Consilium UniAgent™ 9.0
User Guide
Version 9.0.0

Jun 2023

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1 Introduction

This document provides the detailed feature set of UniAgent™ 9.0. It also provides user screens with a description and its working which helps users to work with UniAgent™ 9.0 and use its features.

1.1 About UniAgent™ 9.0

- Consilium UniAgent™ is a web-based graphical user interface
- It enables integration between CRM and Genesys Pure Cloud Telephony
- Agent can perform call control operations and work with CRM objects

1.2 UniAgent™ 9.0 Detailed Feature Set

- UniAgent™ Soft phone UI inside Zoho CRM
- Agent State Control: Ready, Not Ready
- Screen pop in Zoho CRM based on ANI
- Click to dial from Zoho CRM
- Embedded call controls: Answer, Hold, Transfer, Consult and Conference
- Single Sign On (SSO)
- Schedule a callback

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2 Login

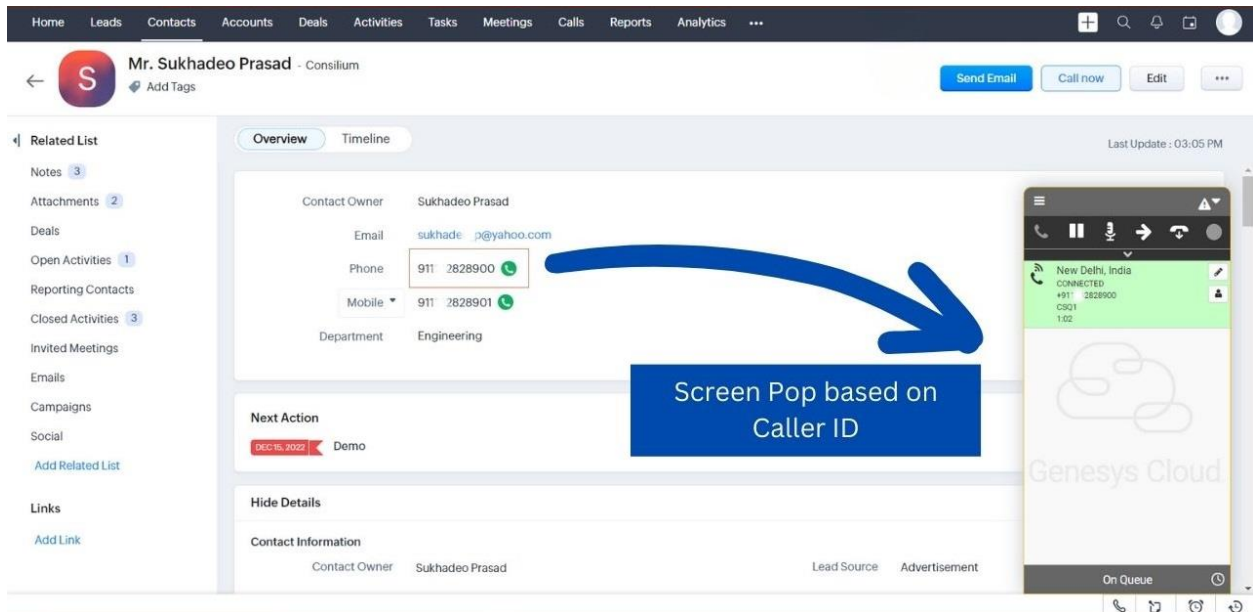Login to UniAgent™ using the following username and password.
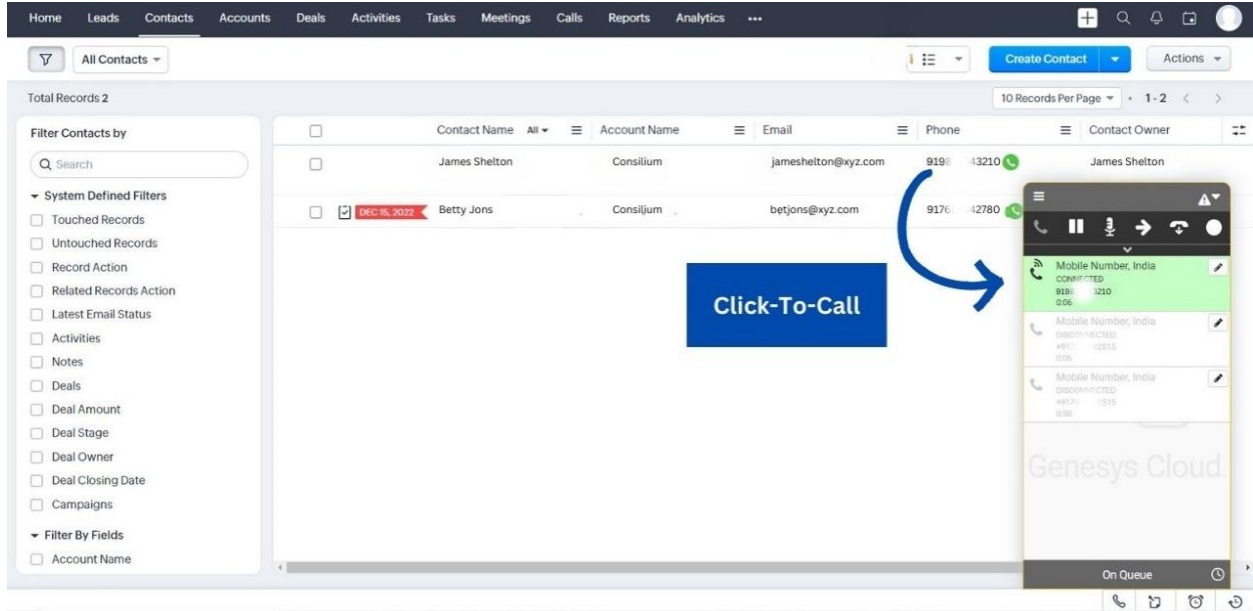
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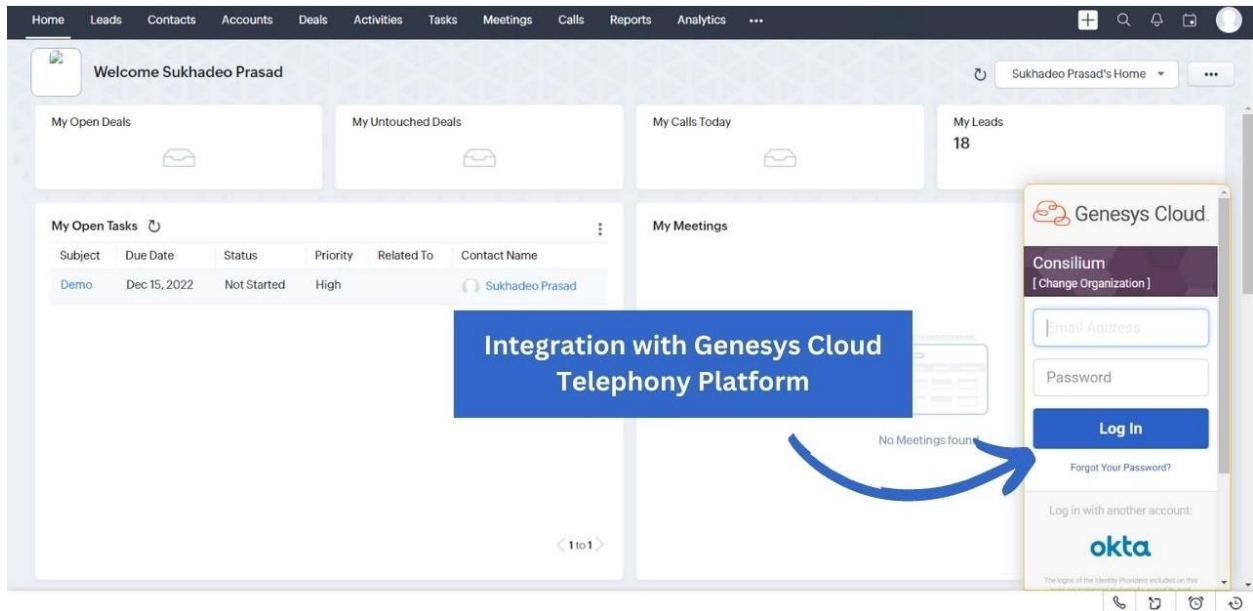
3 Inbound Call & Screen Pop

Users can answer an inbound call by clicking the "Answer" button on the UniAgent™ menu bar. Also, it opens the Contact page in Zoho CRM which matches with caller ID.

4 Click to Call

Users can click the dial icon next to a contact. UniAgent™ will initiate a call and connect to the customer.

5 Call Records

For each inbound/outbound call, UniAgent™ created a call record in Zoho CRM.