EVOLVE IP
THE CLOUD STRATEGY COMPANY™

UC-One Quick Reference Guide

UC-One

| File | Edit | Contacts | Calls | Conversations | Window | Help |

Erica Figurelli
🟩 available ▾
📍 Wayne, PA 1:29 PM
What's on your mind?

(1) Presence
(2) Set Location
(3) My Room

🔍 Search and Dial +

(4) Contacts
Add Group/Contact
Search and Dial Bar

Chat History

Training (3) ⌃

Katie Kappel — mobile 🟧

Kenneth Stringer — meeting 🔳

Nick Geckle — 🟩
Wayne, PA 1:29 PM

My Contacts (28) ⌃

ah Alicia Hudachek — meeting 🔳
Wayne, PA 1:29 PM

cg Chris Glasser — call 🔳
Wayne, PA 1:29 PM

Dave Frazee — 🟩

Dennis Irwin — 🟩
Wayne, PA 1:29 PM

es Erica Shuster — 🟧
Wayne, PA 1:29 PM

(7) Call History & Voicemail
(8) Dialpad
Directory
(10) Options

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1) Presence

🟩	Available – User is active on device and ready for communication	
⬜	Offline – Logged out of UC-One	
🕐	Away – User has been idle or away from computer for more than 10 minutes	
🚫	Busy – User is on a call, in a meeting, or manually placed into busy status	
❓	Pending – User has yet to accept your subscription request	

2) Set Location

- Click Set Location to publish where you are (automatic location is determined by your public IP address)

3) My Room

- Allows you to chat and screenshare with nine other contacts
- Drag and drop contacts to add them into your room
- Copy Guest Link allows you to add external guests to your room (Guest must use Google Chrome)
- Dial directly into your bridge using one of the calling methods at the top (must have a conference bridge)
- Dismiss guests using the more button ⋮

4) Contacts

- Adding Contacts
  - Enter a name into the Search and Dial bar
    - Right click on a user
    - Click New Contact
    - That user will now appear in the My Contacts section
- Adding Groups/Personal Contacts
  - For a personal contact:
    - Click the + to add personal contacts or groups
    - Click New Contact
    - Enter a Display Name and Personal Phone number
    - Click the Add to Contact List button to complete

- For a group
  - Click the + to add personal contacts or groups
  - Click New Group
  - Enter a Group Name
  - Click OK
  - To add a contact to the group, right click on a contact, hover over Add to Group, and select the correct group

5) Communicating with Contacts

💬	Chat – Opens a chat window allowing for instant messaging
📞	Call – Utilizes the UC-One softphone (computer audio) to make calls
📹	Video Call – utilizes webcam and computer audio to make calls
☎	Call from Phone – utilizes physical desk phone to make calls

6) Chat

- One on One
  - Double-click on a contact to open a chat window
  - Type message in the bar at the bottom of the window, press Enter to send a message
  - Screenshare with a contact by clicking the Start Sharing button ⬈ in a chat window
- Group Chats
  - Double-click on a contact to open a chat window
 - Drag and drop additional contacts into the chat window to start a group chat

7) Call History and Voicemail

- Calls Tab
  - Displays all recent calls
  - Double click on a call to dial that party
- Voicemail Tab
  - Click on a voicemail and press the play button to listen
  - Click the more button ⋮ to view more options:
    - Play
    - Mark as Viewed/New
    - Save As… (.wav file)
    - Delete – (deleting messages from UC-One deletes the messages from the physical phone)

8) Dialpad

- To make a call:
  - Start a new call by copying and pasting, typing, or manually entering a phone number
  - For a softphone call, click Call 📞
  - For a desk phone call, click Call from Phone ☎

9) Call Handling
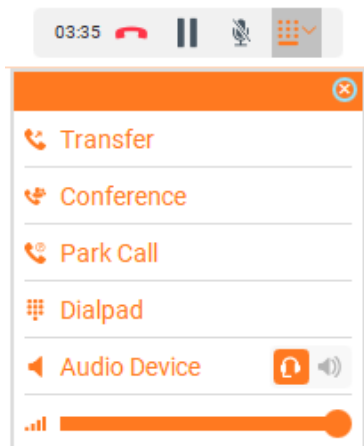
- Transferring
  - Blind Transfers
    - Click the More button in the Call Window
    - Click Transfer
    - Type in an extension or 10 digit number, or select the internal party
    - Click Transfer Now
  - Consulted Transfers
    - Click the More button in the Call Window
    - Click Transfer
    - Type in an extension or 10 digit number, or select the internal party
    - Click Attended Audio
    - Once the third party has answered, click Complete Transfer
- Conferencing
  - Click the More button in the Call Window
  - Click Transfer
  - Type in an extension or 10 digit number, or select the internal party
  - Click Add
  - To connect all parties, go to your active calls (in the main window) and click the Add to Conference button 👥

- Park & Retrieve
  - Park
    - Click the More button in the Call Window
    - Click Park Call
    - Choose where to park the call and click Park
  - Retrieve
    - Click Calls from the Menu Bar
    - Go to Retrieve Parked Call and select UC-One
    - On the Dialpad, enter the extension the call was parked on followed by #

10) Options

- General
  - Enable/disable remember password
  - Enable/disable sign in automatically
- Audio/Video
  - Check that your computer audio is working by playing with input and output devices
  - Ring signal controls whether or not UC-One will ring for incoming calls
- Incoming Calls
  - Enable one of many telephony features
- Outgoing Calls
  - Highlight to call functions similarly as a click to call feature. Highlight a phone number, click your hotkeys, and UC-One will dial the number
- Voicemail
  - Control how and where you are receiving your messages
- Extensions
  - Enable Outlook capabilities
- Services*
  - *For BroadSoft Call Center Agents only
  - Allows agents to change their ACD State

11) Accessing the Voicemail Portal

- To access your voicemail portal, hold down the number 1 on the Dialpad or dial your extension. There, you can change greetings, listen to messages, etc.
- Visit the Voicemail QRG on our Knowledge Base for all things regarding the portal

12) Helpful Tips & Tricks

- Are your calls not going through the device you'd like when dialing out?
  - Click Calls in the Menu Bar
  - Hover over Dialing Service
  - Select the device you would like to use as the default (refer to section 5)

- Pull Call
  - This feature allows you to seamlessly move a call that is on your physical device or mobile app directly to the UC-One desktop softphone without placing the call on hold
  - To pull a call:
    - Click Call in the Menu bar
    - Click Pull Call
  - This feature can be used in any direction between your three devices: physical phone, softphone, mobile app
    - Dial *11 to pull to the physical phone

- Disable Incoming Call Notifications
  - This feature will stop the notification in the corner of the screen from appearing
    - Dial *13 to disable
    - Dial *12 to re-enable

- UC-One Mobile Application
  - Search for Evolved Office UC-One in the App Store or Play Store
  - The mobile app gives you control over your office phone right from your cell phone.
  - Consult with your administrator for correct login instructions