YEALINK PHONE
USER GUIDE

ACC TELECOM
PREMIER CERTIFIED PARTNER

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New User Checklist

NEW USER CHECKLIST

NEW USER ACTION ITEMS

PRIOR TO USING YOUR NEW YEALINK DESK PHONE, PLEASE REVIEW THE FOLLOWING ACTION ITEMS BELOW & CONTACT YOUR SYSTEM ADMIN WITH ANY QUESTIONS.

PLEASE NOTE SOME FEATURES & ACTION ITEMS BELOW ARE ON A PER APPLICABLE BASIS AND MAY NOT PERTAIN TO YOUR ACCOUNT.

- Test your extension and/or direct dial phone number (DID) by placing a call from an outside number, such as a cell phone.

- Setup your Voice Mailbox. See page 4 for first time setup instructions.

- Record your Self Identification Message (SIM) during your voicemail setup. For dial-by-name directory to function, all users must record their SIM.

- Verify that you are receiving Voicemails to Email and/or Voicemail Transcriptions.

- Log in to your 3CX Web Client using your username/temp password found in your welcome email. Change your password by clicking the 3 horizontal dots--> Settings---> General.

- Complete your Mobile App configuration by scanning your QR code found in your 3CX Welcome email.

- Send a chat message to your colleagues (either 1:1 or a group message).

- Send a SMS text message. Type +1 in front of the phone number; i.e.- +19105732467.
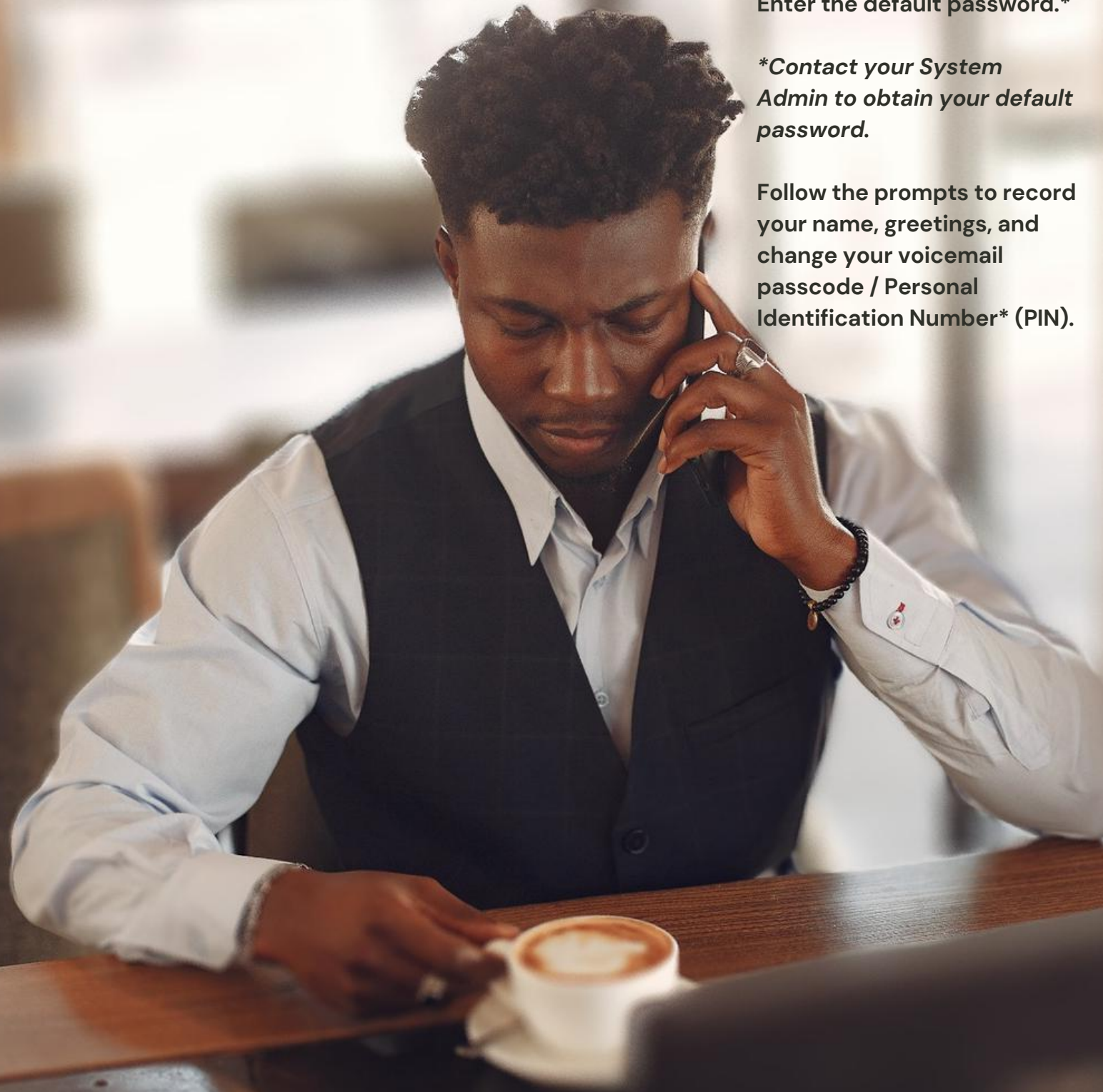
Voicemail

VOICEMAIL

FIRST TIME VOICE MAILBOX SETUP INSTRUCTIONS

To access your voicemail press the Message key (envelope icon) on your Yealink desk phone.

Enter the default password.*

Contact your System Admin to obtain your default password.

Follow the prompts to record your name, greetings, and change your voicemail passcode / Personal Identification Number* (PIN).

*To protect the security of your voicemail, we recommend using 6-digit voicemail PIN codes. DO NOT USE generic PIN codes such as the last 4-6 digits of your extension number or phone number. Additionally, do not use consecutive numbers (ex- 123456) or repeating numbers (ex- 111111) as your voicemail PIN code.

Answering, Placing & Transferring Calls

ANSWERING A CALL

Answering an incoming call from a Yealink desk phone.

HOW TO ANSWER A CALL

There are a few ways to answer a call depending upon your Yealink phone model:

- Press or touch the Answer softkey, or
- Press the speaker phone icon button, or
- Pick up the handset

SILENCE A CALL

To stop your phone from ringing, **press the softkey under Silence**, **or touch 'Silence'** on your display screen.

This will stop your phone from ringing; however, the call will continue to ring other phones in the office if programmed in a ring group.

SEND A CALL TO VOICEMAIL

To send a caller straight to your voice mailbox while the call is actively ringing, **press the button under Reject, or touch 'Reject'** on your display screen.

PLACING A CALL

Placing an outbound call from a Yealink desk phone.

PLACING AN EXTERNAL CALL

Dial the phone number you intend to call. As you dial the number, a list of contacts that match the number will display. Use your arrow keys to scroll up or down the contact list, or tap your touch screen to choose the contact.

Press the softkey under 'Call,' or touch 'Audio Call' or 'Video Call' on your display screen to initiate the call.

PLACING AN INTERNAL CALL

Dial the extension number you wish to call and **press the 'Call' softkey, or touch 'Audio Call' or 'Video Call'** on your display screen.

You can also press the **3CX PBook (phonebook)** and click **Search** to search through your list of contacts. Press **Enter** to view saved contacts, and use your arrow keys to scroll up & down the list. Click **Ok** to select a contact, then press **Call** to complete the call to the specified contact.

PLACING AN INTERNATIONAL CALL

To place an international call*, **dial 011 + the country code of the calling destination + the international number** and press the **'Call' softkey** or touch 'Audio Call' on your display screen.

You may be required to enter an international PIN code to complete your call. Please contact your Office Manager to obtain the PIN code.

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TRANSFERRING A CALL

3 TYPES OF CALL TRANSFERS

Blind Transfer: Transferring a call without introducing the caller before the transfer.

Supervised Transfer: Announcing or introducing the caller to the transferring party before releasing the call.

Uninterrupted Transfer to Voicemail: Send a call directly to voicemail without ringing the intended parties' phone. This will send the caller directly to the user's voice mailbox and will not ring their phone set.

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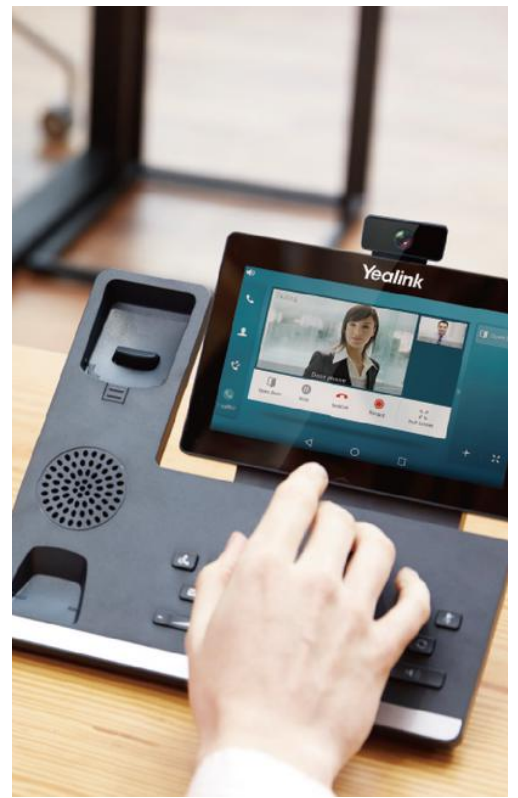
1 BLIND TRANSFER

While on a call, **press the softkey under 'Transfer' or touch 'Transfer'** on your display screen.

Dial the desired extension or external phone number and **press 'B Transfer'** again on your display screen to complete the blind call transfer.

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2 SUPERVISED TRANSFER

While on a call, **press the 'Transfer' softkey** on your display screen.

After dialing the number or extension, wait for the dialed party to answer; announce the party that you are transferring and **press the 'Transfer' softkey again, or touch 'Transfer'** to complete the call transfer.

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3 UNINTERRUPTED TRANSFER TO VOICEMAIL

While on call, **press the 'Transfer' softkey**. Dial ***4 + the extension number** that you are transferring the call to and **press 'Transfer' again**. This will send the caller directly to the user's voice mailbox and will not ring the phone set.

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Conferencing

CONFERENCE CALLING

CREATING AN AUDIO CONFERENCE FROM A DESK PHONE OR FROM OUTSIDE THE OFFICE.

CREATING AN INSTANT AUDIO CONFERENCE BRIDGE FROM YEALINK DESK PHONES

By leveraging your 3CX system and Yealink phone, you can **create an Audio Conference Bridge directly from your desk phone** using your conference extension number,* or from outside the organization using your conference direct dial number (DID).*

Dial the **Conference Extension Number** from your phone, **or if located outside the organization, dial your conference DID.**

The system will ask for the **Conference ID Number**--enter any number to create your conference ID, **then follow with the asterisk symbol (*) and Conference PIN*** followed by **the pound sign (#)**. *Please contact your System Administrator to obtain your Conference PIN.*

The system will confirm that you are creating a new conference and to **press the asterisk/star symbol (*) to continue, or press pound (#) to cancel**. If continuing, the system will ask you to **record your name** and **press #**.

Thereafter, you will be placed into the conference, and now you can **invite others to join** using the internal **Conference Extension number or** the outside **Conference DID** and entering the **new Conference ID** that you created. They do not need to enter the PIN.

*Please contact your System Administrator to obtain the Conference Extension number and Conference PIN.

*A Direct Dial (DID) Conference Number must be authorized and pre-configured by your System Administrator prior to scheduling a meeting.

SCHEDULING A CONFERENCE

SCHEDULING A VIDEO OR AUDIO CONFERENCE FROM THE 3CX WEB CLIENT

SCHEDULE A VIDEO CONFERENCE FROM YOUR 3CX WEB CLIENT

Log in to your online 3CX Web Client* and click the **'Meet' icon**. Click the **plus (+) symbol** to create & schedule a new video conference.

Choose your **meeting type** (audio-only, video or webinar). Choose your **date & time**, add a **subject line** and notes for participants.

Next, select your **email calendar** of choice to download the **meeting invite**. The meeting invite should open in your email client (ex- Gmail, Outlook, etc.). **Add attendees** to the invite and click send.

NOTES:

To access your 3CX Web Client, please refer to your 3CX Welcome Email to obtain your URL and login credentials. Scheduling a video conference must be done through the web or desktop clients, or mobile app only. Desk phones do not offer the ability to schedule video conferences or webinars.

Canceling a meeting should be handled from your email calendar to ensure proper delivery of the cancelation notifications to participants.

Currently, to reschedule a meeting, the original meeting must be canceled first via the web client. Schedule a new meeting using the steps above.

To view your scheduled conferences, or launch an on-demand video conference, click the 'Meet' icon, then click the Video Conference icon (🗓).

Standard & Special Functions

CALL FORWARDING & PRESENCE STATUS
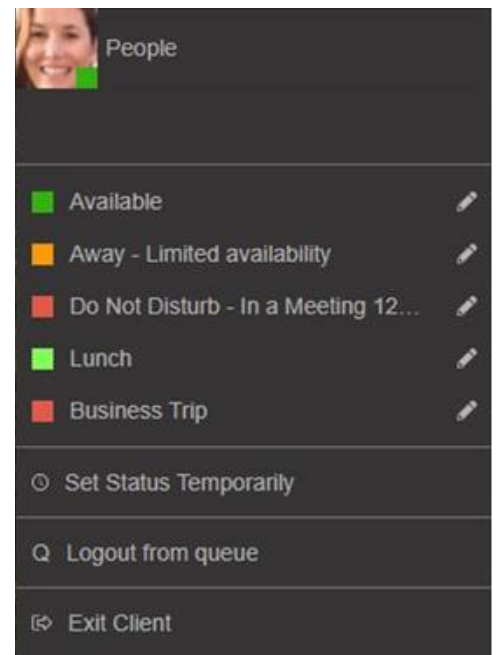## VIA THE WEB CLIENT

To forward calls and set your presence status, **log in to your 3CX Web Client** and **click the '3 horizontal dots' under Panel**.

Click 'Settings,' then **click 'Status'** to set the call forwarding attributes for each type of status* (i.e.- Available, Away, Do Not Disturb, Lunch, Business Trip, etc.).

Choose to forward calls to an external number, voicemail, another extension, etc.

To set **temporary call forwarding**, click **'Set Status Temporarily.'** The system will auto-revert to 'Available' status after the allotted timeframe concludes.

Each status must have its own call forwarding attributes set for internal and external calls.

	People
🟩	Available
🟧	Away - Limited availability
🟥	Do Not Disturb - In a Meeting 12...
🟩	Lunch
🟥	Business Trip
⊙	Set Status Temporarily
Q	Logout from queue
⇥	Exit Client

IMPORTANT NOTES:

Call forwarding and presence status are controlled by your personal profile using the 3CX mobile clients, <u>not the desk phone</u>.

To access your 3CX Web Client, please refer to your 3CX Welcome Email for credentials and URL.

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DO NOT DISTURB (DND)-

HOW TO ACTIVATE & REMOVE FROM DESK PHONE

Do Not Disturb can be activated a few different ways, via the phone set itself, or the 3CX mobile clients.

To activate <u>Do Not Disturb</u> **from the Yealink phone**, press the **DND softkey** or if using a touch screen phone, scroll down from the top of the display screen and click the DND option.

To **remove** <u>Do Not Disturb</u> function from the Yealink phone, press the **DND softkey again**.

DO NOT DISTURB (DND)-

HOW TO ACTIVATE & REMOVE FROM WEB CLIENT

To activate **Do Not Disturb** from the 3CX mobile clients, **click on your avatar** picture or the colored square in the top corner of your screen. **Click Do Not Disturb** and set your DND away message.

To remove, click '**Available**' from the same screen.

VOLUME CONTROL

To adjust your Yealink phone's handset volume, lift the handset then press the plus sign (+) at the bottom of the phone to increase the volume or the minus sign (-) to decrease the volume.

To adjust the speaker volume for internal/external calls, press the speaker button, then press the plus sign (+) or minus (-) sign.

To adjust ring tone volume, make sure that the phone is idle and the handset is in the cradle (on-hook) and press the plus sign (+) or minus sign (-).

SPECIAL FUNCTIONS–
THE 'CALL PARK' FEATURE

'PARK' & RETRIEVE A CALL USING SHARED PARK KEYS

Overview of the Park Feature:

The Call Park feature places a call on an 'orbit hold,' so anyone in the company, regardless of where they are located, can retrieve the parked call by typing in the park orbit number (ex– SP 1, SP 2, etc.).

How it works:

While on an active call, **press SP 1 or SP 2**. This will **'park' the caller to that orbit**. The caller is now on hold.

The chosen **park orbit will appear red on all desk phones** to indicate that there is a call available for pickup.

Inform the intended recipient of the call that the caller is on SP 1 or SP 2.

To Retrieve a Parked Call:

To retrieve a parked call, press the SP 1 or SP 2 button that appears red.

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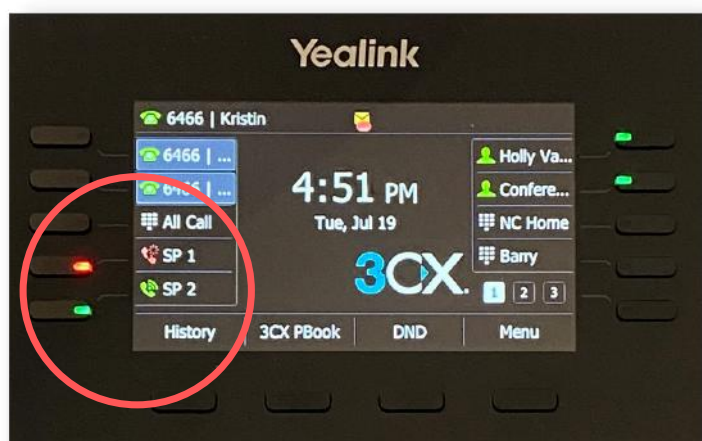
ANSWERING A CALL THAT IS RINGING ANOTHER EXTENSION

To answer a call that that is ringing at another extension, **press asterisk, 20, asterisk (*20*) followed by the extension number** that you are trying to answer (ex- *20*101).

Press the **'Call' or 'Answer' softkey** to retrieve the call.

ALL CALL PAGE ANNOUNCEMENT

Press the **'All Call'** softkey.* This will allow you to page all internal and off-site configured phones within your office.

*Please note this feature is not enabled by default and requires additional configuration by your ACC Service Technician.

VIDEO CALL VIA WEB CLIENT

In your **3CX web client**, click the **phone icon** to **open your softphone**.

Dial a phone number or extension number and **click the video icon** on the softphone to launch the video call.

If the recipient of the call has video calling capabilities, you will be connected via video. If not, then the call will resume with audio capabilities only.

NOTE: Yealink desk phones with built-in cameras can video call directly from the desk phone without using the 3CX Web Client.
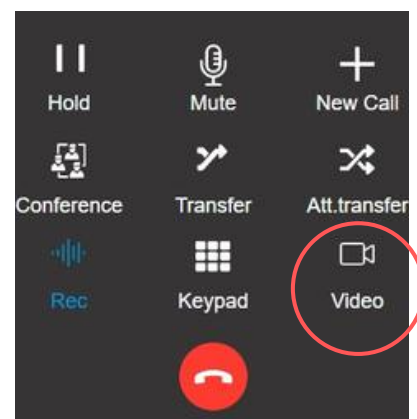
3CX Web Client Softphone

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Thank You

WE SINCERELY THANK YOU FOR YOUR BUSINESS AND APPRECIATE THE TRUST YOU HAVE IN SELECTING ACC TELECOM TO BE YOUR TELECOM EQUIPMENT AND SERVICE PROVIDER.

YOUR CUSTOMIZED DEVICE INSTRUCTIONS ARE ENCLOSED. 3CX VIDEOS & USER GUIDES ARE ACCESSIBLE BY VISITING HTTPS://WWW.ACCTELECOM.COM/3CX-VIDEOS/.

PLEASE CONTACT OUR SUPPORT DEPARTMENT VIA CALL OR TEXT AT 410-423-6500, OR EMAIL SUPPORT@ACCTELECOM.COM WITH ANY QUESTIONS OR CONCERNS.

THANK YOU AGAIN FOR CHOOSING ACC TELECOM. WE LOOK FORWARD TO EARNING YOUR LOYALTY AND EXCEEDING YOUR EXPECTATIONS!