

# Deskphone User Guide

## Yealink T4, T5 Series



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# Getting to Know Your Phone

# Phone Layout



1. ***Logged in User***
2. ***Notifications and Status Icons***
3. ***Busy Lamp Field Indicator***
4. ***Phone Pages***
5. ***Soft Key***

6. ***Line Key***
7. ***Number Key***
8. ***Arrow Key***
9. ***Volume Adjustor***
10. ***Speaker***

# Phone Elements

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This is a more in-depth look at the phone layout on page 3, breaking down the various elements and helping you get comfortable with the functions and their terminology used in the rest of this guide.

## Notifications and Status Icons

The notification and status bar displays relevant or helpful information.

A common notification is a missed call icon (as shown in the image on page 3). It will also show how many calls have been missed.

To see a full list of all the icons that can appear, see Appendix 1.

## Different Keys

There are four different keys to distinguish between.

*Soft Key* - a soft key is one of the buttons in the row below the display. They are phone function keys that change based on context.

*Line Key* - a line key is one of the buttons in the columns to the right and left of the display. They are commonly used to quickly dial a contact, or activate some functions on the first page.

*Number Key* - a number key is one of the buttons used to quickly enter a phone number. It is below the display and usually to the left.

*Arrow Key* - an arrow key is used to navigate around selections on the phone, such as in the menu. Pressing the top arrow key will quickly open the call history menu.

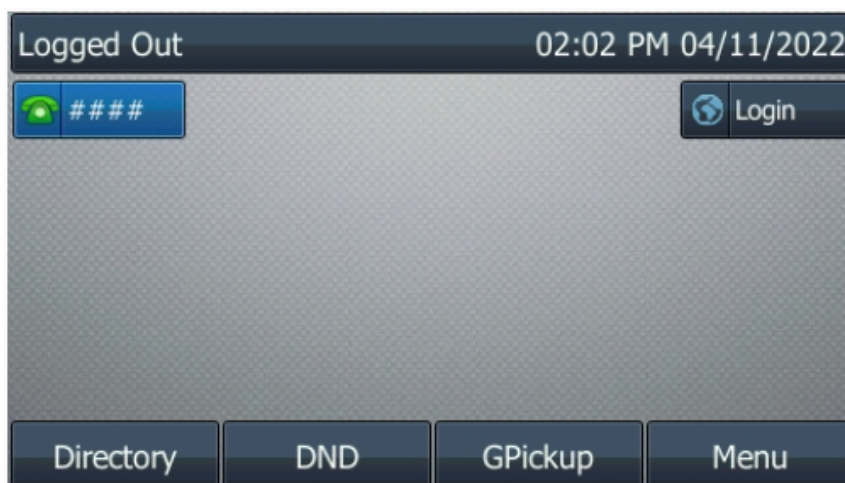
## Phone Pages

Each phone may have a few pages to expand the features that can be easily accessed. Tap the line key to cycle between the various display pages.

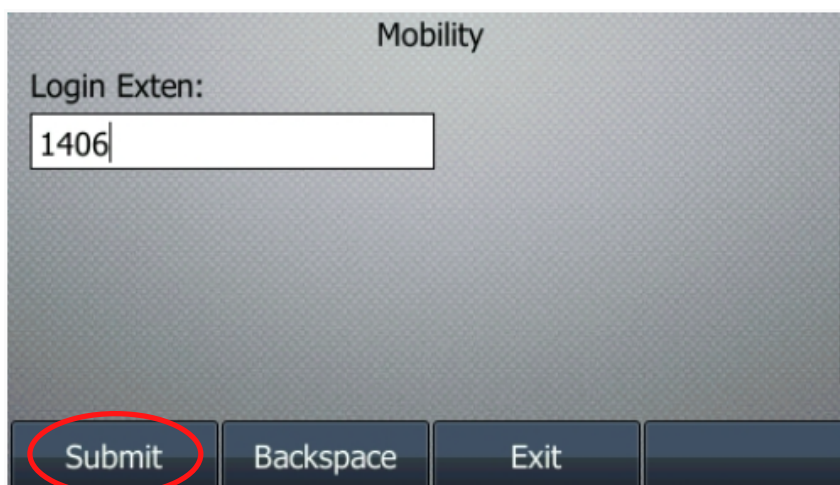
# Logging In and Out -

## Logging In

When you receive your new deskphone, this screen will be presented:



Tap the *Login* line key, enter your extension number and *Submit*.



You will then be logged in, and presented with the following screen:





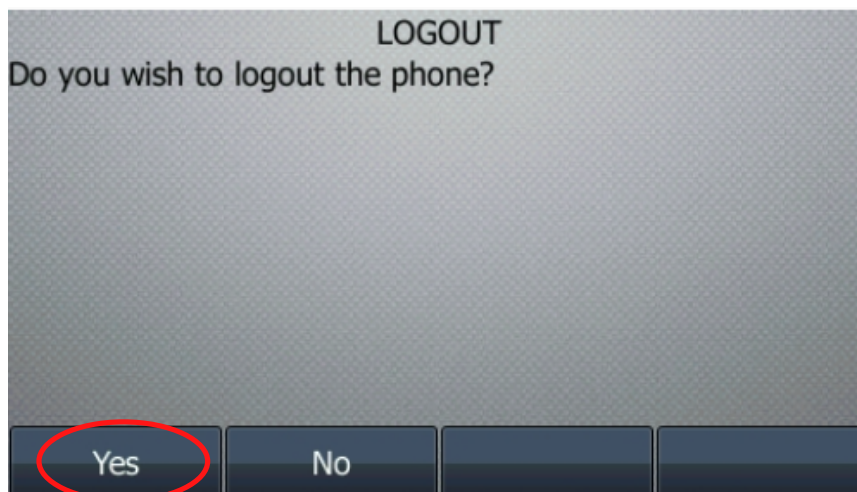
# Logging In and Out (cont.)

## Logging Out

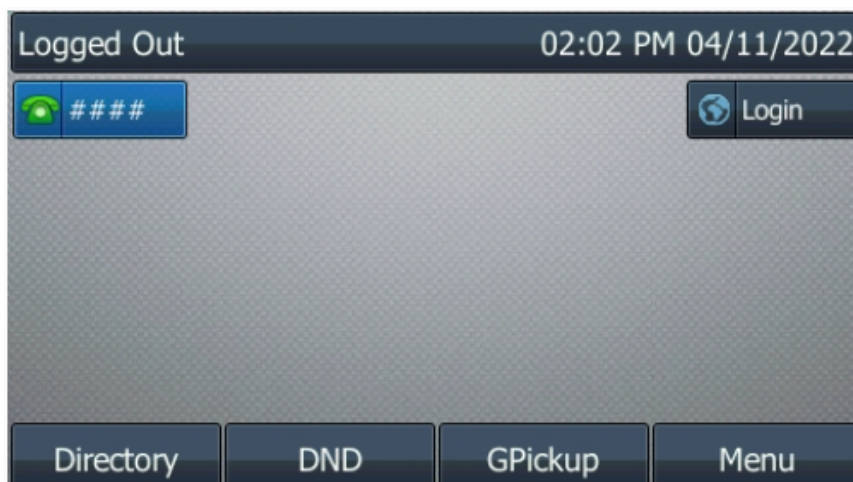
To log out, press the line key to log out.



Tap the Yes soft key.



You will then be logged out, and presented with the following screen:



# Menu Pages

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## Main Menu

The Main Menu is accessed through the *Menu* softkey. Once there, you will see the Main Menu screen as shown below:



There are five menus that can be accessed from the Main Menu. The *Status*, *Directory*, *History*, *Message* and *Basic* menus.

## Status

The Status menu is primarily used to ensure that the phone has an IP Address and to display some other basic information about the phone. It helps technicians to do basic troubleshooting.

## Directory


The directory is broken down into three sub menus: Local, System and Customer directory. In the Local directory, you can view contacts that you have added for quick reference. The System directory is a list of organisational (or system) contacts such as your colleagues. The Customer Directory provides a list of your client/customer contact information.

It is worth noting that the best way to access your directory is through the User Portal. See the IPC Solutions User Portal Guide.



# Menu Pages (cont.)

## History

The History menu shows a log of all of your calls - missed, placed, received and forwarded. It contains information such as the date and time of the call, the call contact, the duration of the call and provides ease of use functions such as redial and adding contact details directly from the log. This option can be quickly accessed from the main screen of the phone by pressing the upward arrow key .

## Message

The Message menu provides direct access to your voicemail. From here, you can view and interact with your voicemail facility. Also available is redial and other helpful functions.

## Basic

The Basic menu enables changes to the Display, Sound, Bluetooth and Wi-Fi capability. It also provides a quick option to reboot the phone.

The relevant menus for most users will be the Display and the Sound menus. In the Display menu, you can adjust the display of the phone by changing the backlight, display contrast, wallpaper, and the screensaver.

The Sound menu (as shown below), enables you to change ring tones, key tones and BLF (Busy Lamp Field) Ring Type.



# **Basic Features**

# Calling

## Ways to Call

There are a few ways to call. Let's go through the most common methods.

### Line Keys

The fastest way to call is using the line keys.

To initiate a call, tap the line key corresponding to the contact you wish to call.

### Redial




Using the Redial button is helpful when you want to call back the last person you were on the phone with. This will apply whether you made or received the most recent call.

### Number Pad

As is intuitive for a phone, you can call by entering the number you wish to call on the number pad. The call will automatically be placed when the last digit has been entered.

### Call History

Calling back from your call history can be a very helpful way to find a previous contact. Press the upward arrow key  to quickly access your call history. Use the arrow keys to navigate, and press the *Send* or soft key.



# Calling (cont.)

## Hold

When on the phone, there is a simple way to put the call on hold. Just press the *Hold* soft key. The caller will hear your hold music.



To resume the call, press the *Resume* soft key. The call will now be active.

## Mute

To mute yourself while on call, press the *Mute* button.

It will turn red while you are muted. Simply press it again to unmute.



## Group Page

Group page is a function that allows you to instantly speak through the deskphones of your colleagues (as in making public announcements). To initiate a page, press the Gp Page line key on the right side of your display. Then speak through the handset or other preferred audio input. Your words will be transmitted straight through to other deskphones in your group. Hang up to end the group page.

# Calling (cont.)

## Intercom

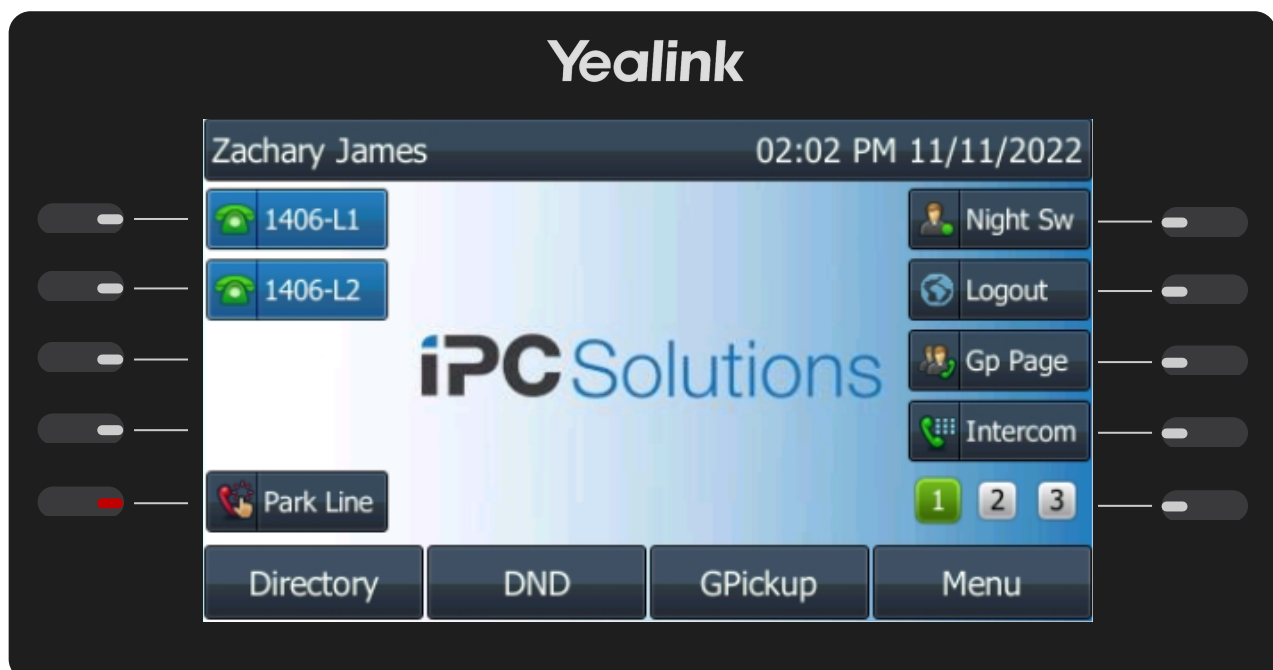
Intercom functions similarly to group page, except that it is a direct message to an individual extension in your organisation.

To initiate an intercom, press the intercom line key on the right side of your display. Then press the line key of the colleague you wish to intercom.

Speak through the handset or other preferred audio input. Your words will be transmitted straight through to the selected deskphone. Hang up to end the intercom.

## Park Line

The Park Line enables calls to be placed, ready for a different member of the system to pick up. When on a call, tap the Park Line key. This will park the call, resulting in this screen:



A parked call can be picked up by another member of the system simply by pressing the Park Line key on their deskphone (or the park line icon on their Mobile Softphone). The call will be immediately resumed with the new system member.

# Calling (cont.)

## Changing Audio Output

It is possible to have three different audio outputs when on a call.

*Handset* - The handset is the default option when you pick up a call. If you pick up the handset and then call, the audio will be transmitted to and from the handset itself. Putting down the handset while it is the active output will hang up the call.

*Speakerphone* - the speakerphone is activated by pressing the speakerphone button on your device.



When it is active, a green light will be displayed.



**If the speakerphone is the active output and the handset is in place, tapping the speakerphone button will end the call.**

*Headset* - a headset can be selected as the active output by tapping the headset button.



When it is active, a green light will be displayed.



To switch back from a headset to the speakerphone or the handset, tap the speakerphone button or pick up the handset and the active output will be changed.



# System Control

## Do Not Disturb

Do Not Disturb (DND) is a function that stops your phone from ringing by appearing as busy. This will likely send calls to your voicemail or to another extension, depending on the nature of the call.

To activate your DND, press the *DND* softkey. Your deskphone display will look like this:



## Night Switch

The Night Switch is a line key to toggle between business hours and after hours (night) call handling mode. For example, on most systems Night Switch will cause incoming calls to go to an after hours announcement and the voicemail. Night Switch is usually scheduled to automatically turn on/off however this option allows the current setting to be manually over-rided.

To activate the night switch, press the *Night Switch* line key. The BLF will light up red, and the night switch will be activated.



# **Advanced Features**

# Call Transfers

## Attended Transfer (Recommended)

Call transferring is a critical part of managing your organisation's incoming calls and ensuring that they reach the appropriate destination.

The most common and effective way of transferring a call is by doing an attended transfer.

When you are on a call and you need to redirect the call to another member of your system, press the *Transfer* soft key.

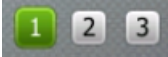


The call will now be placed on hold, and you will be presented with the following screen:



# Call Transfers (cont.)

## Attended Transfer (cont.)

From there, navigate using your phone's pages  to the relevant page, and tap the line key of the system contact that you wish to transfer the call to:



You can also use the number pad to enter the extension number or the phone number of the contact you wish to transfer the call to.

Tapping the line key or entering the number of your contact will ring their phone. If they answer, ask them whether they would like to have the call transferred through, or provide context to the call. If they confirm that they wish to receive the call, press the *Transfer* soft key:



The call will be transferred through to your system contact.

You are free to hang up your phone as the process has been a success.

If they do not answer or it goes to their voicemail, tap the End Call soft key.

The transfer is halted - tap the Resume soft key to continue the call, or you can attempt to transfer the call to another contact.

If they answer but do not wish to take the call, they can simply hang up to cancel the transfer. You will then be returned to the call as above.

# Call Transfers (cont.)

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## Blind Transfer

A blind transfer is not the recommended method of transferring a call as there is no confirmation that the transfer has reached its intended destination - hence the name "blind transfer".

However, it can be useful for quick transfers when your system contact has otherwise confirmed that they wish to receive the transfer, such as in the instance where they are expecting a call back from a client.

When on a call, tap the **Transfer** soft key.

Then tap the line key of the relevant system contact and then hang up. The call will be re-routed to your system contact. If they do not pick up the call, it will not be returned to you - so in most cases, an attended transfer is a better way of transferring a call.

# Advanced Calling

## Conference Calling

Conference calling follows a similar pathway as call transferring.

Your IPC Solutions Communications System can currently manage three parties on any call.

To initiate a conference call, press the *Conference* soft key when on a call.



The original caller will now be placed on hold.

Similarly to transferring a call, navigate to your preferred system contact and tap their corresponding line key. Alternatively, you can use the number pad to enter the number of any person you wish to bring in to the conference call.

Their phone will ring, and you will be able to ask them whether they would like to join the conference call. If they confirm that they wish to join the call, press the *Conference* soft key to complete the process.

You will now both be on the call. From here, there are options to manage the call. Press the *Manage* soft key. You will then have the following displayed:





# Advanced Calling (cont.)

## Conference Calling (cont.)

The soft keys are now changed to present some options to manage the callers. If you wish to mute either the original caller or the third party on the call, use the arrow keys to toggle to the correct party and press the *Far Mute* soft key. If you wish to put either party on hold, navigate to the correct party and press the *Far Hold* soft key. You can see what this looks like below:



Press the same respective keys again to unmute or resume that party. You can also remove a party from the call by using the *Remove* soft key.

Tap the *More* soft key and then the *Back* soft key to return to the default conference call screen.

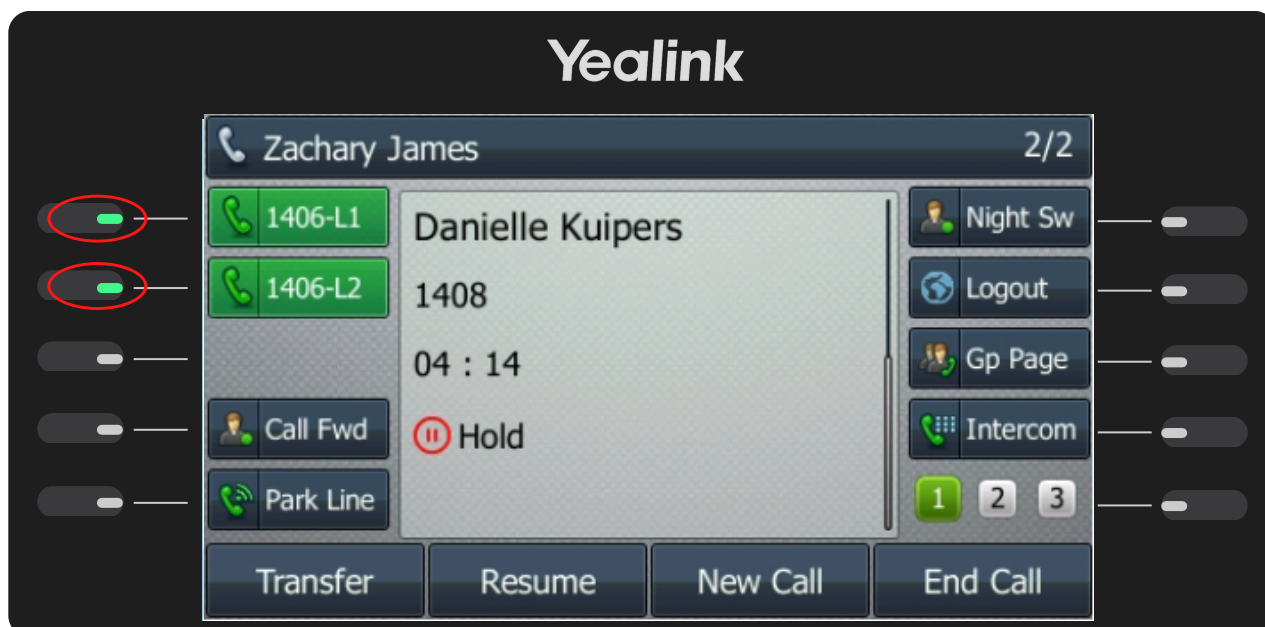
To separate the call back from a conference call into two individual calls, press the *Split* soft key:



# Advanced Calling (cont.)

## Conference Calling (cont.)

Your display will now show both of your lines are in use, as indicated by the flashing green BLFs on the top left of your display:



Toggle between the calls by tapping the L1 or L2 line keys.

Each call can be transferred, resumed, parked, or ended. Please note that if you wish to rejoin the calls, the active call must be resumed. You will then see the *Conference* soft key - press it to rejoin the calls.

# **FAQs and Scenarios**

# FAQs

## ***How do I call back a contact from a previous call?***

Navigate to the History menu. Once there, use the arrow keys to select the call you wish to return. Then press the *Send* soft key to dial.



## ***How do I set and access my voicemail?***

To open your voicemail, press the *Message* button.



When you are setting up your deskphone, you will be prompted to set a password by the voiceover. Follow the directions from the system to record the voice recording, access voice recordings and more.

## ***My screen is not appropriately lit for the space that I'm in. How do I change that?***

Navigate to the *Basic Menu > Display > Backlight*.

You can use the arrow keys to adjust the level of your backlight.

## FAQs (cont.)

### ***How do I change my ring tone and what tones are available?***

Changing your ring tone is fun and easy.

Navigate to the *Basic menu > Sound > Ring Tones*.

Once there, use the arrow keys to select the ring tone you want to use.



### ***What's the best way to call a system contact or a client contact?***

The best way to call a system contact is by cycling through your phone pages and pressing the corresponding line key to call a system contact. You can also have external contacts listed for easy calling through your line keys. Contact your telephony provider to discuss the most efficient way to organise your line keys for ease of use.

# Scenarios

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## Scenario 1 - Redirecting a Customer Call to the Right Destination

If you receive a call from a customer and you need to redirect it to the correct person in your organisation to handle the query, what's the best way to do it?

**The recommended way to handle this is using an attended transfer.**  
It ensures your customer has the best possible experience.

*Step 1: Tell the customer that you will put them through to the relevant party, and ask them to hold. When the transfer is initiated, the call is placed on hold.*

*Step 2: Press the **Transfer** soft key.*

*Step 3: Navigate using the pages to the desired contact and tap their line key. You will dial your contact.*

*Step 4a: If they do not pick up, **Resume** the call with the customer or **Transfer** the call to a new contact. If they pick up and do not wish to take the call, **End** the call with your contact, and then either **Resume** or **Transfer** the call to a new destination.*

*Step 4b: If your system contact picks up the transfer call and indicates that they will take the transfer, tap the **Transfer** soft key to finalise the process. You have now successfully transferred the call.*