

KAKAPO

SYSTEMS

# UNITY PORTAL

User Guide

# CONTENTS

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<b>1 THE PORTAL .....</b>	<b>1</b>
<b>2 DETAILS TAB.....</b>	<b>2</b>
<b>3 AUTOMATIC ASSIGNMENT TAB .....</b>	<b>3</b>
<b>4 BRANDING TAB .....</b>	<b>4</b>
Connectivity	
Branding	
Customisation	
Call Center	
Security	
Privacy	
Instant Messaging	
User Monitoring	
Updates	
Custom Help Files	
<b>5 SERVER HOSTNAMES .....</b>	<b>7</b>
<b>6 PORTAL USER ACCOUNTS.....</b>	<b>7</b>
<b>7 LICENSE DETAILS.....</b>	<b>8</b>
<b>8 MANUAL LICENSE ALLOCATIONS .....</b>	<b>8</b>
<b>9 RESELLERS/GROUPS/USERS TAB .....</b>	<b>10</b>
<b>10 HISTORY LOG .....</b>	<b>11</b>
<b>11 USER TEMPLATES .....</b>	<b>11</b>
<b>12 KNOWLEDGE BASE.....</b>	<b>12</b>
<b>13 NOTIFICATIONS.....</b>	<b>12</b>
<b>14 INVOICES.....</b>	<b>12</b>
<b>15 TROUBLE SHOOTING .....</b>	<b>13</b>

# 1 THE PORTAL

This document will give you an overview on how to use the Unity Portal and assign licenses as well as explaining how the BroadWorks hierarchy and setup process works.

Did you know that you can also integrate the Portal with your existing provisioning system? Email [ineedhelp@kakaposystems.com](mailto:ineedhelp@kakaposystems.com) for more information.

When you are sent your portal login details go to <https://portal.unityclient.com/> to login, if your login attempts fail three times then the account will be locked. Once an account is locked it can be unlocked by any logged-in user.

Details Automatic Assignment Branding Server Hostnames **Portal User Accounts** License Details Resellers His

### Update arjun.h@dco.in

Add or update a portal user account and assign permissions. When updating, the password will only be updated if one is entered. A user's email address is used to send notification of ticket updates etc and must be verified before the user is granted access to the portal. A portal user account can also be set as an interface user. These accounts cannot log into the web portal but are used when provisioning interface users.

User Name: arjun.h@dco.in  
Email Address: arjun.h@dco.in  
Password: [ ] The current password is [ ]  
Confirm Password: [ ] [Send Password Reminder](#)  
Is Interface User:   
Is Email Contact Only:  Email contacts cannot log into the portal

**Permissions**

Can Purchase Licenses:   
Can Create Objects:   
Can Update Objects:   
Can Delete Objects:   
Can Reactivate Objects:

**Notifications**

Send Technical Emails:  An example would be a notification of planned work  
Send Invoices & Receipts:   
Send License Expiry Alerts:

[Cancel](#) [Update Account](#) [Delete Account](#) [Login](#) [Unlock Account](#)

When you first log into the Portal you will be presented with a list of recent notifications.

System Provider  
Reseller  
Group  
User  
Knowledge Base  
Trouble Tickets  
History Log  
Languages  
**Notifications**  
Invoices

## Notifications

**Unity License Consumption Reminder**  
This notification is to inform you that the below licenses have been consumed. Consumption: 91.43 Current number of trial licenses in use: 9  
Entered by chris.tutt at 2017.01.27 03:00:04

**Unity License Consumption Reminder**  
This notification is to inform you that the below licenses have been consumed. Consumption: 98.91 Current number of trial licenses in use: 36  
Entered by chris.tutt at 2017.01.20 03:00:07

**Unity License Consumption Reminder**  
This notification is to inform you that the below licenses have been consumed. Consumption: 98.82 Current number of trial licenses in use: 29  
Entered by chris.tutt at 2017.01.13 03:00:05

The Portal is separated into sections relating to the BroadWorks hierarchy, System Provider, Reseller, Group and User. This document outlines the different settings available in the different sections and how they cascade down the hierarchy.

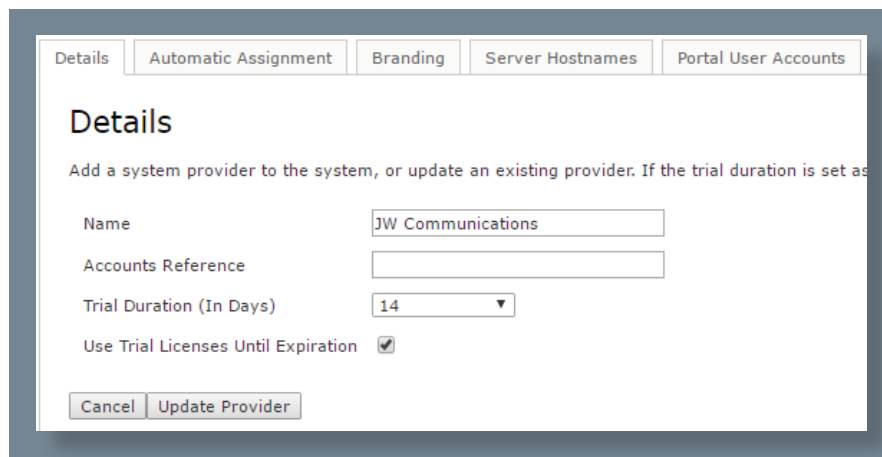
Any settings configured at a higher level will cascade down to the lower ones. These settings can be overridden by simply ticking or unticking the relevant boxes at a lower level. For example: If 'Rollback Available' is ticked at the System Provider level then it will be ticked for all Resellers, Groups and Users. However, the Reseller/Group/User can override this by unticking the box in their own Branding tab.

If any text boxes in the portal settings are left blank, then whatever is in the text box at the Parent level will be used. For example: If there is no license expiry prompt set for the Group level then the information will be pulled from the Reseller level.

Please note: After you change any setting in the portal you must go to the bottom of the page and click Update to save the changes. If you do not click Update the changes will not be saved.

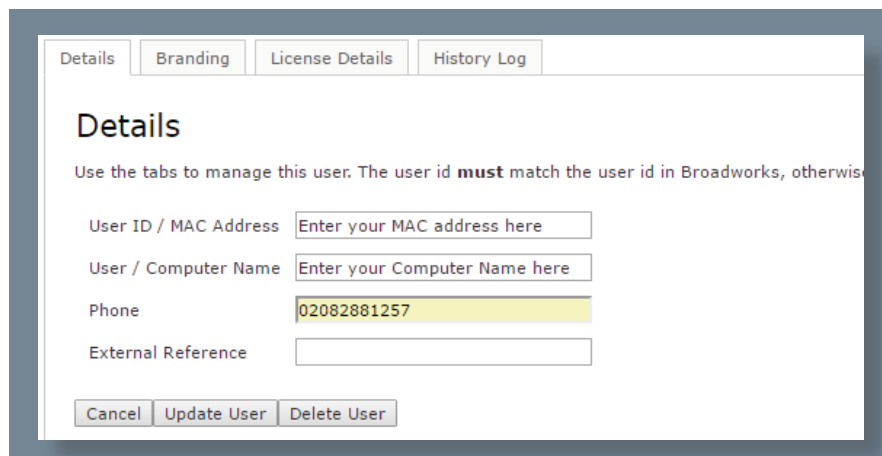
## 2 DETAILS TAB

In this section the Name, Accounts Reference and Trial duration for the System Provider, Reseller and Group is initially setup.



The screenshot shows a web interface with a tabbed menu at the top containing 'Details', 'Automatic Assignment', 'Branding', 'Server Hostnames', and 'Portal User Accounts'. The 'Details' tab is active. Below the tabs, the title 'Details' is followed by a subtitle: 'Add a system provider to the system, or update an existing provider. If the trial duration is set as'. The form contains the following fields: 'Name' with the value 'JW Communications', 'Accounts Reference' (empty), 'Trial Duration (In Days)' with a dropdown menu set to '14', and 'Use Trial Licenses Until Expiration' with a checked checkbox. At the bottom are 'Cancel' and 'Update Provider' buttons.

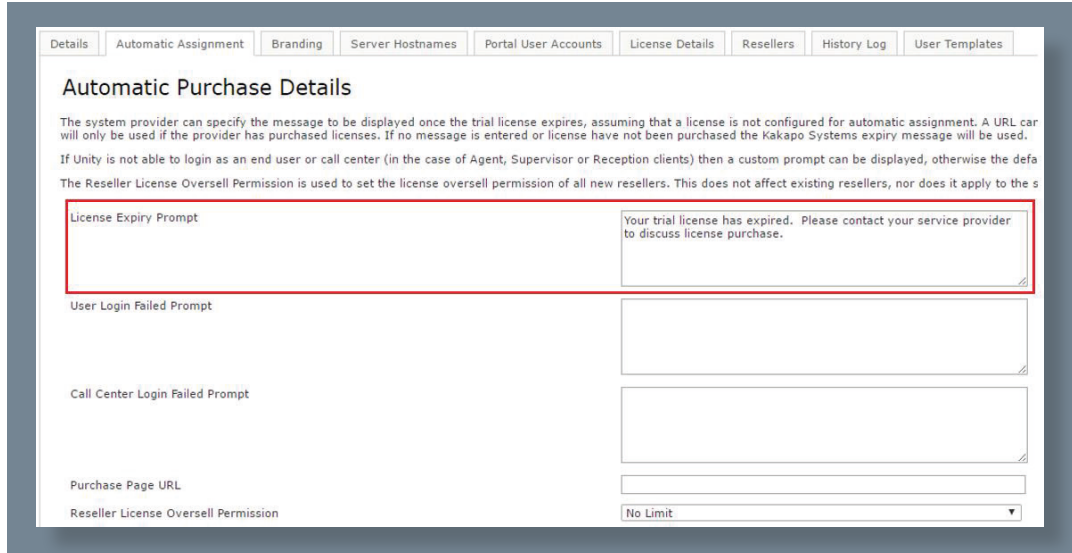
If you are looking at the Details tab for a User this will display the User ID/MAC Address, Computer Name, Phone and External Reference.



The screenshot shows a web interface with a tabbed menu at the top containing 'Details', 'Branding', 'License Details', and 'History Log'. The 'Details' tab is active. Below the tabs, the title 'Details' is followed by a subtitle: 'Use the tabs to manage this user. The user id **must** match the user id in Broadworks, otherwise'. The form contains the following fields: 'User ID / MAC Address' with a placeholder 'Enter your MAC address here', 'User / Computer Name' with a placeholder 'Enter your Computer Name here', 'Phone' with the value '02082881257', and 'External Reference' (empty). At the bottom are 'Cancel', 'Update User', and 'Delete User' buttons.

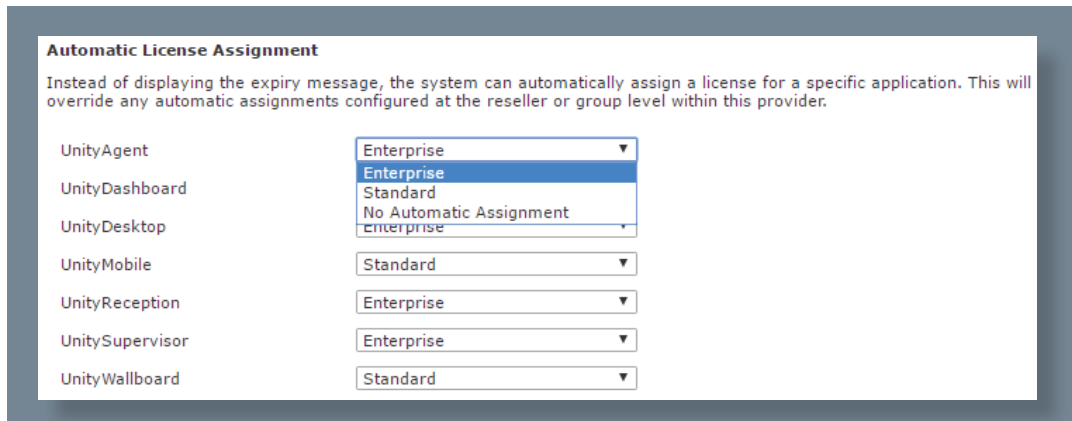
### 3 AUTOMATIC ASSIGNMENT TAB

Here the System Provider, Reseller and Group are able to customise the expiry prompt that is presented to users once their license has expired.



It is also possible to customise the message they are presented with if the user or call center login fails.

To automatically assign licenses to users simply select the license type from the drop-down menu and once the trial license expires for that application, Unity will automatically assign one to the user.



Automatic assignment can be done at the System provider, Reseller and Group level. However, these are usually done at the Reseller and Group level as any automatic assignments made at the system provider level will cascade down to every user under all Resellers.

## 4 BRANDING TAB

Most of the settings in the Branding tab usually only need to be setup once.

The screenshot shows the 'Branding Details' configuration page. At the top, there are tabs for 'Details', 'Automatic Assignment', 'Branding', 'Server Hostnames', 'Portal User Accounts', and 'License Details'. The 'Branding' tab is selected. Below the tabs, there is a heading 'Branding Details' followed by several paragraphs of explanatory text. The main configuration area is divided into two sections: 'Connectivity' and 'Branding'. The 'Connectivity' section includes fields for 'VoIP Server Port' (2208), 'Broadworks Connection Is Secure' (checked), 'Instant Messaging' (checked, 'Use Kakapo Messaging Server'), 'Default Domain' (empty), 'Keepalive Frequency (seconds)' (300), 'XSI URL' (apps.voice2000.com), 'XSI Security Type' (None (HTTP)), 'XSI Application ID' (empty), 'Reporting URL' (empty), 'Reporting Security Type' (TLS 1.1), and 'Reporting Application ID' (empty). The 'Branding' section includes a 'Logo Path' field with a 'Choose file' button and the text 'No file chosen'. Below the 'Logo Path' field, there is a preview of a logo that says 'Partner Branding' with a red 'x' next to it, indicating an error.

### CONNECTIVITY

The VoIP Server Port, Keepalive Frequency and XSI Security Type are a onetime setup and should not be touched after the initial setup.

This is a close-up screenshot of the 'Connectivity' section from the previous image. It shows the following settings: 'VoIP Server Port' is 2208; 'Broadworks Connection Is Secure' is unchecked; 'Instant Messaging' is checked, with 'Use Kakapo Messaging Server' selected; 'Default Domain' is empty; 'Keepalive Frequency (seconds)' is 300; 'XSI URL' is empty; 'XSI Security Type' is TLS 1.2; 'XSI Application ID' is empty; 'Reporting URL' is empty; 'Reporting Security Type' is None (HTTP); and 'Reporting Application ID' is empty.

## BRANDING

In the Branding tab the System Provider/Reseller/Group's logo and Icon can be uploaded. The logo is displayed at the top right of the Unity interface and the Icon is located on the top left and in the taskbar.



Logo Url	<input type="text"/>
Icon Path	<input type="button" value="Choose file"/> No file chosen
Use Icon In Shortcuts	<input type="checkbox"/>
Replacement Broadworks Phrase	<input type="text" value="JW Communications"/>
Replacement Client Name	<input type="text" value="JW Communications Unity"/>

Replacement BroadWorks Phrase will replace all mentions of the word BroadWorks to the word that is entered in the box. Similarly, whatever is entered into the Replacement Client Name will replace the word Unity.

<b>Customisation</b>	
Support Client URL	<input type="text" value="http://www.kakaposystems.com/w"/>
Prompt Users To Change Their Startup Application	<input type="checkbox"/>
Prompt Users To Use Unity Click To Dial	<input checked="" type="checkbox"/>
Call Recording URL	<input type="text" value="https://ews.kakaposystems.com"/>
User Can Change Recording Option	<input type="text" value="Show button"/>
DDE Integration Available	<input type="checkbox"/>
Browse To URL Address	<input type="text"/>
Contents Menu is Visible	<input checked="" type="checkbox"/>
End-Users Can Raise Tickets	<input type="checkbox"/>

## CUSTOMISATION

'Support Client URL' is the address you want the user to be taken to when clicking Help>Get remote assistance in Unity. This can be done at any level. The call recording URL will be the Broadworks XSP server/servers that host the XSI interface.

<b>Call Center</b>	
Get Reason Codes URL	<input type="text"/>
Set Reason Codes URL	<input type="text"/>
Record Call Center Events	<input checked="" type="checkbox"/>
Report Viewer Is Available	<input checked="" type="checkbox"/>
User Can Choose To See Queued Calls	<input checked="" type="checkbox"/>
Statistics Refresh Frequency Range (seconds)	<input type="text" value="120"/> to <input type="text" value="900"/>
Call Center Batch Limit	<input type="text" value="2"/>

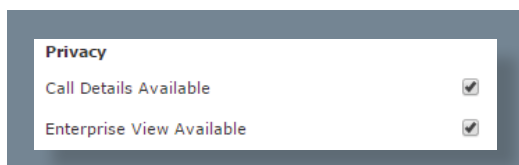
## CALL CENTER

The 'Record Call Center Events' box needs to be ticked in order for Supervisors and Agents to see the abandoned calls in the abandoned calls tab.

<b>Security</b>	
Users Can Change Settings Tab	<input checked="" type="checkbox"/>
Users Can Change Call Center	<input checked="" type="checkbox"/>
Users Can Change Network	<input checked="" type="checkbox"/>
Users Can Change Authentication	<input checked="" type="checkbox"/>
Users Can Change Their Password	<input type="checkbox"/>

## SECURITY

These settings can be ticked and unticked according to the System Provider's preference. However, if all boxes are ticked it could lead to users accidentally creating errors and issues within Unity.



## PRIVACY

If the 'Call Details Available' box is not ticked, then the user will not be able to see the call details of other users. For example: They will be able to see if someone is on a call but not who they are on a call to.

Enterprise View allows Groups to see the other Groups under the same Enterprise.

## INSTANT MESSAGING

These settings relate to Unity's Instant Messaging capability. Please refer to the separate XMPP document for more information.

## USER MONITORING

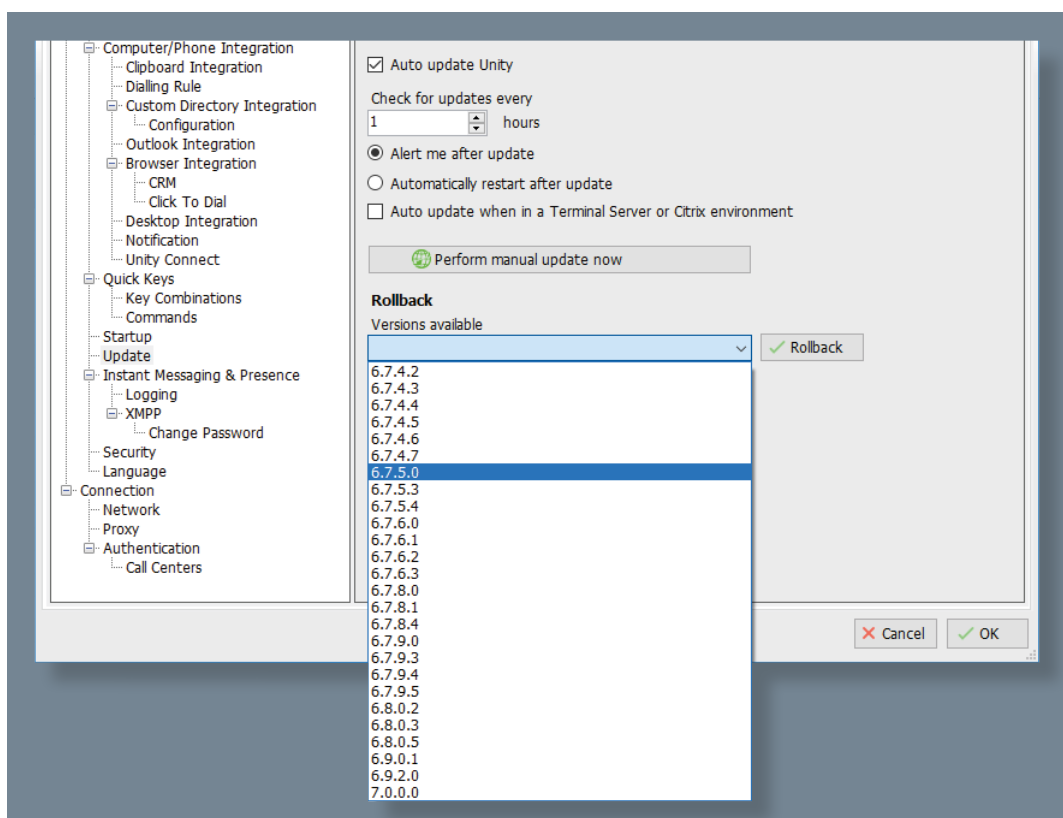
Select from the drop-down menu how you want the default users in the Monitored User List to be presented:

- **None:** No users will be automatically populated until the user manages the user list in the BLF.
- **Hide Tab:** The Contacts tab will not be displayed at all.
- **Random:** The user list will automatically be populated with users randomly.
- **Top:** The first X number of users will be populated automatically.

## UPDATES

The 'Old Clients Can Update To New Client' box must be ticked in order for users to be using the new blue Unity Client rather than the old red Unity Client.

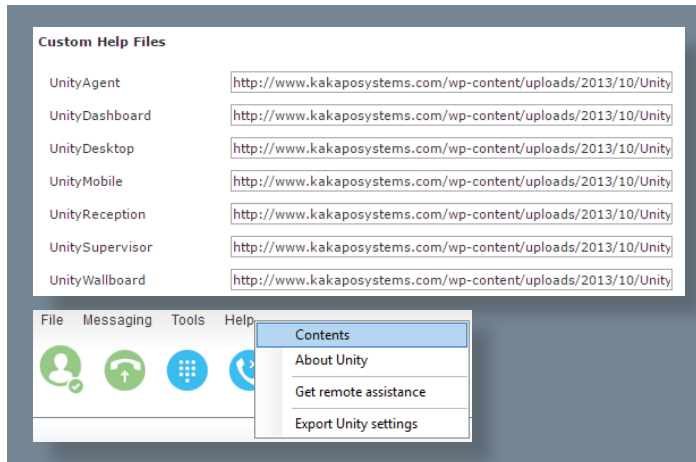
If 'Rollback Available' is ticked, then users are able to rollback to older versions of Unity. Below is how this setting looks when available to a user in Unity.





## CUSTOM HELP FILES

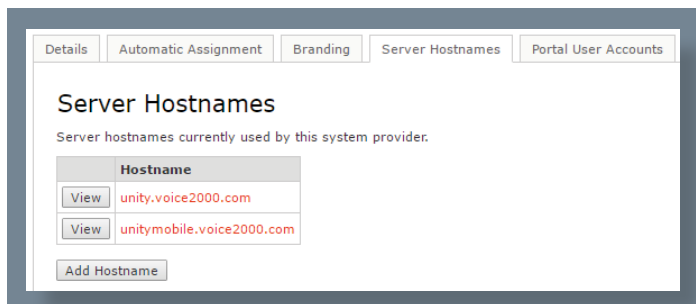
Enter the URL for a user guide (PDF) that the user can access through Unity in Help>Contents.



## 5 SERVER HOSTNAMES

The server address is the unique identifier in the Portal. In this tab the list of all the server hostnames is listed, even though the hostnames are different they all route back to the same BroadWorks server.

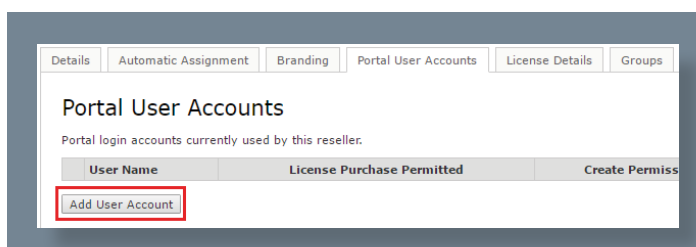
To add another hostname, simply click the button at the bottom of the list.



## 6 PORTAL USER ACCOUNTS

View, delete and add new Portal user accounts and configure all user details, permissions, and notification settings.

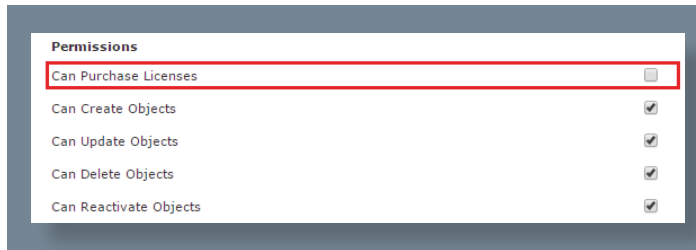
To add a user, click the 'Add User Account' button, as shown below.



Simply enter all of the user's details.

**Please note:** It is recommended that you use the user's email address as their username to avoid any confusion. It does not matter which password you create as the user will be sent an email to change it.

Please leave the 'Can Purchase Licenses' box unticked (as this service is redundant) but keep all other boxes ticked.



## 7 LICENSE DETAILS

View, allocate and assign all Unity licenses in the license details tab. Please note that trial licenses are automatically assigned once the user has started Unity for the first time and are automatically deleted once the trial duration has ended.

Licenses				
Unity licenses currently assigned to the users of this system provider.				
Download License Usage Breakdown	License Type	Purchased	Allocated	Assigned
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityAgent Enterprise	1400	0	1356
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityAgent Standard	0	0	0
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityAgent Trial	0	0	10
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityCallLogger Standard	0	0	0
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityCallLogger Trial	0	0	0
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityContactCenterAgent Standard	50	0	19
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityContactCenterMediaStream Instance	10	20	11
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityContactCenterSupervisor Standard	50	0	16
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityCrmIntegration Standard	50	0	5
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityCrmIntegration Trial	0	0	2
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityDashboard Standard	35	0	34
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityDashboard Trial	0	0	7
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityDesktop Enterprise	135	0	92
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityDesktop Lite	4105	0	3777
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	UnityDesktop Pro	4700	0	4486

Click on purchases to see a list of all licenses that have been purchased for that Unity Application. When clicking on Assignments you will be presented with a list of all of the licenses and who they have been assigned to.

## 8 MANUAL LICENSE ALLOCATIONS

To view all license details, click the License details tab, you will then be presented with a list of all the license types available for all Unity applications.

Download License Usage Breakdown			License Type	Purchased	Allocated	Assigned
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityAgent Enterprise	1400	0	1355
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityAgent Standard	0	0	0
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityAgent Trial	0	0	12
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityCallLogger Standard	0	0	0
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityCallLogger Trial	0	0	0
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityContactCenterAgent Standard	50	0	19
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityContactCenterMediaStream Instance	10	0	11
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityContactCenterSupervisor Standard	50	0	16
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityCrmIntegration Standard	50	0	6
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityCrmIntegration Trial	0	0	1
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityDashboard Standard	35	0	35
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityDashboard Trial	0	0	12
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityDesktop Enterprise	135	0	92
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityDesktop Lite	4105	0	3715

In the Purchased column you will see all licenses purchased for that application, similarly in the assigned column you will see how many licenses have been assigned to users for that license type.

Purchased	Allocated	Assigned
1400	0	1355
135	0	92
4105	0	3715
4700	0	4519

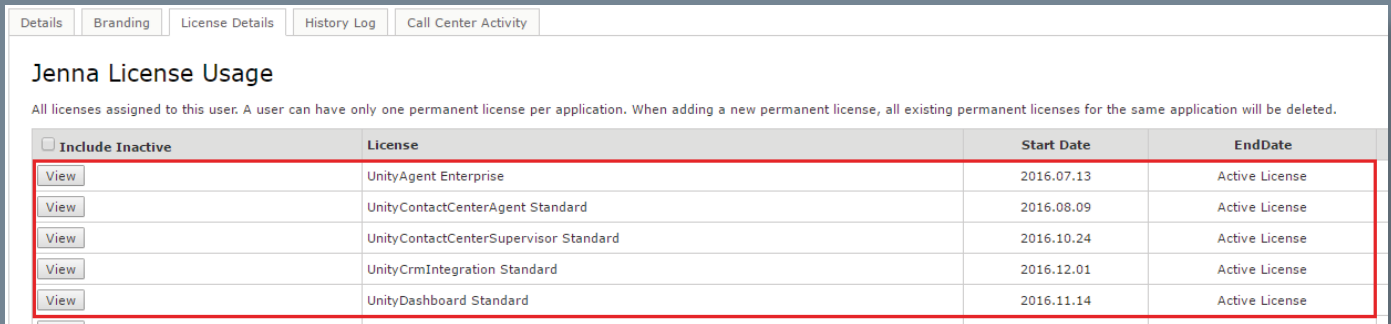
Click on assignments to view all users that have that license assigned.

Download License Usage Breakdown			License Type	Purchased	Allocated	Assigned
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityAgent Enterprise	1400	0	1359
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityDesktop Lite	4105	0	3707
<a href="#">Purchases</a>	<a href="#">Allocations</a>	<a href="#">Assignments</a>	UnityDesktop Pro	4700	0	4516

To view all licenses that are assigned to a user click view>license details.

UnityAgent Enterprise Assignment Details			User	Start Date
<input type="checkbox"/>	Include Expired Licenses			
<a href="#">View</a>			Iain Sinnott	2014.01.27
<a href="#">View</a>			JC Bhat	2015.11.05
<a href="#">View</a>			Jenna	2016.07.13
<a href="#">View</a>			John Cole	2016.04.14

All licenses assigned to that user will then be listed along with the start date, end date and which version they are using.



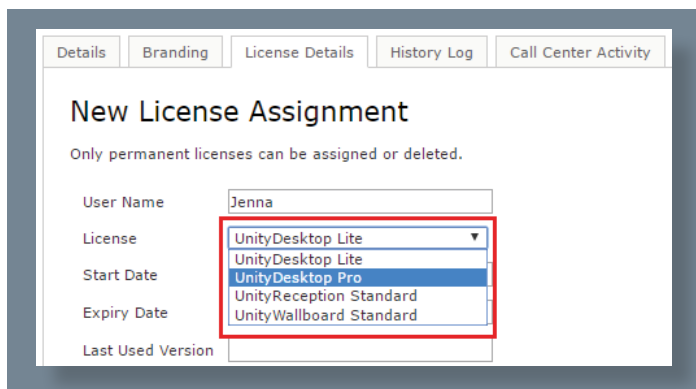
The screenshot shows the 'Jenna License Usage' page with a table of licenses. The table has columns for 'Include Inactive', 'License', 'Start Date', and 'EndDate'. There are five rows of licenses, each with a 'View' button. The table is highlighted with a red border.

<input type="checkbox"/> Include Inactive	License	Start Date	EndDate
<a href="#">View</a>	UnityAgent Enterprise	2016.07.13	Active License
<a href="#">View</a>	UnityContactCenterAgent Standard	2016.08.09	Active License
<a href="#">View</a>	UnityContactCenterSupervisor Standard	2016.10.24	Active License
<a href="#">View</a>	UnityCrmIntegration Standard	2016.12.01	Active License
<a href="#">View</a>	UnityDashboard Standard	2016.11.14	Active License

Here you can manually add a license assignment by clicking the add assignment button and selecting the license type from the drop-down menu.



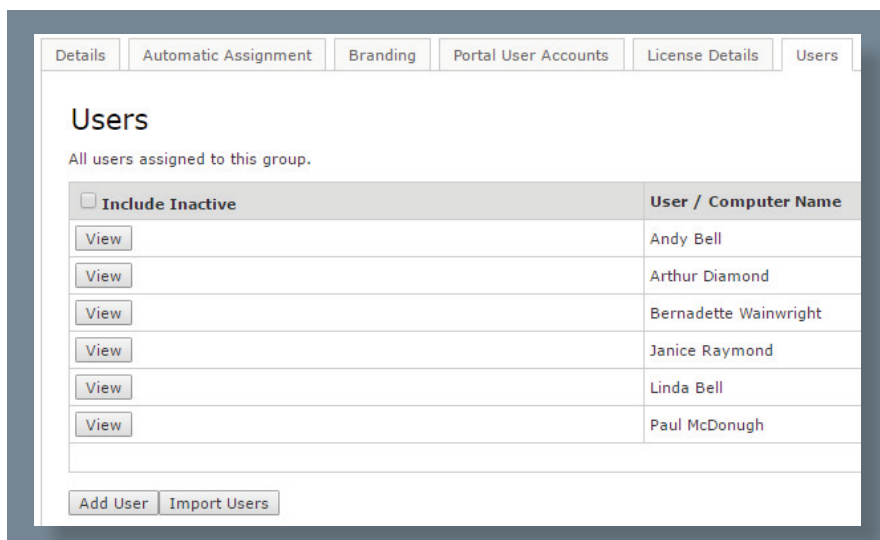
Please note that only the licenses that the user doesn't have will be present. Simply select which license you want to add then click Add Assignment.



The screenshot shows the 'New License Assignment' form. The 'User Name' field is filled with 'Jenna'. The 'License' dropdown menu is open, showing options: 'UnityDesktop Lite', 'UnityDesktop Lite', 'UnityDesktop Pro', 'UnityReception Standard', and 'UnityWallboard Standard'. The 'Start Date', 'Expiry Date', and 'Last Used Version' fields are empty.

## 9 RESELLERS/GROUPS/USERS TAB

View, add, update and delete the resellers, groups or users in the list, depending on which level of the hierarchy you are currently logged in as.



You can import Users at the Group level by clicking the 'Import Users' button then uploading a CSV file.

## 10 HISTORY LOG

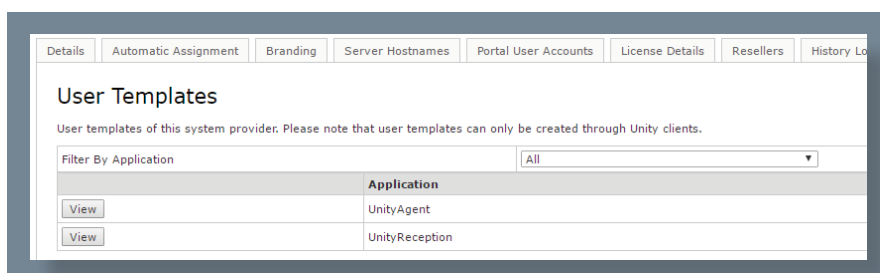
View all actions relating to the System Provider, Reseller, Group or User level. The history log will show all actions performed by both the System and the portal Users.

**History Log**  
View all actions performed against this user.

User	Date & Time	Action
System	2017.02.07 @ 10:53:56	User Jenna [jenna.wimshurst@drd.co.uk] updated. <ul style="list-style-type: none"> <li>• Reference:</li> <li>• Active: True</li> <li>• My call details available: True</li> <li>• Other's call details Available: True</li> <li>• Email address:</li> <li>• Enterprise view available: False</li> <li>• Old client can update to new client: True</li> <li>• New client update available: All versions</li> </ul>

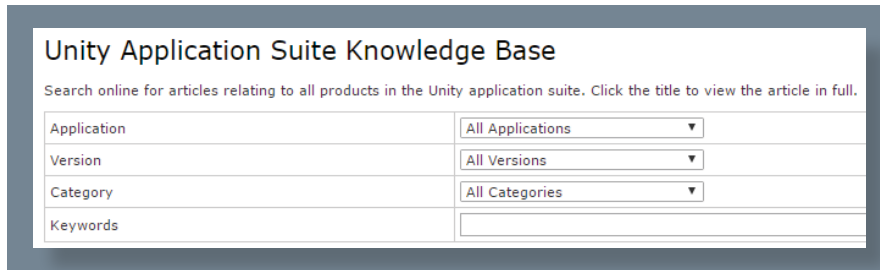
## 11 USER TEMPLATES

Templates are usually assigned to users at the Group level, but they can also be assigned at the Reseller and System Provider level. However, this will then be cascaded down the hierarchy to all the users under the Resellers. Therefore, we recommend that you assign Templates at the Group or User level.



## 12 KNOWLEDGE BASE

The knowledge base provides a variety of articles relating to all Unity products. Articles include solutions to issue reports, technical documents and white papers.

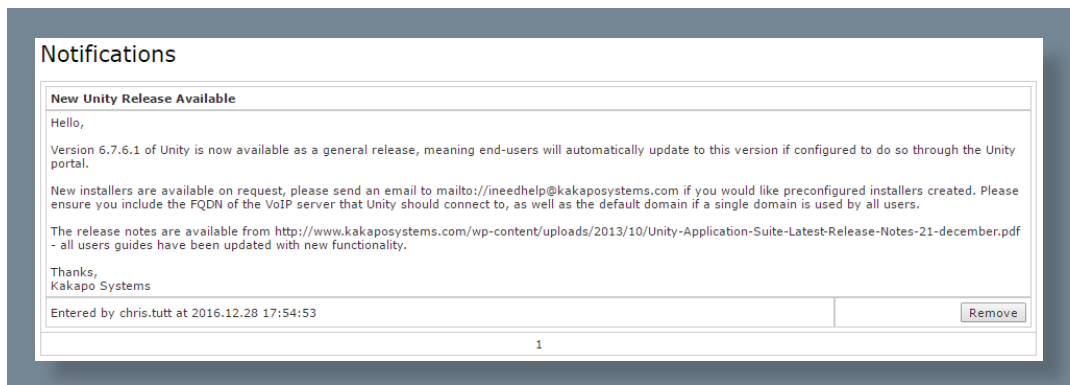


The screenshot shows the 'Unity Application Suite Knowledge Base' search page. It features a search bar and three dropdown menus for filtering results by Application, Version, and Category. The Application dropdown is set to 'All Applications', Version to 'All Versions', and Category to 'All Categories'. There is also a text input field for keywords.

Simply select the application, version and category from the drop-down menu then click Search. You can also add in any keywords for more filtered results.

## 13 NOTIFICATIONS

Unity License Consumption reminders are listed on the Notification page along with the latest news, releases and feature requests from Unity. When you first log into the Portal, you will be taken to the Notifications page.



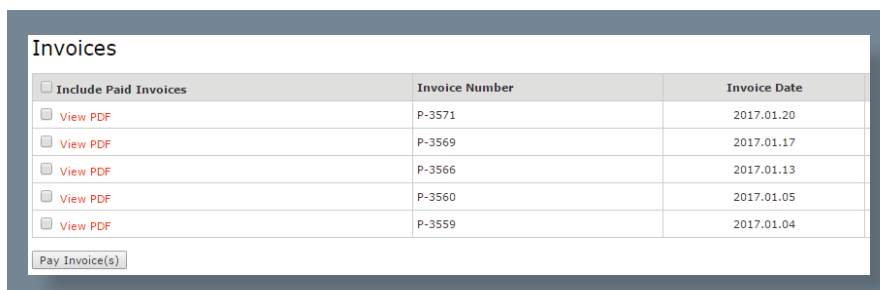
The screenshot shows the 'Notifications' page with a notification titled 'New Unity Release Available'. The notification text reads: 'Hello, Version 6.7.6.1 of Unity is now available as a general release, meaning end-users will automatically update to this version if configured to do so through the Unity portal. New installers are available on request, please send an email to mailto://needhelp@kakaposystems.com if you would like preconfigured installers created. Please ensure you include the FQDN of the VoIP server that Unity should connect to, as well as the default domain if a single domain is used by all users. The release notes are available from http://www.kakaposystems.com/wp-content/uploads/2013/10/Unity-Application-Suite-Latest-Release-Notes-21-december.pdf - all users guides have been updated with new functionality. Thanks, Kakapo Systems'. At the bottom of the notification, it says 'Entered by chris.tutt at 2016.12.28 17:54:53' and there is a 'Remove' button.

The Notifications will remain on the page until they are removed. To delete a Notification, simply click Remove.

## 14 INVOICES

At the System Provider, Reseller and Group level, the invoices page lists all unpaid invoices along with the invoice number, date and value.

You can also view paid invoices by ticking the box and clicking View PDF.



The screenshot shows the 'Invoices' page with a table of unpaid invoices. The table has columns for 'Include Paid Invoices', 'Invoice Number', and 'Invoice Date'. There are five rows of invoices, each with a 'View PDF' link. At the bottom of the table, there is a 'Pay Invoice(s)' button.

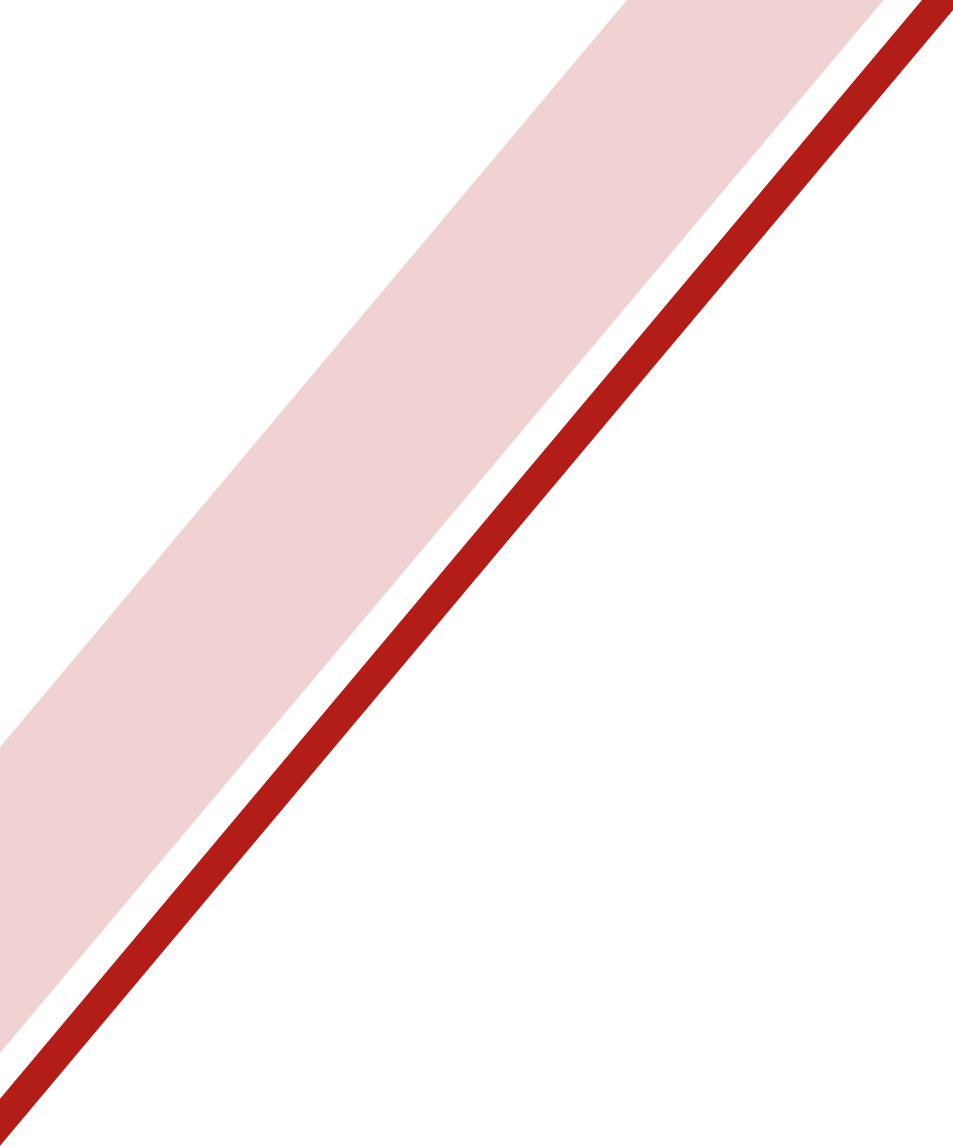
<input type="checkbox"/> Include Paid Invoices	Invoice Number	Invoice Date
<input type="checkbox"/> View PDF	P-3571	2017.01.20
<input type="checkbox"/> View PDF	P-3569	2017.01.17
<input type="checkbox"/> View PDF	P-3566	2017.01.13
<input type="checkbox"/> View PDF	P-3560	2017.01.05
<input type="checkbox"/> View PDF	P-3559	2017.01.04

## 15 TROUBLE SHOOTING

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If you get any of the below errors, there could be a simple explanation:

- A **license expired error** when the license has not expired could be because the wrong server host address has been entered. Please check the server host name and restart Unity.
- If the user gets a **license expired error** and the server hostname is correct, then you need to check which Unity application the user is running as they may have changed the Start-up application. For example: A user had a Reception license but accidentally changes their Start-up application to Desktop, a Desktop trial license will automatically start. At the end of the trial duration the user will be presented with the license expired error – they would need go into Unity settings and change their start up application back to Reception.
- If **Groups can't see the other Groups** under the same Enterprise, then the 'Enterprise View Available' box in the System Provider's Branding tab has not been ticked. Tick the box, click Update then restart Unity.



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