



# Client Application User Guide

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**Toshiba America Information Systems, Inc.  
Telecommunication Systems Division**

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## General End User Information

### FCC Requirements

Means of Connection: The IPedge does not connect directly to the telephone network. All direct connections are made to a gateway. Please refer to the gateway manufacturer's documentation

### Radio Frequency Interference

Warning: This equipment generates, uses, and can radiate radio frequency energy and if not installed and used in accordance with the manufacturer's instruction manual, may cause interference to radio communications. It has been tested and found to comply with the limits for a Class A computing device pursuant to Subpart J of Part 15 of FCC Rules, which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference, in which case, the user, at his/her own expense, will be required to take whatever measures may be required to correct the interference.

### Underwriters Laboratory

This system is listed with Underwriters Laboratory (UL). Secondary protection is required, on any wiring from any telephone that exits the building or is subject to lightning or other electrical surges, and on DID, OPS, and Tie lines. (Additional information is provided in this manual.)



### CP01, Issue 8, Part I Section 14.1

Notice: The Industry Canada label identifies certified equipment. This certification means that the equipment meets certain telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The Department does not guarantee the Equipment will operate to the user's satisfaction.

**Repairs to Certified Equipment** should be coordinated by a representative designated by the supplier. Any repairs or alterations made by the user to this equipment, or equipment malfunctions, may give the telecommunications company cause to request the user to disconnect the equipment.

Users should ensure for their own protection that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The equipment must also be installed using an acceptable method of connection. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

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**CAUTION!** **Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.**

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Regulatory Information		
Area	United States	Canada
Safety	ULn	CSA
Network	FCC CFR 47 Part 68 TIA/EIA/IS-968	IC CS-03
EMC	FCC CFR 47 Part 15	ICES003:2004

### **Emergency Service (911) Warning**

The IPedge system must have a constant source of electricity and network connection availability to function. In the event of a power failure or network availability outage the IPedge system's SIP service will be disabled. The user understands that in the event of a power or network outage the IPedge system will not support 911 emergency services and further, that such services will only be available via user's regular telephone line not connected to the IPedge system or gateway. User further acknowledges that any interruption in the supply or delivery of electricity or network availability is beyond Toshiba's control and that Toshiba shall have no responsibility for losses arising from such interruption.

### **Security Warning**

All IPedge systems ship with the same default user names and passwords. To help protect your IPedge system from unauthorized administrator access change the user names and passwords as described in the new system installation section of the IPedge Install manual. An IPedge system that is not properly protected may be exposed to toll fraud, denial of service or other attacks.

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## **Telecommunication Systems Division**

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# Contents

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## Chapter 1 – UCedge Client

- Feature Availability for Each Platform . . . . . 2
  - Prerequisites . . . . . 2
- Application Installation . . . . . 2
- Auto-start UCedge . . . . . 3
- Login . . . . . 5
- Initial Setup Wizard . . . . . 8
- MY PROFILE . . . . . 9
  - Avatar Picture . . . . . 9
  - Edit Your Screen Name . . . . . 9
  - Edit Your Email Address . . . . . 10
  - Edit Phone Number . . . . . 10
- Navigation Drawer . . . . . 10
  - Navigation Drawer Menus . . . . . 11
  - View Contacts . . . . . 11
  - View Groups . . . . . 11
  - Subscribe External Contacts . . . . . 11
  - My Profile . . . . . 11
  - Edit Groups . . . . . 11
  - Settings . . . . . 11
  - About . . . . . 11
  - Help . . . . . 11
  - Download Log Files . . . . . 11
  - Logout . . . . . 12
- Settings . . . . . 13
  - Call Settings . . . . . 13
  - Voicemail Settings . . . . . 14
  - Home Settings . . . . . 15
  - Phone Modes . . . . . 16
  - Reset Application . . . . . 16
  - Sync to Cloud . . . . . 16
  - Allow IM/GIM/Broadcast on DND . . . . . 16
  - Save Logs . . . . . 16
- App Menu And Contacts . . . . . 17
- Flyover Text . . . . . 17
- App Menu . . . . . 18
- Subscribe External Contacts . . . . . 19

Phone Labels . . . . .	19
Subscriber / Contacts List . . . . .	20
Unsubscribe . . . . .	21
Grouping . . . . .	21
View Groups . . . . .	22
Initiate Group IM/Broadcast From Group . . . . .	22
Answer A Call . . . . .	23
Answering an Incoming call on a PC or Mac Computer . . . . .	24
Answer a Call on a Locked Screen . . . . .	25
Multiple DNS . . . . .	25
Make A Call. . . . .	27
Dial a Number. . . . .	27
Use the Subscriber List . . . . .	27
Transfer a Call . . . . .	27
Multiple DN Calling . . . . .	29
Voicemail. . . . .	30
Inbox. . . . .	30
Reply, Forward, Save Message, Delete Message . . . . .	31
Recording a New Voicemail . . . . .	31
Retrieve Voice Messages . . . . .	32
Delete a Message. . . . .	32
Fax . . . . .	33
Presence. . . . .	36
Location . . . . .	37
History. . . . .	39
Call Using History . . . . .	39
Other Options . . . . .	39
Instant Message (Chat). . . . .	39
Group Chat . . . . .	40
Broadcast . . . . .	40
Buttons . . . . .	41
Speed Dial Buttons. . . . .	41
PDN or PhDN Buttons . . . . .	42
Advanced Voicemail Feature . . . . .	42
Follow Me Configuration . . . . .	42
Receiving / Making a Follow Me Call . . . . .	43
Greetings Management . . . . .	43
Custom Greetings. . . . .	44
Routing Options . . . . .	45
Call Back Options. . . . .	48

## Chapter 2 – ACD Agents

ACD Login. . . . .	50
Advanced Settings . . . . .	50
Group Status . . . . .	51
Notifications . . . . .	51
Alert Message. . . . .	52

Miscellaneous . . . . .	52
ACD Features . . . . .	53
Unavailable and Available . . . . .	53
Status Display . . . . .	54
Queue Alarms . . . . .	55
ACD Group Status . . . . .	55

**Chapter 3 – ACD Operations**

Changing ACD Group status. . . . .	57
Incoming Calls. . . . .	57
Requesting/Handling Help Call to Supervisor. . . . .	58
Initiating Call to an Agent/Supervisor . . . . .	58
Initiating Chat to an Agent/Supervisor. . . . .	59
Broadcast Messages. . . . .	61
Sender . . . . .	61
Recipient. . . . .	61
ACD Call Pick Up . . . . .	63
Adding Call Notes. . . . .	64
End Wrap Up Time . . . . .	64

**Chapter 4 – Supervisor Functions**

Monitoring an Agent . . . . .	65
Call Monitoring / Join Call . . . . .	66
End Monitoring . . . . .	67
Help Request . . . . .	67
Internal Calls . . . . .	68
Monitoring from Multiple Devices . . . . .	68

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This chapter covers the Toshiba UCedge unified communication application for Android and iOS mobile devices and for PC's and Mac computers. UCedge enables users to collaborate with others through communications such as Instant Message (IM) and phone calls with the capability by using Toshiba's Business/Telecommunications Systems – IPedge, VIPedge and Strata CIX with IPedge Application Server. Two versions of UCedge are available – Essentials and UCedge.

This chapter includes user instructions on the following key features of UCedge that are available on an Android phone, tablet, PC or Mac Computers.

**Important!** Screen captures shown in this chapter are representations and may vary depending on the size and type of smartphone, tablet, PC or Mac Computer.

- UCedge Application Installation on your device
- Login – phone and softphone
- My Profile
- Screen Rotation
- Apps Menu
- Calling – Incoming calls, Outgoing calls, and Call thru
- Multiple DNS<sup>1</sup> – Prime DN and Phantom DNS<sup>1</sup>
- Contacts
- Presence – Available, Away, Busy/Do Not Disturb<sup>1</sup>, Off-line
- Instant Messaging
- Group Instant Messaging
- Broadcast
- History
- Settings
- Voice Mail
- Greetings Management
- Call Alert<sup>2</sup>

**Important!** Please confirm with your System Administrator as to the system (IPedge, VIPedge or Strata CIX) you are connected. Some features may or maynot work based on the system and license.

---

1. Available when connected to IPedge systems only.

2. Not available when connected to VIPedge.

**Feature Availability  
for Each Platform**

	<b>IPedge TGZ 1.6.2.359 or later</b>	<b>TGZ 1.6.212 IPedge/App Server for CIX</b>	<b>VIPedge</b>
Softphone for iOS	Y	Y	Y
PDN/Phantom DN	Y (PDN and up to 3 PhDN)	N (PDN only)	N (PDN only)
Button	Y	Y	Y
Voice Mail/Fax Mail Support	Y	Y	Y
Voice Mail recording time limit <sup>1</sup>	2 minutes	30 seconds	30 seconds
Native dialer intercept for Callthru/Callback	Y (Android only)	Y (Android only)	Y (Android only)
Call Alert/In Call menu	Y	Y	Y
Wizard and instructions	Y	Y	Y
Win/Mac compact mode	Y	Y	Y

1. The voice mail time limit applies only when the user records a voice mail using the UCedge application.

The UCedge Application installation procedures are based on the assumption that the user already has an account set up by the System Administrator.

**Prerequisites**

- Cellular data plan and/or Wi-Fi access

**Application  
Installation**

The UCedge app requires internet access to the host system – VIPedge, IPedge or Strata CIX.

**Notes:**

- Mobile devices require a data plan with an option to enable Wi-Fi access for locations with poor cell network service.
- On Android 6.0 device, UCedge may require the permission to access data on the system. Make sure the data permission is set appropriately. Otherwise, certain features may not work and UCedge may terminate. When it happens, please relaunch UCedge and grant all the permissions it requests.
- Uninstall IPMobility when using UCedge. If both are installed, UCedge Callthru/Callback may not work correctly.
- UCedge does not support a custom keyboard on iOS 8. Please use the Apple standard keyboard software.

The application may be downloaded from Google Play or the iTunes™/Apple App Store.

For Android: <https://play.google.com/store/apps>

For iPhone: <http://www.apple.com/itunes/> or AppStore app on iOS device.

For PC and Mac Computers:

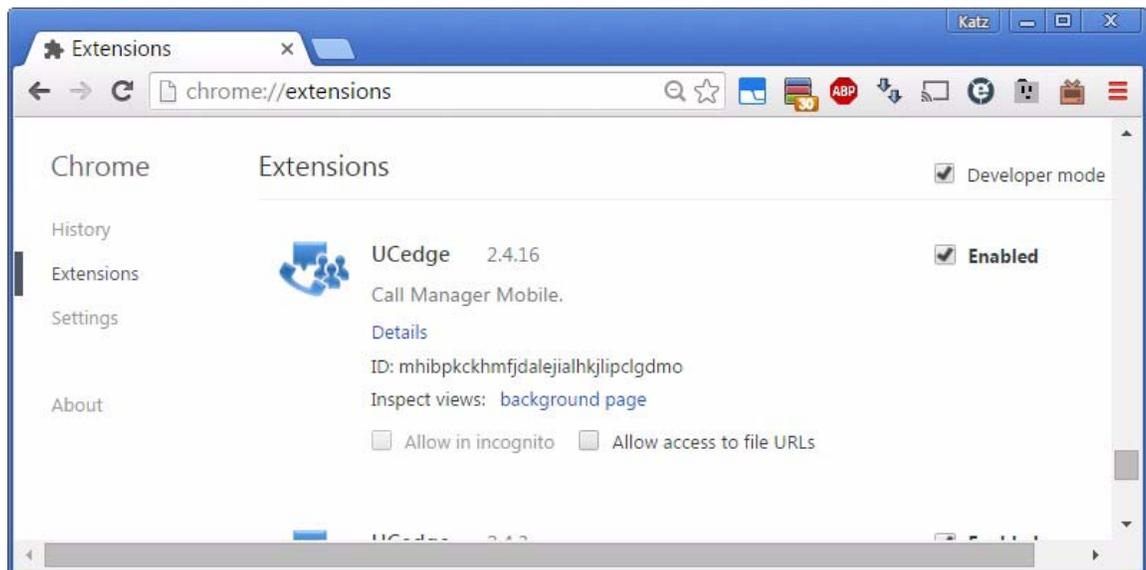
UCedge client for PC and Mac is implemented as a Chrome app and is available from the Chrome web store. Please follow the steps below to install the application:

1. Access your Google Chrome browser.  
If you do not have the Chrome browser installed on your computer, please install it from [chrome.google.com](http://chrome.google.com). Chrome browser must be version 36 or above.
2. Sign in to Gmail with your Google ID.  
If you do not have a Gmail account, create one by accessing [gmail.com](http://gmail.com).
3. From Chrome browser, access Chrome App store from <https://www.google.com/chrome/webstore/apps.html>
4. Search for UCedge and install.

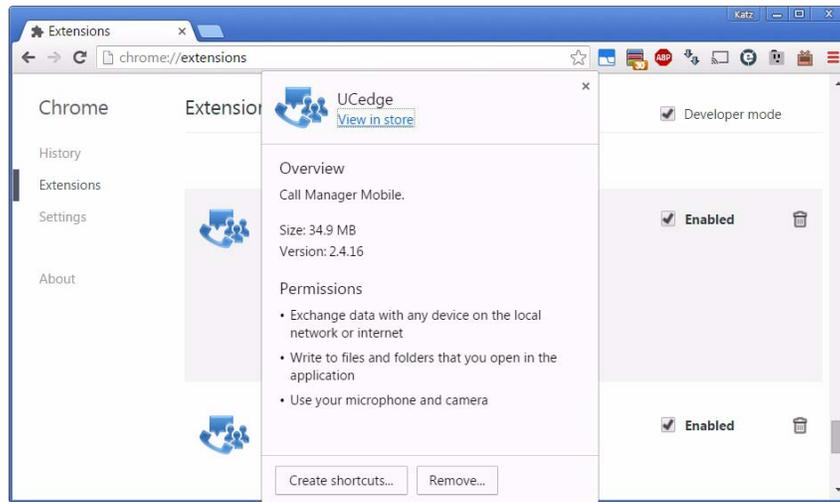
## Auto-start UCedge

The procedure below is to start UCedge for PCs/Mac automatically when the PC starts. UCedge on Android and iOS needs to be restarted manually when the device is restarted. The shortcut will have to be stored in the Startup folder. Make sure that UCedge is installed before doing the steps are outlined below:

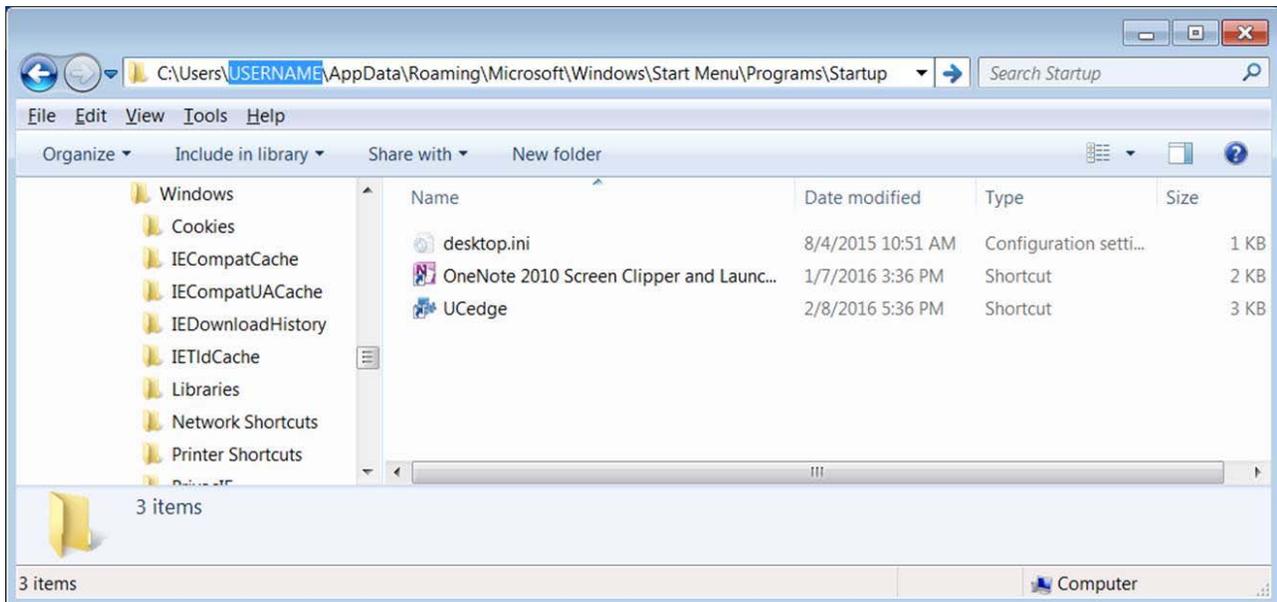
1. From the Chrome menu, open the Settings menu.
2. Select Extensions menu, then find UCedge (shown below).



3. Click Details. The UCedge details display (shown below).



4. Click Create shortcuts... button. The Create application shortcuts dialog box displays.
5. Check the Desktop and click Create. The shortcut is created on the Desktop. 
6. In the Explorer, open the following directory where USERNAME is the user name to login to Windows (shown below).



7. Drag and drop UCedge shortcut in the Startup folder or copy and paste it into the folder (shown above).

## Login

To use the UCedge application, please obtain the following information from your System Administrator:

- Your user ID for UCedge
- Initial login password
- UCedge server Domain Name – Example: ax20140918.VIPedge.com
- SoftPhone Extension Number (if Softphone is used)
- SoftPhone Password (if Softphone is used)
- Voice card address (if Strata CIX or Unifier is used)
- Voicemail server address (if centralized voicemail is used)
- Voicemail DID call thru number
- Voicemail Pilot DN
- Voicemail password

When you have obtained the Login information, follow the steps outlined below:

1. Launch the UCedge client

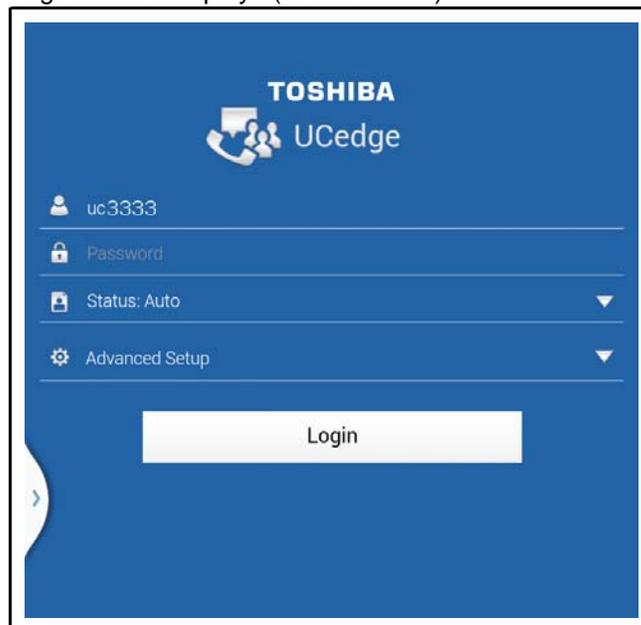


For PC's and Mac Computers: Click on the Chrome icon  then click the

UCedge icon



2. The main login screen displays (shown below).



3. Enter your Username and Password.
4. Tap the Advanced Setup down arrow. The following screen displays.

5. Enter the FQDN of the UCedge server. The server IP address may be used if the server is configured with the IP address.

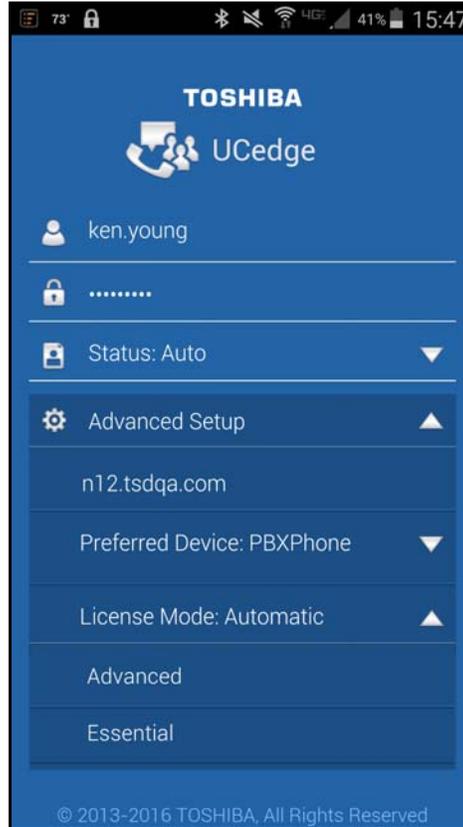
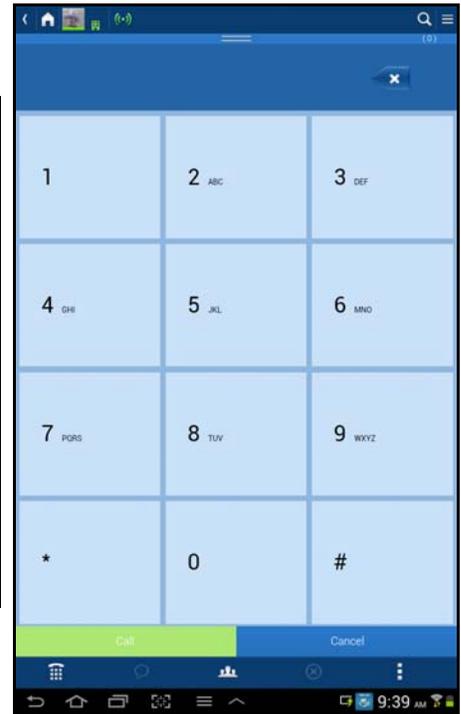
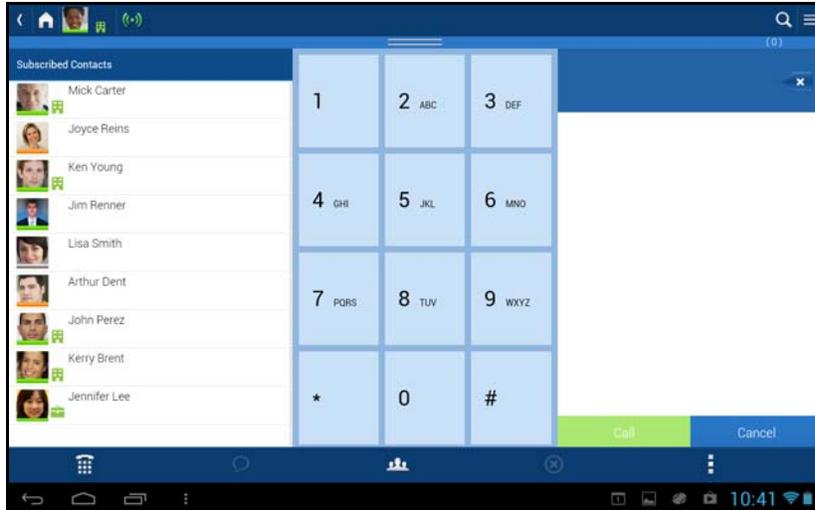


Figure 1 – App Login

6. Tap **Preferred Device** and select an option. When Pairing is selected, phone audio is provided on the desktop phone or other softphone, but not on this device.
7. If Softphone is selected, enter the password (pin) of the IP telephone extension for this UCedge account. This field can be blank if no such password/pin is programmed. If your device is connected to Strata CIX or Unifier is used for network operations, enter the FQDN or IP address of MIPU card or the target IPedge system.
8. Tap the **Login** icon.

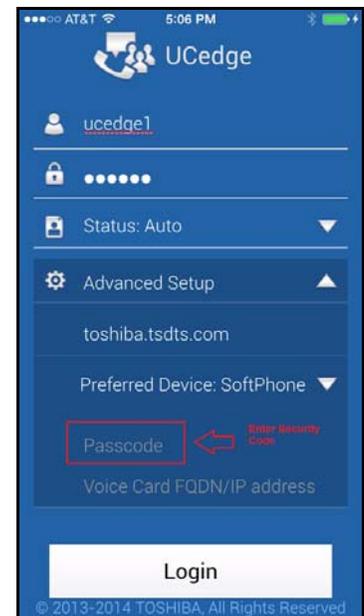
**Note:** The orientation of the screen can change based on the device (tablet or smartphone) and the rotation of the screen (shown below).



9. The user can use the softphone when another SoftIPT/PBX phone with their extension is already in use by transferring the registration from one SoftIPT/PBX phone to another.

**Note:** The IPedge and CIX systems must have Transfer Registration and IP Phone Login Password enabled along with a Security Code entered.

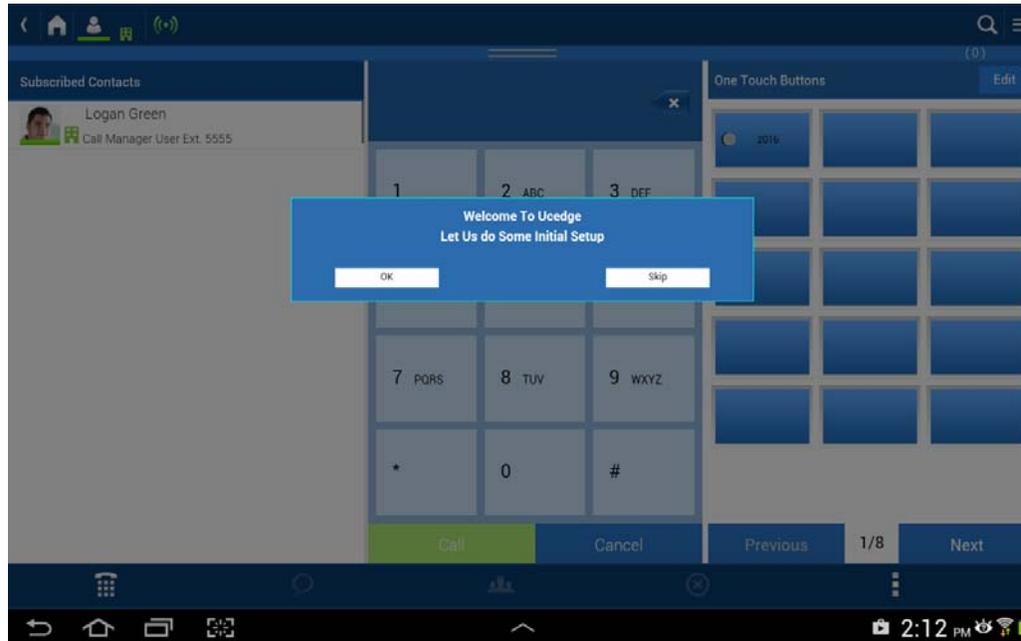
10. Click Login.



## Initial Setup Wizard

Once you click Login, the UCedge Initial Setup Wizard (shown below) will guide you through the initial setup necessary to take advantage of many UCedge features. Click OK to continue with the wizard or skip to set up UCedge on your own.

The initial setup wizard has steps to set up your Profile, Voicemail and Home page.



The My Profile set up includes:

- Changing your password
- Including your avatar picture
- Entering your email address
- Entering your phone number

Voicemail set up includes:

- Setting up the mailbox number and password
- Voicemail DID for Callthru operation
- Voicemail pilot DN to route the call to voicemail

First Time Instruction:

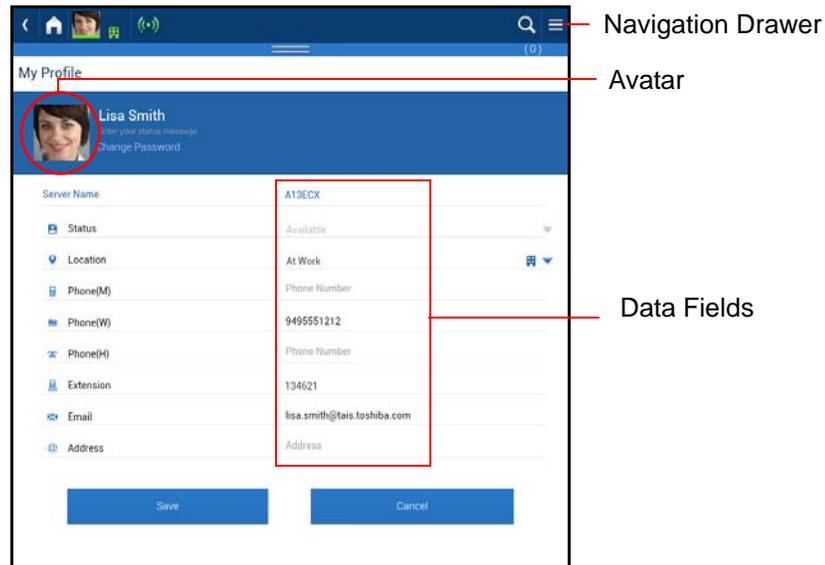
Instructions are provided for the first time the user accesses a menu. The user may follow the instructions or skip it. Instructions can be re-enabled from Help on the Setting menu.

## MY PROFILE

The UCedge Profile screen is used to personalize your contact information. The My Profile is where you place your picture or have an avatar or any other appropriate picture placed. This information can be completed even without using the wizard.

### To access the Profile Screen

Tap the Settings icon on the right corner, then select My Profile. The Profile screen displays (shown below).



Tap on the data field to enable editing of any parameter.

### Edit Your Profile

#### Avatar Picture

1. Make sure you have a picture of yourself available on your phone or tablet. Or you can take a picture within the app with your phone. However, this picture is not stored in your picture gallery.
2. Tap the settings icon. Tap **My profile**. Tap the avatar icon .
3. In the dialog box navigate to the picture on your phone.

**Note:** You can take a photo with your phone or tablet from this screen. Follow the prompts to take and then use the photo. You can also crop the photo.

#### Edit Your Screen Name

1. Tap your profile name, the name next to the avatar.
2. Your device keyboard should appear. Enter your name. This is the name other users will see when they subscribe you.
3. Enter your phone number by tapping the Phone number field. You cannot save your profile if the phone number is empty.
4. Tap Save.

### Edit Your Email Address

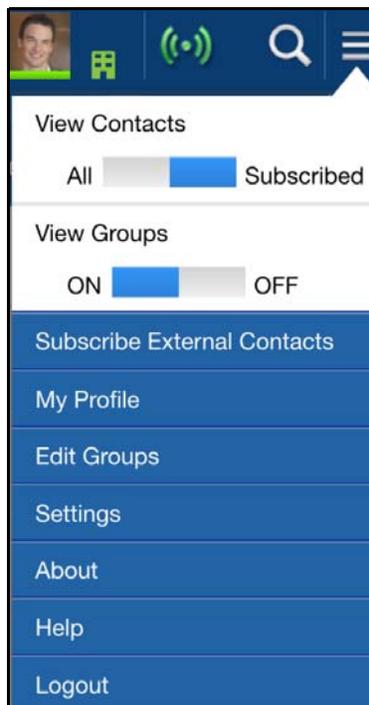
1. Tap your profile name, the name next to the avatar.
2. Your device keyboard should appear.
3. Enter your email address by tapping the Email field. You cannot save your profile if the email address is empty.
4. Tap Save.

### Edit Phone Number

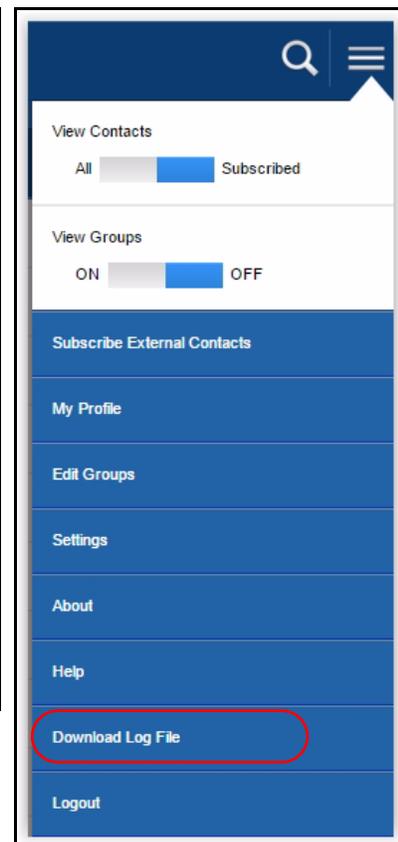
Tap the on Phone (W) data field to enter the correct work phone number or extension.

### Navigation Drawer

Access various menus by tapping the Navigation Drawer icon . Shown below are menus contained in the Navigation Drawer. External federation, as well as supporting white-list user entries which can be put in the contact list individually using the subscribe external contacts is supported on IPedge and VIPedge systems running software versions 1.6.2 or higher and therefore has the "Subscribe External Contacts" menu. The system Administrator must enter authorized FQDNs in the whitelist to show the allowed servers for the federation.



IPedge / VIPedge



Settings on PC's  
and Mac computers

<b>Navigation Drawer Menus</b>	These are the menus that can be accessed by clicking/tapping on the Navigation drawer icon:
<b>View Contacts</b>	Switch between seeing all contacts in your organization or just the subscribed contacts.
<b>View Groups</b>	Switch between seeing contacts in different groups or a no group view. The default is access off to keep the view simple.
<b>Subscribe External Contacts</b>	To add outside contacts to communicate using the UCedge application.
<b>My Profile</b>	Used to personalize your contact information.
<b>Edit Groups</b>	To create additional groups; such as, Marketing, Engineering, etc.
<b>Settings</b>	To change other settings such as the Home display, Call preferences, Phone modes, etc.
<b>About</b>	Contains information regarding the software version, etc.
<b>Help</b>	Enables the instruction for checked menus. <ol style="list-style-type: none"><li>1. From the Navigation Drawer, select Help.</li><li>2. Check the boxes to access the tutorials on any of the following topics:<ul style="list-style-type: none"><li>• Bottom Navigation</li><li>• Buttons</li><li>• IM</li><li>• History</li><li>• Voicemail</li></ul></li><li>3. Tap Save once you have check marked the appropriate boxes.</li><li>4. Access the feature for which you require help and the tutorial will display. For example, if Buttons is selected in Step 1, then select the App Menu  icon, then select the buttons  icon, then the Once Touch Buttons tutorial will display. Tap the appropriate options: Next, Skip or Previous.</li></ol>
<b>Download Log Files</b>	The files can be used for troubleshooting.
<b>For PC's and Mac Computers</b>	<ol style="list-style-type: none"><li>1. Click the Download Log File.</li><li>2. Specify the location for the log file.</li><li>3. Access the file from the appropriate folder. The file name will look like Ucclient2_Sep 29th, 10_29_04 pm.log</li></ol>

## IPedge / VIPedge

### UCedge Client

**For Android Devices** Collect all the files under the following location using the File Manager App and send them to Toshiba Technical Support by the email on the device when requested.

[//Android//data//com.toshiba.uclient/files](#)

- For iPhone**
1. Connect the device to a PC with iTunes installed.
  2. Click the device icon and select App.  
When UCedge is selected, it will show the list of files in the window towards the bottom of iTunes.
  3. Drag and drop the files to the Desktop or any folder.
  4. Send them to Toshiba Tech Support when requested.

**Logout** Select to log out of the UCedge client.

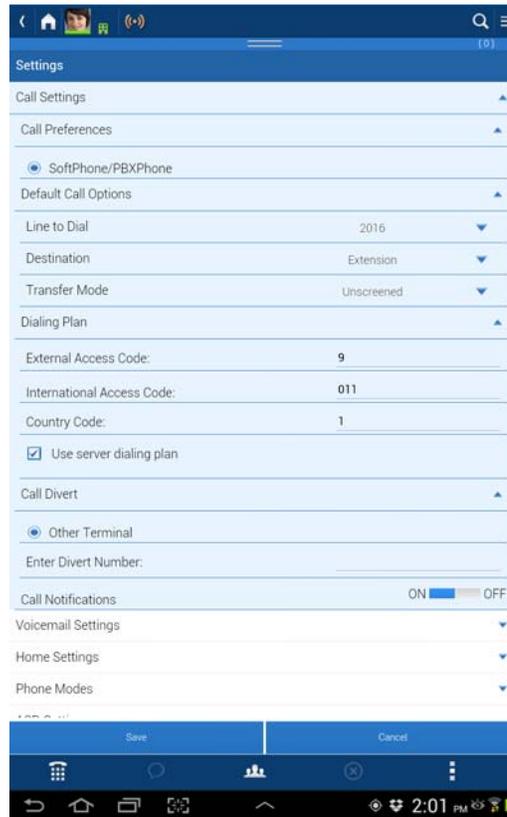
## Settings

Tap the Navigation Drawer icon , then select Settings. The Settings screen can also be used to change other settings such as the Home display, Call preferences, Phone modes, resetting the application, Sync to cloud, and saving logs.

Click on the drop down arrows to expand, view or change options.

## Call Settings

Tap the Navigation Drawer icon > Settings, tap the Call Settings drop down. Displayed below is the expanded view of all the Call Settings.



The various options available are:

- **Call Preferences** – SoftPhone/PBXPhone
- **Default Call Options** – For user's quick operation, the following options are used when the user makes call with the tap. If the user uses the long tap (or double click on UCedge for Windows/Mac), the user can override the default option.
  - Line to Dial – select the default DN to make a call (default is PDN).
  - Destination – Target DN to make a call to (default is extension). Options include: Extension, Mobile, Work, Home.
  - Transfer Mode – Unscreened transfer or Consultation transfer (default is Unscreened).
- **Call Divert** – Other Terminal. Enter the number of the other device here.
- **Call Notifications** – Option to enable or disable.
- **Use server dialing plan** – If this is checked, the dialing plan that is set up in the IPedge Net Server is used. If unchecked, the UCedge application dialing plan is used.

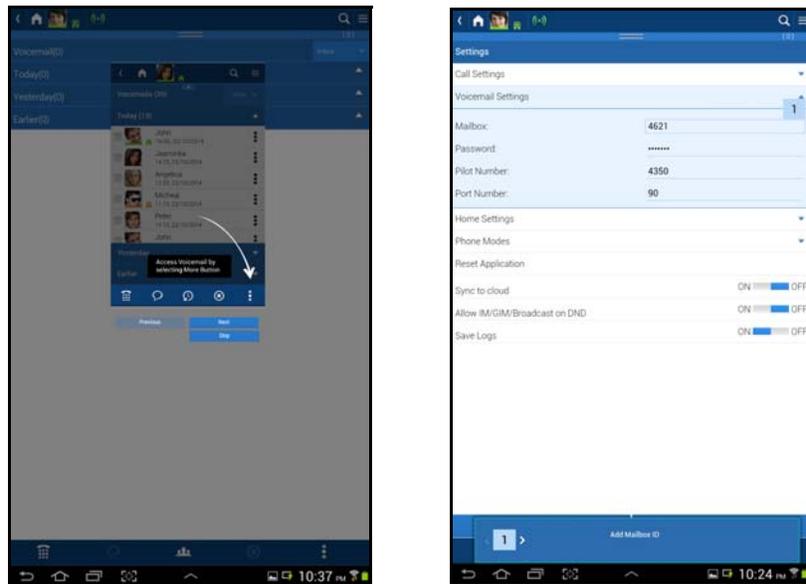
- **Cell Routing** – Option to intercept the cell phone call. Route cell call using callthru, Route cell call using callback, Ask on every call, and Do not route cell call. This feature works with Android phones only. If any option other than “Do not route cell call” is selected, it is in effect even when the UCedge is not running. If you do not want to use cell routing, then select the “Do not route cell call” option before exiting UCedge.
- **OAK Recording** – UCedge provides the capability to record a call. The default for this setting is Off. Set this option to On if you will require to use recording on a frequent basis. Otherwise, set it to On as needed.

**Important!** For this feature to work, your Phone DN must be set up with the OAK server.

**Note:** Do not use this feature until further notification from Toshiba.

### Voicemail Settings

Voicemail settings wizard (shown below) walks you through the initial voice mail set up. To use the visual voice mail or Callback/Callthru feature, Voicemail information must be configured.



However, the voice mail settings can be accessed anytime from the Navigation Drawer > Settings > Voicemail Settings.

Voicemail Settings include:

- Mailbox Number
- Password
- Change Voicemail Password
- Voicemail DID for Callthru
- Port Number

**Important!** Check with your System Administrator for the above information.

- Voicemail server – FQDN or IP address when centralized voicemail is used.
- Change Name

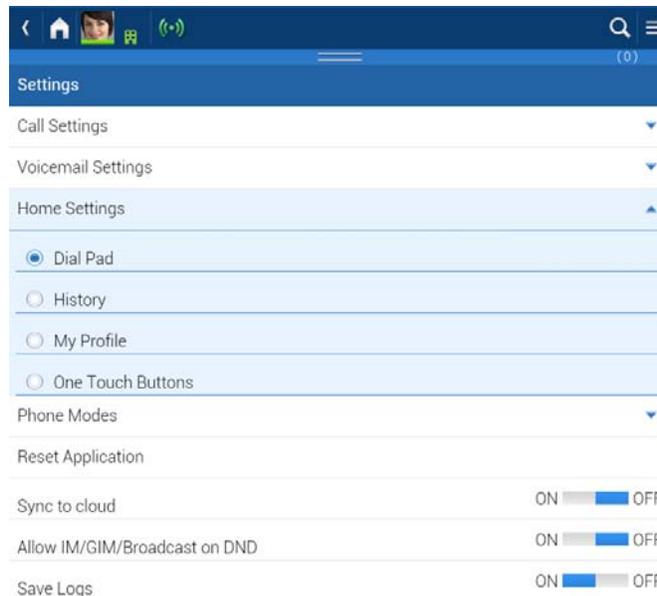
- Call Alert
1. Enter voicemail Mailbox number, mailbox password, VM DID call thru number (a DID Number that will ring into the voicemail), VM Pilot Number, the Cell Phone No. of this phone.  
Leave the Cell Phone No. blank if you're using a tablet without a cellphone.
  2. Tap the Save icon.

## Home Settings

Enables you to select the UCedge home page display.

Select the appropriate radio button:

- Dial Pad
- History
- My Profile
- Buttons



## Phone Modes

Select No Phone Mode, Pairing or SoftPhone Mode (shown below).

**No Phone Mode** – When No Phone Mode is selected, UCedge will function for everything, except as a phone.

**Pairing** – When this option is selected, UCedge will function without voice. Call control to answer the call, place the call on hold, transfer the call, and hang up is available.

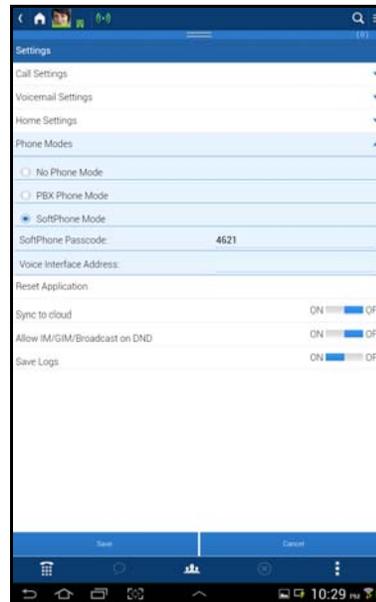
The desk phone will provide the talk path – the audio functions, such as talking and listening will be performed by the IP telephone or a softphone.

**SoftPhone Mode** – UCedge can be used for all functions; to talk with voice, make calls, etc.

### Important!

When using SoftPhone, enter the passcode of the device.

**Voice Interface Address:** When connected to a Strata CIX with an MIPU or Unifier network operation, enter the MIPU IP address or the target IPedge address.



## Reset Application

This will reset and delete all information stored in UCedge.

## Sync to Cloud

If UCedge is running on multiple devices, IM and Call History can be synced among multiple devices through Google Drive.

Slide to On and enter the gmail ID and password to activate.

## Allow IM/GIM/Broadcast on DND

When the user selects the presence status to DND, IM/GIM/Broadcast will also be disabled if this is set to On.

## Save Logs

Saves the log for the trouble shooting. Slide to Off, if it takes up the space.

## App Menu And Contacts

Once the initial set up is complete the UCedge Client application is ready to use. The App menu icon (shown below) is in the lower right corner.

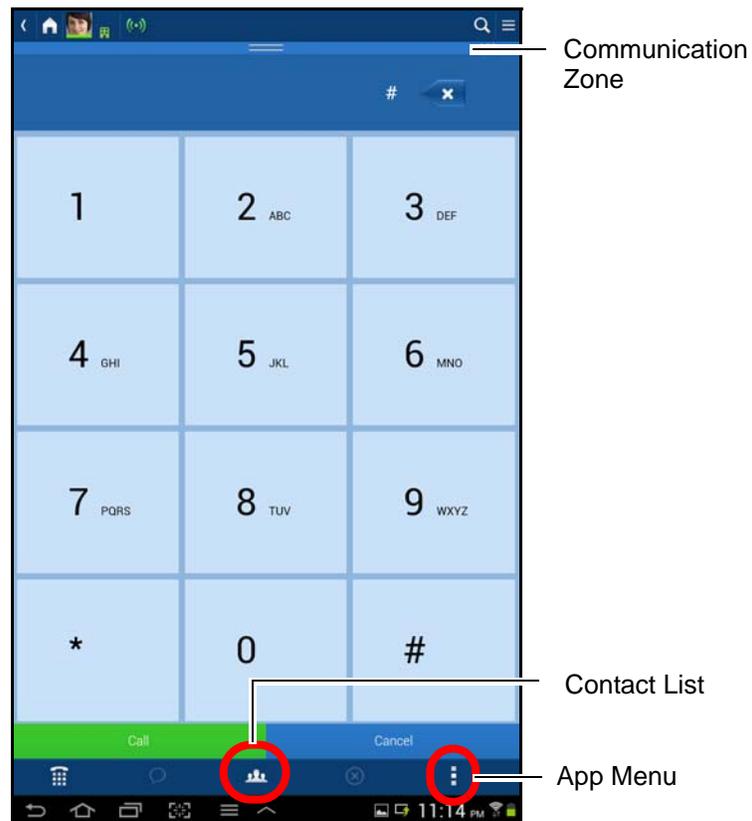
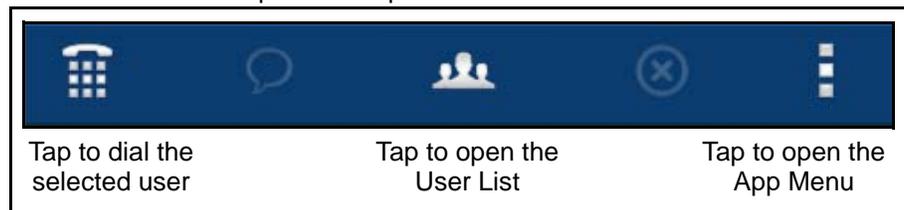


Figure 2 – UCedge App Menu

- **App Menu icon**  – Tap this icon to see icons for Voicemail, Call, Broadcast, IM, History and Close functions.
- **Contact List** – Tap this  icon to display the Contact List.
- **Communication Zone** – Tap the communication zone to expand or contract. This area contains information relating to conversations, chat, fax, etc.

While the UCedge app is idle, the menu bar across the bottom of the screen will be viable below the telephone dial pad.

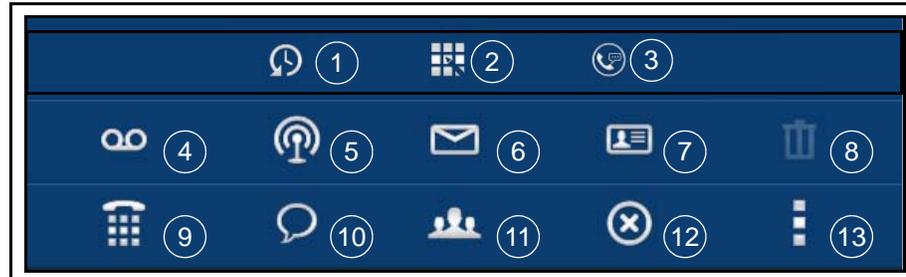


## Flyover Text

Flyover texts to show the command functions. For example, if you hover over the Contacts icon, it shows Contacts above it. On UCedge for Windows and Mac, it appears when the mouse stays on the icon. On UCedge for Android and iOS, it appears when the user taps long on the icon.

## App Menu

The App Menu displays the features available based on the context of the UCedge device when opened.

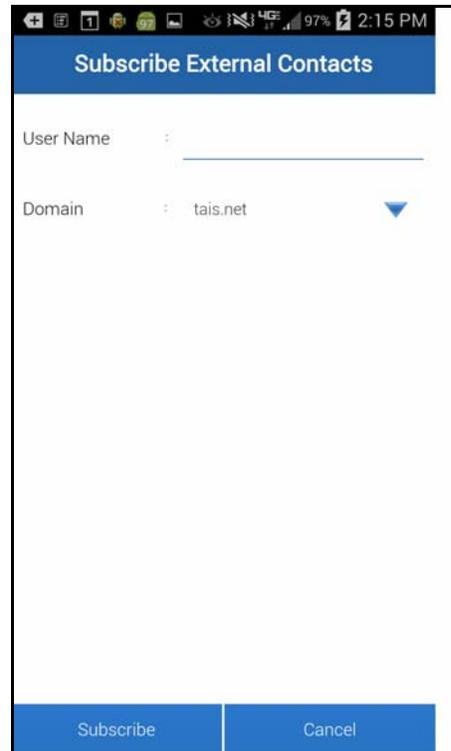


1. **History** – Displays the call and IM history.
2. **Buttons** – This contains a custom feature button bank. Program these buttons to work as speed dial buttons or the System Administrator may program multiple DN buttons on you station (PDN or PhDN buttons).
3. **Greetings Management** – Enables you to set or change the presence recording with the location to be reached. The three types of greetings are Default, Extended Absence and Busy. This menu also enables you to change your recordings and out of office options. The user can also activate/deactivate Follow Me and change the Follow Me destination.  
**Note:** If Call Control (Net Server) is used for the Follow Me, the Busy greeting and Follow Me routing is used instead of Default – set up the greetings and Follow Me destination using the Busy conditions.
4. **Voicemail** – Tap this icon to retrieve your voicemail messages.
5. **Broadcast** – Instant Message (IM) paging. Select the users then tap this icon to send an IM text message. This is a one-way message. Users cannot reply.
6. **Email** – Select a user then tap this icon to open an email message to the selected user.
7. **User Profile** – Select a user then tap this icon to view that user's profile information. If the user has saved a custom location it can be displayed here.
8. **Delete** – When an item that can be deleted has been selected this icon will highlight.
9. **Call** – Select a user then tap this icon to call that user or open the dialpad to dial any number. When you tap the default call options (using PDN to make a call to an extension) is used automatically. If you change the option, you can long tap (or double click on Windows or Mac) to see options to modify.
10. **Instant Message** – Select one or more users, tap this icon to start an IM session. This icon toggles between a Chat icon and Group Chat icon.
11. **Contact** – Tap this icon to display the list of users. The display will be all users or only your subscribed users. Select the list by opening your settings.
12. **Remove** – Remove the selected party or end the communication.
13. **App Menu** – Tap this icon to open the App Menu, tap again to compress the menu.

## Subscribe External Contacts

This feature is available to users connected to an IPedge system.

1. Tap Settings icon, then select Subscribe External Contacts.
2. Enter the User ID of the person that you would like to connect/network with. This ID is called Jabber ID and this must be obtained from the person on the external server.



3. Select the external server from the Domain drop down. Consult your System Administrator if you do not see the appropriate server.
4. Tap Subscribe. The contact that you are trying to connect with must accept your subscription in order for Presence and IM to work.

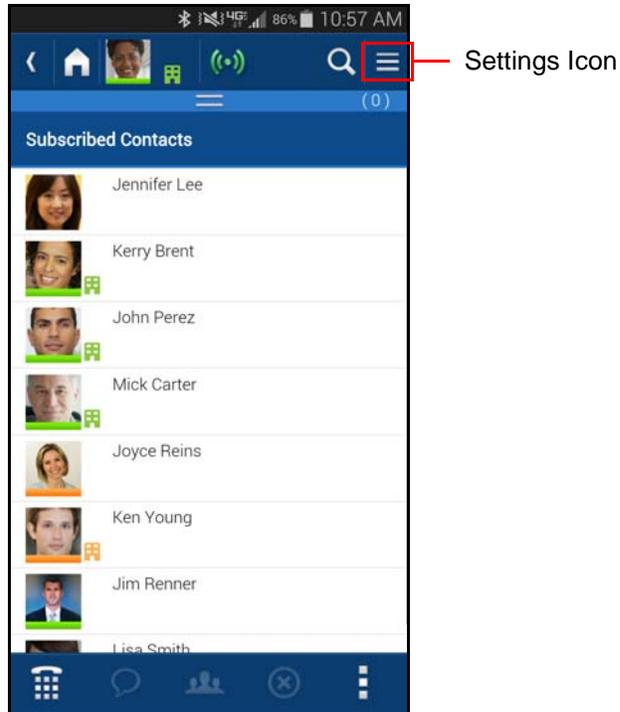
## Phone Labels

When there are multiple phone entries, UCedge can show the label of each phone number.

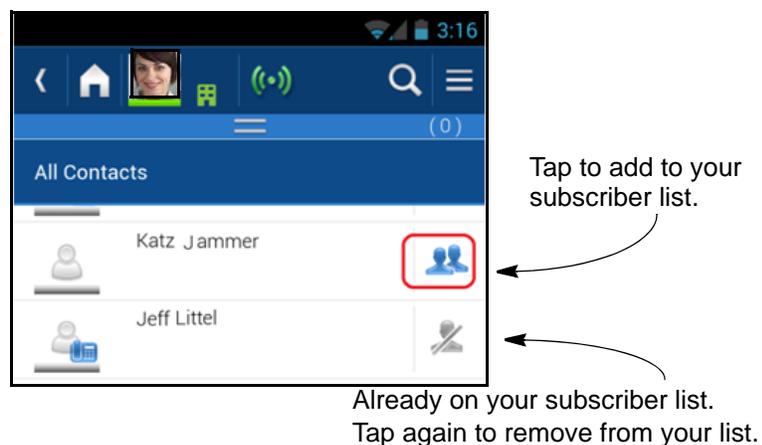
## Subscriber / Contacts List

The subscribed contacts list (shown below) is a subset of the phone system and personal contact list on your device. This allows you to find users easily and see their presence data. The Contacts can be sorted. Device contacts are sorted by email ID, therefore Contacts without an email are not incorporated.

1. Create a subscriber list, or add to your list, by tapping the setting icon.



2. In View Contacts select All.
3. In the All Contacts list tap the blue contacts icon to add the user to your Subscribers List.



### Notes:

- Device contact displays entries that have the email address. Add the email address to the contact from the smartphone device contact list.

- Use Grouping to browse contacts. Sorting with no grouping mixes up the device contacts and Corp contacts, and as the result, it may seem disorganized.
- Subscribing external contacts can be initiated by an IPedge user and accepted by the external user. However, this kind of subscription cannot be initiated by a VIPedge user.
- Extension information is not available for external subscribing users. Therefore, if IPedge and VIPedge users subscribe to each other, the extension number should be manually configured in one of phone number fields.
- When using multiple devices, you must accept the subscription from each device.

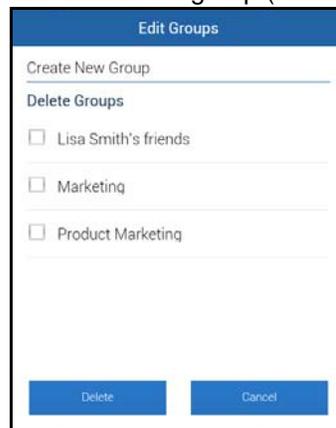
**Unsubscribe** To remove / unsubscribe a contact from the Subscribed Contacts list:

1. From the Subscribed Contacts list, highlight the name of the contact.
2. Tap the App menu  icon.
3. Tap the Contact  icon. The selected contact's details display.
4. Tap the Unsubscribe button.

## Grouping

To group contacts or to edit groups:

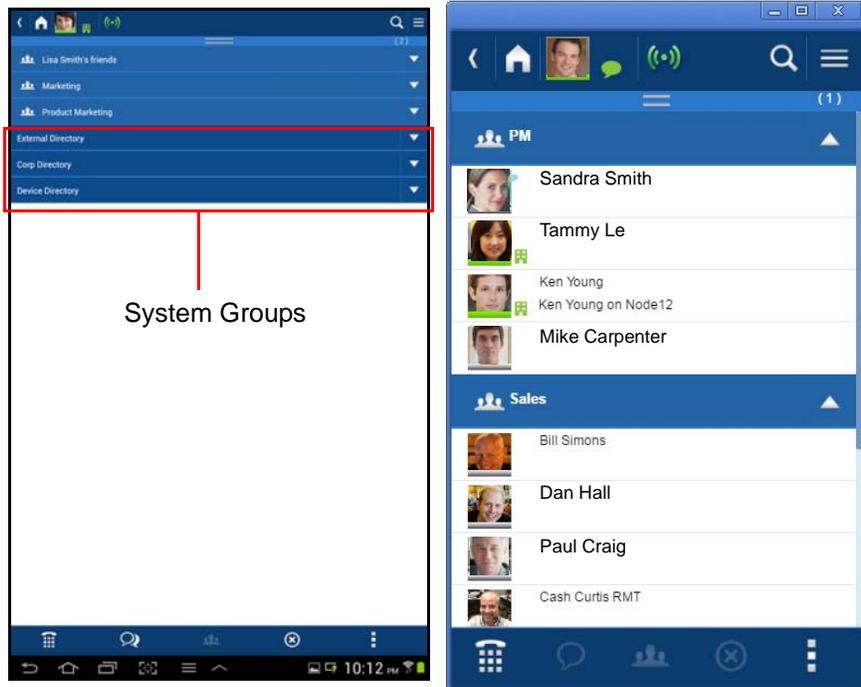
1. Tap the Navigation Drawer icon.
2. Select Edit Groups. The Edit Groups dialog box displays.
3. Tap Create New Group.
4. Type in the name of the group (shown below).



5. Select the contacts to be grouped.
6. Tap the Create button.

### View Groups

1. Click on the Navigation Drawer icon.
2. Tap ON under View Groups. The default is set to OFF. The different groups display.
3. Tap on the Group name bar to view the group members.



### Notes:

- The External Directory, Corp Directory and Device Directory are system groups that cannot be changed.

### Initiate Group IM/ Broadcast From Group

1. Tap the group Name or the Contacts icon  next to the Group name.
2. The Group Detail displays with Broadcast and Chat icons (shown below).

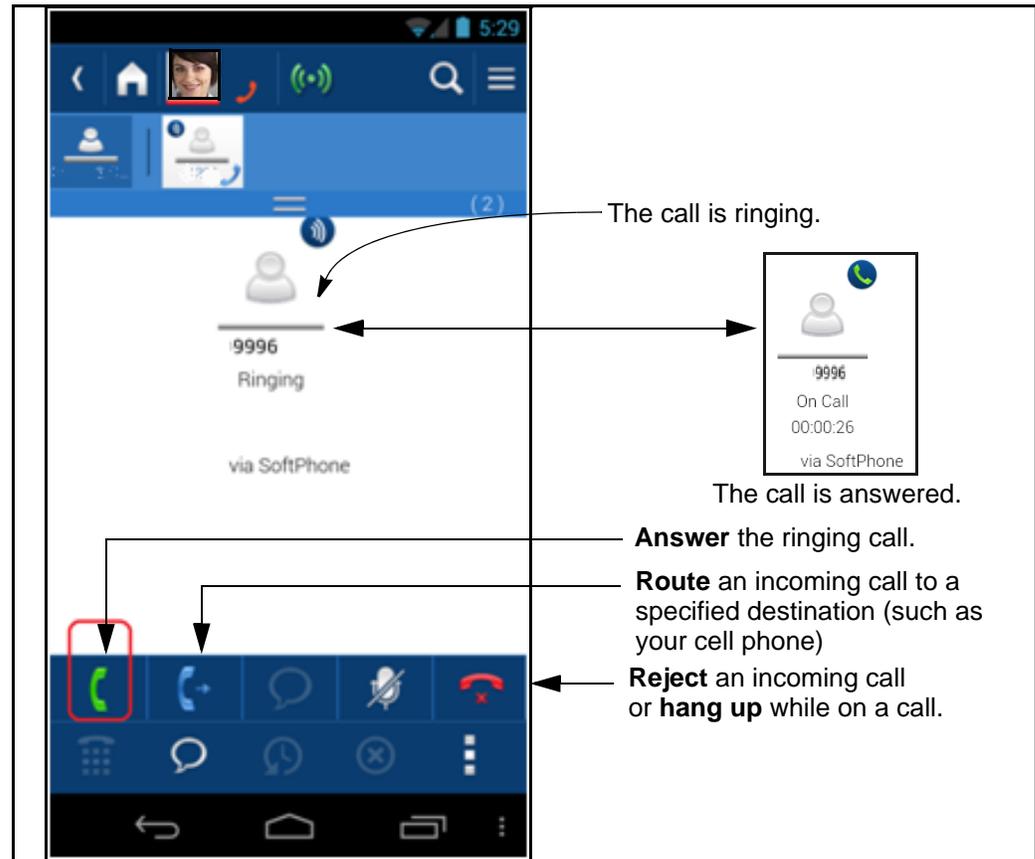


3. Select either the Broadcast or Chat icon to perform the appropriate function.

## Answer A Call

When a call rings the display will show the caller ID.

Tap the Answer icon to connect:



### Notes:

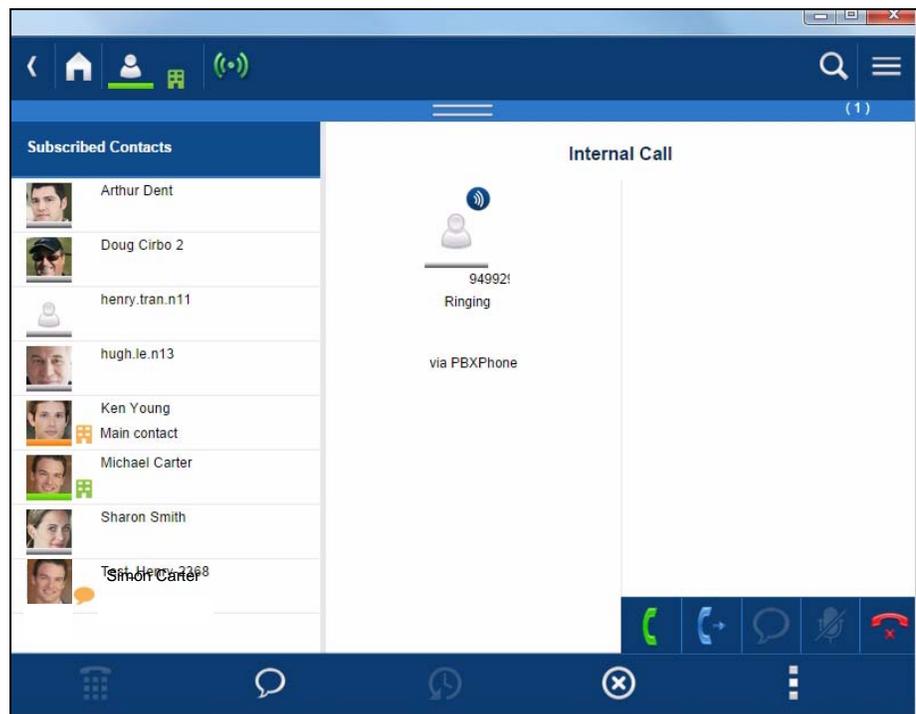
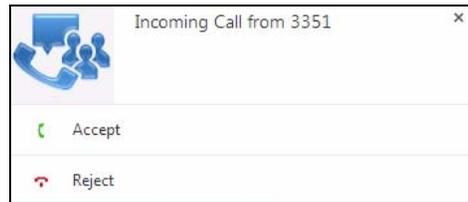
- Answer and hang up using the UCedge application. The Answer/hang up button on the Bluetooth device will not work for the softphone, and the headset will get disconnected.
- When receiving two calls simultaneously from the softphone and cell phone, reject the second call. Do not talk on both softphone and cell phone at the same time.  
If you need to answer the softphone call while on the cell phone call, hang up the cell phone and answer the softphone call or place it on hold to talk on the cell phone call. The cell phone takes over the Bluetooth device when it starts ringing, and the softphone switches to the earpiece from the Bluetooth automatically if you are on the softphone call with the Bluetooth device.
- When the app uses the PBX Phone mode (pairing mode), there is no ringing tone/vibration is provided. In iOS, there is no Call Window pop up while Android app pops up the Call Window.
- When receiving a call on iOS when UCedge is in background, tap the notification or UCedge icon to answer the call. Android will automatically bring up UCedge screen.
- UCedge for iOS cannot be used for the extension which is a member of a Multiple Calling Group. Otherwise, the incoming call may not be answered or diverted.

### Answering an Incoming call on a PC or Mac Computer

When a call rings, a pop up notification appears at the bottom of the screen (shown below) if the UCedge client is running in the background.

1. Click Accept or Reject to answer or ignore the call.
2. Answer the call using the phone that is paired with the UCedge client

If UCedge is in the front, then it displays the ringing of the incoming call (shown below).



#### Notes:

- Pairing allows the user to initiate dialing on their Toshiba IP telephones and digital desk phones from Windows or Mac computers. Transfer, conference and hold call control functions are also available.
- Softphone is not supported on UCedge for PC and Mac computers. Please use Call Manager for Windows or Android smartphone or tablet if required.

### Answer a Call on a Locked Screen

(Android devices only) When the device screen is locked; for an incoming call a call window will pop up. Accept or reject the call.

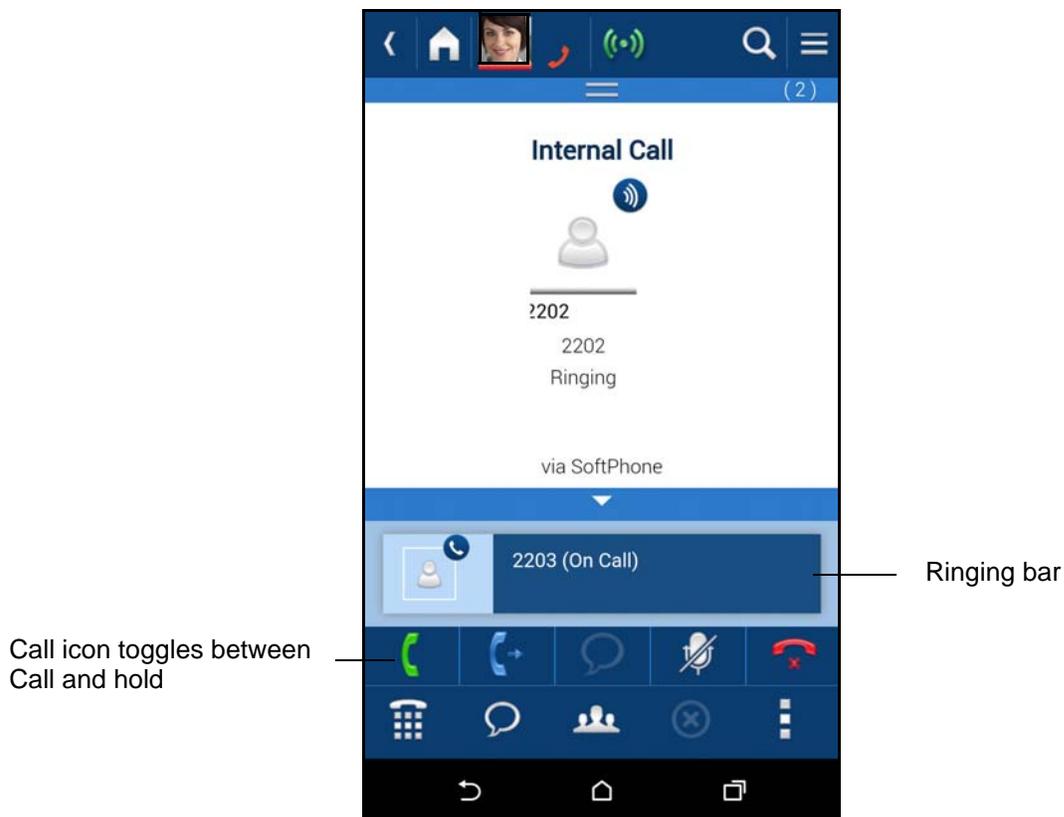
**Note:** When an incoming call arrives when the screen is locked, the call window is presented so that you can answer or reject the call. The user may see the app screen instead of the password entry screen when the user wakes up the device. In this case, the user can tap the device Home button to go to the password entry screen to unlock it.

### Multiple DNs

Multiple Directory Numbers (Multiple DNs) will display on your UCedge client only if they have been programmed by your System Administrator using Enterprise Manager. There can be one Prime DN and up to three Phantom DNs. The number of calls that can be made or received simultaneously is based on the number of Phantom DNs programmed in the system.

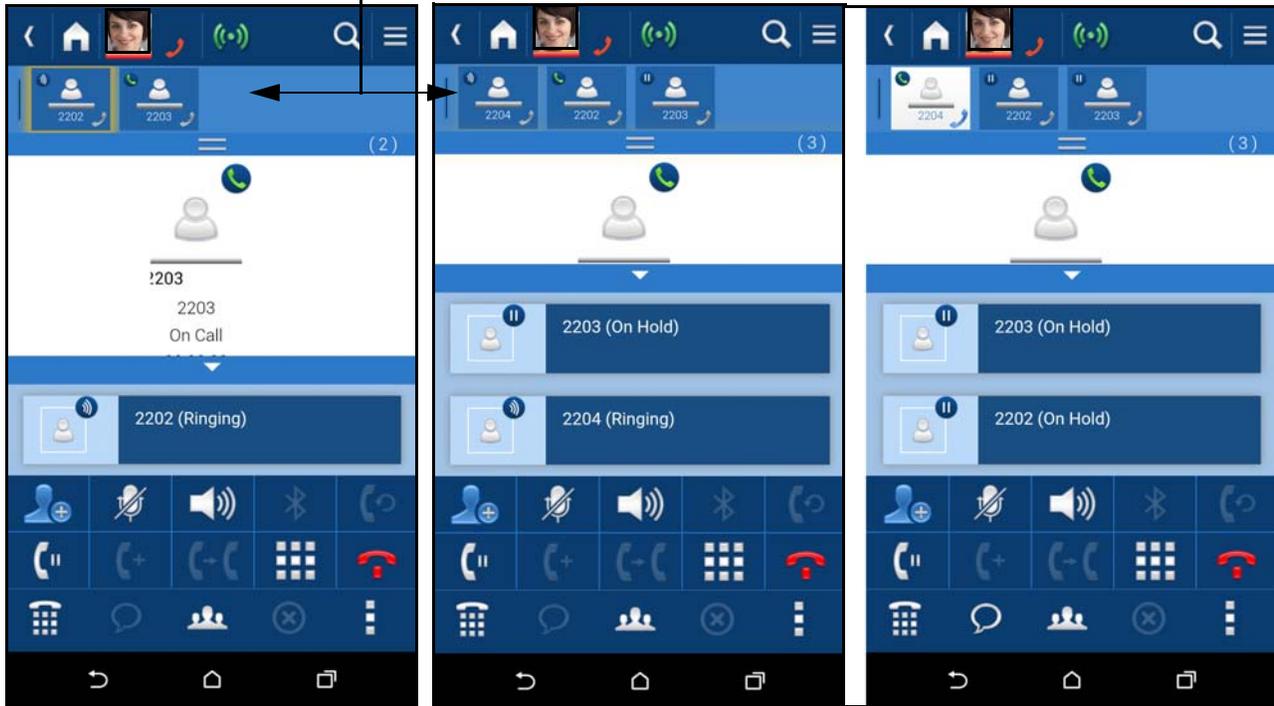
Below is a sequence of screens, when multiple calls come in.

1. When on an active call and another line rings. The screen displays the call as ringing (shown below).
2. Tap the ringing bar.
3. Tap the green Call icon to answer the call.



The first call is automatically placed on hold.

Active and Calls on Hold  
Status



4. When a third or fourth call rings, repeat steps 2 and 3.
5. Other operations that may be performed when using multiple DNs are:



**Note:** The Answer icon toggles between Answer and Hold. The color of the Hold icon changes between blue and white; blue indicates the call is on hold, white indicates an active call.

## Make A Call

To place a call:

### Dial a Number

Dial the number using the telephone dial pad then tap the Call icon.



### Use the Subscriber List

If the subscriber list is not visible tap the App function menu icon. Tap the Contact List icon. Refer to [Figure 2](#). Tap to highlight an entry then tap the Dial Pad icon.



Go to the Settings icon and toggle the “View Contacts” slider to switch between the full users list and your subscriber’s list.

### Transfer a Call

There are two types of transfers: Conference / Transfer (screened) and Unscreened Transfer. This procedure below can be used to form a conference or perform a screened transfer.

1. While on a call tap the Add user icon  .
2. Select a contact or dial the number of the next person.  
When calling from the Subscribers list the first person will go on hold.  
When calling from dial pad the first person goes on hold when the call button is tapped.
3. To drop the called line and return to the held party, (for example: busy or voice mail) tap the  icon. If the disconnect icon  is tapped the held party will be transferred to the call person.
4. When the called party answers tap the Join key  to form the conference.

### Conference

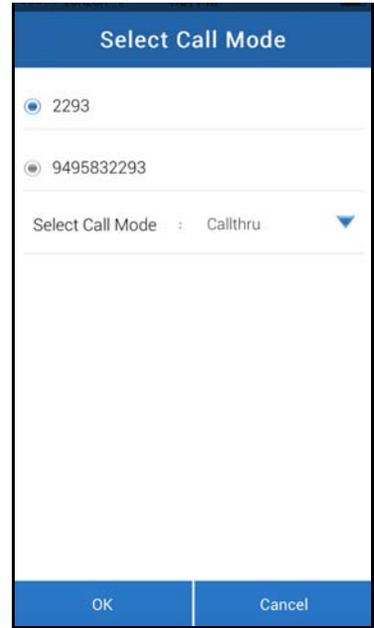
#### Notes:

- Feature access code may not be supported from the softphone when the total number of digits exceeds 6 digits.
- Phantom DN, GCO, Pooled line is not supported by the softphone or paring mode.

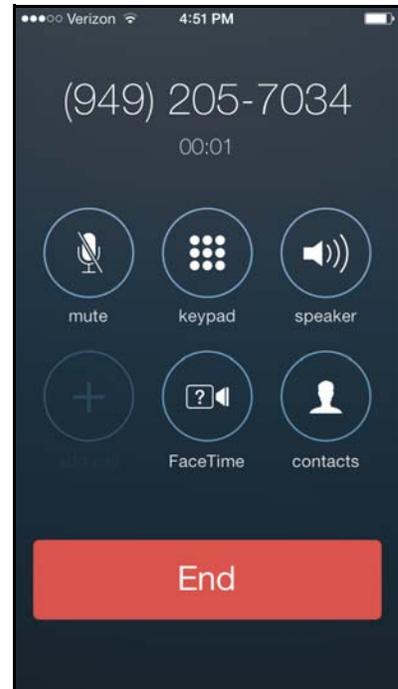
### Callback/Callthru

To make a Callback/callthru using a cell phone, follow these steps:

1. Tap the contact (it will turn blue).
2. Long tap the phone tab or call icon to call. If the short tap is used, UCedge will use the default call options to make a call.
3. Select a number to dial.
4. Select the Call Mode - Callthru or Callback (shown right).  
When Call thru is selected, the operation is transparent to the user, and the system will connect the cell phone to the destination. When Call Back is selected, the system will call the cell phone first, and the user needs to answer the cell call and press 1 or # to initiate the call to the destination.



5. Tap OK.



**Call Notes** A note relating to a call on a device can be seen or is visible on a different device.

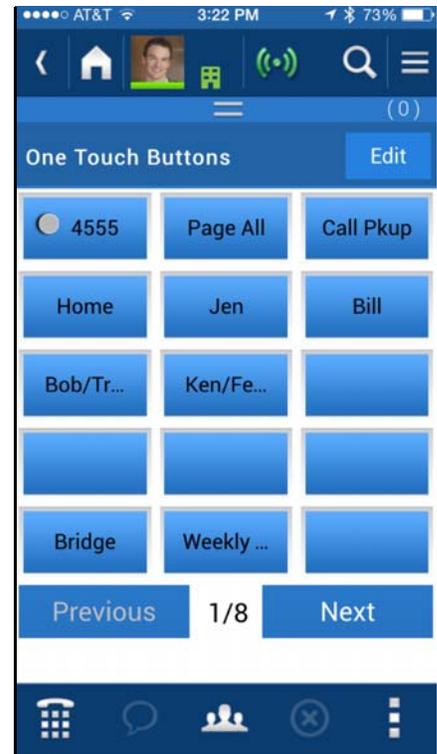
## Multiple DN Calling

Multiple DNs can also be used to place calls.

If multiple directory numbers have been set up by your System Administrator, you can use these buttons to make calls.

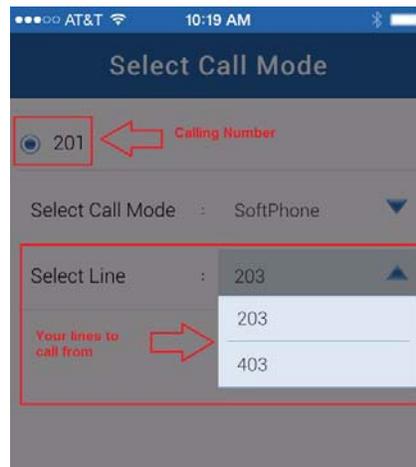
1. Tap the App menu  icon.
2. Tap the Buttons  icon. The Feature buttons display.
3. Tap the line button you want to use, then call.

**Note:** The Prime DN is used by default to make calls.



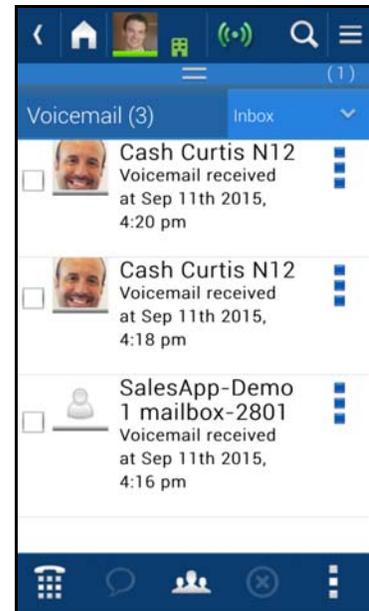
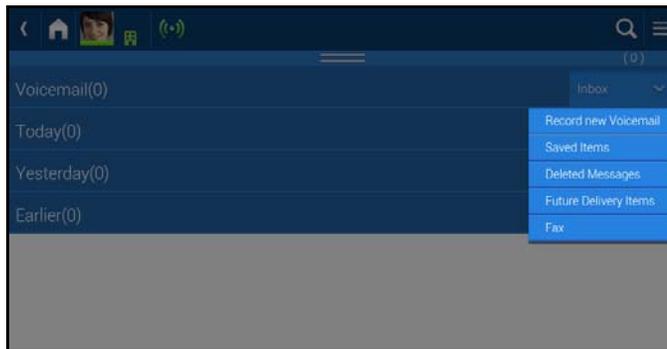
## (Alternate Methods)

1. Dial the number using the telephone dial pad with long tap Call button. ...or Tap the Contacts List icon and long tap the Phone icon.
2. The following options display after the long tap. Select the appropriate line or tap OK if the appropriate line is already selected (shown below).



## Voicemail

1. Tap the App menu  icon.
2. Tap the voicemail  icon. The voicemail screen displays.



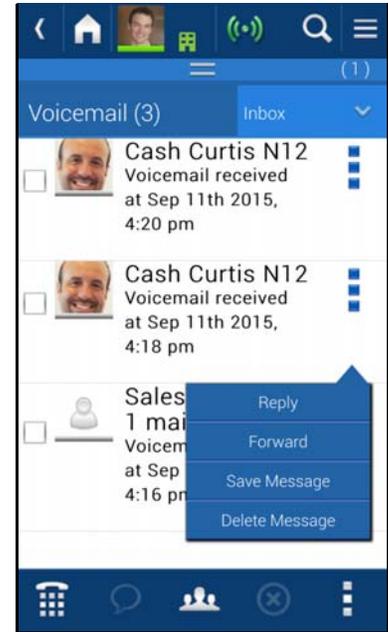
**Note:** Voicemail settings can be shared among multiple devices.

**Inbox** Tap the drop down next to the Inbox on the right to access various voicemail functions.

- Record new Voicemail
- Saved Items
- Deleted Messages
- Future Delivery Items
- Fax

**Reply, Forward,  
Save Message,  
Delete Message**

Tap the icon next to the voicemail message to access these functions (shown below).

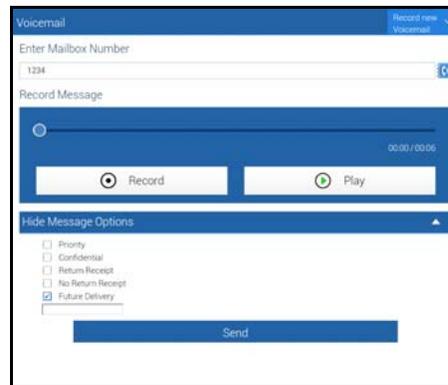


**Recording a New  
Voicemail**

1. Tap the Record new Voicemail from the menu shown above.
2. Record your message. The following screen displays.

**Note:** The voice message cannot exceed the following time limits: 2 minutes when connected to IPedge TGZ 1.6.2.3xx or later and 30 seconds when connected to an IPedge/App Server for CIX TGZ 1.6.212 or a VIPedge system.

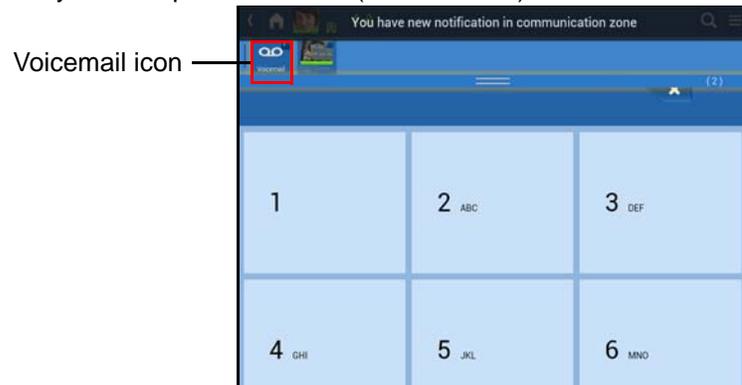
3. Select Play / Replay to review your message.
4. Select the message options – Priority, Confidential, Return Receipt, No Return Receipt, and Future Delivery.
5. Tap Send.



**Important!** When connected to the VIPedge, recorded voicemail is limited to one minute for a new, reply, and forwarded voicemail.

## Retrieve Voice Messages

When a voicemail message is received on your device a new message alert will appear briefly at the top of the screen (shown below).



1. Tap the voicemail icon  to listen to your messages.
2. Or Tap the App Menu icon  .
3. Tap the voicemail icon  .
4. List of voicemail messages will display. Tap expand icon on the right to show the messages in each category.
5. Tap a message in the list to high-light then tap the Play button on the message to play the message.

**Note:** When playing back a voicemail or recorded greeting, the volume control does not work on Android 5.x device.

### Delete a Message

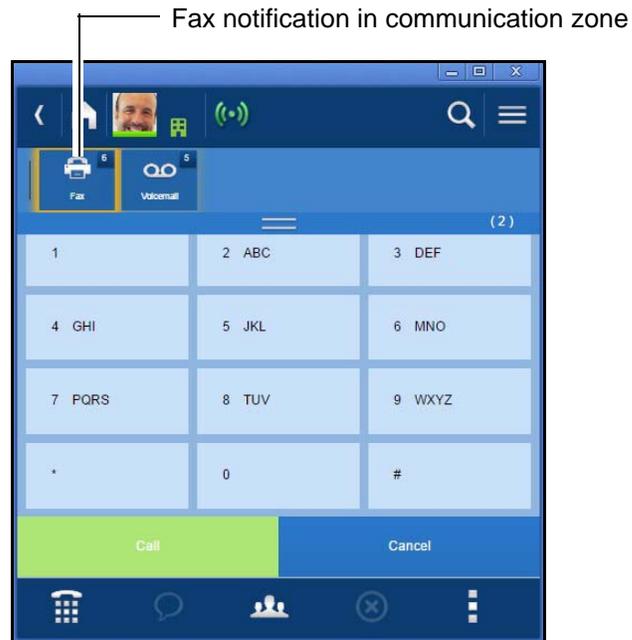
To delete a voicemail:

1. Tap to highlight the message you want to delete.
2. Tap the apps menu icon.
3. Tap the delete (trash can) icon.

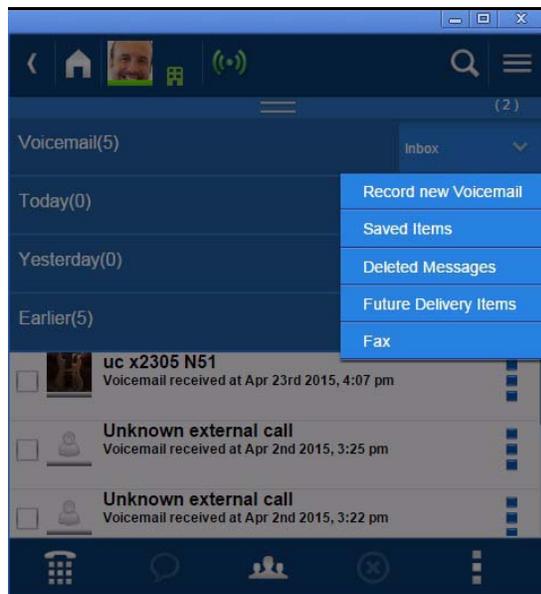
**Fax** Faxes can be received and forwarded on the UCedge client. Fax messages can be accessed directly through the Inbox. Fax messages can be saved, deleted and forwarded.

### Receiving Fax

1. UCedge will indicate that you have a fax message in the communication zone (shown below).

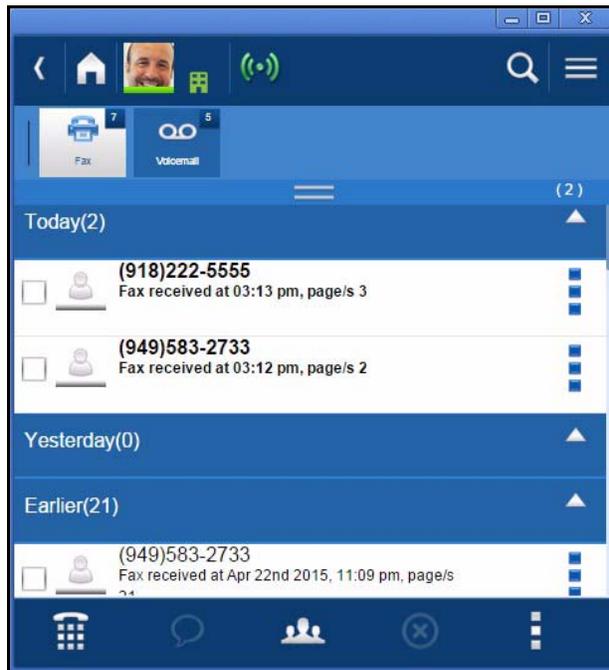


2. Tap the Fax notification icon (shown above) to open the fax folder or select the App menu, tap the voicemail icon, tap the Inbox drop down, then select Fax (shown below).



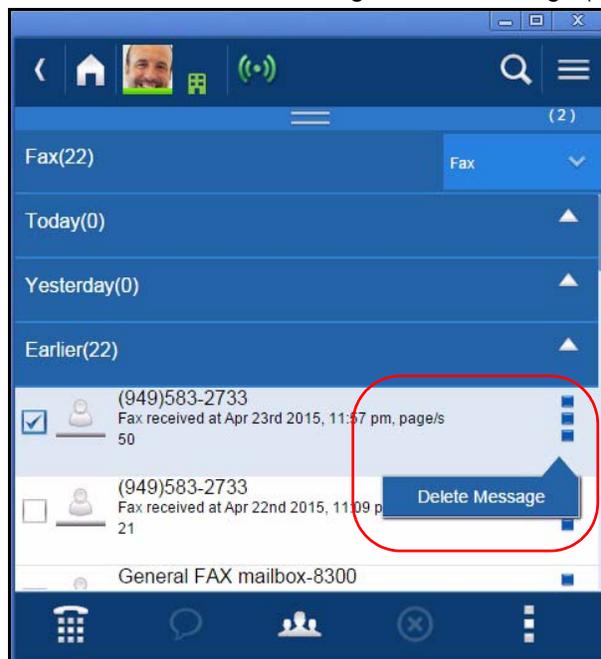
The fax folder contains only faxes and displays them in Today, Yesterday and Earlier categories.

3. Tap the drop down arrows to open up the different categories.
4. Tap the fax message to open/view it.



### Deleting a Fax

1. Select the three-dot icon on the right of the message (shown below).

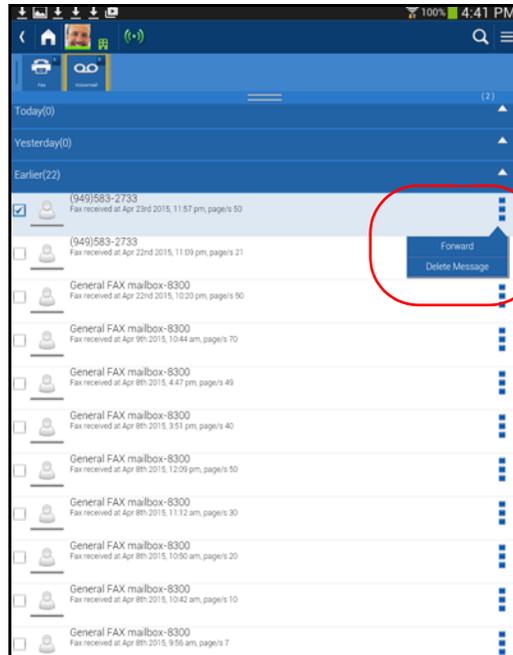


2. Tap Delete Message.

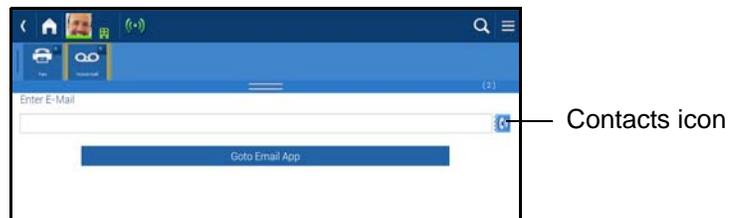
## Forwarding a Fax

**Note:** This option is available on the tablet and the phone, but not on the PC or Mac computers.

1. Select the three-dot icon on the right of the message.



2. Tap Forward (shown above). The email client of the device will display (shown below).



3. Select the Contacts icon .
4. Scroll/select to enter the contact.
5. Select "Go to Email App." This displays the default email application of the device.  
The fax gets attached as a .pdf document.
6. Tap Send.

## Presence

A user's presence consists of the following:

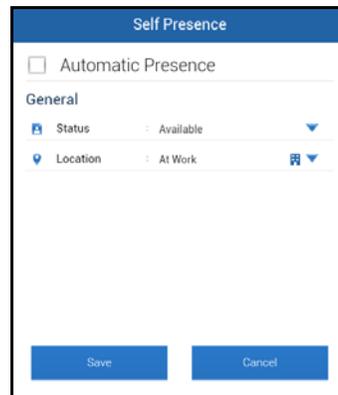
General Presence (Status), Location, Activity, and Comments

By default, general presence is changed automatically based on activity. You can set your general status manually or System (Auto) to any of the following:

Icon	Color	Status	Description
	Green	Available	On-line and can be contacted.
	Red	Busy DND <sup>1</sup>	On a call or some activity. Do Not Disturb – When this status is selected, all communication is automatically blocked.
	Yellow / Orange	Away	Not at desk.
	Grey	Off-line	Signed out, network failure or intentionally set by user.

<sup>1</sup>Available when connected to IPedge systems only.

To change your Self Presence, uncheck the Automatic Presence checkbox (shown below), then change your Status and Location.



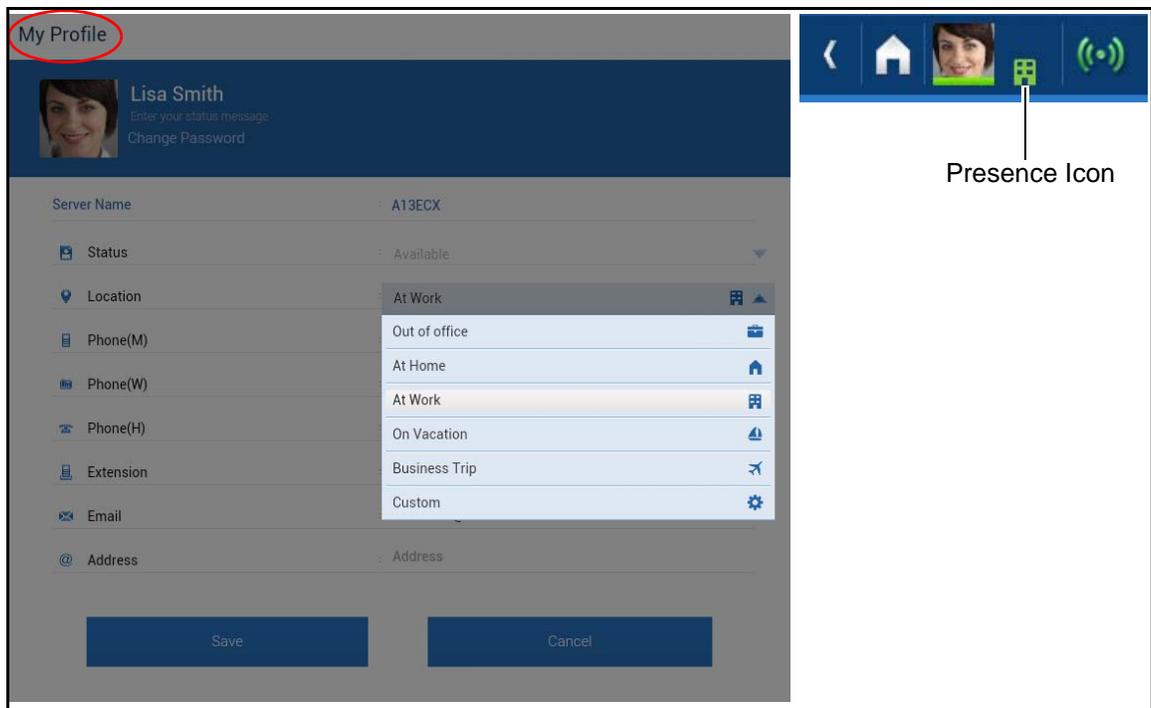
### Notes:

- If the device sleeps while on a call, the presence status may get stuck in DND. Wake up the device to correct the Presence.
- Multiple Devices:
  - When using multiple devices, set the same manual presence status on each device. Otherwise, the presence may be updated by another device with a different presence status. Therefore, when changing status, ensure that all devices are set to the same status. For example, to set the Auto Presence, change all devices to Auto Presence.
  - When all the devices are set to Auto, each device may detect a different status such as Away or Available. In this case, other users will see the last updated presence.

- Call history may show the same call history entries twice when multiple devices are used.
- Upgrade the software or login from one device at a time and wait for the completion before upgrading or logging in from another device.

**Location** The location indicator shows other users whether you are in, out, busy or away from the office. The default location is 'office.' The location selected remains set until you change it or you login to the UCedge app. At login the location will reset to office.

1. Changing the status of your Presence can be accessed from Settings menu > My Profile. Or tap the presence icon at the top left corner of the screen (shown below).
2. Tap to select your location from the pull-down list.



3. Click on the **Save** icon.

You can set any of the following locations. The color of these icons change depending on the Presence Status set.

Icon	Status	Usage
	Out of Office	On a customer visit, etc.
	At Home	At Home – May or may not be working from home.
	At Work	When working at your office.
	On Vacation	Signed out, network failure or intentionally set by user.
	Business Trip	Travelling on work.
	Custom	For any other message.

The custom setting allows you to enter any location information. The custom location can be up to 128 characters in length. The custom location icon will be displayed.

**Note:** The text entered into the custom field is deleted when the location is changed, resets to default, or you change the custom entry.

To see the text of a custom location select the user then tap the V-card icon in the app menu. The location display is approximately 20 characters wide. If more characters were entered swipe the location field to scroll.

 Location : Traveling to customer site. A

 Location : between meetings. Returnin

Swipe finger to scroll.

Full text reads:  
Traveling to customer site. Available only between meetings. Returning Tuesday.

## History

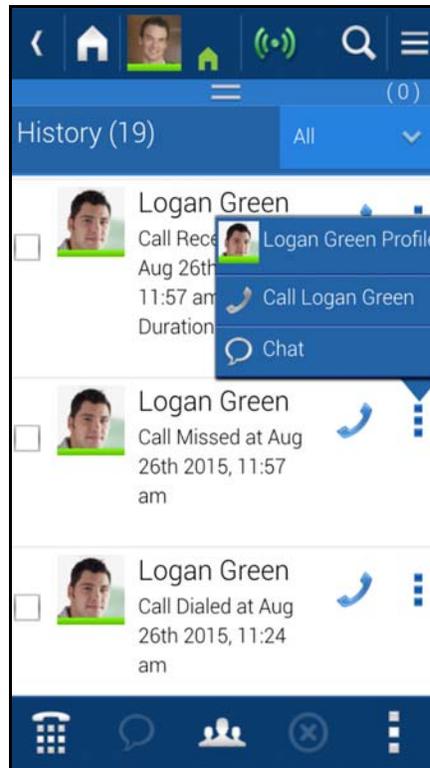
To view your call history tap the history icon  .

## Call Using History

To place a call from history list find the call in the history list then tap the call icon  .

## Other Options

Tap the App Menu icon  next to an entry in History. This displays options to view the callers profile, call and chat.



## Instant Message (Chat)

Instant Messaging allows you to send a message to one of the users. To start a chat session:

1. Display the Users list.
2. Tap a user.
3. Tap the Chat icon .
4. Tap in the 'Type your message' box to call up your keyboard.
5. Tap the **Send** icon to send your chat message.

When a chat message is received at your device a new message alert will appear briefly at the top of the screen. Tap the pulsing bar at the top of the screen to open the chat message.

#### Instant Replies

Sorry, I cannot take your call right now.

I will call you in a few minutes,

I'm in a meeting. call you later.

I'm busy right now. please text me.

I'm busy right now. please email me.

#### To Exit a Chat Session

1. Click on an chat session in the Communication zone.
2. Tap or click the Remove icon  at the bottom of the screen.

**Note:** The chat status will display as a chat as long as chat sessions are in the communication zone even if the chat is not active. Close all chats to change the status or location icon.

#### Group Chat

The Group Chat allows you to send the Chat message to two or more users at the same time.

1. Display the Users list.
2. Tap all of the users.
3. Tap the Chat icon changes to a group chat icon .
4. Tap in the 'Type your message here' box to call up the keyboard.
5. Type your message.
6. Tap the **Send** icon to send your chat message.

#### Notes:

- If the person sent the chat message is not logged into the system the message may not be delivered. There will be no error message.
- If you have exited the chat when a chat message is returned it will be treated as a new message.

#### Broadcast

The broadcast function is a one-way broadcast message.

1. Display the users list.
2. Tap to highlight the users to which you wish to send the message.
3. Tap the Broadcast icon .
4. Type your message.
5. Tap the **Broadcast** button.

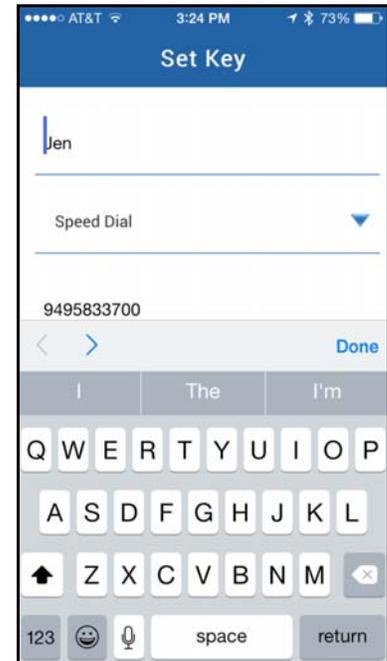
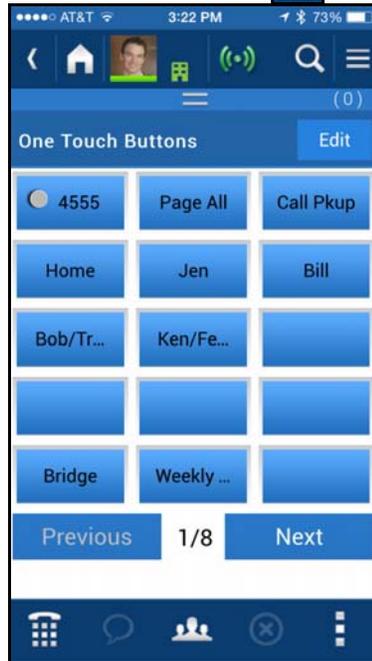
## Buttons

These buttons can be customized to function as speed dial buttons for frequently dialed numbers, conference PINs, feature codes or any other dialable numbers.

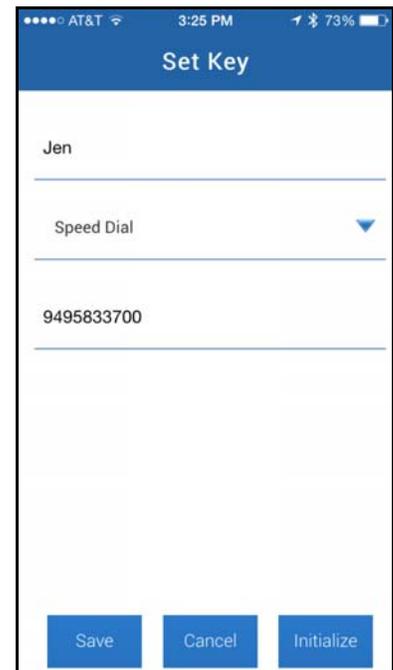
### Speed Dial Buttons

These buttons can be used as speed dial buttons to make a call. Follow the steps below to set them up.

1. Tap the App menu icon.
2. Select the Buttons icon . The following screen displays.



3. Tap the button.
4. To change the button, tap Edit and tap the button. The Set Key dialog box displays (shown above).
5. Enter the label name.
6. From the drop down select the Speed dial action.
7. Enter the speed dial number (shown right).
8. Tap Save.



### PDN or PhDN Buttons

If the UCedge is programmed with PDN or PhDN, then the feature buttons are automatically set to work for PDN and PhDNs.

### Advanced Voicemail Feature

Users may also easily access key voice messaging functionality and manage administration of their voice mailbox without dialing into the voice mail system.

### Follow Me Configuration

This can also be defined in Call Alert. See [“Call Alert Activation” on page 46](#).

1. Login to EMPA by following the URL provided by the Administrator to configure Follow Me.
2. In the Login page:  
Username: Ext Num (ex. 3351)  
Password: Ext Num (ex. 3351)
3. Tap Submit
4. From EMPA Main Page, select Application > Messaging > Mailboxes > Schedule > Personal Schedule.
5. Select New Schedule > Time Handle = Always
6. Tap Destination Box, Destination =1+Cell number

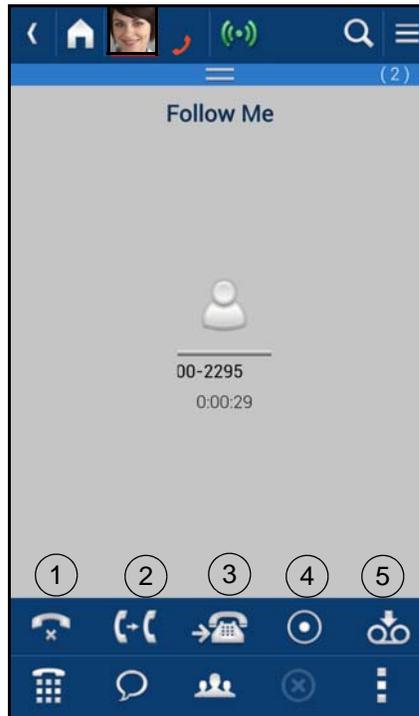
**Note:** VIPedge only supports 7 and 11 digit dialing.  
10 digit dialing is not supported.  
Priority =20, Time out =32  
If multiple destinations have the same priority, they are called simultaneously. If the priority is different, each destination will be called sequentially. One of the destinations can be the user's cell phone.

7. Tap Save.  
Follow Me Active = D. and auto attendant.
8. Tap Save to save personal call handling assignment.

Follow Me call may be routed to the cell phone based on the Follow Me configuration.

## Receiving / Making a Follow Me Call

When receiving a Follow Me call, press **1** to accept the call. When the Follow Me call is connected to the cell phone, the following screen is presented to the user.



1. Disconnect – This will disconnect the current call.
2. Transfer – Transfer the call to another phone number.
3. Transfer to Desk – Transfer the call to your office desk.
4. Record/Stop Record – Start/stop recording of the conversation.
5. Send to Voicemail – Send the call directly to your voice mailbox.

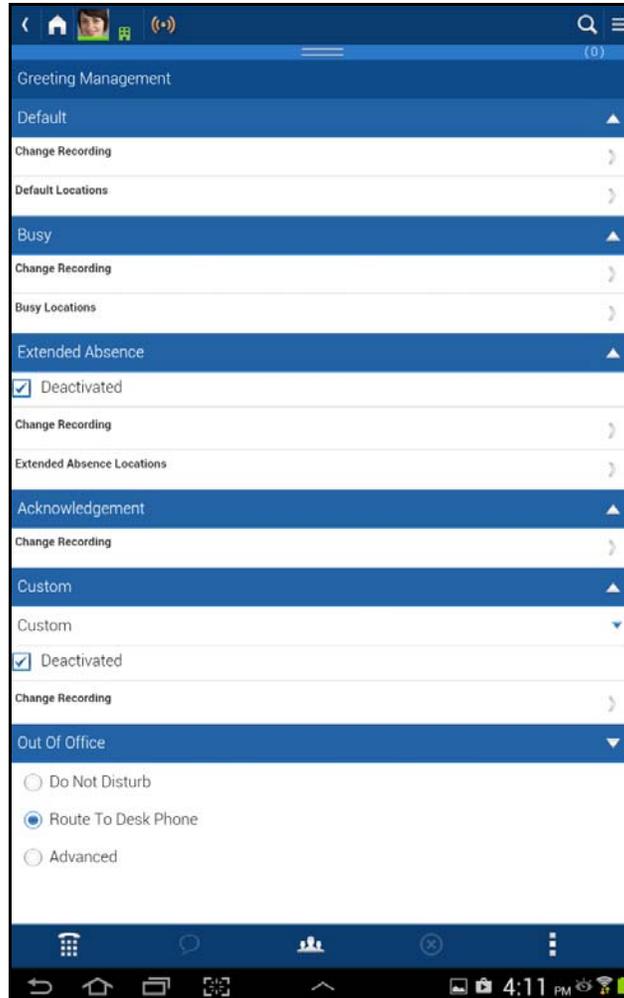
## Greetings Management

The Greeting Management screen enables you to change or select various options, such as:

- Default – Tap the down arrow to record your default greeting or to select the default routing locations.
- Busy – Busy destination numbers may be set to call all destination numbers at the same time or to direct the call immediately to voice mail.
- Extended Absence – An extended absence greeting can be used when you are away from the office for an extended period of time, such as on vacation or business.
- Acknowledgement – is an announcement that is played to the caller when the user has selected the Announce option in Call.
- Custom – Nine custom greeting options are available.
- Out of Office – This feature is only available with enhanced Msync.

1. Tap the Apps menu icon .
2. Select the Greetings Management icon .

The following screen displays.



### Custom Greetings

1. Tap the down arrow next to custom.
2. Select the appropriate greeting number Custom 1 ~ Custom 9.
3. The Custom number selected will display in bold font.
4. Tap Change Recording (located at the bottom of the Custom section).
5. Tap the Record button to record greeting.
6. Press Stop when done.
7. Select Play/Replay to replay the greeting.
8. Select Save or Cancel.

From the Greeting Management screen, check or uncheck the Deactivated check box to activate or deactivate the custom greeting.

## Routing Options

These options control how the Messaging handles the call for Auto Attendant as well as calls forwarded to the Messaging.

- Do Not Disturb – Calls are routed to the mailbox.
- Route to Desk – Calls are routed to the desk phone from the Auto Attendant.
- Advanced – Calls are operated by Follow Me settings.

**Note:** Changing to Do Not Disturb will change the call handling at the IPedge Messaging, and it does not change the Presence status.

**Important!** To use Follow Me or Call Alert, Advanced menu must be selected.

## Call Alert

Call Alert feature notifies the user of a call so that the user can route the call to a cell phone or other destinations or to voice mail. Also, when someone dials the users mailbox from within auto attendant with the call alert feature turned on, the inbound call will be held by the system. A notification will be sent to the UCedge Client.

### To set the Call Alert Time Limit

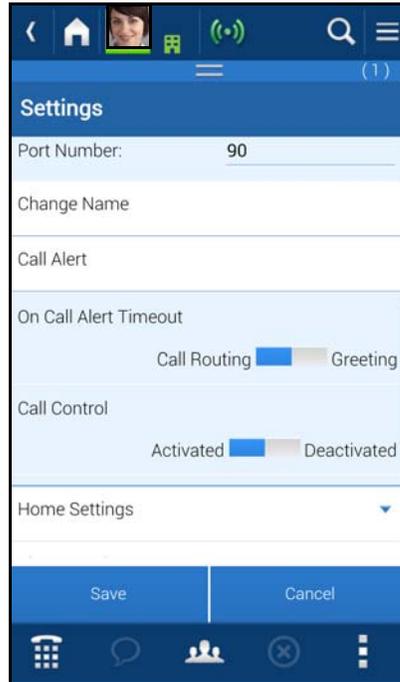
1. Tap Navigation Drawer icon .
2. Select Settings.
3. Select Voicemail settings.
4. Tap Call Alert. The Call Alert timer screen displays.
5. Enter the time in seconds (example 30 in the following screen). Default is 0.

**Important!** If the timer is set to the default of 0, the Call Alert feature gets disabled even though it may be turned on under Advanced Routing in UCedge.



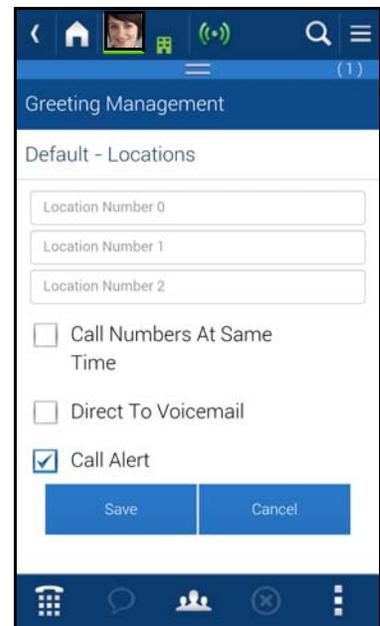
**Call Control / Call Alert  
Timeout**

1. Tap Navigation Drawer icon .
2. Select Settings.
3. Select Voicemail settings.
4. Select Call Routing as the On Call Alert Timeout.
5. Select Activated for Call Control.
6. Tap Save.



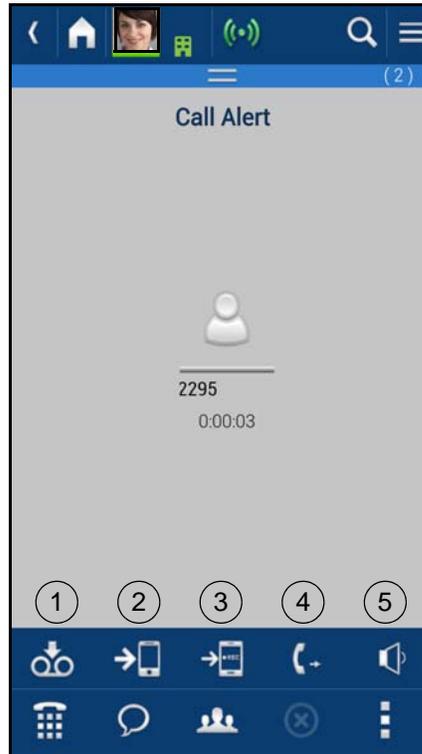
**Call Alert Activation**

1. Tap the Apps menu icon , then the Greetings Management icon .
2. Tap the desired condition (Default, Busy, etc.) drop-down.
3. Tap Locations (ex. Default Locations). The following screen displays.
4. Enter up to three locations (destinations) to use Follow Me. These destination can be also changed in EMPA. Check Call Number At Same Time for simultaneous ring operation.
5. Check Call Alert to activate the Call Alert Feature if required (shown right).
6. Tap Save.



**Call Alert Activated**

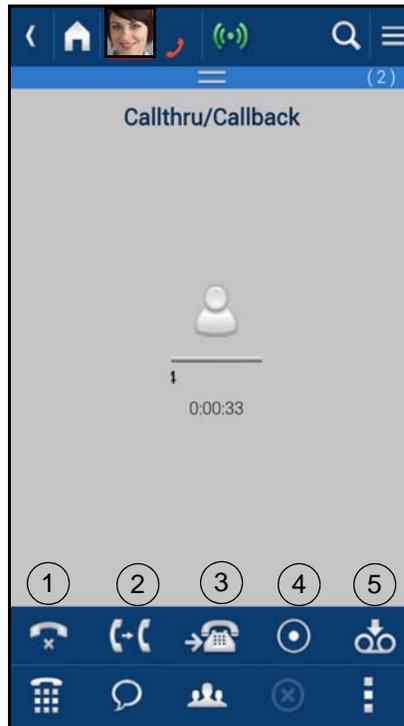
When a call comes in the following options display. Call Alert has the precedence over Follow Me operation which may be activated after Call Screening times out.



1. **Send to Voicemail** – The call is immediately sent to the mailbox so that the caller can leave a message.
2. **Divert to Me** – The call is routed to the smart phone to take the call. Selecting this option will take you to the Follow Me options.
3. **Divert to Me and Record** – The call is routed to the smart phone to take the call and start recording the conversation.
4. **Divert To** – Route the call to the specified destination.
5. **Announce** – Play the announcement "Please Hold" to the caller. The announcement can be changed by recording an Acknowledge announcement.

### Call Back Options

When a call is made using Callback feature, the following options are available for Call back.



1. **Disconnect** – This will disconnect the current call.
2. **Transfer** – To transfer the call to another phone number.
3. **Transfer to Desk** – Transfer the call to your office desk.
4. **Record/Stop Record** – Start/stop recording of the conversation.
5. **Send to Voicemail** – Send the call directly to your voice mailbox.

Automatic Call Distribution (ACD) for Toshiba Strata systems provides a quick, efficient means of handling a large volume of incoming calls that are automatically connected to ACD Agent Groups.

Calls are served in order of arrival based upon assigned priorities and are automatically distributed among available Agents. The ACD features also provide announcements to incoming callers when no Agent positions are available to immediately handle the call.

This chapter covers the Toshiba UCedge unified communication application for Android and iOS mobile devices and for PC's and Mac computers. This document describes initial ACD Agent functions that will be supported by UCedge. The goal is to provide the basic agent functions that allow agents/supervisors to login to ACD, see ACD queues, and handle basic ACD calls.

UCedge enables users to collaborate with others through communications such as Instant Message (IM) and phone calls with the capability by using Toshiba's Business/Telecommunications Systems – IPedge, VIPedge and Strata CIX with IPedge Application Server.

Agent features enable UCedge agents to connect to ACD, to view the status of all ACD groups that the agent is a member, and to manage the user own status such as log in/out of ACD group(s), make available/unavailable, set alerts when status changes, etc.

To begin, a user needs to login as an ACD agent. Once logged in, UCedge retrieves the list of ACD Groups that the user belongs, each ACD group's statistics such as call summary & agent summary, and each agent's information. From the information and threshold settings, UCedge sets local ACD group status for each group.

For UCedge client installation and telephone features, refer to [Chapter 1 – UCedge Clients](#).

**Important!** Screen captures shown in this document are representations and may vary depending on the size and type of smartphone, tablet, PC or Mac Computer.

This document covers:

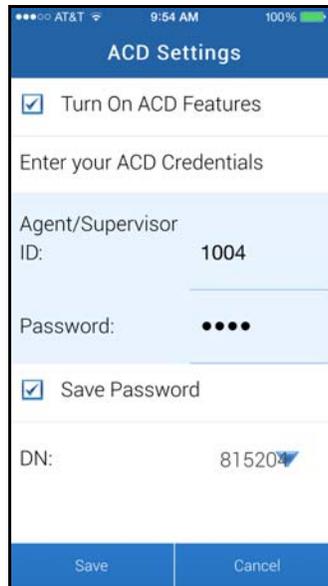
- ACD Login
- Settings and Advanced Settings
- ACD Groups
- Agents Status
- Notifications

**Important!** Please confirm with your System Administrator as to the system you are connected. Some features may or maynot work based on the system.

**ACD Login**

To use the ACD features, the user must turn on the ACD features. Otherwise, ACD menus will not display on the device.

1. Click the Navigation Drawer, then Settings.
2. Select ACD Settings. The ACD Settings screen displays.



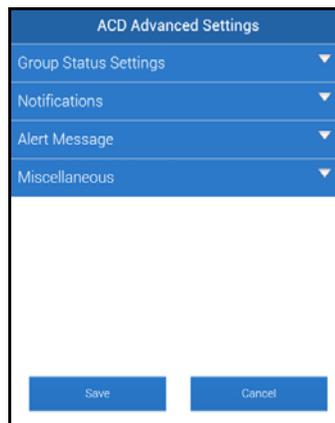
3. Check "Turn On ACD Features."

**Note:** The Agent/Supervisor ID must be assigned in Web ACD by the Administrator.

4. Enter the password.
5. The system detects the DN and Phantom Dn
6. Click Save.

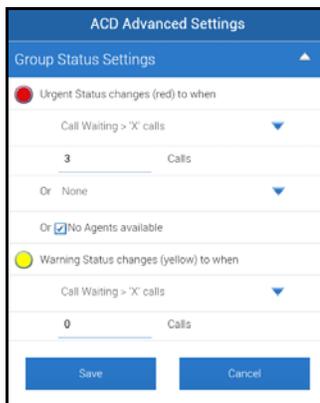
**Advanced Settings**

These settings are used to set up configuration properties, such as Group Status Settings, Notifications, and Message alerts.



**Group Status**

The group status sets the criteria when an ACD group status should show Urgent or Warning. The Warning status can be set based on up to two user-defined criteria. The Urgent status can be set based on up to two user-defined criteria or no agents are available.

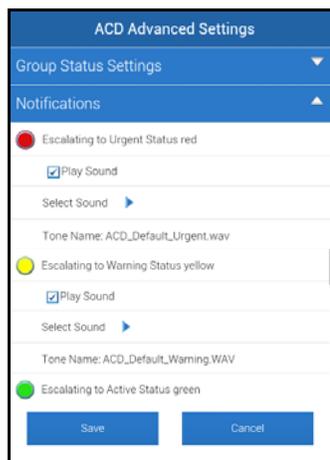


The user-defined criteria supported are:

- Percent ratio of Waiting calls over agents is greater than the specified number.
- Longest call waiting is greater than the specified seconds.
- Number of waiting calls is greater than the specified number.

**Notifications**

The notifications set the type of alert/notification to be performed when ACD Group status is changed. These can be audible and visible notifications when criteria such as, Urgent (red), Warning (yellow), and Active (green) status is met.



If desired, enter a checkmark in the Play Sound box to hear a sound over the speakers on your PC when a status is met. Use the Browse button to browse to a specific wav file.

Click **Save** to save all changes.

**IPedge**  
ACD Agents

**Alert Message** These alert messages will be displayed when an ACD group is in a specific status.

The screenshot shows the 'Alert Message' configuration screen within 'ACD Advanced Settings'. It lists four status types: Urgent Status (Red), Warning Status (Yellow), Active Status (Green), and Idle Status (Blue). Each status has a 'Display Messages' checkbox and a message template. The Urgent status message is 'Urgent: ACD x%G: %Q Calls Waiting, LCW=' with a dropdown set to 'S'. The Warning status message is 'Warning: ACD x%G: %Q Calls Waiting, LCW' with a dropdown set to 'S'. The Active status message is 'ACD x%G: Total Calls=%C, Available Agent' with a dropdown set to 'S'. The Idle status message is 'Occurs when there are agents but no calls' and its 'Display Messages' checkbox is unchecked. 'Save' and 'Cancel' buttons are at the bottom.

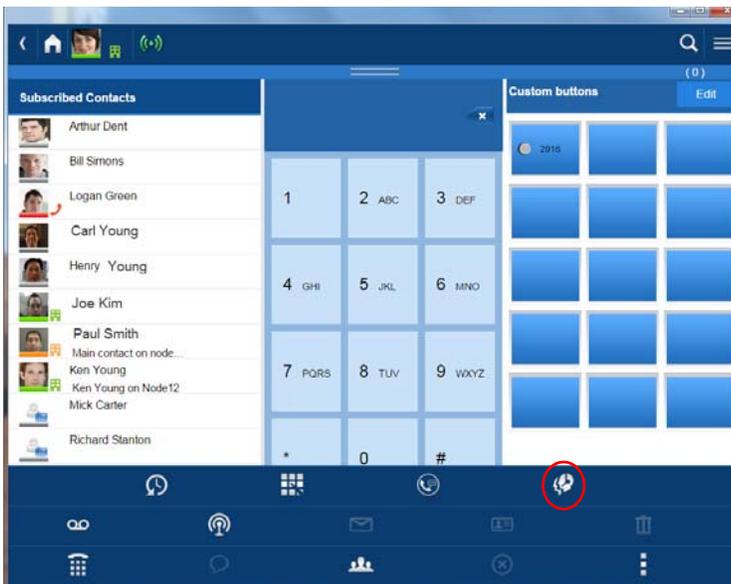
**Miscellaneous** Check or uncheck this box to specify whether or not to use Agent ID as extension for the agent when agent's info does not contain extension number, such as when agent has not logged in. It is used when user initiates a call to the agent.

The screenshot shows the 'Miscellaneous' configuration screen within 'ACD Advanced Settings'. It features a list of settings: 'Group Status Settings', 'Notifications', 'Alert Message', and 'Miscellaneous'. Under 'Miscellaneous', there is a checkbox labeled 'Use Agent ID as extension' which is checked. 'Save' and 'Cancel' buttons are at the bottom.

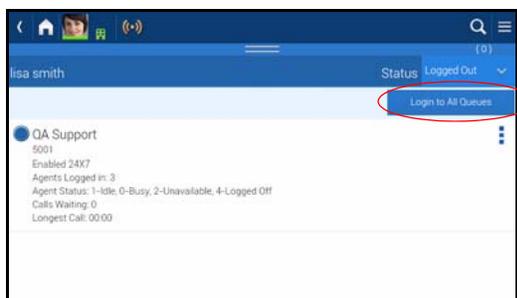
**ACD Features**

Once you have enabled the ACD settings in UCedge;

1. Click on the App Menu  icon to find the Contact Center icon.
2. Click the Contact Center icon  (shown below) to get to the main ACD page.

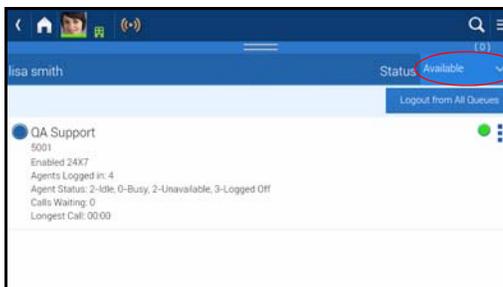


3. Click the Login to All Queues to log in to the ACD Queues (shown below).

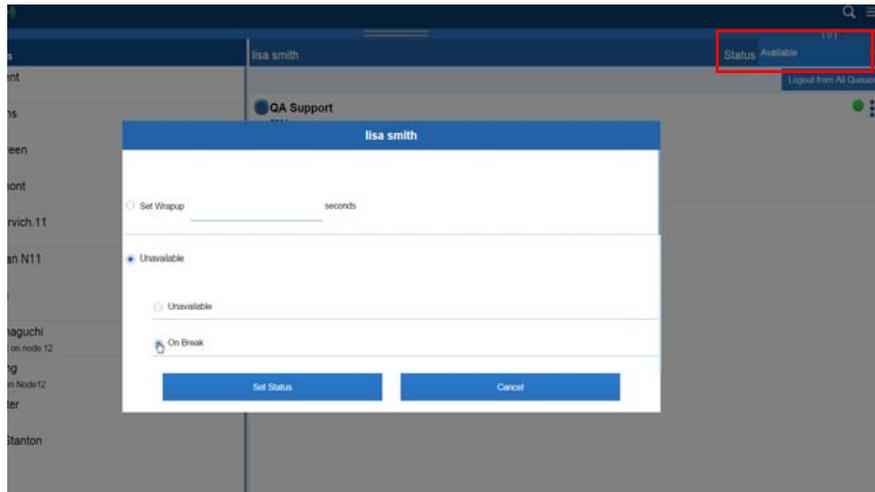


**Unavailable and Available**

Once you log in to UCedge and open up the Contact Center, your status will default to Available (shown below). However, this feature enables an agent to make themselves temporary unavailable for ACD calls without logging out. It can be used when going on breaks, such as lunch and coffee breaks, and extended times away from the telephone.

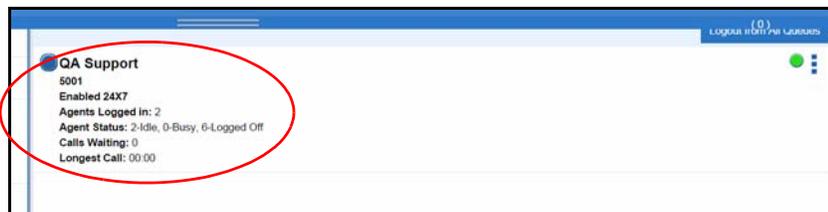


1. Click the dropdown next to Available on the right.
2. Select the Unavailable radio button.
3. Select the appropriate status: Unavailable, On Break, Away from Desk, Wrapping Up, Making Calls, Sales Demo, In Conference, Scheduling, Conference Call, Missed ACD Call, and Generic Unavailable.
4. Click Set Status.



**Status Display**

ACD Agents can display and view the queue status (shown below). The Supervisor's phone is also able to view the Agent Status (Available, Unavailable, etc.) for each Agent logged into the ACD Group.



A button is available for the phone to allow for stopping or re-starting the Status Display. When a call is active, this display is removed to enable the UCedge to present information about that call. When the call is ended, Queue Status is restored. The Queue status displays the following information:

Status for a Group or Queue	Displays the Group in which the agent is logged into.
Agents status	Shows the number of agents who are either idle, busy, Unavailable, or logged off.
Calls Waiting	The number of calls waiting is displayed.
Longest Call	Shows the time of the longest call.

ACD Agents

**Queue Alarms**

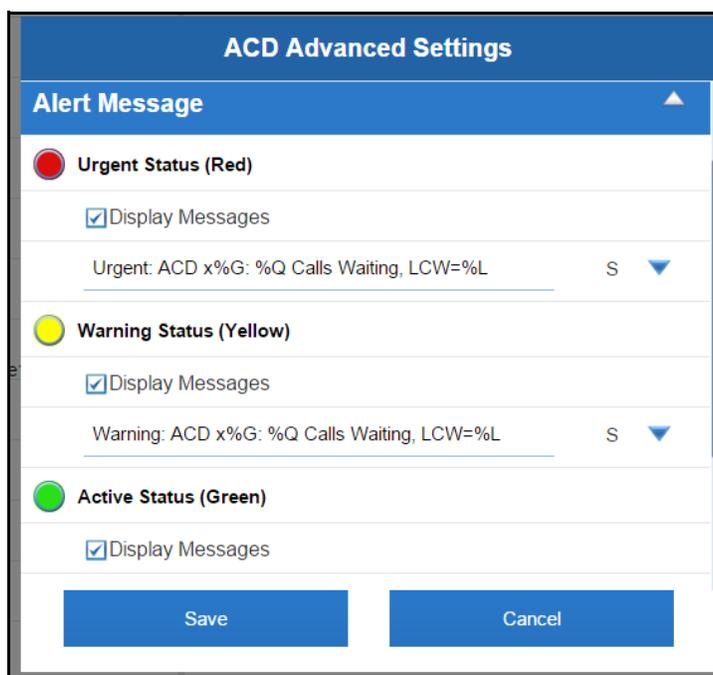
During queue operation, a number of conditions can send an alarm indication to Agent's and Supervisor's telephones. These warnings are to alert the Supervisor or Agent that some action may be necessary to correct for the condition.

To view Alarms

Alarms for the Queues will automatically appear and provide an audible ringing sound on the phone. Emergency Call type ringing occurs when the phone is idle.

**ACD Group Status**

ACD group status is based on activity conditions. Different colors represent the different status conditions of (how busy is) each ACD group. Yellow and Red represent warning and urgent status levels respectively and can be specifically configured to decide when those levels should be reached.



**Urgent Status (Red)**

This is the highest level status of a queue and should typically be reached when the load or conditions in the ACD queue indicates a problem that needs attention. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Red. In addition to these two conditions, this status will automatically be reached whenever the queue is enabled but there are NO agents available. Available conditions are:

- Calls Waiting > 'x' calls
- Longest Waiting Call > 'x' Secs
- Waiting Calls / Agent > 'x' %

**Warning Status (Yellow)**

This is the 2nd highest level status of a queue and should typically be reached when the load in the ACD queue is approaching a problem level. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Yellow. The available conditions are:

- Calls Waiting > 'x' calls
- Longest Waiting Call > 'x' Secs
- Waiting Calls / Agent > 'x' %

## **IPedge**

### ACD Agents

**Agent Status** Active Status (Green), Idle Status (Blue), and Disabled Status (Black)

The ACD Group Status will automatically appear Green if there are agents logged into the group and there are calls taking place in the group, but there are no waiting calls for the group. The status will automatically appear Blue when there are agents available to take ACD calls, but there are no calls. Black indicates the queue is Disabled (or off-schedule) and not receiving calls.

This chapter describes the various Agent features, such as:

- Call Control
- Unavailable/Available
- End Wrap Up Time
- Call Notes
- Chat
- Broadcast messages

## Changing ACD Group status

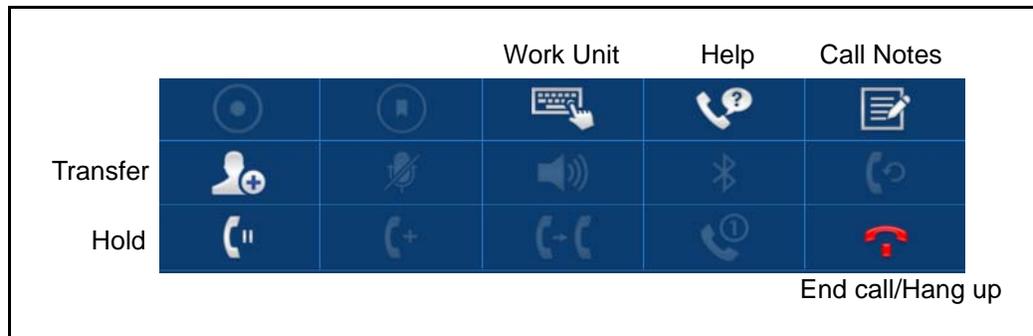
This operation is available for Supervisor only. It allows supervisor to:

- enable queue: Enable the queue 24X7 if currently disabled
- disable queue: Disable the queue if it is currently enabled
- use schedule (the schedule is setup from ACD server): Enable the queue using the Schedule for the queue.

## Incoming Calls

When an agent receives a call, the agent has several options, such as:

Answering the Call, placing the caller on hold, transfer, hanging up, etc. The following buttons become active.



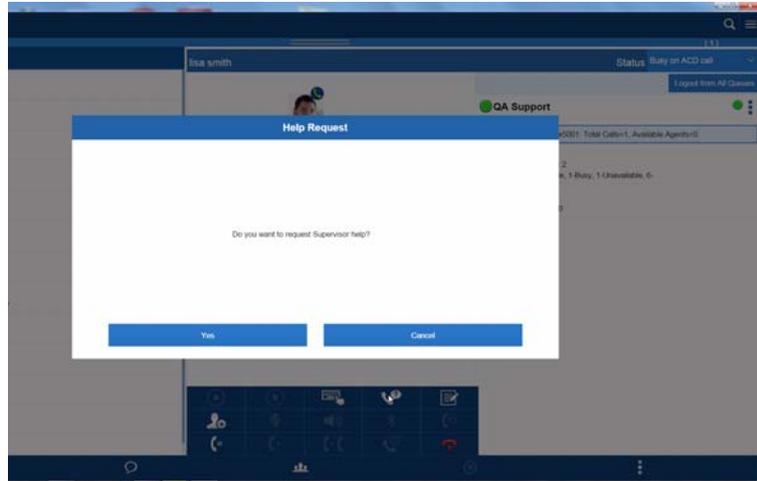
## IPedge

### ACD Operations

#### Requesting/Handling Help Call to Supervisor

The agent has the option to request a supervisors help when the agent is handling an ACD call.

1. Tap the ACD help button.
2. A dialog box to confirm request for supervisor help displays (shown below).



3. Select Yes to confirm the request.  
Another notification will be shown once the request has been sent to supervisor showing the name and extension of the supervisor receiving the request. A notification is shown when supervisor either accepts or rejects the request.
4. When supervisor accepts the request, the caller is put on hold while agent is connected to supervisor.

The agent has an option to either make a three-way conference with the caller and the supervisor, transfer the caller to the supervisor, or drop the supervisor to go back to the caller.

#### Notes:

Agent's "ACD Help" icon is disabled once agent has triggered it until completion of the help request process (i.e. supervisor rejects the request, request has timed-out, or supervisor finishes helping the agent).

Supervisor receiving the help request from agent is shown a notification page indicating the request with option to accept or reject the request, and prompt icon is added in communication zone. If supervisor accepts the request, notification is sent to the agent and supervisor is connected to the agent. If supervisor rejects the request, notification is sent to the agent indicating that the request is rejected. If supervisor is not responding within certain amount of time, server considers it as rejection.

#### Initiating Call to an Agent/Supervisor

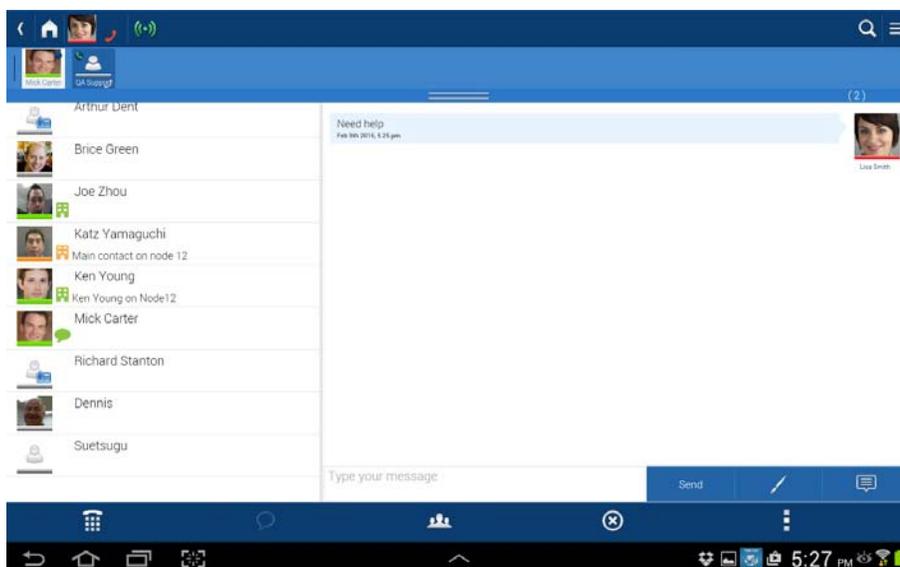
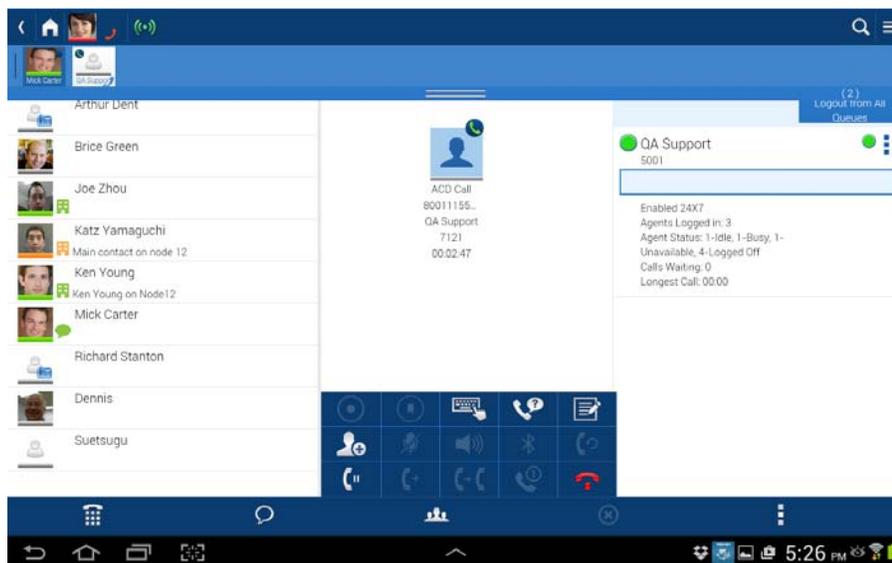
Agent or supervisor can call another agent from the group detail.

1. Tap the agent.
2. Select the call from dropdown menu. If the called agent DN is not known (s/he has not logged in, the call cannot be made). However, if the setting

to treat agent ID as the agent extension is checked, the call can be made using the agent ID as the extension.

**Initiating Chat to an Agent/Supervisor**

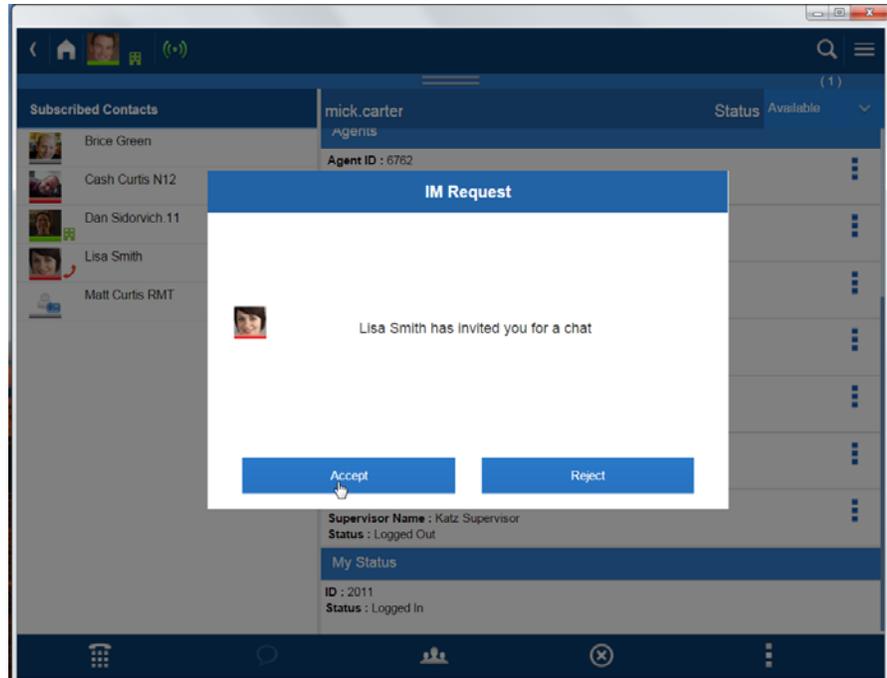
An Agent or Supervisor can initiate a chat / IM with another agent using the group detail. Chats can be initiated even while an Agent/Supervisor is on an ACD call.



1. Tap the agent and select IM from dropdown menu.
2. Tap Accept or Reject to proceed.

**Note:** UCedge should use agent extension to find the corresponding agent's Jabber ID to initiate IM. If the DN is not known, then you cannot chat or IM.

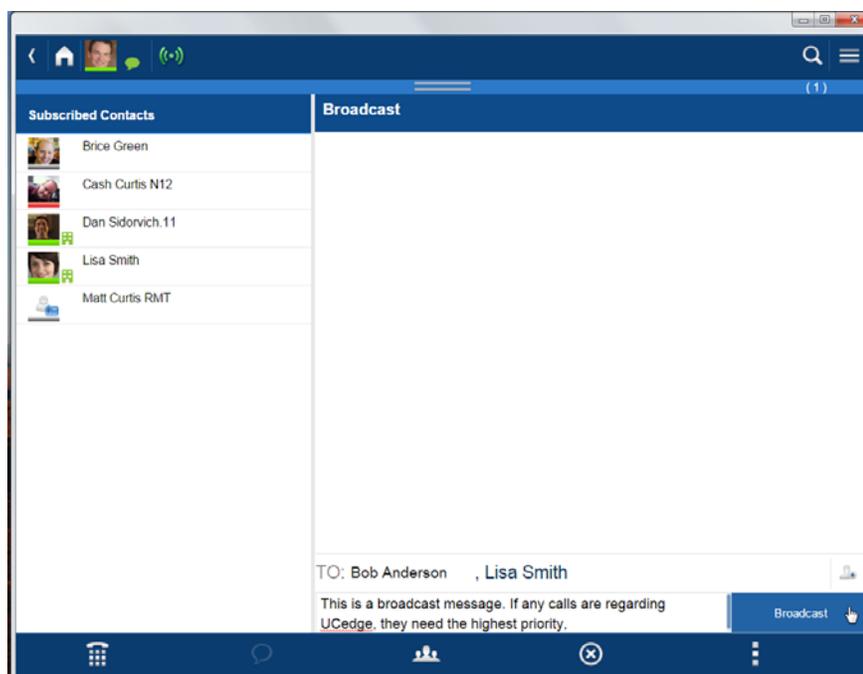
**IPedge**  
ACD Operations



**Broadcast Messages**

**Sender** Agent or Supervisor can send a broadcast message to all agents in an ACD group. The message is sent to all agents in ACD group whether the agents are currently logged in or not.

1. From the App Menu, tap Broadcast.
2. In the To: field, select the ACD group or broadcast recipients by clicking on the Add recipients icon  .
3. Click OK or Cancel.
4. Type your message.
5. Tap Broadcast.

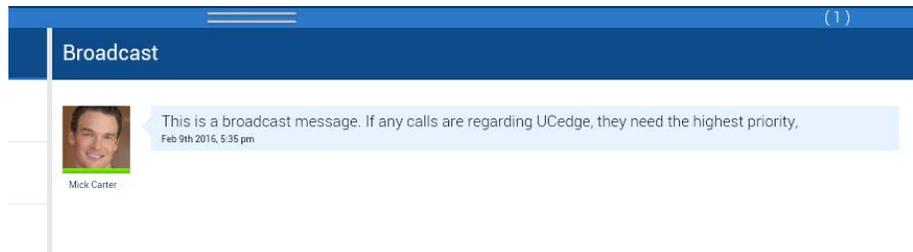
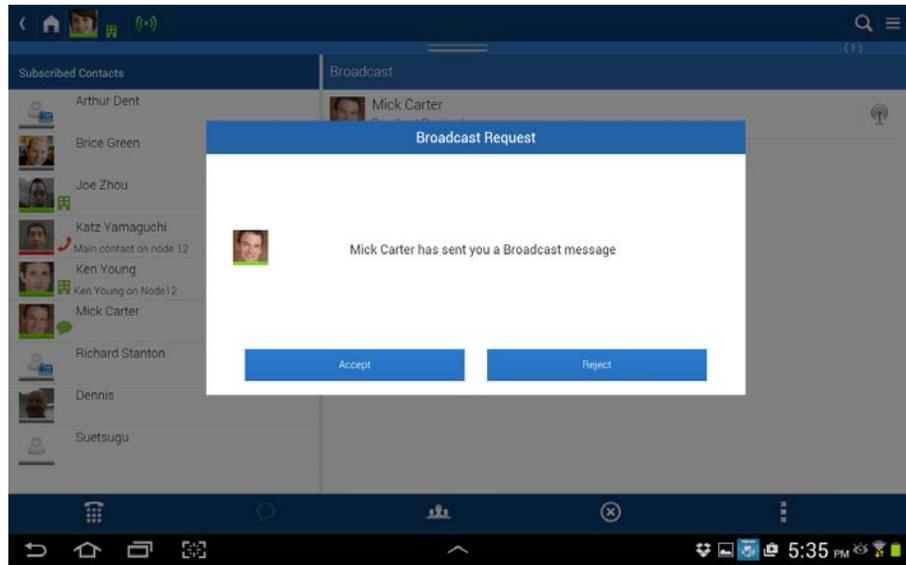


**Recipient** Once the broadcast message is sent, the recipients will receive indication on the Communication zone (shown below).



1. Tap the Comm zone to view the message.
2. Tap the Broadcast icon displaying in the Comm zone  .

The messages will be received just like any other broadcast messages.

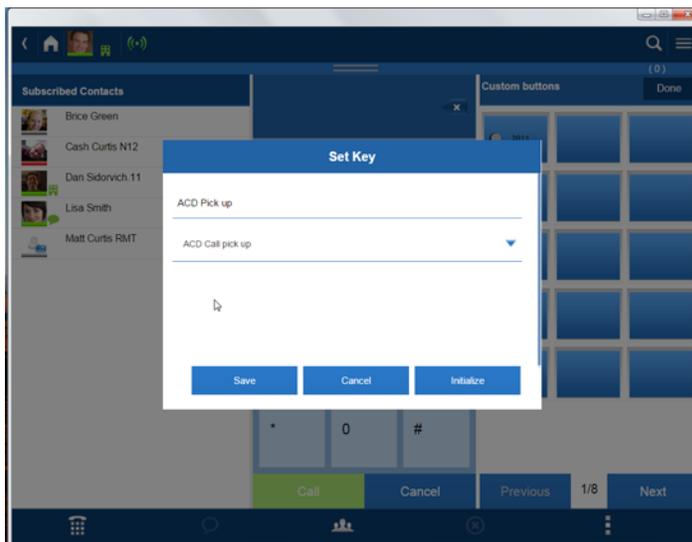


ACD Operations

**ACD Call Pick Up**

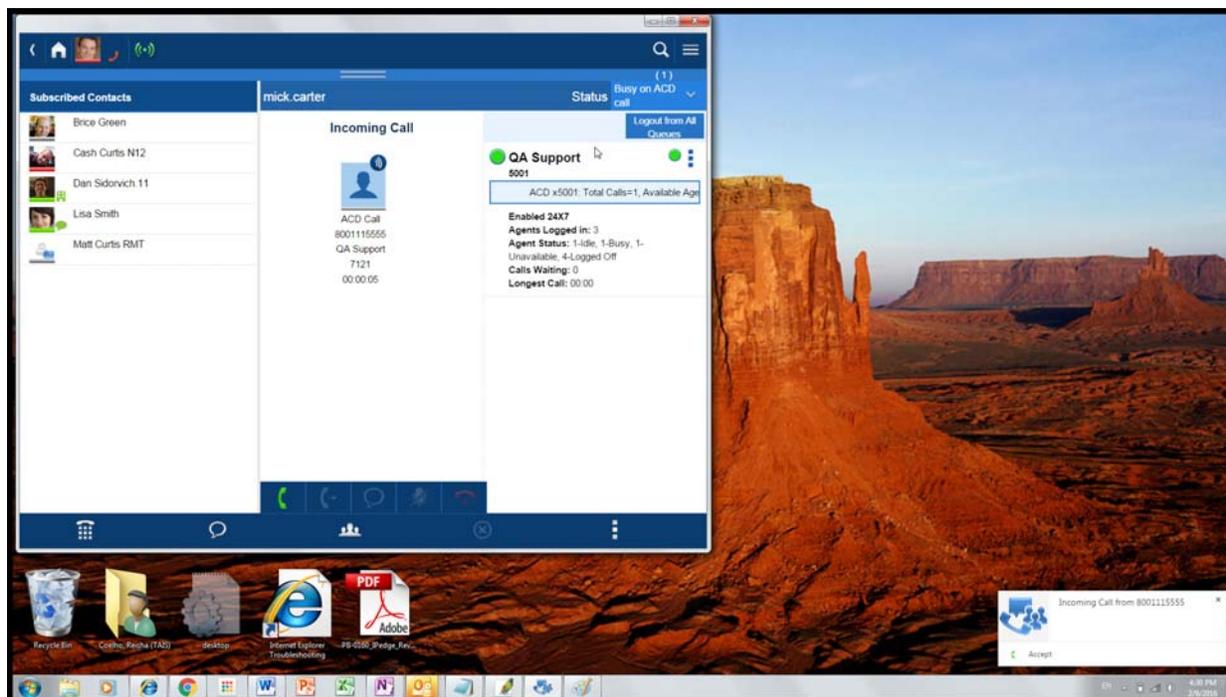
An ACD call is usually automatically distributed to available agent. In some cases, an idle agent might want to pick up an ACD call that rings on another agent. To do that, an agent has to be logged in to the queue (where the call is given to another agent) and available (meaning agent is ready and DN that is receiving the ACD call is idle). If the agent logs on multiple queues and there are multiple calls ring on another agents, the agent does not have control of which call to transfer.

1. Under Custom Buttons, create a button for ACD Pick up (shown below)..



2. When a call comes into the other Agent's number, a popup displays on your screen.
3. Select Accept or the Call Answer button to pick up the call.

This can be done as long as the other agent has not answered the call.

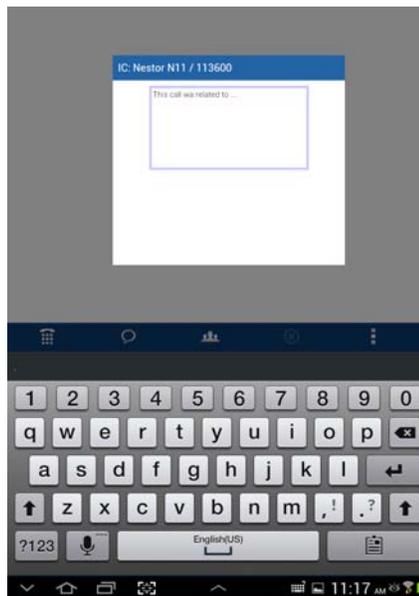


#### Adding Call Notes

This feature is used to attach notes to the call. After a call is answered, in the call window page there should be an option (tap) to enter notes to be associated with the call. When option is selected, user is given a dialog to enter the notes. User can open, close, and re-open the notes to continue editing until the call end or dialog is closed whichever the latest. The note is per call. This means if there are multiple calls, there could be multiple call notes dialogs.

The notes should be stored as part of call history, and can be displayed as part of call history record.

The length of the notes can be limited to 512 characters.



#### End Wrap Up Time

When you have completed an ACD call, your client may enter the Wrap Up mode automatically if that option is selected for your ACD group. Wrap Up mode is a pre-defined mode with a time limit that enables you to process paperwork or complete items related to your last ACD call without interruption. ACD calls are routed to you again when the Wrap Up time limit expires or you end it.

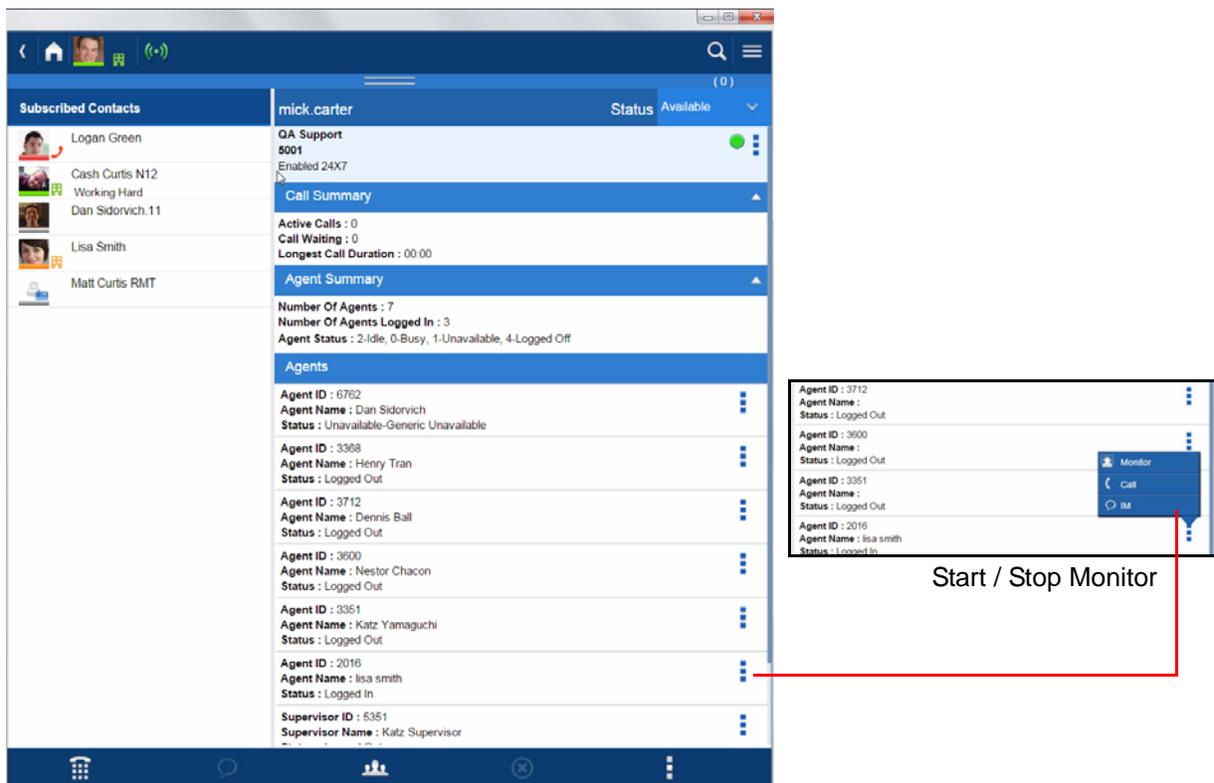
When you have completed your paperwork, you can end the Wrap Up time period by **how??** You can make/receive UCedge calls during the Wrap Up time period.

This chapter contains the procedures for various Contact Center Supervisor functions. The Supervisor can monitor an agent at any time, he/she can join a monitored agents call.

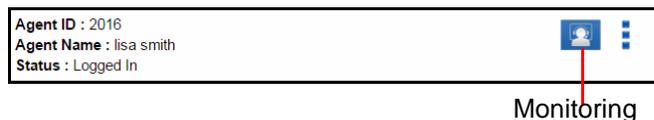
## Monitoring an Agent

Supervisor should be able to monitor an agent. Only one agent can be monitored by a supervisor at a time.

1. Click/tap the Contact Center icon.
2. Click/tap the details area. More information displays, such as the Call Summary, Agent Summary, and Agents information (shown below).



3. Click/tap the menu icon next to an Agent (shown above).
4. Tap Monitor. Once the supervisor starts monitoring an agent, the monitoring icon displays next to that agents name.



5. To stop monitoring the agent, click the menu icon again.
6. Select Stop Monitor.

**Notes:**

While monitoring an agent, if the Supervisor taps on the start monitoring of another agent, the monitor of the first agent is stopped and the monitoring of the new agent begins.

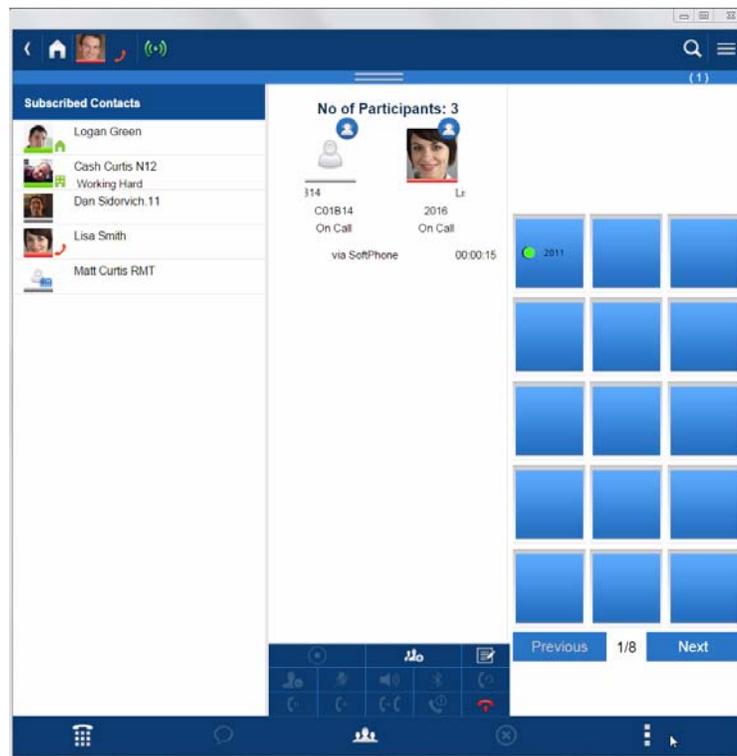
While monitoring, the Supervisor's agent status will reflect the monitored agent's status. The supervisor's agent status should be disabled.

**Call Monitoring / Join Call**

Call Monitoring or Join Call enables the Supervisor, to monitor conversations between a Contact Center Agent and a caller. A one-way, listen-only path is established for the Supervisor only. The monitoring feature does not apply to non-ACD calls. The Supervisor may participate in the conversation using the Join Call function. This provides a three-way conference with the Agent and the caller.

1. A call comes in to an Agent, the following screen displays on the Supervisor's device.
2. The Supervisor has the option of listening to the conversation or joining the conversation.

3. Tap/click the Join icon 

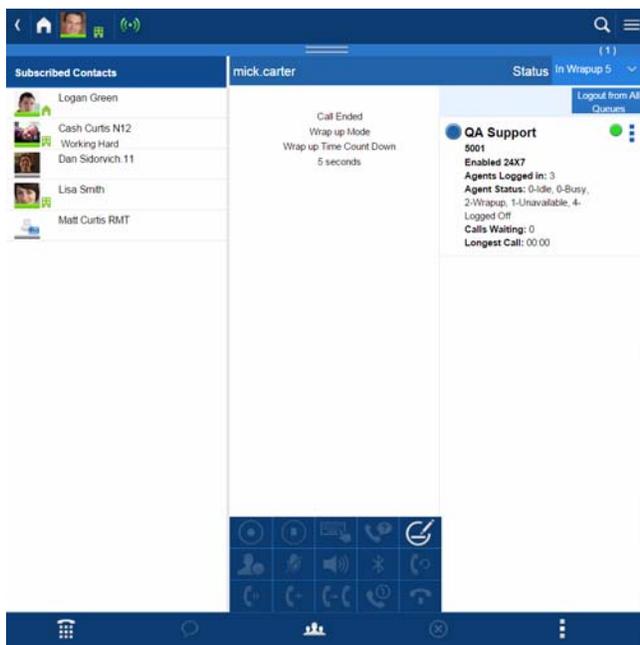


Supervisor Functions

**End Monitoring**

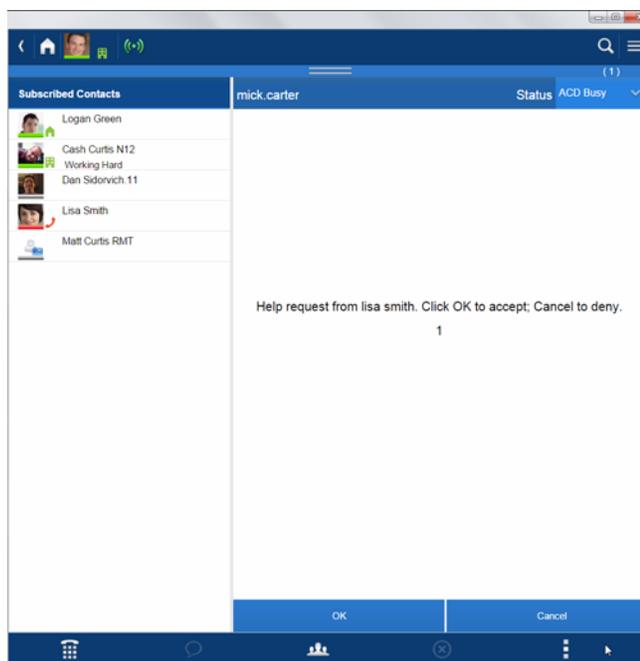
The Supervisor / Agent can end the call.

1. Tap/click the red End call icon  . The following End call / wrap up mode screen displays (shown below).
2. Click the Wrap up icon  to enter any notes and end the call.



**Help Request**

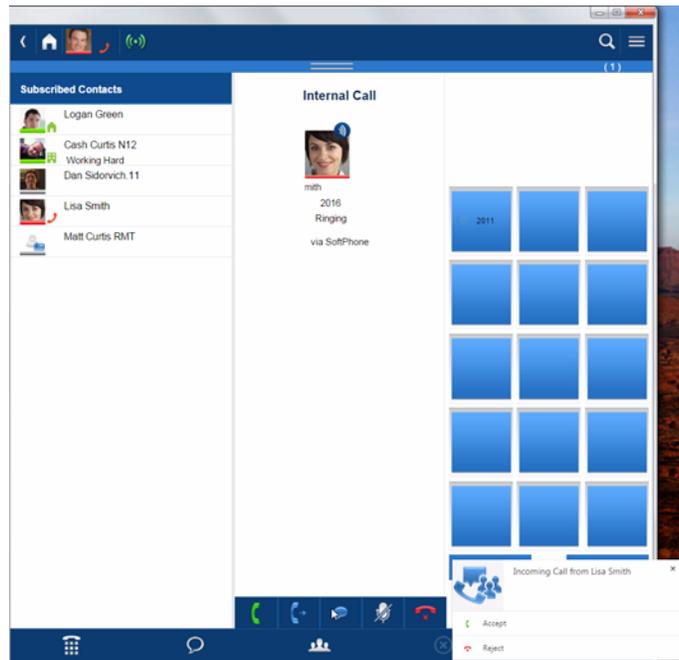
An Agent in your ACD Group can request a Supervisor’s help. The help request will display. Click OK or Cancel to either accept or decline the request.



## IPedge Supervisor Functions

### Internal Calls

As a Supervisor, you have the option to either accept or reject an internal call (shown below).



### Monitoring from Multiple Devices

When the same supervisor has logged in on multiple devices and started agent monitoring from one device, other devices should know and should be able to change the monitoring (cancel the monitoring or change to different agent).

When supervisor starts monitoring from the hard phone, UCedge should detect it and initiate the monitoring for agent status, too.