), and Charlotte Quartly.

Annotations on the left side of the image point to these sections:

- Call Control Buttons
- Active Call Window
- Busy Lamp Field

An annotation on the right side points to the Docked IM Panel.

Call Controls

Icon	Function	Description
	Dial	Click this icon to dial a number and make a call. Right-click it to redial from the last 10 numbers called.
	Answer	This button displays when a call is ringing.
	Release/End call	This button displays when in an active call. Click to end the call. If you have multiple calls, click on the call you want to end first.
	Hold	This button displays during an active call. Click to hold the call. If you have multiple calls, click the call you want to put on hold first.
	Retrieve	This button is available when a call is 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 Voicemail button when idle (no active calls) to dial your voicemail box.
	Transfer	Click the Transfer button to transfer a current call to a specified number. Drag and drop the call over a contact to transfer to them without entering their number.
	Conference	Select two or more calls then click the Conference button to start a conference with those callers.

TRANSFER A CALL

- » **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.
- » **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.
- » **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.
(You can also transfer a call to someone's voicemail or mobile by right-clicking their icon and selecting the option.)

START A CONFERENCE CALL

1. Establish the first call.
 2. Click Dial and select or call a second person.
 3. Click the Conference button to merge the calls and start a new conference for all three of you.
- » To add more people to the conference simply click Dial and start another call, then click the Conference button.

END 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 all parties, hang up the phone or select both calls and click Release.
- » To leave the conference but allow the other callers to continue speaking to each other, perform an Announced Transfer between the two calls.

MANAGE 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

USER STATUS VIEWS

- » Monitor up to 30 users, depending on Unity license assignment.
- » Right-click anywhere in the list to change the view of the users, the list, icons, etc.
- » To modify the list of users currently being monitored, right-click in Contacts and select Manage User List. Highlight and move the users you want to add to the list on the right using the → arrow. (see fig. 2).

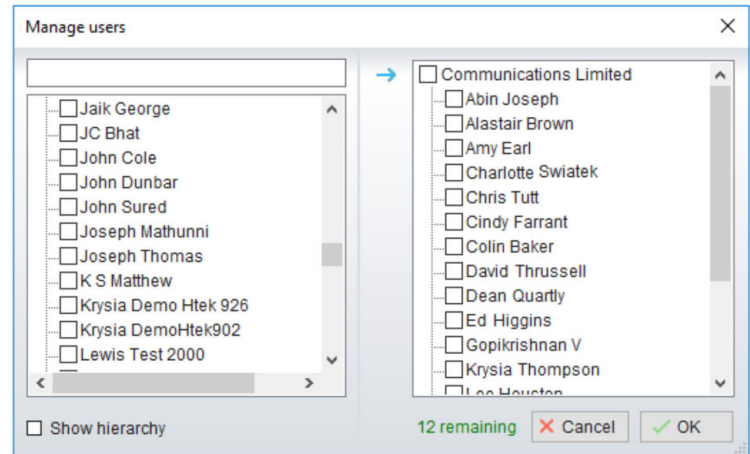


Fig. 2

MONITORED USER STATES

Monitored users always display their current availability status:

User State	Description	User Status Image
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	

DRAG AND DROP CALLS AND IM

- » Hold down and drag a user's icon to the docked IM panel to start instant messaging.
- » Drag a user to the Active Call Window to call them.
- » Drag an active call to another user to transfer/show available transfer options.

CALL PICKUP

This feature allows the user to answer an incoming call on behalf of a monitored user. Simply right-click on a ringing user and select Answer this call (see fig. 3).

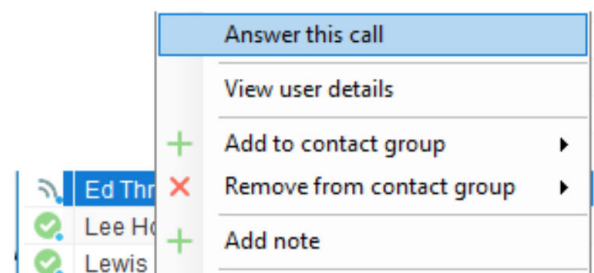
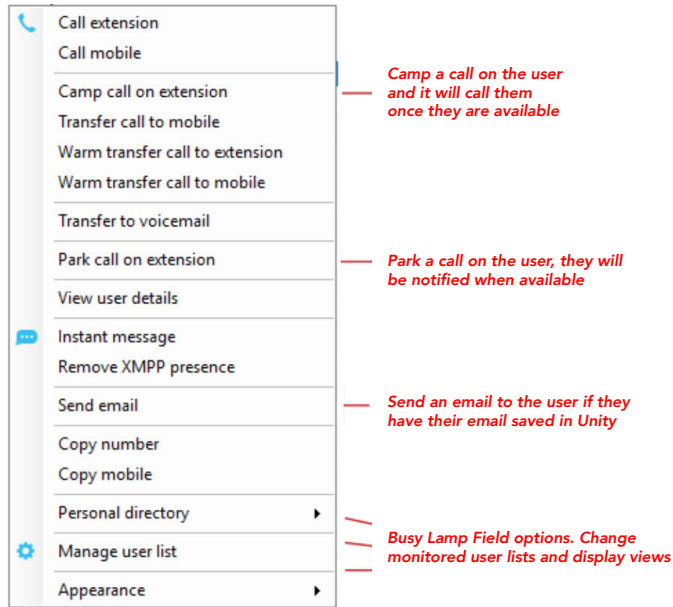
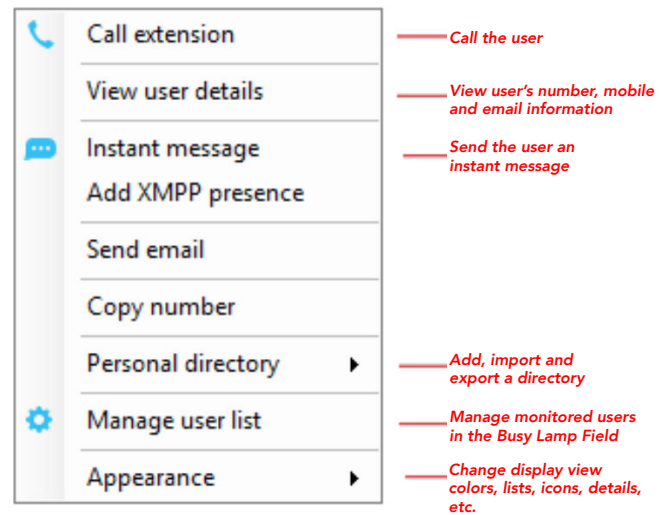


Fig. 3

ACTION OPTIONS FOR A BUSY USER



ACTION OPTIONS FOR AN AVAILABLE USER



INSTANT MESSAGING

A small blue dot next to a user's icon indicates they are available for instant messaging. To send an instant message, you may:

- » Right-click the user icon and select Instant Message.
- » Drag and drop the user's icon to the docked IM panel on the right (this can be defined in Settings).
- » Click Messaging at the top of Unity and select Start Conversation. Then add the people you want to instant message (see fig. 4).
- » Multiple online users can be selected to start an IM conversation by holding down the CTRL key while selecting users.

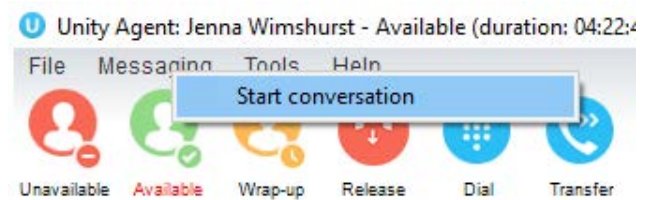


Fig. 4

MY STATUS

- » To set your status to Available, Busy, Do Not Disturb, etc., click on the My Status link in the Busy Lamp Field and choose a status option. (see fig. 5)
- » To activate Call Forwarding, click on My Status, select the option "Call forward always", then enter the number. All incoming calls are sent to the pre-defined phone number, meaning the user's phone will not ring.
- » To activate and deactivate Call Forwarding, hover over "Call forward always" and select the desired option.

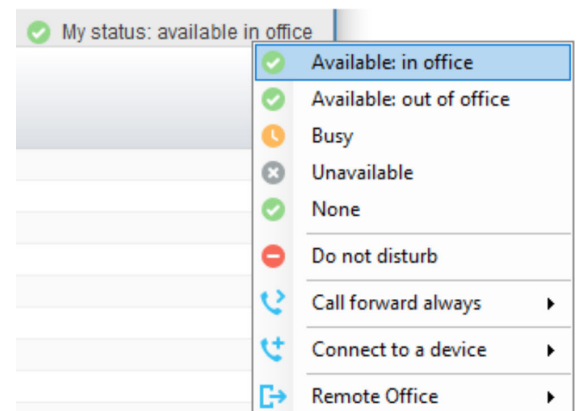


Fig. 5