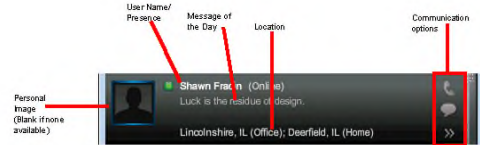# UC CLIENT USER GUIDE – UNIVERGE 3C

Information Frame

The main window shows the user name and presence of the currently logged in user


Message of the Day

You can share a text-based post of up to 140 characters with other colleagues, it is displayed in the information frame for your account

To Clear your message, click in the message text and delete the message, then press enter on your keyboard, or just click another area of screen
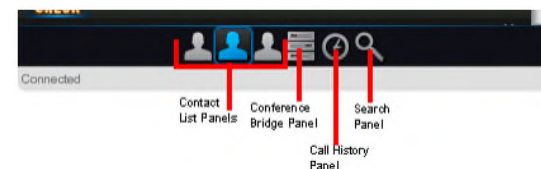
Active Call Frame

In this frame, you can answer a call, reject or hang up, transfer, transfer to conference, and send to VM
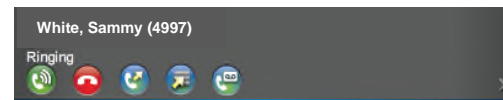
Quick Navigation Controls

The Quick Navigation Controls let you jump to a specific panel

Types of Panels

Contact Panel

- My Colleague list- is a default contact list for the client application
- Contact list- is created by you and is only viewed by you

History Panel

- Incoming and outgoing call log
- Click ⊘ in the Panel Controls, or click 📞 at the top of the window to view a list of missed calls

Call History Icons

- 📞 Missed Call
- 📞 Received Call
- 📞 Placed Call

Call History Call Control Icons

- 📞 Click to call a user
- 💬 Click to start an Instant messaging session with the user
- » Click to open a panel to view additional user details and options

Conference Bridge Panel

- To join a conference bridge, click 📞
- To leave a conference, click 📞 OR hang up
- To view conference participants, click ▢
- Click ▢ to close the conference participant window

Search Scope

Used to search for a user that is not in your "My Colleague List" or "Contact List"

Presence Types

Use the drop down to select current status

Answering a Call

- Click 📞 OR Click Answer in the Notification window

Ending a Call

- Click 📞

Placing a Call on Hold

- While on a call, click ✋

Retrieving a Held Call

- Click ▶

Placing Calls

Placing an Internal Call

- Scroll to the contact entry or enter the name or number into the search dial box
- Click

Placing an External call

- Enter a number, including an access code 8/9 **OR** +1
- Click the Quick Dialer Icon
- Use your phone to conduct the call

Placing a Call from the Last Dial List

- Click the drop-down icon in the search/dial area
- Select a number from the list

Conference Calls

- While on a call, press hold
- Dial extension or press a speed dial
- Wait for an answer
- Click on either one of the calls and select the other call from the drop-down list to join those two calls into a 3-party conference call.
- Drag and Drop one of the calls to the other call

Transferring a Call

Blind Transfer

- While on a call, Click
- Type the name of the contact you would like to transfer to
- Click Search OR hit Enter
- Select the Contact
- Verify that "Talk to the person before transferring the call" is NOT selected
- Click Transfer

Consult Transfer

- While on a call, Click
- Type the name of the contact you would like to transfer to
- Click Search OR hit Enter
- Select the Contact
- Verify that "Talk to the person before transferring the call" IS selected
- Click Transfer
- Talk to the Contact
- Click
- Select the call to transfer from the drop-down menu to complete the Transfer
- If the consult doesn't answer you can click to hang up
- Click to get the first caller back

Transfer using Drag and Drop

- Scroll to the Contact List that contains the user you wish to transfer to – make sure the user information frame for that user is visible
- Click and hold the active call frame for the call - A transfer to that user will be made. The transfer will proceed using your default transfer preference (Consult or blind)

Note: You cannot use drag and drop to transfer calls to External Contacts

Checking Voicemail

- Click and pick up your handset
- Dial your extension followed by #
- Enter your password
- Press #

Recording a Call

- While on a call, Click
- While connected: The call connection timer turns red when you are recording the call
- If you place the caller on hold, all recording will pause until you resume the recording.
- If you move a call while you are recording, the call will continue to record.
- If you do a blind transfer while recording, the call will continue to record.
- If you do an Attendant transfer while recording, the recording will pause when you start the transfer, and then the recording will stop when the call is transferred. If you do not complete the transfer, you can click to resume the call and call recording
- To stop the recording, click

Playing Back a Recorded Call

- Click the call history tab
- Click to view call details
- Click Play

Emailing a Recorded Call

- To Save the recording, press
- Save to a file folder
- Right click and send recording to destination

Preference Options

- Click ⚙ to open Preferences
- **My Profile** –
    - Name, Email and Photo are changed or added by the system administrator
    - Location- Enter your location for where you are working
- **Display**– Changes the display preferences on your client
- **Alerts** –Changes audio and visual notification preferences
- **Quick Set Profiles** –Allows you to set a combined presence status and Call Offering in a single profile
- **Soft Media Phone** – You can use the Soft Media Phone as an audio device to make and receive phone calls from your computer. If you have a supported video camera, you can also use the Soft Media Phone to make and receive video calls

Training Links:

http://www.loffler.com/support/training/voice-solution-training/nec-telephony-phone-systems/

Forwarding Options

Forwarding to another Number

- Click ⚙ to open Preferences
- Click the arrow for the forwarding tab ➡
- Click Create New Forwarding Profile

    Create a new forwarding profile

- Click Forwarding and change the name

    Forwarding Disabled ▾
    This forwarding profile has no forwarding destinations

- Click Modify

    Fwd To Cell Disabled ▾   Remove
    This forwarding profile has no forwarding destinations   Modify

- Click New Destination

    New Destination

- Enter a name and number (+1 and number)

    Forward to this destination:
    Name   Cell Phone
    Number +161255555
    Forward at this time:
    After 24 secs (4 rings) ▾
    ☐ continue to offer the call
    OK   Cancel

- From the Drop-down, select Immediately
- Press OK
- Click Save **OR**
- Specify when you would like to forward your phone (Forced or Scheduled)

Note: You can have up to 10 forwarding profiles

Dual Ring to Voicemail

- Click ⚙ to open Preferences
- Click the arrow for the forwarding tab ➡
- Click Create New Forwarding Profile
- Click Forwarding(2) and change the name
- Click Modify
- Click New Destination
- Enter a name and number (+1 and number)
- Select immediately or the number of rings you want a call to ring your desk before forwarding to your cell
- Check Continue to offer call
- Press OK
- Click New Destination
- Name it Voicemail
- Click to the search button to the right of "Voicemail"
- Click the Voicemail Extension
- Click Select
- Select the number of rings you want- select a number lower than the rings to your cellphone voicemail
- Check Continue to offer call
- Press OK
- Click Save
- To enable forwarding, Schedule or Force the forwarding profile

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