



UNITY

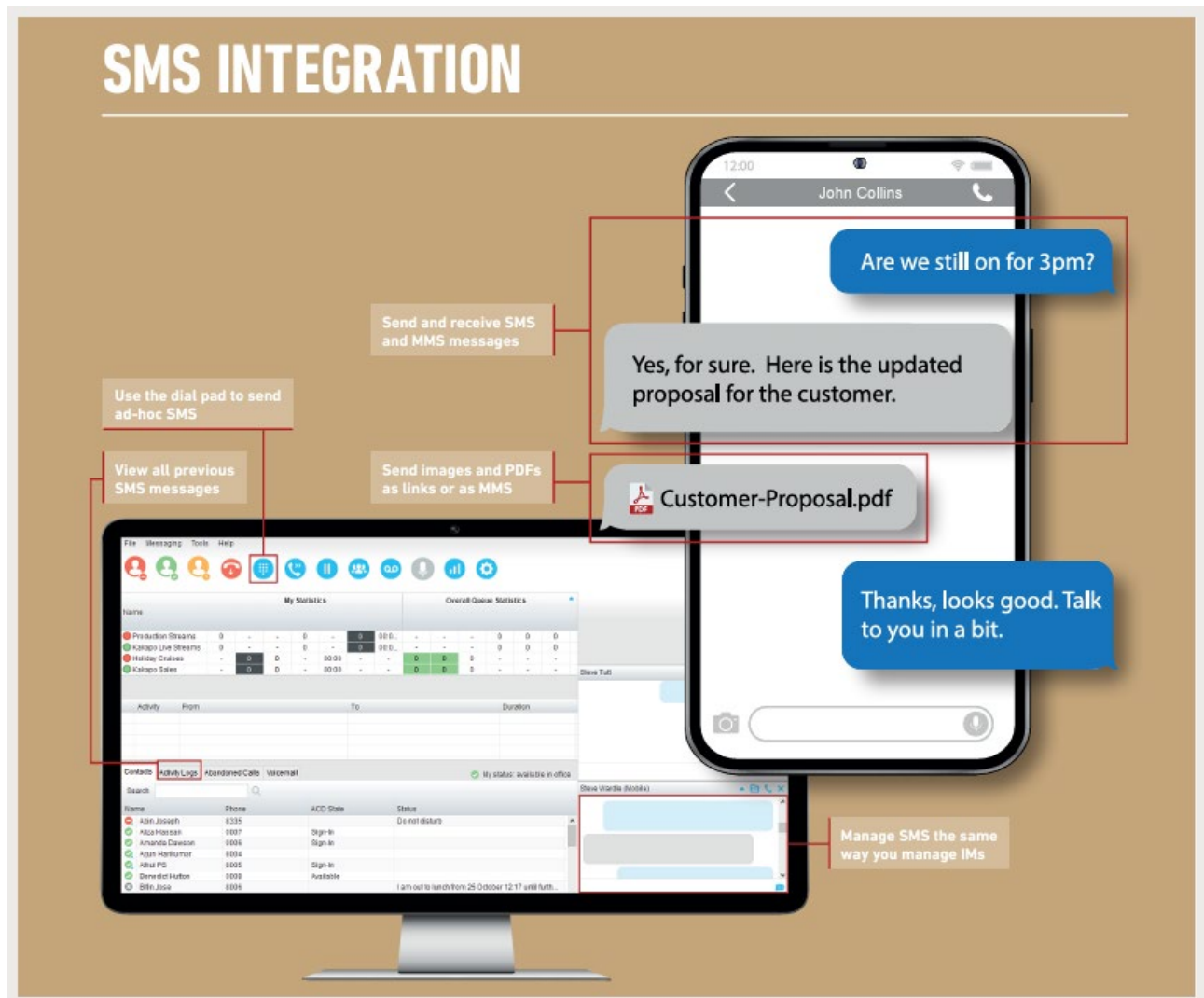
SMS 101

Quick Reference Guide

MOMENTUM

UC24Q1

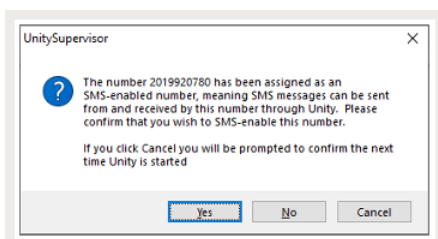
Unity SMS Integration is an add-on option for Unity Desktop, Reception, Agent, and Supervisor licenses. As a point-to-point text solution it allows users to send and receive SMS messages from within their Unity application direct to (known/identified) colleagues and customer's cell phones. With a Unity SMS add-on, users can send SMS messages ad-hoc to any number or to a contact in a BroadWorks directory, Salesforce, Microsoft Dynamics, or other leading CRM platform if that add-on integration is in place – and to any SMS enabled (mobile) number they enter.



SMS User Activation Confirmation

When the add-on provisioned and a new CPaaS (SMS enabled) number is assigned to a Unity end-user, they will be prompted to confirm that they wish to allow activation of the SMS integration for the number assigned to them. The user should click **Yes** in this prompt to acknowledge SMS activation for the number noted and start using Unity SMS tools.

- If **No** is clicked in the prompt, a Unity Admin or the service provider should be contacted to reenable.
- If **Cancel** is clicked in the prompt, the user will be prompted again the next time they start up Unity.

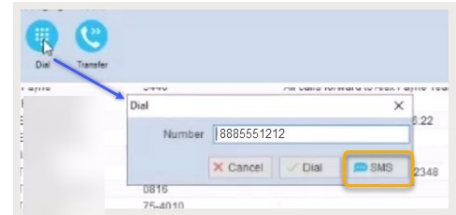


This confirmation is to alert the end-user that the SMS integration has been enabled on their account, so texts can be received and sent via Unity once activated. When active, Unity SMS users can perform tasks for conversations and manage some helpful Unity client settings to manage what they view when sending or receiving SMS texts via the application.

Send SMS Texts from Unity:

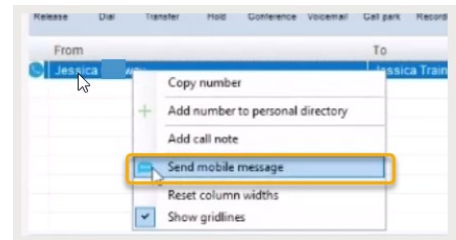
Dial Button

Instantly send ad-hoc SMS text messages via the Dial button without having to save the number into the directory first. If you know the mobile number, you can simply click the dial button, enter the number, and click the SMS option. Write your text message and click the Send icon or press the Enter key.



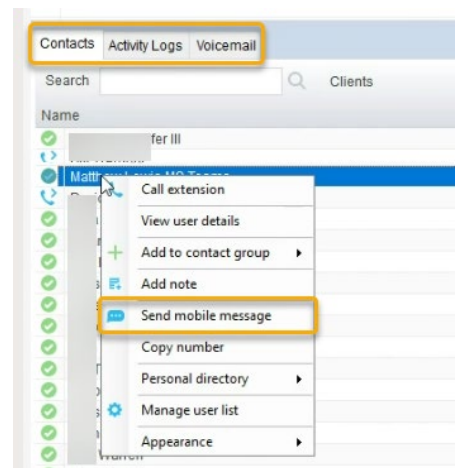
Active Call

Right-click on an active call and select Send mobile message to start writing your text.



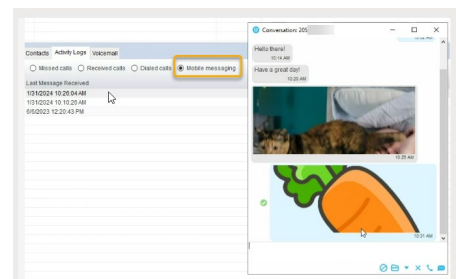
Contacts, Activity Logs and Voicemail

Right-click on a contact and select Send mobile message.



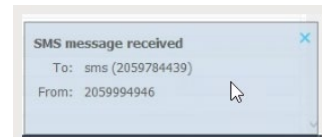
Mobile Messaging log

Click on a previous message in the Mobile Messaging log list to re-open it and send another text.



Screen Pop

Click on the SMS screen pop to open the message and respond via SMS text.



SMS Dialog Tools

The SMS Text dialog offers several useful tools.

Text field

A place to write your text message.

Delivery notifications

A green checkmark offers visual confirmation of message delivery, or a red exclamation point icon if the message could not be delivered (not an SMS enabled line, etc.)

Block Number

This icon displays when a text is sent to you. Click that icon to stop future text communications from reaching you in Unity from that number.

Add File

Click this icon to find an image file in your local drive to send via SMS. The message recipient sees a link to the file in their text.

Dock / Undock

Click the small arrow icon to move the dialog to the message panel on the right to keep it in view. Click it again to undock the message.

Close

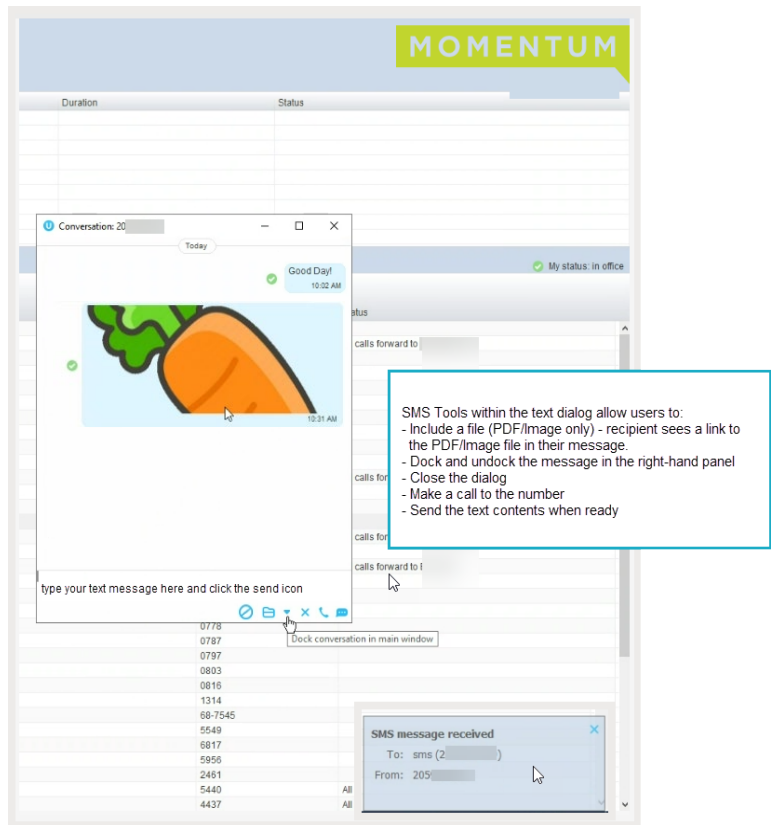
Click the X icon to close the dialog.

Call

Click the phone icon to initiate a call to the number.

Send

Click the send icon to send a text (or press the enter Key)



SMS Messaging Settings

Manage preferences for SMS messages in the Settings section.

