

Re: UniFi Softphone Test Invite

From: Eric McPherson (emcpherson@cfserve.org)
To: bret_blackford@yahoo.com; mennis@cfserve.org
Cc: dking@cfserve.org; bret_blackford@yahoo.com
Date: Friday, May 8, 2026 at 07:51 AM CDT

Hey Bret! Mary is out of the office on Fridays and may not get to this until Monday. She may get to it today, just letting you know in case she doesn't.

Get [Outlook for iOS](#)

From: M Bret Blackford <bret_blackford@yahoo.com>
Sent: Friday, May 8, 2026 7:47:15 AM
To: Mary Ennis <mennis@cfserve.org>
Cc: Dia King <dking@cfserve.org>; Eric McPherson <emcpherson@cfserve.org>; Bret Blackford <bret_blackford@yahoo.com>
Subject: UniFi Softphone Test Invite

Mary,

I sent you a UniFi invite so we can test using your iPhone as a CFS softphone.

You should receive an email from UniFi, Ubiquiti, or UniFi Identity at your CFS email address. If you do not see it, please check your junk or spam folder.

The basic steps should be:

1. Open the UniFi invitation email.
2. Follow the link to accept the invitation.
3. Install the UniFi Endpoint app on your iPhone if prompted.
4. Sign in using your CFS email address.
5. Allow notifications and microphone access if the app asks for those permissions.
6. Once it is set up, let me know and we can test calling, receiving calls, transferring calls, and voicemail.

This is only for testing right now. Your desk phone will still work, and we are not changing anything permanently. I mainly want to see whether the softphone could be useful for you or others, especially for testing transfers, call handling, and possible future flexibility.

No rush, but when you have a chance to try it, let me know how it goes.

Thanks for helping me test this.

— Bret

On Thursday, May 7, 2026 at 09:43:50 AM CDT, Mary Ennis <mennis@cfserve.org> wrote:

Hi Bret,

Just thinking about the app and would love to see how that all works. My concerns are in yellow below.

As for as Friday, May 22nd, I think that would work out. Dia will need a phone for sure. I will be here in the morning only but will not need a phone. Jodi works from home so she will not need a phone as well. Third floor can use one phone to share. Kitchen does not need a phone.

Wednesday, May 27th Carla will need a physical phone.

Serving for Life

Mary Ennis

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From: M Bret Blackford <bret_blackford@yahoo.com>
Sent: Wednesday, May 6, 2026 6:03 PM
To: Mary Ennis <mennis@cfserve.org>
Cc: Dia King <dking@cfserve.org>; Eric McPherson <emcpherson@cfserve.org>; Bret Blackford <bret_blackford@yahoo.com>
Subject: Day-One Phone Needs for CFS Phone Migration

Mary and Dia,

As we plan for the phone migration in a couple of weeks, I would like to better understand what absolutely needs to be working on day one.

In other words, what is the minimum number of physical phones CFS needs for the first day or two after the cutover? I have purchased several phones and am working on configuring them, but I am trying to determine whether every phone needs to be replaced immediately or whether some areas could use temporary workarounds for a few days.

For example, could the third-floor staff share a phone temporarily, or does each person need to have a hard physical phone assigned to them on day one? Do we need the kitchen phone working immediately, or could that wait a few days?

I am not trying to reduce what we ultimately set up. I just want to be realistic about the cutover, prepare for the most important day-one needs, and minimize headaches for everyone during the transition.

Also, the new system offers what they call a “softphone,” which is an app on a cell phone that acts like a physical office phone. This would allow CFS to transfer calls to a softphone just like any other phone. Users could also call out using the softphone with a CFS number and caller ID, just as if they had a physical phone, and voicemail would still work. Using the app is free.

Thinking of questions how the app might or might not work:

When transferring a call to their cell phone using this app, would we be able to speak to our staff prior to transferring the call? We typically do not transfer a call without speaking to the employee first. We usually get information from the caller and then pass on the call. Just wondering if we would have the capability to let them know who the caller is prior to transferring.

Currently we have two cell phones through Cricket for Connect Care and Pregnancy Resources. If we were to use this app in the future, could we ask our social workers to use their own phones? Is there a way to use the app now and transfer their afterhours calls to their personal cell phones, eliminating the Cricket phones?

Eliminating physical phones, would eliminate the intercom communication within the office (employee to employee)

I am wondering whether anyone at CFS might find this appealing, especially for staff who do not need a physical phone at their desk every day. This could potentially reduce the number of physical phones we need to purchase, but

I realize that may be a bigger question for Eric and possibly something he would want to discuss with staff.

I appreciate all your help and patience as we get closer to migrating to a new, better, and much less expensive phone system.

Thanks for helping me think through this.

— Bret

P.S. I am copying Eric just to keep him in the loop, especially since the softphone option may involve cost savings and staff preference decisions.

On Tuesday, May 5, 2026 at 10:52:09 AM CDT, M Bret Blackford <bret_blackford@yahoo.com> wrote:

Mary,
Thanks for this info! Based on this current call-flow information I believe we can *substantially* recreate the existing Affiliated behavior in UniFi Talk, though we will need to test and fine-tune the exact ring timing, group behavior, voicemail notifications, and after-hours menu. I'll keep you posted as things progress.
--- Bret

On Tuesday, May 5, 2026 at 09:44:04 AM CDT, **Mary Ennis** <mennis@cfserve.org> wrote:

Bret,

Dia and I went over all your questions, please see the answers below in yellow. Let me know if you need anything else.
Thanks for all you do!

Mary

Mary,

Can you document how the current call flow works for CFS for the main number, (314) 968-2216?

Please try to document what happens during regular business hours, after hours, weekends, holidays, and any other special situations. Do your best and we can review it together later. I'll want to understand what the staff wants and needs as far as call flows so I can duplicate or recreate them in the new UniFi phone system.

It would be helpful to consider the following:

1. Who answers the main line during business hours

For example: Mary only, front office group, all front office phones, specific extensions, etc.

The phone will ring at Dia, Carla and Mary's desk for three rings and then it will ring at everyone else's desk two more times. If no answer it will go to the general voice message giving the caller the option to dial an extension or leave a voice message in the general mailbox.

Dia will answer first, then Carla then Mary, if the front desk does not answer, then it will ring at everyone's desk two more times in hope that they will answer.

2. How many rings before voicemail or forwarding

This will matter when setting up ring groups or call routes in UniFi Talk.

During regular business hours the phone will ring 5 times and if unanswered, it will go to the general message to dial an extension or leave a voicemail in the general mailbox.

3. What voicemail boxes exist and who checks them

Main voicemail, general mailbox, pregnancy hotline, individual staff mailboxes, etc.

Dia, Carla, and Mary listen to the daily messages in the general mailbox. Dia takes on the majority of the call backs.

If a caller wants to speak with the pregnancy hotline, the call is sent directly to the social workers cell phone.

If a message is left on an individual's voicemail, the individual will get an email and their "message" indicator on their phone will flash. Each individual is responsible for taking care of their messages.

4. What the current recorded greetings say

Especially business-hours greeting, after-hours greeting, holiday/closed greeting, and emergency/pregnancy hotline language.

Below is the message before and after business hours. If a call is unanswered during business hours, they will receive the same message.

"Thank you for calling Christian Family Services. Our office hours are 8:30 to 5:00, Monday through Friday. We are closed Saturday and Sunday. If you have called outside normal business hours, you can dial the extension of the party you wish to reach at any time. Please press 1 for the company directory, press 2 for the general voicemail box, or press 3 if you are pregnant and wish to speak to someone immediately. If you are having an emergency, please call 911 or BHR at 314-469-6644. Again, thank you for calling Christian Family Services and have a great day."

Each individual has their own recorded message on their phone.

If there is a holiday or office closure day during the work week, we general set that up with Hawk iSolutions and they record a message similar to the general message, except explaining that the office is closed due to holiday or staff meeting.

5. Menu options and where they route

The after-hours message below mentions "press 1" for the company directory, "press 2" for the general voicemail box, and "press 3" for pregnancy-related immediate assistance. Please confirm whether these are the only menu options, whether they work the same during regular business hours, and where each option routes.

These are the only options, 1, 2 and 3. Yes, the message is the same.

6. Common transfer patterns

Such as calls transferred to Eric, counselors, pregnancy services, billing, front office, etc.

When we get a live call for an individual that is currently in the office, we put the caller on "Park 1 or Park 2" and call their extension to let them know they have a caller on hold. They then can pick up the caller on Park from their desk.

When we get a live call for an individual who is either in a meeting or cannot take the live call, we then transfer the caller to their voicemail.

7. Any special call handling

Holidays, snow days, staff meetings, lunch coverage, calls from the Illinois number, (618) 397-7678, or anything that forwards to another number.

All calls ring to the STL office.

No immediate rush, but if you could get me your best effort sometime next week that would be helpful.

P.S. Here is the current after-hours message I have. Can you confirm whether this is still accurate?

"Thank you for calling Christian Family Services. Our office hours are 8:30 to 5:00, Monday through Friday. We are closed Saturday and Sunday. If you have called outside normal business hours, you can dial the extension of the party you wish to reach at any time. Please press 1 for the company directory, press 2 for the general voicemail box, or press 3 if you are pregnant and wish to speak to someone immediately. If you are having an emergency, please call 911 or BHR at 314-469-6644. Again, thank you for calling Christian Family Services and have a great day."