

CFS Phone Migration: Front Office Testing and New Phone Basics

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Date: Saturday, May 9, 2026 at 06:33 PM CDT

Mary, Dia, and Carla,

As you know, CFS is working to migrate from the current Affiliated phone system to the new UniFi phone system. I will not get into all of the cost savings and technology benefits here, but they are significant and, I believe, worth the normal disruption that comes with a migration like this.

The current plan is to switch the main CFS line — **314-968-2216** — sometime before the long Memorial Day weekend. The goal is to have the main cutover occur before the long break so that any major bugs can be worked through before regular business resumes the following week.

I have installed one of the new UniFi phones at each of your desks so you can begin getting familiar with the phones and testing some basic functionality. I have also attached a high-level “How To” memo that explains the main day-one features, including making and receiving calls, transferring calls, parking calls, using extensions, checking voicemail basics, and viewing the security cameras from the phones.

For now, the installation is functional but not final. I will do a cleaner install after we are able to remove the existing black Grandstream phones, which will need to be returned to Affiliated after the migration.

I will try to stop by the office a few times before the migration to answer questions, help with testing, and make sure everyone is as ready as possible before the final switch occurs. Unfortunately, we cannot know with absolute certainty exactly when the number will port from Affiliated to UniFi Talk, since that timing depends on the porting process and the coordination between the phone providers. However, we should have some advance notice before the switch happens.

I like the functionality in the new phones, and I hope you and the rest of the CFS team will find the new system helpful once we get through the transition. I will send a broader update to the rest of CFS when we get closer to the actual switch.

As always, let me know if you have questions or experience any problems.

---- Bret

PS

For testing, you can call **314-912-4101**. That number will ring the new UniFi phones until the main CFS number is switched over.



CFS-UniFi-PhoneBasicsMemo.docx
21.2 KB

CFS UniFi Phone Basics

For: Mary Ennis, Dia King, and Carla Rupkey

Purpose: Basic day-one instructions for using the new UniFi phones at CFS

Prepared by: Bret Blackford

Draft date: May 2026

1. Overview

CFS is moving to a new UniFi phone system. The front office phones will be used much like the current office phones, but some buttons and screens may look different.

This quick guide covers the basics:

- Making and receiving calls
- Calling another CFS extension
- Transferring calls
- Parking calls
- Checking voicemail basics
- Viewing Protect cameras from the phone

Additional instructions may be added later for special items such as changing call routing for weather closures, holidays, or staff meetings.

2. Key Front Office Extensions

Person / Location	Extension
Mary Ennis	5900
Carla Rupkey	5901
Dia King	5902
Jodi Mitchell	5903
Emily Jenkins	5904
Eric McPherson	5905
Observation Room	5906
Kitchen	5907
Samantha Brown	5908
Sarah Gentry	5909
Teha Lewis	5910
Miquilae Young	5911
Taylor Hilburn	5912

3. Making a Call

To call another CFS extension

1. Pick up the handset or press the speaker button.
2. Dial the person's extension, such as **5900** for Mary or **5902** for Dia.
3. Press **Call** or wait for the phone to place the call.

To call an outside number

1. Pick up the handset or press the speaker button.
2. Dial the outside phone number.
3. Press **Call** or wait for the phone to place the call.

You should not need to dial a special prefix unless CFS later decides to configure one.

4. Receiving a Call

When the phone rings:

1. Pick up the handset, or
2. Press **Answer**, or
3. Press the speaker button to answer hands-free.

If multiple front office phones ring at the same time, the first person to answer will take the call.

5. Transferring a Call

Use transfer when the caller needs to speak with a specific CFS employee.

Recommended method: Announced transfer

This is the safest method because you first confirm that the employee is available.

1. While on the call, press **Transfer**.
2. Dial the employee's extension.
3. Wait for the employee to answer.
4. Let the employee know who is calling.
5. Complete the transfer.

Quick transfer / blind transfer

Use this when you do not need to speak with the employee first.

1. While on the call, press **Transfer**.
2. Dial the employee's extension.
3. Press the option to complete/send the transfer.

If the employee does not answer, the call should follow that employee's voicemail or call-handling settings.

6. Parking a Call

Call Park is useful when a caller needs to be placed on hold and picked up from another phone.

Example: A call comes in for someone away from the front desk. Instead of transferring directly, the call can be parked, and the employee can pick it up from another phone.

To park a call

1. While speaking with the caller, press **Park** or the available **Call Park** option.
2. The phone should show a park location, such as **Park 1** or **Park 2**.
3. Tell the staff member where the call is parked.

Example:

“Eric, you have a call parked on **Park 1**.”

To pick up a parked call

1. On a UniFi phone, press the matching **Park 1**, **Park 2**, or call park option.
2. The parked call should connect.

If the call is not picked up after a period of time, it may ring back or follow the system’s call-handling rules.

Note: The exact button name may vary depending on the phone model and how the buttons are configured.

7. Using Voicemail

Voicemail may be available for individual users, groups, or the general CFS voicemail box.

Common voicemail options may include:

- Pressing the voicemail/message button on the phone
- Long-pressing **1** on the keypad
- Dialing the voicemail access code, if configured

Each person’s voicemail should be set up with the correct greeting and notification settings.

For the front office, general voicemail should be monitored by the appropriate staff, currently expected to include Dia, Carla, and Mary.

8. Viewing Protect Cameras from the UniFi Phone

The UniFi phones can also view approved CFS Protect cameras.

To view cameras

1. On the UniFi phone display, press the **double-square icon** at the bottom-left of the screen to open the app/menu view.
2. Tap the **Protect** icon.
3. If already signed in, the camera view should open.
4. Select the camera or camera layout you want to view.

Shared Protect account

The phones use a shared CFS Protect viewing account:

phones@cfsserve.org

This account is for **camera viewing only** and should not be used for general system administration.

If the phone asks for the password, contact Bret or the designated CFS system administrator.

9. What Not to Change Without Checking First

Please do not change these items unless you have been asked to do so or have been trained on that specific task:

- Main call routing
- Smart Attendant / phone menu settings
- Business hours or holiday schedules
- User roles or permissions
- Camera permissions
- Network settings
- Phone number assignments

These settings can affect the entire office phone system.

10. Future Items to Add

This guide can be expanded later to include:

- How to change the office-closed message for snow days, storms, or unplanned closures
 - How to change holiday schedules
 - How to update greetings
 - How to check general voicemail from outside the office
 - How to use the mobile softphone, if CFS chooses to enable that feature
 - How to handle after-hours urgent/pregnancy calls
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11. Quick Reference

Task	Basic Action
Call another staff member	Dial their extension
Answer a call	Pick up handset or press Answer
Transfer a call	Press Transfer , dial extension, complete transfer
Park a call	Press Park , note Park location, tell staff member
Pick up parked call	Press matching Park button/location
View cameras	Tap Protect on the phone
Protect login account	phones@cfserve.org

Draft note: Exact button labels may vary slightly by phone model and final UniFi Talk configuration. This guide should be updated after the final phone layout and call-routing setup are confirmed.