UCB WITH ACD TELEPHONE QUICK REFERENCE VIA CONSOLE

LOGIN/LOGOUT

In order to start accepting phone calls you must be logged into the UCB LOGIN

- Click the flashing Login Icon on the left side of your screen Logout
- > Click on S on the top left side of your screen

<u>Note</u>: You should only Login & out once a day. If you need to step away from your desk (Ex. Filing, Lunch Break, etc...) you should be putting your phone onto break mode

BREAK MODE

Any time you need to step away from your desk you should be putting your phone on Break

SHORT BREAK

If you are going to be away from your desk for only a few minutes (Ex. Washroom break)

- Click on the top left of your desktop screen (this will put you on a 5 minute break)
- When you are back from your break, click

LONG BREAK

If you are going to be away from your desk for an extended amount of time (Ex. Lunch)

- Click on the down arrow beside
- > Click on the type of break you would like to go on, or click on Custom...
- Fill out your Break Reason and how long you will be gone
- > Click Go on a break

ADD A BREAK REASON

If you are going to be away

- Click on File and then Preferences...
- Click on Breaks and then Add



- > Fill out your Break Reason and how long you are usually gone for.
- Press OK





DIAL OUT

- See Contraction
- Beside destination, enter in the persons phone number or extension number (Or type in person's name if they have been added to your phonebook)
- Press enter to make call

INTERCOM CALLS

- Go to the *Presence* Screen
- > Click on Employee's name you would like to call

PARK A CALL

With an active call...

Click Park (on the bottom of the screen)

To Retrieve Call: Press 🖻 Unpark

PARK A CALL ON A BUSY EXTENSION

With an Active call...

- ➢ switch to ^𝒴 Presence Screen
- > Right click on the person's Presence Button
- Choose "Park for <person's Name>"



<u>Note</u>: When the busy extension disconnects from their current call, their phone will start to ring with the parked call.

TRANSFER A CALL

With an Active call...

- ➢ Switch to ^𝒴 Presence Screen
- > Right click on the person's Presence Icon
- Choose "Transfer to <Person's Name>"

Note: Click transfer to Mailbox to send a caller directly to voicemail





REDIAL/CALLER ID CALL BACK

- ➢ Go into ☐ Call History screen
- Double click on the number you would like to call

CALL FORWARD

- ➢ Go to the ^{✓ Presence} Screen
- Right click on your Presence Profile Icon
- Click S Forward all Calls...
- Enter in the phone number or the extension number OR
- Click Mailbox for calls to go immediately to your voicemail

To Cancel:

- Right click on your Presence Profile Icon

RECORDING A PHONE CONVERSATION INTO YOUR VOICEMAIL

With an active call...

Click Record (Record Phone Conversation)

<u>Note:</u> Retrieve the recorded conversation the same way as all other voicemail messages OR

> You can also play back the conversation through the call history screen

Presence	Call History							
Web Browser	Filters: N	Media: 🔊 🧼 🦻 🖃 🖻	🎯 🛛 Messages: 🍥 🍕	Calls:	! 🛯 🖪			
	Line	Caller/Called	Phone/Address	Date	Time	State	Duration	Queue
	🖃 Today							
	3 101	Unknown	424	7/17/2009	9:30:03 AM	📑 Outbound	0:21	
	Noice	Krystle Nootebos	101	7/17/2009	9:29:37 AM	🖹 Read		
	3 101	Unknown	+1 (604) 8344291	7/17/2009	9:28:56 AM	📑 Outbound	0:19	
	101	Unknown	+1 (604) 8692615	7/17/2009	8:38:25 AM	📑 Outbound	0:19	

ADD A NEW PHONEBOOK ENTRY

- Click (1) (Open Phonebook)
- Click on the + (next to found contacts on the left hand side of the dialog box)
- Click on "Add a new Personal Contact"
- > Fill out appropriate information in the New Personal Contact Dialog Box
- Click OK
- Click on the + (Next to Numbers on the Right hand side of the dialog box)
- Click on phone type (ex. Extension, Mobile, home, office, etc...)
- Enter in phone number
- Press OK



UPDATING YOUR STATUS

It is a good idea to update your status so employees will immediately know if you are in or out of the office and when you are expected to return

- ➢ Go into the ^𝒴 Presence screen
- Right click on your name and go down to Select Presence Profile
- Click on the status you would like to change your profile to



CREATING A NEW PRESENCE PROFILE

You are able to create a new presence profile if there is not a profile that fits your status, such as working from another office. It can be important to have this so your employees know that you are still available if they need you and they can inform customers as well.

Under Voice Messaging, click on Mailbox Setup

👂 Desktop - K	(rystle Nootebos	
<u>File Call Agent</u>	Voice <u>M</u> essaging <u>V</u> iew <u>H</u> elp	
Contact:	Profile Scheduled (trl+Alt+S	• 🖌 🛄
6-0-0	Call Voice Messaging Ctrl+Alt+V	🧸 <in td="" the<=""></in>
📔 Phone Calls	Mailbox Setup	

Click on Presence Profile, then new

General Presence Profiles Caller Profiles Distribution Lists Schedule One-Toucl # Profile Forward Presence ● 图 0 <in office="" the=""> No Yes ● 图 0 <in office="" the=""> Mailbox No ● 图 1 in Annacis at x204 Mailbox No ● M 2 Out of Office Mailbox Yes ● M 2 Out of Office Mailbox Yes ● M 3 On Vacation Mailbox Yes ● M 4 On Sick Leave Mailbox Yes</in></in>	n Keys Unified Messagir Ignore Calendar No No Yes Yes Yes Yes
# Profile Forward Presence ● Q Yes ● Q ● Q ● Q ● Mailbox No ● Mailbox Yes ● ✓ 3 On Vacation Mailbox Yes ● ✓ 4 On Sick Leave Mailbox Yes	Ignore Calendar No No Yes Yes Yes
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w wars un vacanon Manacox res ≪ ∰ 4 On Sick Leave Mañbox Yes	res Yes
Tes Malloox Tes	163
New Edit Delete Edit Pre Record	d Prompt



Click on one of the two



Click on the Presence Profile you would like to add, or click on Custom if you would like to create your own

→ <u></u>	In the Office
> 🚮	f Out of Office
→ +	Out of Office - Sick
→ ×	Out of Office - On Vacation
→	Out of Office - Lunch
→ <u>8</u> 1	In a Meeting
→	Do Not Disturb
→ 🔢	Custom

- > Fill in the name you would like for your presence and select a picture
- Click on the forwarding option you would like
- Click on whether or not you would like to record your profile name and greeting now or later
- If you are going to record the greetings later, click finish, or if you are going to record them now, click then click Record. When you are finished recording press some
- > Press next and follow the same steps as above to record your profile name
- Press next, and then finish

